Market and Trade Profile: Italy

June 2021

Destination Bristol ©Gary Newman

Overview

- **'Chapter 1: Inbound market statistics'** provides insights on key statistics about Italian travellers, where they are going, and who they are. It also takes a look at Britain as a destination and its competitive set.
- **'Chapter 2: Experiences and perceptions'** features details about what visitors from Italy are likely to do in the UK, how they felt during their visit to the UK, and whether they would recommend a stay there to their acquaintances. Perceptions of Britain held by the Italian in general are also highlighted.
- **'Chapter 3: Understanding the market'** takes a close look at consumer trends in Italy, and the booking, planning and further travel behaviour of this source market. Some details on how to best reach Italian consumers are indicated, too.
- **'Chapter 4: Access and travel trade'** shows how people from Italy travel to the UK, how to best cater for their needs and wants during their stay, and gives insights into the Italian travel trade. Further ways of working with VisitBritain and other useful research resources are pointed out in the appendix.

Please note that most of this report refers to the market conditions for travel from Italy to the UK prior to the COVID-19 pandemic and gives some insight on changes which have resulted from the crisis. An international recovery sentiment tracking survey is available here: visitbritain.org/inbound-covid-19-sentiment-tracker.

Contents

Chapter 1: Market statistics

1.1 Key statistics 10

1.2 Getting around Britain 17

1.3 Visitor demographics 22

1.4 The UK and its competitors 26

Chapter 2: Experiences and perceptions

2.1 Inbound activities 29

2.2 Experiencing a visit to the UK 37

2.3 Perceptions of the UK 41

Chapter 3: Understanding the Market

3.1 Structural drivers 50

3.2 Consumer trends 54

3.3 Booking and planning 57

3.4 Reaching the consumer 62

Chapter 4: Access and Travel Trade

4.1 Access 71

4.2 Travel trade 76

4.3 Caring for the consumer 83

Appendix:

Working with VisitBritain 85

Useful resources 88

Definitions, sources and information on this report 90

Executive Summary

1: Inbound market statistics

Chapter summary

- Despite the shorter term impact from the COVID-19 pandemic, the Italian outbound market is forecasted to account for almost 44 million trips abroad with at least one overnight stay by 2030. In 2019, the UK was the third most popular destination behind France and Spain for such trips.
- The Italians rank globally in 10th place for international tourism expenditure with more than US$30.3bn spent on outbound travel in 2019.
- Italy is the UK's sixth largest and sixth most valuable inbound source market globally in terms of volume of visits and visitor spending respectively (2019).
- 58% of Italian visitor spend comes courtesy of holiday visitors. On average, visitors residing in Italy spend £505 per visit in the UK; on holiday this rises to £552 per visit.
- London is the leading destination for a trip to the UK but the South East and Scotland are also popular based on the average nights spent in the UK in 2017-2019.
- Short trips of up to seven nights spent in the UK are the most popular and showed record-breaking performance in 2019.
- Please note that market-level inbound statistics have not been produced for 2020; see slide 10 for more.

Source: International Passenger Survey by ONS, Oxford Economics, UNWTO

2019:
Italian visitor spending is worth £1.1bn to the UK.

2: Experiences and perceptions

Chapter summary

- Almost three-in-five Italian visits involve dining in restaurants; more than half feature shopping. Going to the pub is also very popular.
- While on holiday in the UK, more than three-in-five Italian visits feature sightseeing; half of them include a visit to parks or gardens, museums or art galleries and almost as many to castles or historic houses, reflecting the strong interest of the market in culture and heritage. A quarter of Italians on holidays in the UK go on a guided tour. Almost a quarter of Italian visits include socialising with locals.
- 97% of Italian visitors are either 'Very' or 'Extremely' likely to recommend Britain for a holiday or short-break.
- The Italians rate the UK within the top five out of fifty countries for contemporary culture and culture overall, vibrant cities, and associate museums and music most strongly with the UK.
- Asked for reasons which would encourage the Italians to travel back to the UK for a holiday, more than half said that they would like to visit a different part of the UK, a proportion well above the all-market average.

The Italians rank the UK within the top 5 for contemporary culture, culture overall, and vibrant cities out of 50 countries

Source: International Passenger Survey by ONS, Anholt-Ipsos Nation Brands Index 2019 and 2020

3: Understanding the market

Chapter summary

- The most influential source for destination choice for Italian visitors are friends, family and colleagues followed by websites providing traveller reviews, information on search engines and price comparison websites.
- In a normal year, more than one-in-three Italian visitors tend to start thinking early about their trip to Britain, i.e. half a year or more in advance; but half of Italian visitors book their trip within two months before arrival.
- The majority of Italian travellers book part or all of their leisure trips online. However, when they booked accommodation and transport combined, more than a quarter of Italian visitors made the booking face-to-face.
- Almost half of Italians state some degree of influence of literary, movie or TV locations on their holiday destination choice.
- Istat reports that in 2020 travel by Italian residents hit the lowest levels recorded since 1997 with a total of just over 37.5 million overnight trips across both outbound and domestic due to the disruption by the pandemic. Nonetheless, VisitBritain's international recovery sentiment tracking shows 81% of the Italians considered taking an international leisure trip in the next twelve months, showing very strong desire to travel, but more than three in five will leave booking until last minute amid the uncertainty.

Source: VisitBritain/IPSOS 2016, Ipsos-Anholt Nation Brands Index 2017, TCI/VisitBritain/VisitScotland/Visit Wales/London & Partners published May 2021, Istat 2020

Almost half of Italians state some degree of influence of literary, movie, or TV locations on their holiday destination choice.

4: Access and travel trade

Chapter summary

- 96% of Italian visits to the UK were made by plane in 2019. It is a short non-stop flight: usually between 2-4 hrs flight time, depending on the departure and arrival airports.
- Annual seat capacity has shown strong growth again since 2013 up to more than 9 million seats in 2019; however, seat capacity on non-stop flights between Italy and the UK declined by 66% in 2020 compared to 2019 as a result of the COVID-19 pandemic.
- 77% of annual seat capacity in 2019 from Italy came on routes to the London airports.
- The regional spread of Italian visitors is supported by the connectivity to many regional airports in the United Kingdom.
- Italian tour operators offer itineraries in Britain covering destinations from Northern to Southern England and Scotland. Wales remains a challenge to sell in the Italian market due to few non-stop connections. Generally speaking, tour operators most commonly use ground handlers in the UK.
- Tour operators are going to focus on reinforcing their best selling products (London, Scotland, England) and city breaks (London; Edinburgh, Manchester) to recover after the Coronavirus pandemic.

Source: Apex 2020 non-stop flights only, International Passenger Survey by ONS, trade feedback

Almost all of Italian visitors to the UK travel by plane.

Inbound market statistics

Chapter 1

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1.1 Key statistics

Key insights

- Italy is the UK's sixth-largest source market globally by volume of visits. In terms of visitor spending it also ranks sixth in 2019, moving up from 9th place in 2018.
- In 2019, the UK was the 3rd most popular destination of Italian outbound overnight travel globally behind France and Spain, ahead of Germany.
- In 2019, the UK welcomed 2.2 million visits from Italy contributing £1.1 billion in visitor spending across the UK. On average, visitors residing in Italy spent £505 per visit in the UK; amongst those on holiday this rises to 552 per visit.
- Italian visitor spending in the UK increased by 39% over the past 10 years, equating to an additional £311 million more spend for the visitor economy between 2009 and 2019.
- London is the leading destination for a trip to the UK but the South East and Scotland are also popular based on the average nights spent in the UK in 2017-2019.
- The Italians rank globally in 10th place for international tourism expenditure with more than US$30.3bn spent on outbound travel in 2019.

Italian visitor spend in the UK exceeds £1 billion.

(2019)

Source: International Passenger Survey by ONS, Oxford Economics, UNWTO. Please note that market-level inbound statistics have not been produced by the ONS for full-year 2020 as the IPS was suspended from mid-March; latest full-year inbound data is for 2019. More information is available here: https://www.visitbritain.org/2020-inbound-data

1.1 Key statistics: global context and 10 year trend

Global context

Measure	2019
International tourism expenditure (US$bn)	30.3
Global rank for international tourism expenditure	10
Number of outbound overnight visits (m)	35.8
Most visited destination	France

Inbound travel to the UK overview

Measure	Visits (000s)	Nights (000s)	Spend (£m)
10-year trend	+35%	+14%	+39%
2009	1,627	11,134	798
2010	1,810	12,374	885
2011	1,853	11,637	960
2012	1,881	12,537	957
2013	2,068	14,154	1,033
2014	2,208	16,973	1,167
2015	1,911	13,771	940
2016	2,061	13,546	1,020
2017	2,039	14,387	958
2018	2,080	10,887	902
2019	2,197	12,715	1,109
Share of UK total in 2019	**5.4%**	**4.4%**	**3.9%**

Source: International Passenger Survey by ONS, UNWTO, Oxford Economics

1.1 Key statistics: volume and value

Inbound volume and value

Measure	2019	Change vs. 2018	Rank out of UK top markets
Visits (000s)	2,197	+6%	6
Nights (000s)	12,715	+17%	7
Spend (£m)	1,109	+23%	6

Between January and March 2020, the UK welcomed 279,000 visits from Italy (down 42% on the first quarter of 2019), worth £118 million (down 50% on the first quarter of 2019).* The COVID-19 pandemic already heavily impacted visitation from Italy to the UK in the first quarter of 2020 as both France and the UK introduced restrictions to counter the spread of COVID-19 in spring 2020.

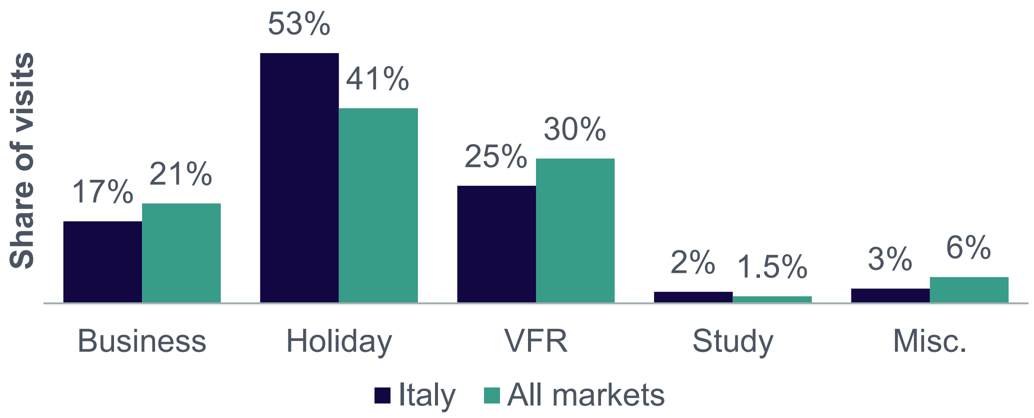
Key metrics by journey purpose

Averages by journey purpose in 2019	Nights per visit	Spend per night	Spend per visit
Holiday	5	£104	£552
Business	5	£121	£554
Visiting Friends/ Relatives	6	£61	£365
Study**	22	£35	£784
Misc.	6	£53	£300
All visits	6	£87	£505

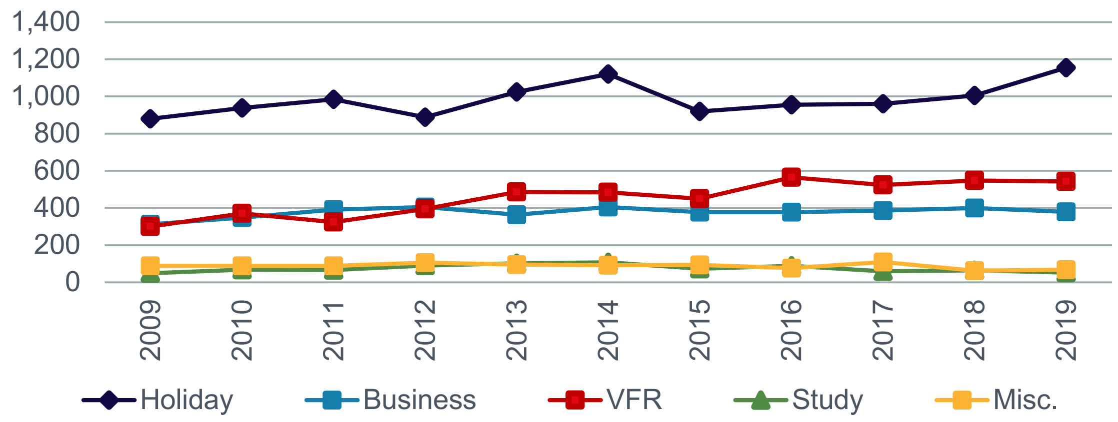
Source: International Passenger Survey by ONS, *provisional data for January-March 2020, latest statistics at time of writing **small base

1.1 Key statistics: journey purpose

Journey purpose 2019



Journey purpose trends (visits 000s)



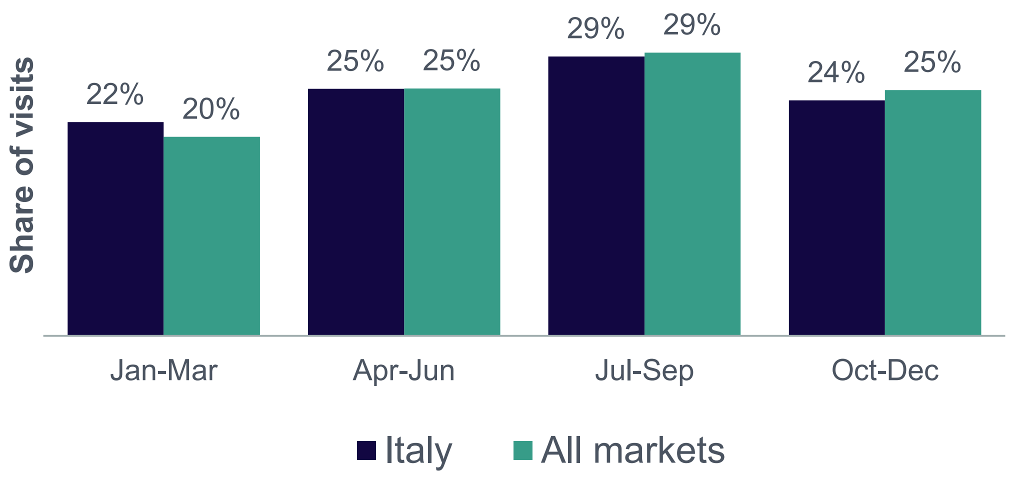
- Leisure visits generated the bulk of Italian visit volume with almost four out of five Italian visits either made for a holiday or to visit friends/relatives residing in the UK.
- Italian visits to the UK made for holidays set a new record in 2019 with 1.2 million such visits worth a record £638 million, recording the strongest levels of year-on-year growth for both volume and spend among the different journey purposes.
- The UK also welcomed 542,000 visits to friends/relatives residing here with a total value of £198 million.

- 58% of Italian visitor spend comes courtesy of holiday visitors. On average, visitors residing in Italy spend £505 per visit in the UK; on holiday this rises to £552 per visit. Italian business visitors to the UK spend a similar amount of £554 per visit.
- Taking the last decade into consideration, visits made from Italy to friends/family residing in the UK showed the strongest volume and value growth with 81% and 84% respectively, followed by holiday visits with 32% and 51%. While Italian business visits also grew by 22% in volume and 56% in visitor spending between 2009 and 2019, they remain still more than 50,000 visits short of the record set in 2006 before the financial crisis hit, which occurred in 2008/2009.

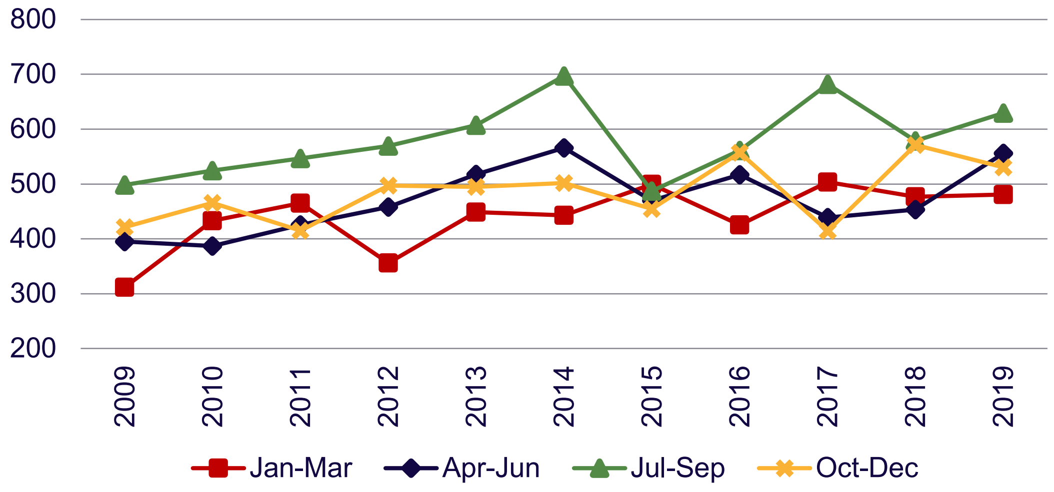
Source: International Passenger Survey by ONS

1.1 Key statistics: seasonality

Seasonality 2019



Seasonality trend (visits 000s)

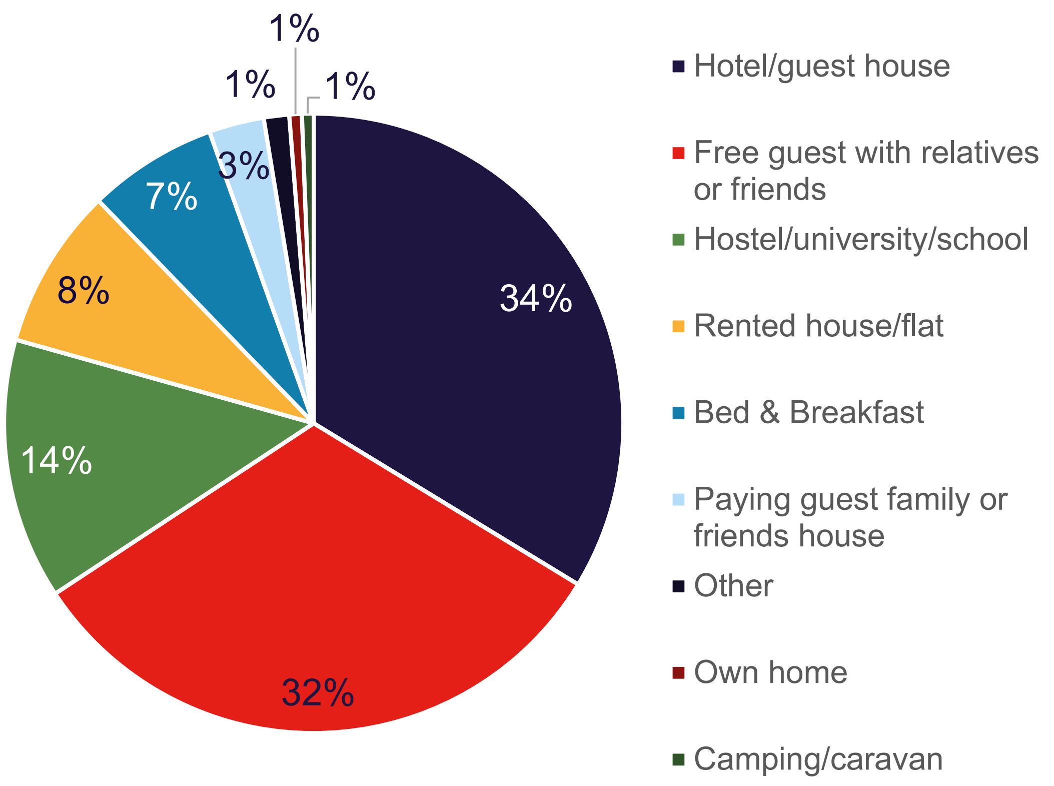


- 29% of Italian visits to the UK are made between July and September, followed by around about a quarter in spring between April and June and in the autumn and winter between October and December. More than one-in-five of their visits occur in the first three months of the year. This shows whilst the summer season is when most of visits from Italy to the UK are made (29%), there is good seasonal spread throughout the year.
- The UK saw record visitor spending from Italian visitors in the first and last quarter of 2019 worth £236 million and £249 million respectively. There was fluctuation in the volume of visits in different quarters in the past decade, but when considering the overall growth, the first quarter of the year has gained most (+54%) between 2009 and 2019, followed by the spring quarter between April and June which saw an increase of 41% over the same period.

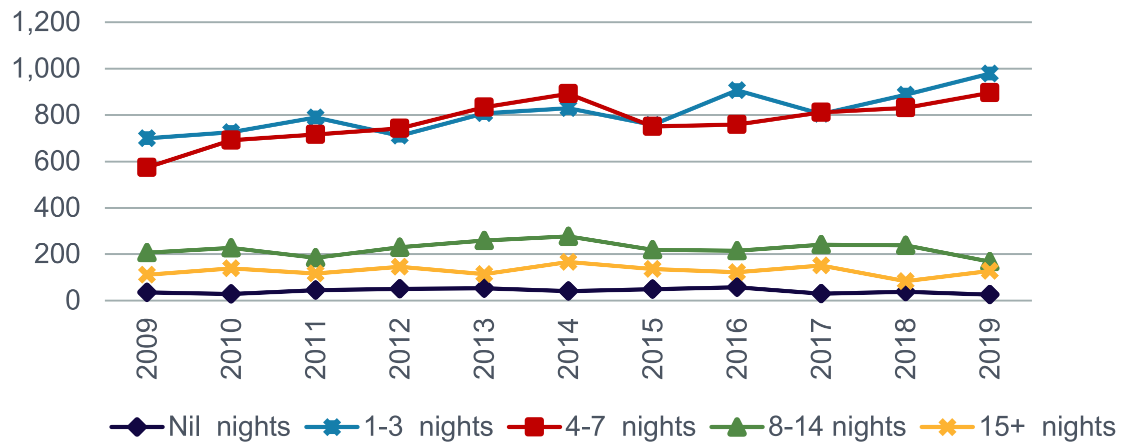
Source: International Passenger Survey by ONS

1.1 Key statistics: length of stay and accommodation

Accommodation stayed in, in 2019 (nights, %share)



Duration of stay trend (visits 000s)

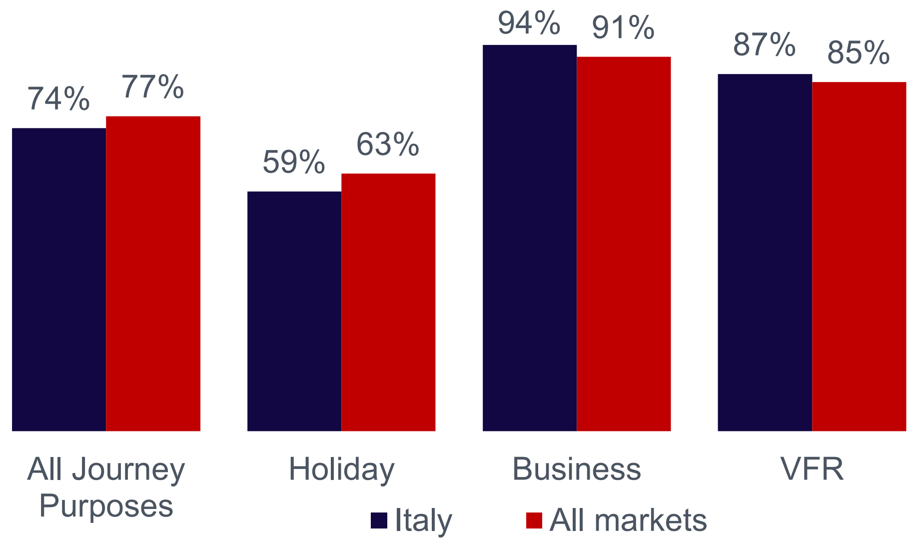


- Short trips of 1-3 nights and 4-7 nights are the most popular duration of stay amongst Italian visitors: In 2019, the UK welcomed a record 979,000 short visits of 1-3 nights from Italy worth a record £333 million. In addition, a record 896,000 visits of 4-7 nights were made from Italy to the UK worth a record £480 million.
- Two forms of accommodation dominate the picture with more than a third of nights spent at a hotel/guest house and a further third of nights spent staying for free with relatives or friends. 14% of nights are spent at a hostel/university/school.

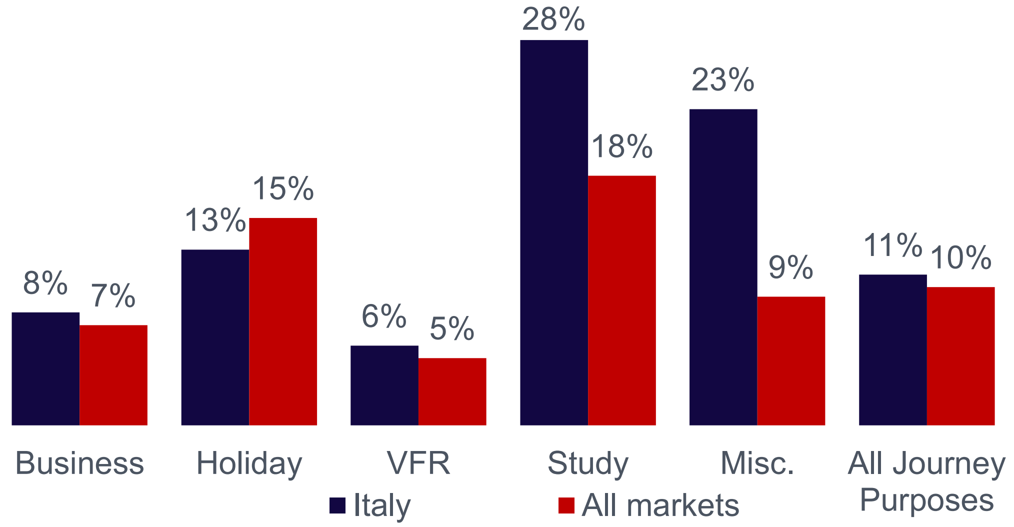
Source: International Passenger Survey by ONS

1.1 Key statistics: repeat visits and package tours

Proportion of overnight holiday visitors to the UK who have been to the UK before*



Proportion of visits that are bought as part of a package or all-inclusive tour in 2019**



- 59% of holiday visits from Italy to the UK in 2015 were made by repeat visitors (excl. UK nationals). These repeat visitors came on average between four and five times (a medium average visit frequency compared to other markets) and spent on average £2,161 in the UK in the past ten years.
- 94% of those coming to the UK for business visits (excl. expats) had been to the UK before, followed by those coming to visit friends or relatives who live in the UK (87%).
- More than one-in-ten visits from Italy are bought as a package or all-inclusive tour in 2019; most Italian visits to the UK remain independently organised.

International Passenger Survey by ONS. *2015, excluding British nationals; **See definition of a package holiday in appendix

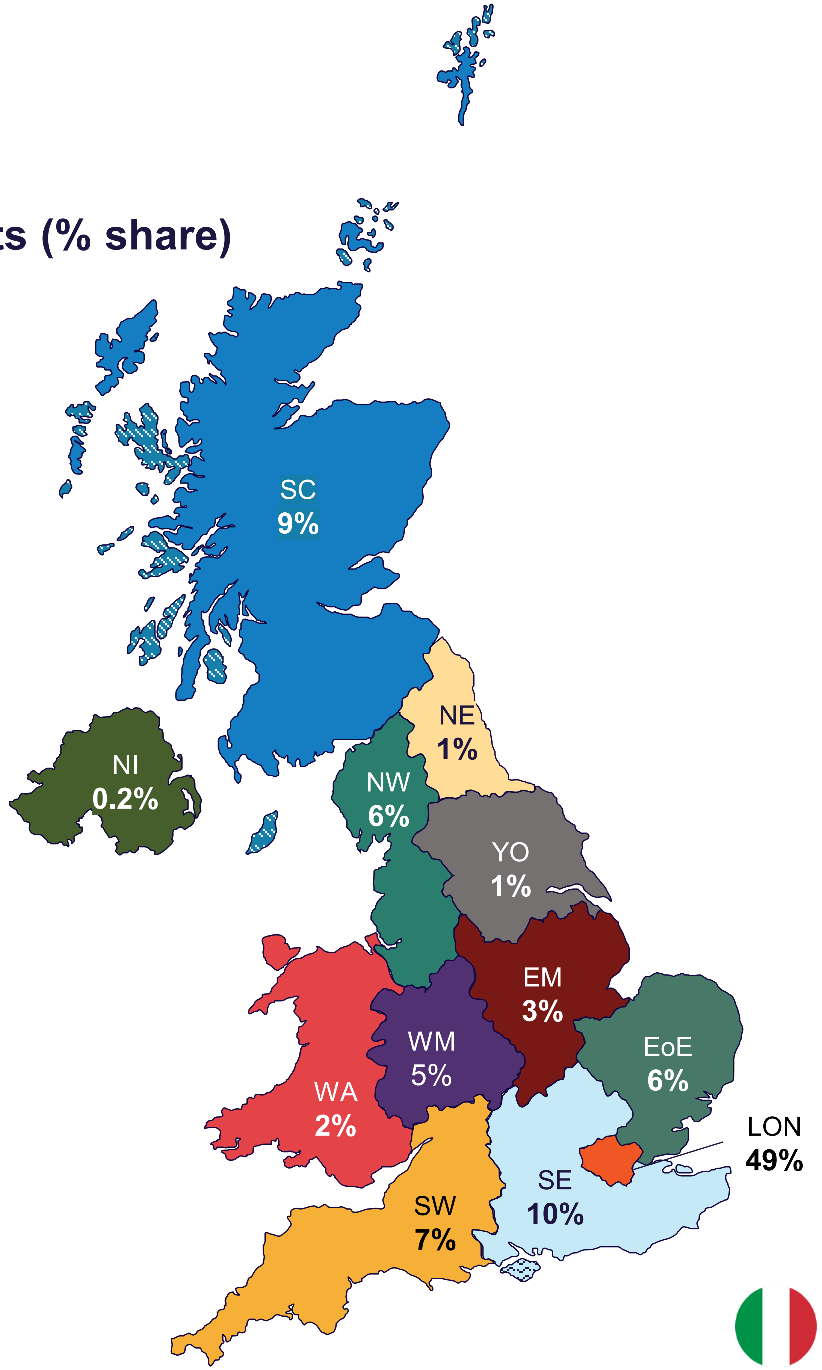
1.2 Getting around Britain

Annual visits to the UK (2017-2019 average)

Region	Nights stayed (000)	Visits (000)	Spend (£m)
Total	12,663	2,105	990
Scotland (SC)	1,123	186	98
Wales (WA)	275	41	12
Northern Ireland (NI)	30	6	2
London (LDN)	6,233	1,256	590
North East (NE)	186	16	8
North West (NW)	708	112	38
Yorkshire (YO)	183	38	13
West Midlands (WM)	589	80	33
East Midlands (EM)	390	46	18
East of England (EoE)	707	110	30
South West (SW)	901	118	45
South East (SE)	1,293	227	96
Nil nights (Nil)	N/A	31	2

Source: International Passenger Survey by ONS

Nights (% share)

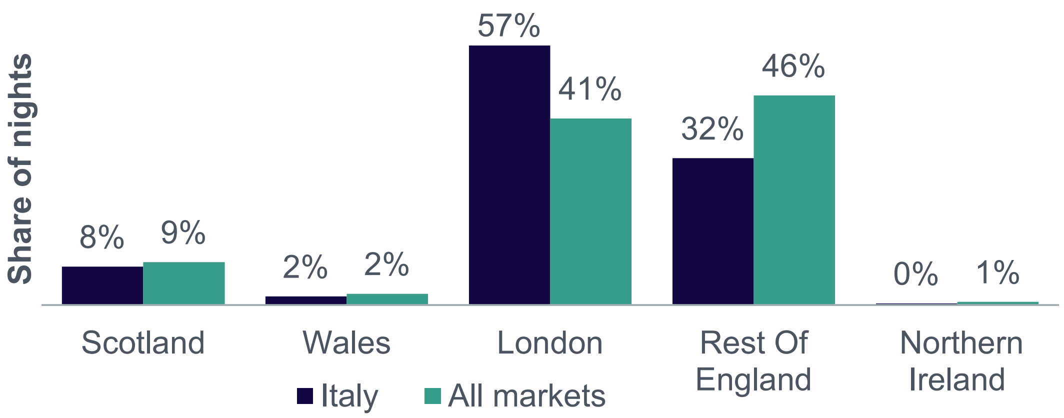


1.2 Getting around Britain: regional spread and top towns/cities

Top towns and cities visited (2017-2019 average)

Town	Visits (000s)
London	1,256
Edinburgh	126
Manchester	52
Cambridge*	45
Birmingham*	45

Regional spread 2019

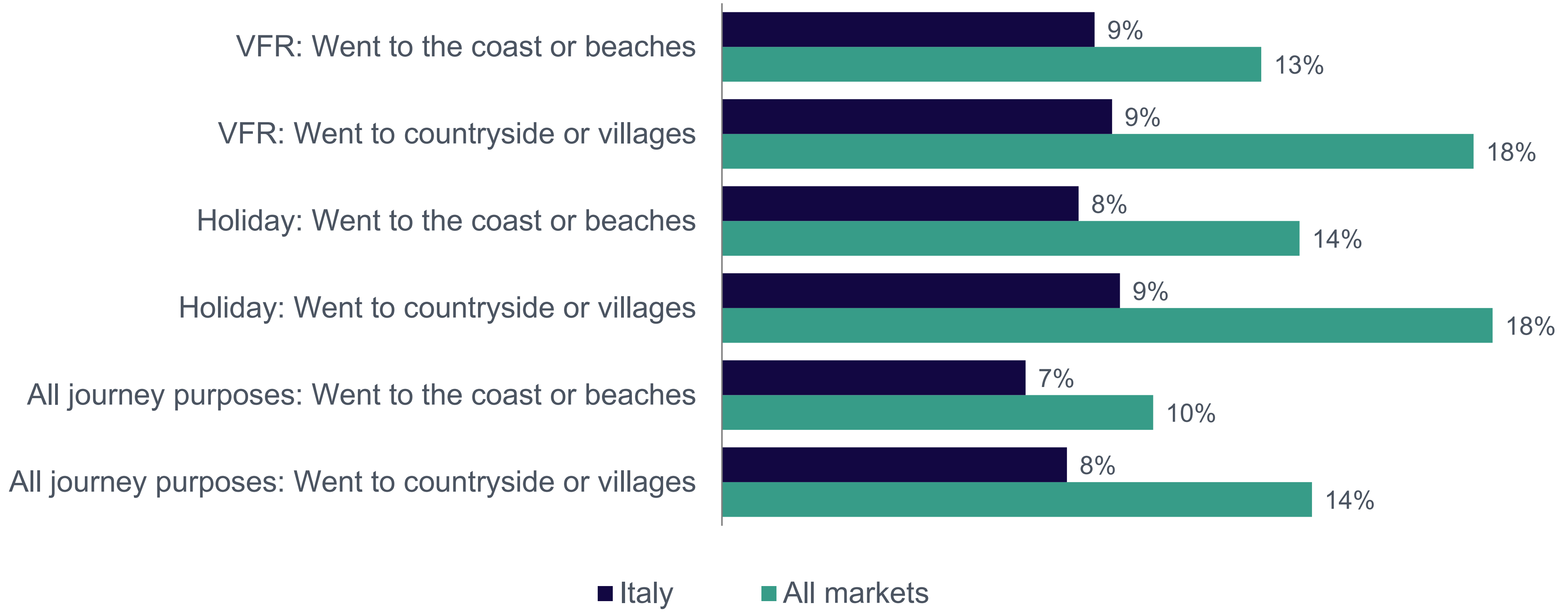


Source: International Passenger Survey by ONS, *small base

- London is the leading destination for a trip to the UK, accounting for almost half of Italian visitor nights, but the South East and Scotland are also popular based on the average nights spent in the UK in 2017-2019.
- Visits from Italy to regional England, that is England outside of London, set a new volume record in 2019 with 714,000 such visits (up 9% on 2018) worth a total of £275 million (up 1% on the previous year).
- London welcomed 21% more visits from Italy in 2019 than in 2018 with 1.4 million visits worth a total of £733 million in visitor spending in the capital in 2019 (up 50% on 2018).
- Italian visits have a slightly below average propensity to feature rural and coastal areas of Britain. Holiday visits and those to family/friends in the UK are most likely to feature activity in such areas.

1.2 Getting around Britain: visits to coast, countryside and villages

Propensity to visit coast, countryside and villages

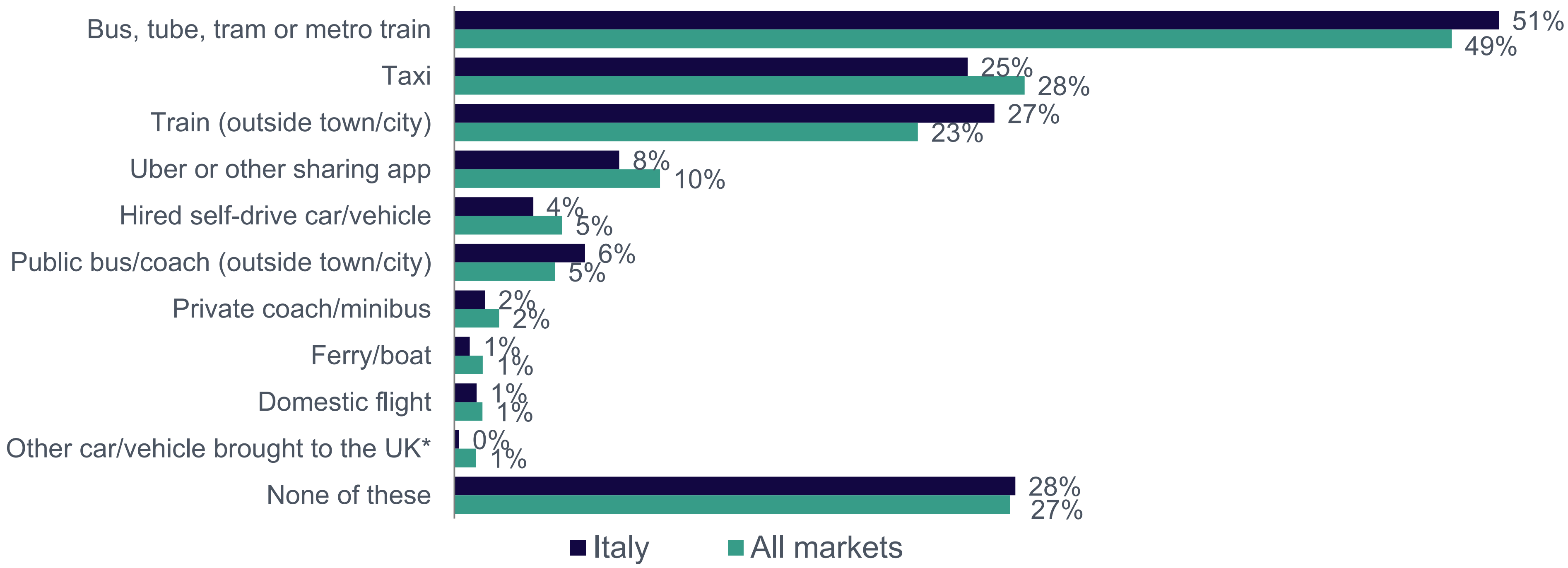


- Fewer than one-in-ten Italian visits are likely to go to the countryside or villages or to the coast or beaches as part of their visit. The propensity is marginally higher among those visiting on a holiday or when they come to see their friends or relatives in the UK.

Source: International Passenger Survey by ONS 2016

1.2 Getting around Britain: use of internal modes of transport

Propensity to use internal modes of transport

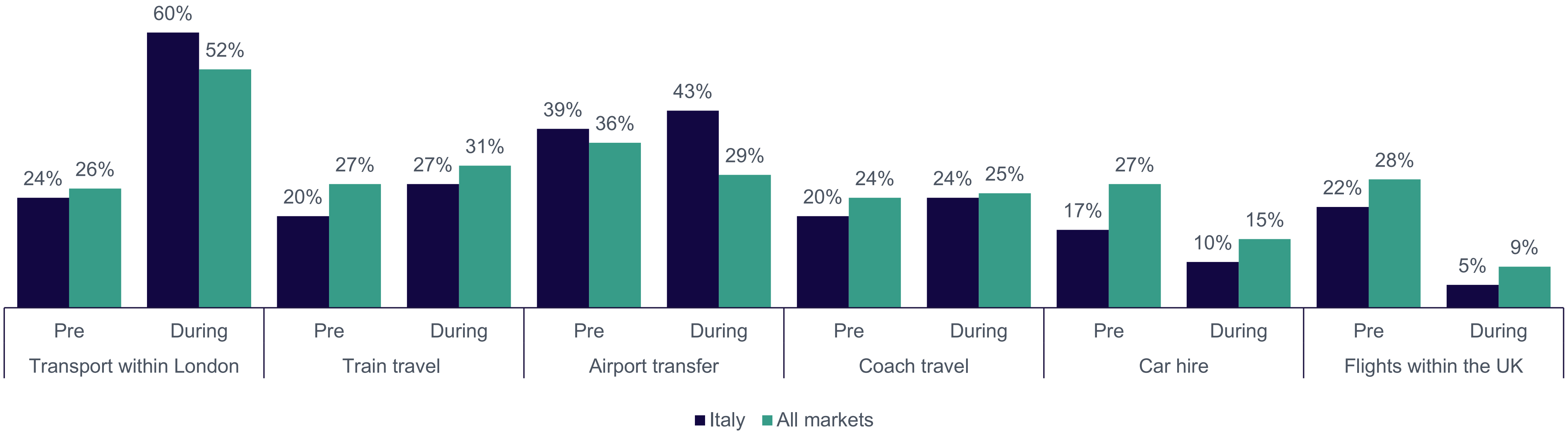


- Italian visitors are very comfortable with taking public transport while in the UK. More than half of the Italians have a propensity to use bus, tube, tram or metro trains during their visit in the UK. Visitors from Italy are also more likely than the all-market average to use the train (outside a town or city) and public busses/coaches.
- Italian visits in the UK have below-average propensity to use any of the other internal modes listed.

Source: International Passenger Survey by ONS 2018; most lorry drivers were not asked this question, and as a consequence, are not taken into account in the results for ‘car/vehicle you/group brought to the UK

1.2 Getting around Britain: purchase of transport

Transport services purchased before or during trip (%)



- More Italian visitors buy their tickets for transport in Britain whilst they are here in contrast to before their trip (with the exception of internal flights and car hire). This is particularly true for transport in London, airport transfers and train tickets.
- Fewer transport services were pre-booked; airport transfers were the most likely to be booked before the trip with 39% of Italian visitors stating they reserved them in advance.

Source: International Passenger Survey by ONS, VisitBritain/IPSOS 2016, base: visitors

1.3 Visitor demographics

Visitor characteristics

- Almost two-in-five visits from Italy to the UK are made by visitors aged under 35. The volume of Italian visits to the UK in the age groups of 45-54 and 55-64 set new records with 446,000 and 277,000 visits respectively in 2019; both age cohorts also show the strongest visit growth between 2009 and 2019. Those aged 45-54 also contributed record spend of £239 million in the UK in 2019.
- Among holiday visitors from Italy and those visiting friends/relatives in the UK the split between women and men is fairly balanced, while those in the UK for business reasons have a higher tendency of more men on such trips and those visiting to study or for miscellaneous reasons are more often women.
- 9% of visits made to see friends and relatives (VFR) residing in the UK are British nationals.
- Around a third of visits from Italy are by travellers on their own or with their spouse or partner.
- The largest proportion of Italian visitors who came to the UK reside in Lombardia, Lazio and Veneto.

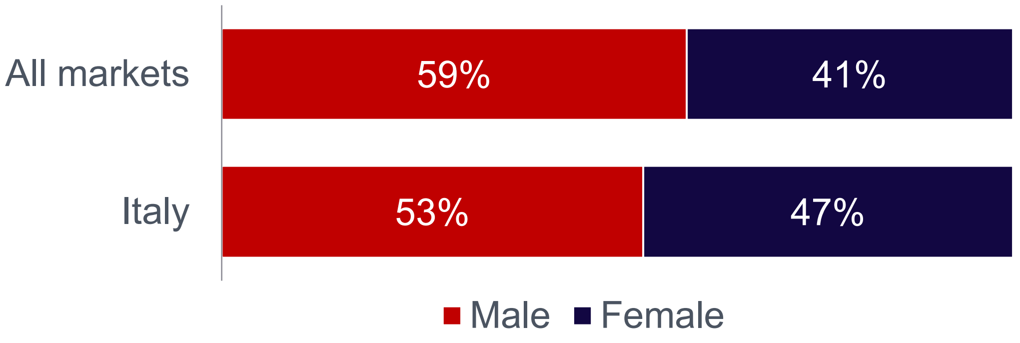
59%

of Italian holiday visitors have been to the UK before*

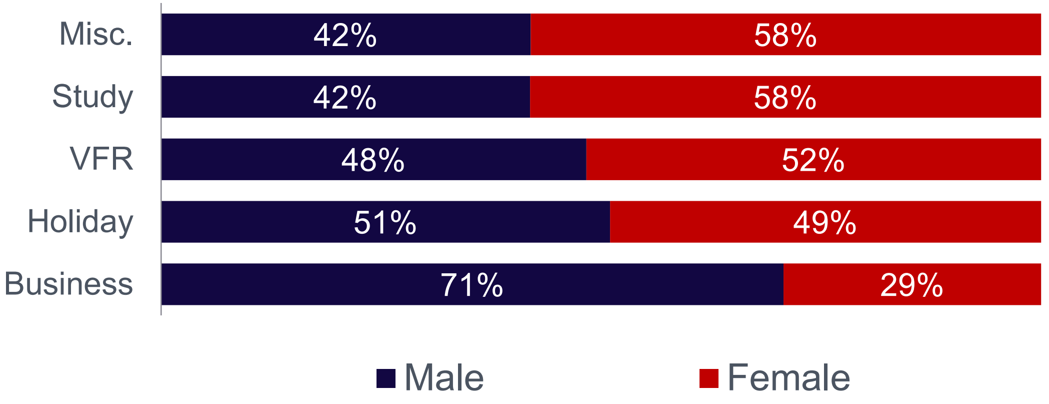
Source: International Passenger Survey by ONS, *IPS 2015

1.3 Visitor demographics: gender and age groups

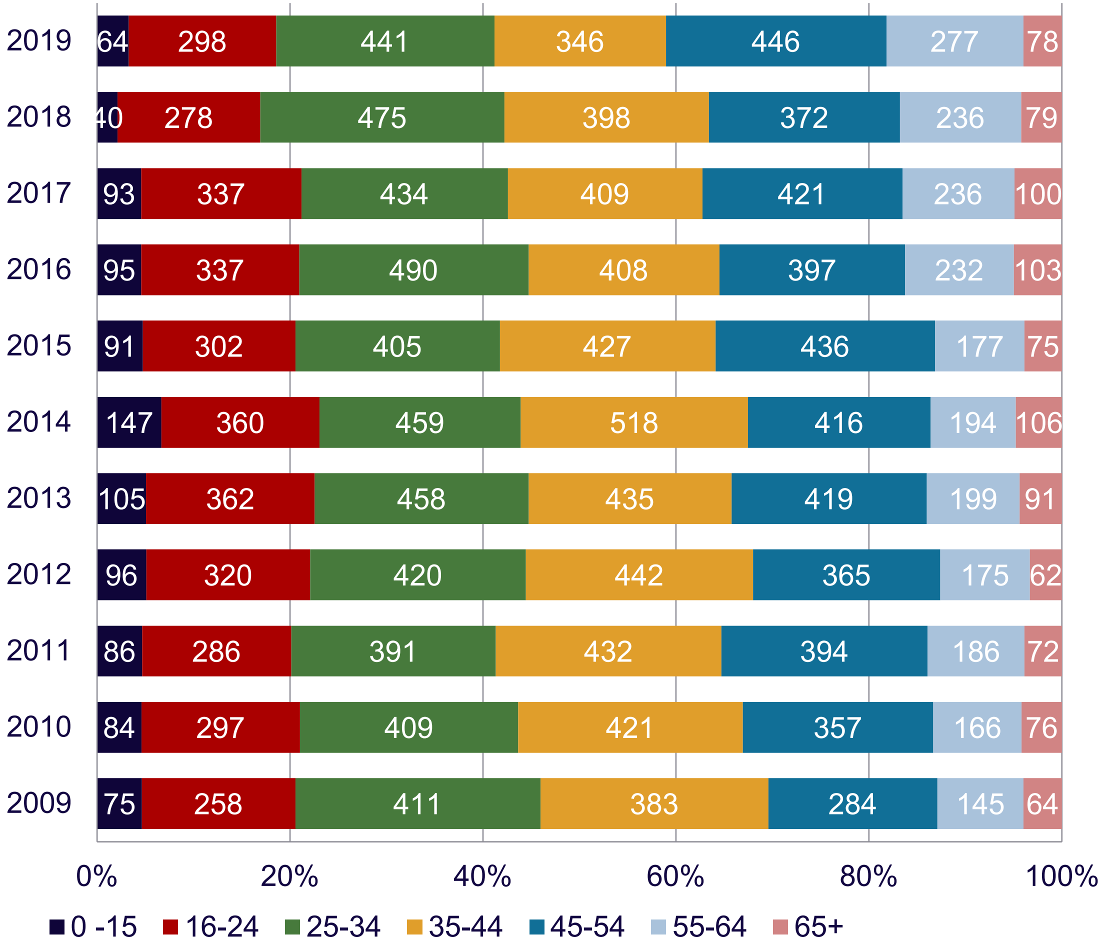
Gender ratio of visits (2019):



Gender ratio of visits from Italy by journey purpose (2019):



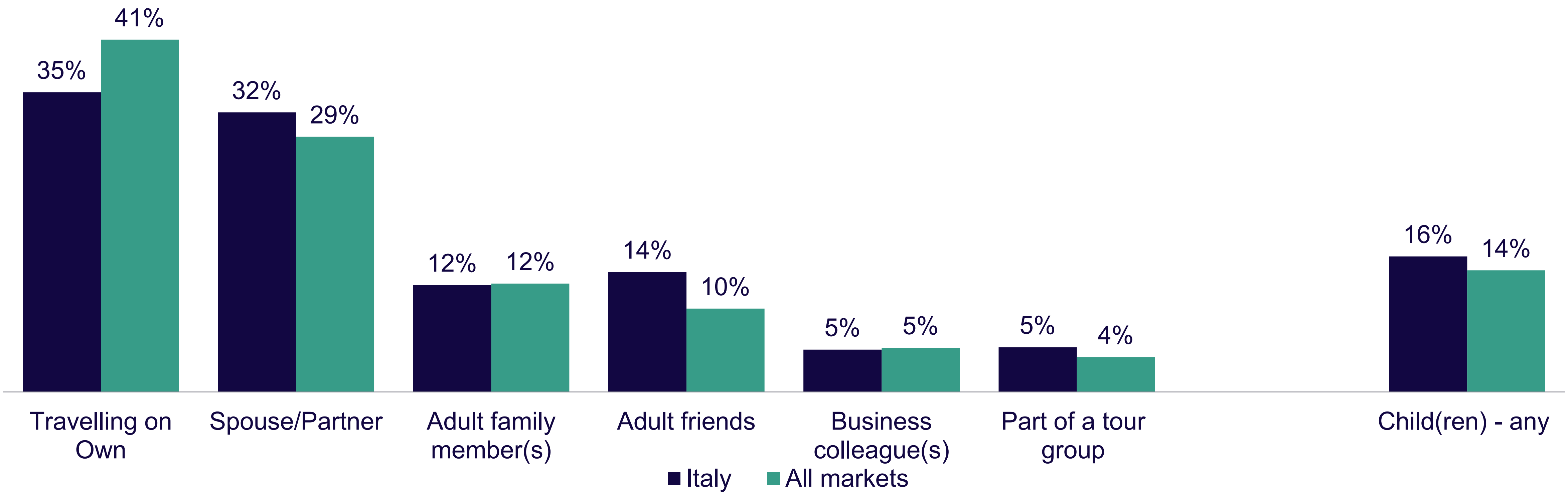
Age group trend (visits in 000s)



Source: International Passenger Survey by ONS

1.3 Visitor demographics: travel companions

Who have Italian visitors to the UK travelled with?



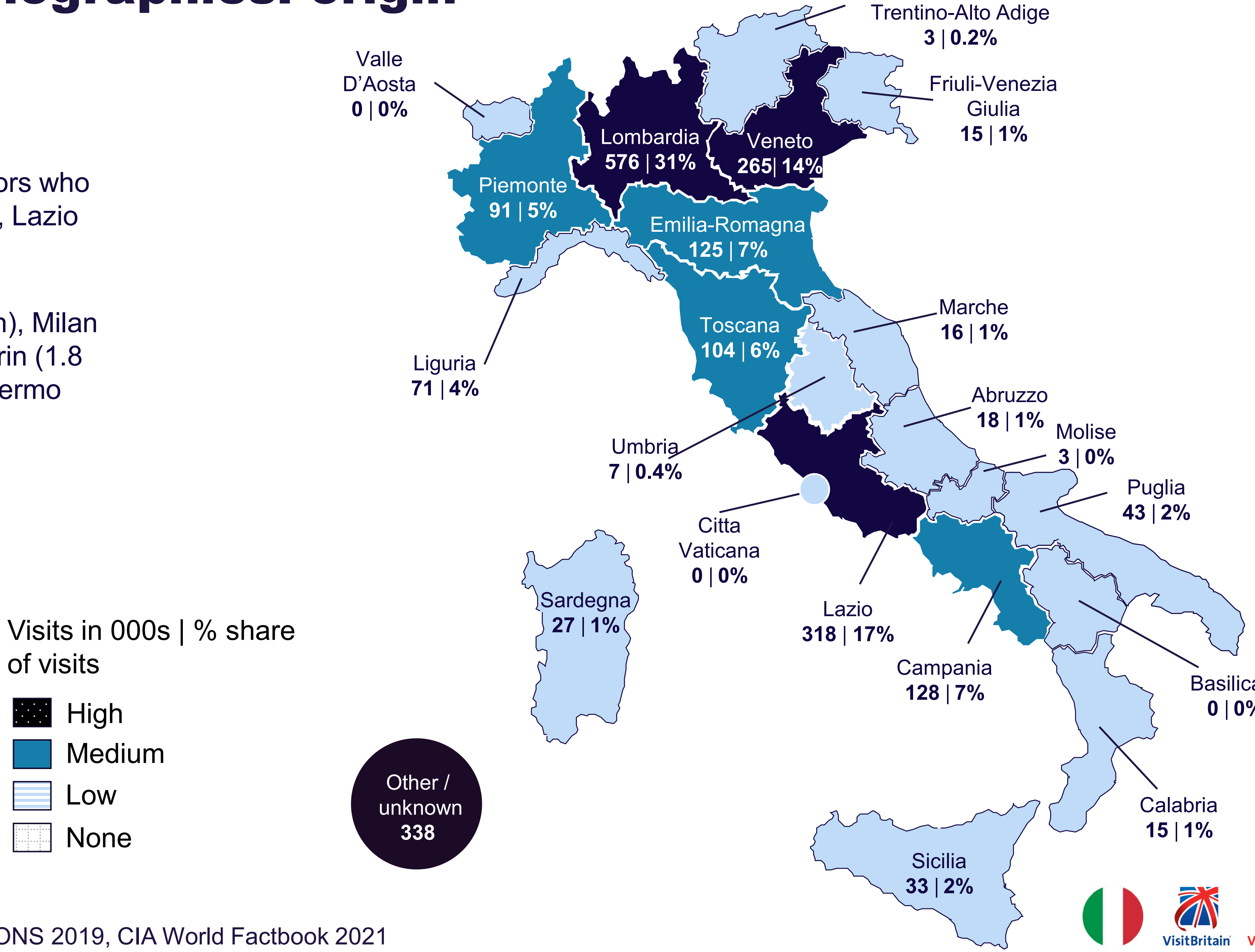
- Round about a third of visits from Italy are by travellers on their own or with their spouse or partner.
- The Italians are broadly aligned with other markets on the proportion of other travel companions like other members of the family, or colleagues, but have a slightly above-average share of those who participate travel with children, adult friends or as part of a tour group.

Source: International Passenger Survey by ONS, 2017, Who accompanied you on your visit to the UK, excluding UK residents you may have visited during your trip?

1.3 Visitor demographics: origin

Visits to the UK

- The largest proportion of Italian visitors who came to the UK reside in Lombardia, Lazio and Veneto (2019).
- The largest urban areas in terms of inhabitants include Rome (4.3 million), Milan (3.1 million), Naples (2.2 million), Turin (1.8 million), Bergamo (900,000) and Palermo (850,000) (2021).



Source: International Passenger Survey by ONS 2019, CIA World Factbook 2021

1.4 The UK and its competitors (1)

Market size, share and growth potential

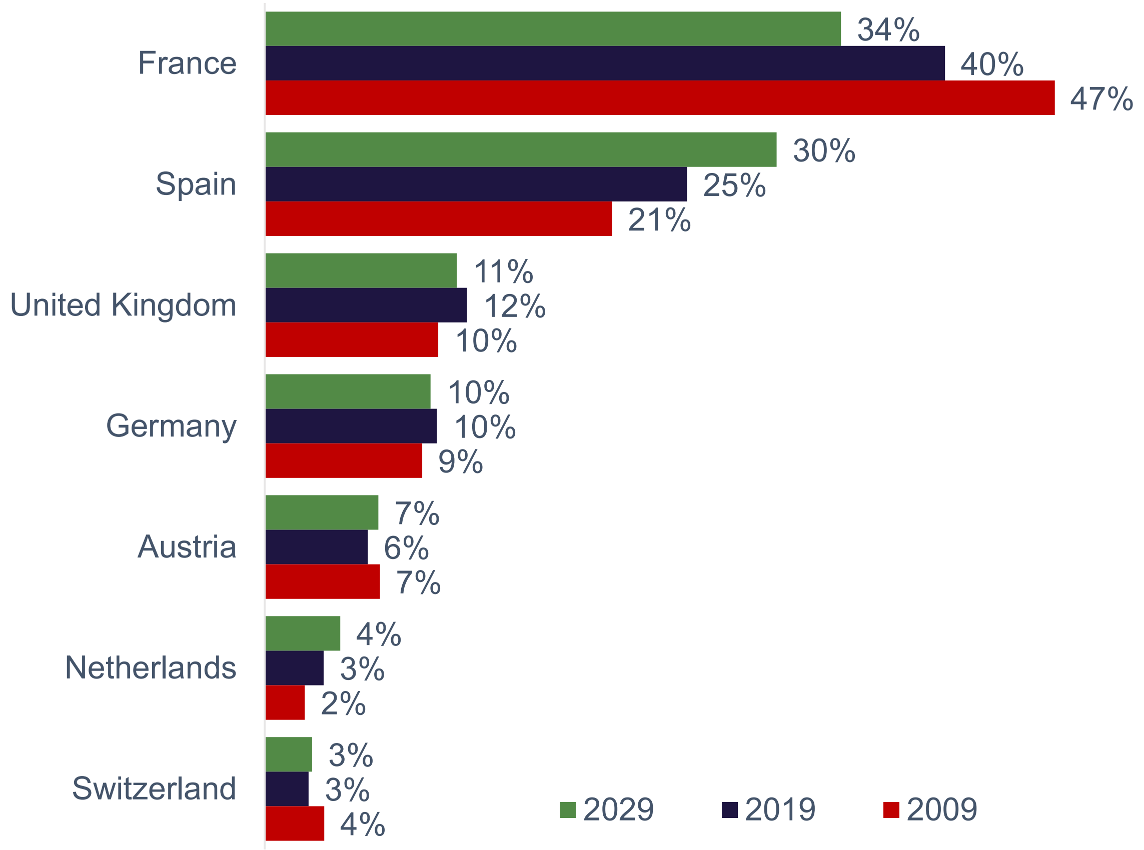
- In 2019, the UK was the 3rd most popular destination of Italian outbound overnight travel globally behind France and Spain, ahead of Germany.
- In a highly competitive set of destinations within Europe, both the UK and Germany are projected to struggle keeping their market share, as is France which is expected to see the most substantial market share loss in the set. Spain is forecast to expand its market share strongly, alongside smaller increases expected for Austria, the Netherlands and Switzerland.
- Despite the severe shorter-term impact of the COVID-19 pandemic, visits from the Italian market are forecast to grow by 9% comparing 2019 and 2030, and Italian visitor spending in the UK by 26% in the same timeframe, which would see the value of the Italian market reach almost £1.4 billion in 2030.
- Of those who came to Britain for a holiday, France was the most considered alternative destination whilst about one in four were firmly set on Britain.
- Of the almost 72 million overnight trips taken by the resident population in Italy in 2019, 76% were taken to domestic destinations in 2018. The remaining trips were mostly directed towards EU destinations.

The UK ranks
3rd
for Italian outbound overnight visits

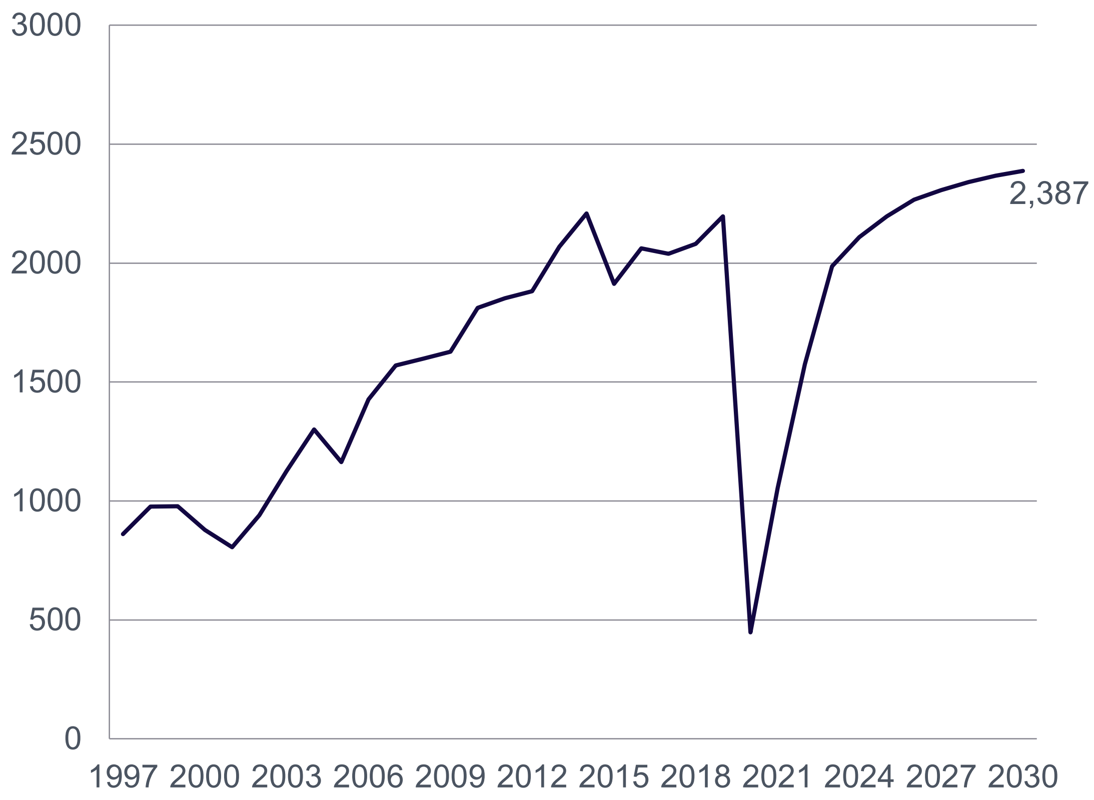
Source: Oxford Economics, VisitBritain/IPSOS 2016, Istat 2019, Oxford Economics forecasts with VisitBritain adaptations
Please note that given the current situation, prospects can change rapidly, whether for overall inbound tourism or for market-to-market prospects.

1.4 The UK and its competitors (2)

The UK's market share of Italian visits among competitor set



Historic and potential visits to the UK (000s)



Source: Oxford Economics for competitor set based on overnight visits, 'Historic and potential visits' displays total visits based on International Passenger Survey historic data and Oxford Economics forecasts with VisitBritain adaptations. Please note that given the current situation, prospects can change rapidly, whether for overall inbound tourism or for market-to-market prospects.

Experiences and perceptions

Chapter 2

2.1 Inbound activities: summary

- Almost three-in-five Italian visits involve dining in restaurants; more than half feature shopping. Going to the pub is also very popular.
- While on holiday in the UK, more than three-in-five Italian visits feature sightseeing; half of them include a visit to parks or gardens, museums or art galleries and almost as many to castles or historic houses, reflecting the strong interest of the market in culture and heritage. Almost a quarter of Italians on holidays in the UK go on a guided tour.
- Almost a quarter of Italian visits include socialising with locals.
- More than one-in-seven enjoy walking in the countryside during their holiday in the UK. A similar proportion visit bars/nightclubs during their stay.
- Around 39,000 Italian visits involve watching live football while here.
- 97% of Italian visitors are either ‘Very’ or ‘Extremely’ likely to recommend Britain for a holiday or short-break.

Top 10 activities for Italian visitors during their visit to the UK

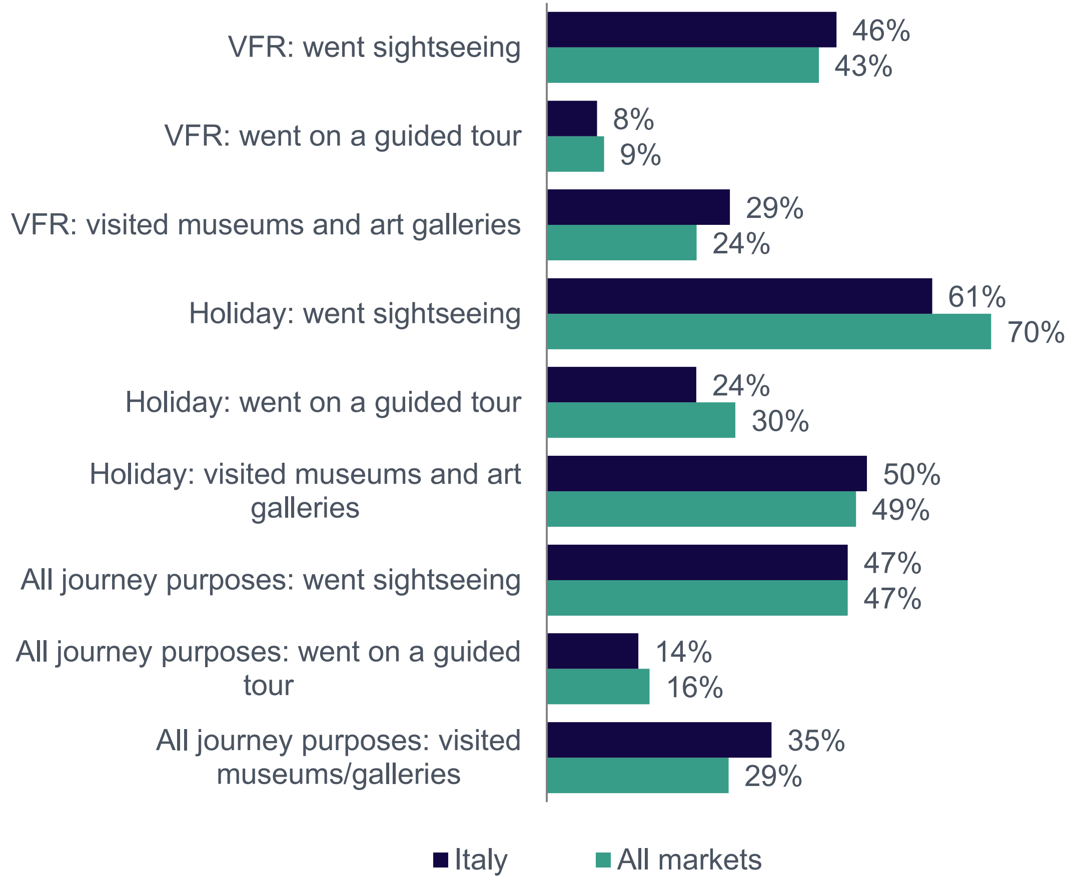
1. Dining in restaurants
2. Going shopping
3. Sightseeing famous monuments/ buildings
4. Going to the pub
5. Visiting parks or gardens
6. Visiting museums or art galleries
7. Visiting castles or historic houses
8. Socialising with locals
9. Visiting religious buildings
10. Walking in the countryside

For more information on activities, please visit our webpage of activities undertaken in Britain

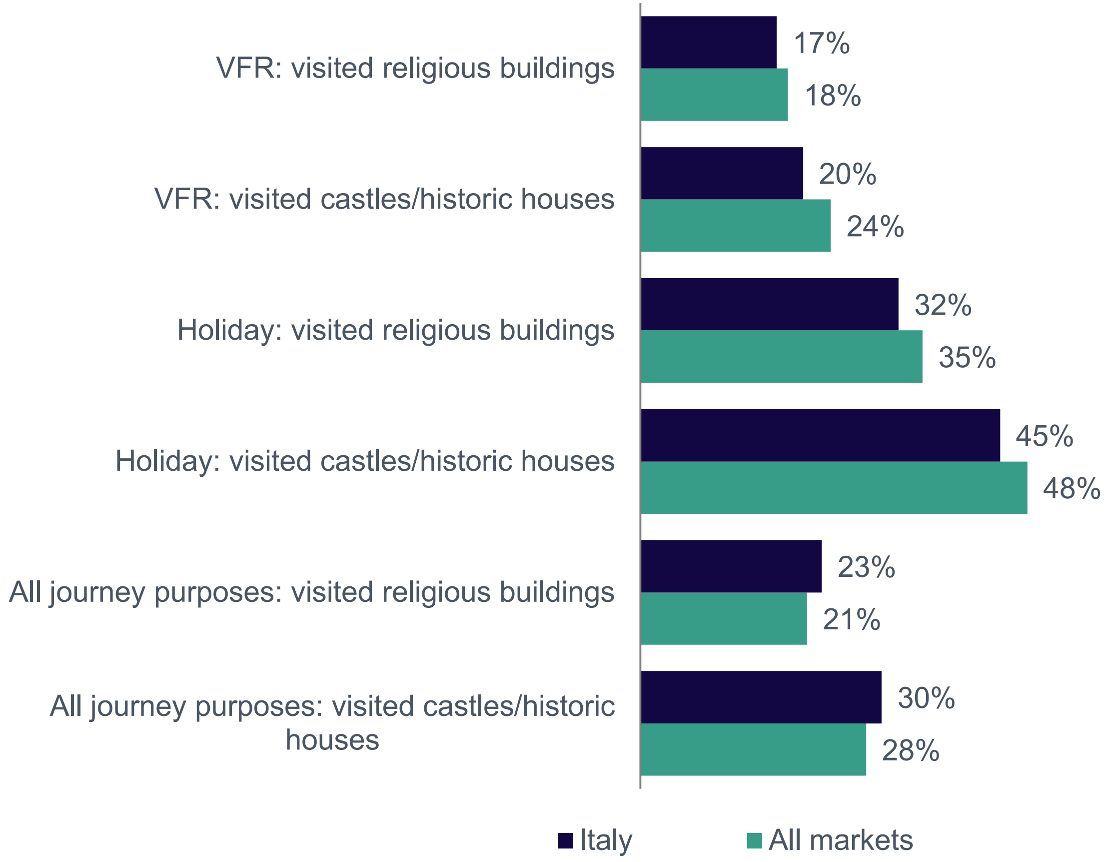
Source: International Passenger Survey by ONS, rankings based on 2007-2019 data

2.1 Inbound activities: tourism and heritage

Propensity to go sightseeing, visit museums and galleries or to go on a guided tour



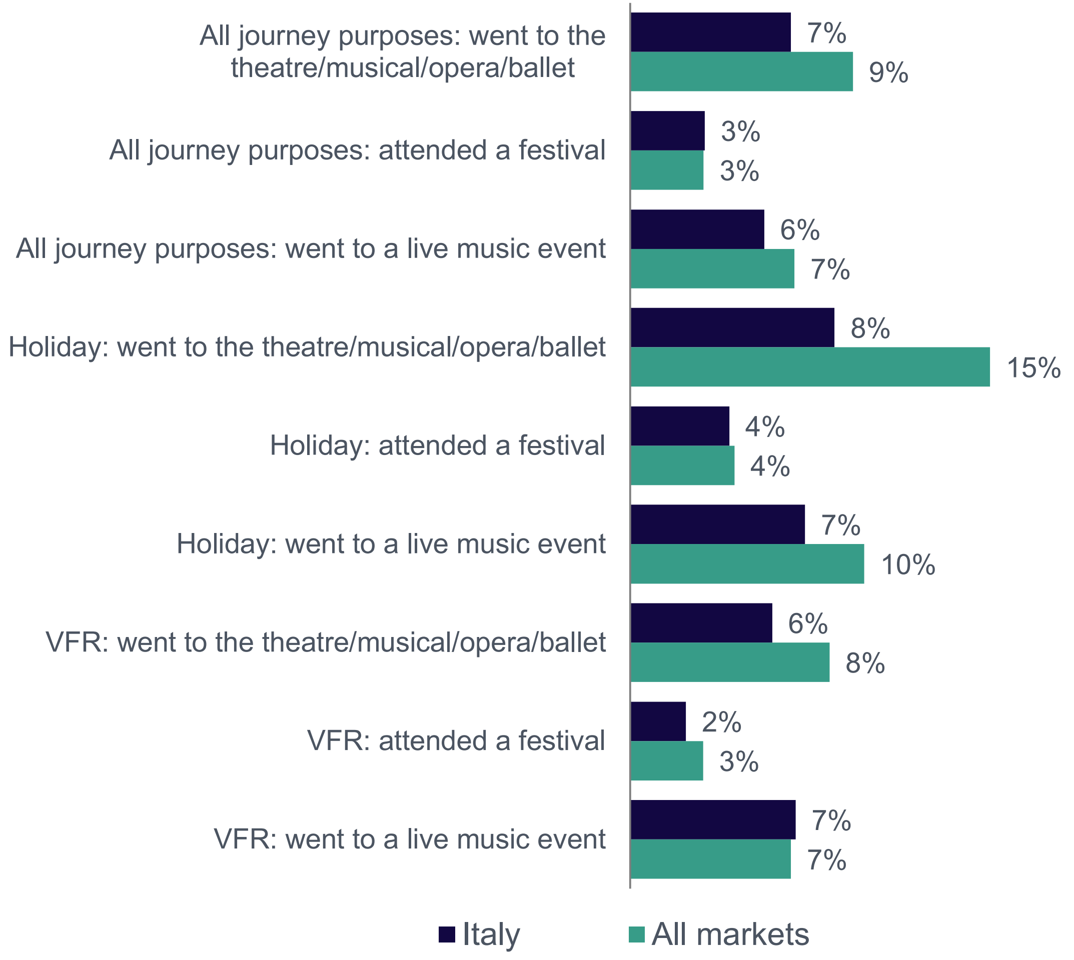
Propensity to visit built heritage sites



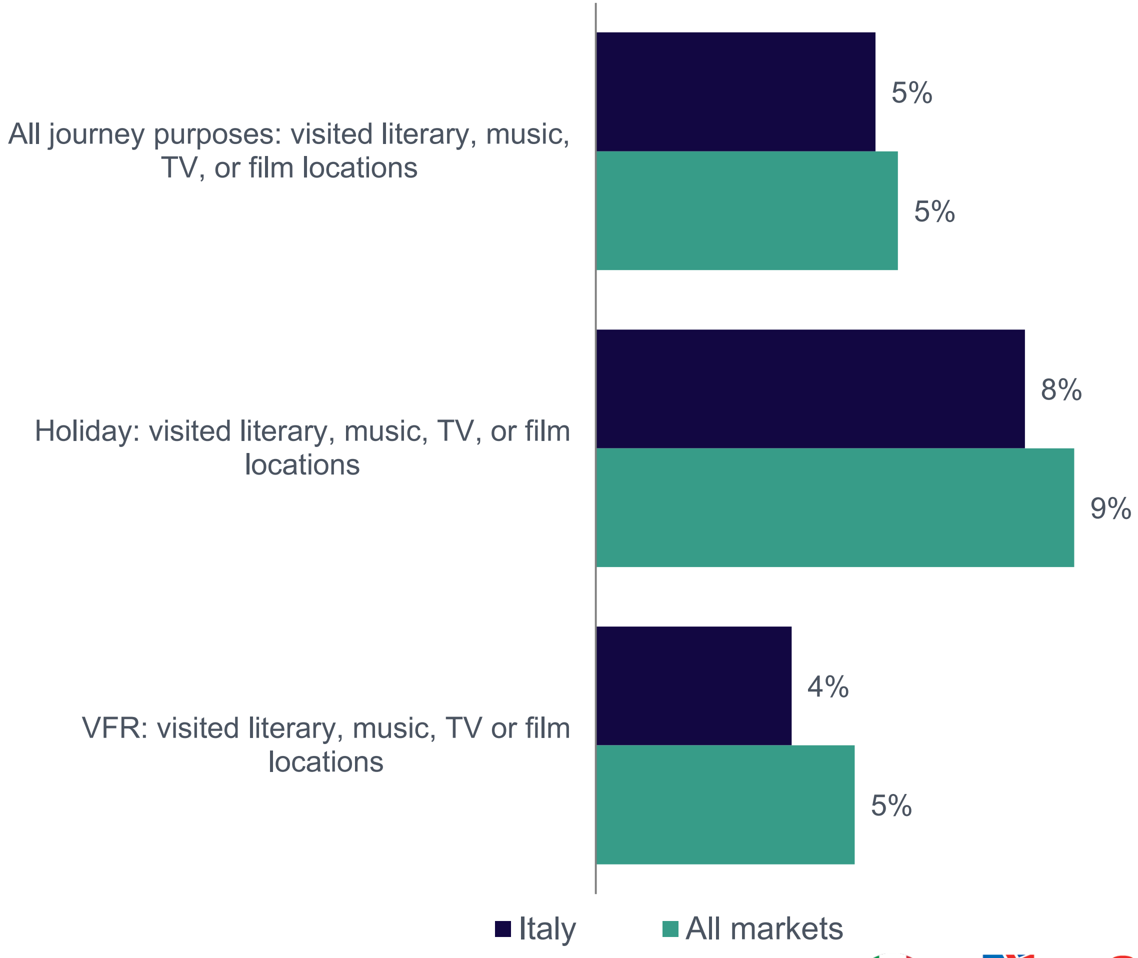
Source: International Passenger Survey by ONS, 2016

2.1 Inbound activities: culture

Propensity to attend the performing arts



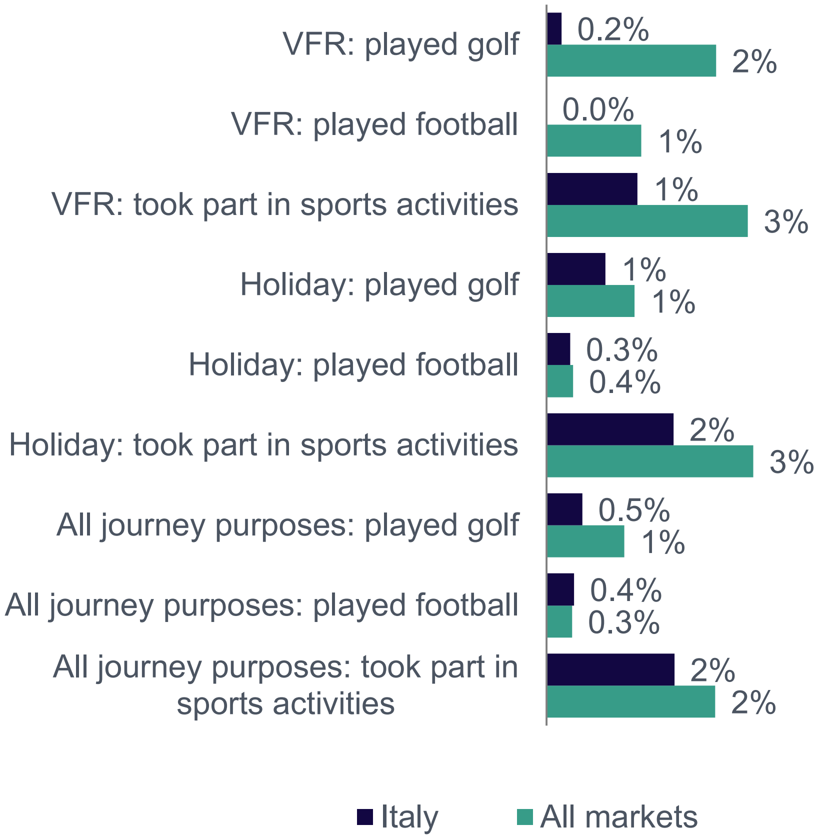
Propensity to visit literary, music, TV, or film locations



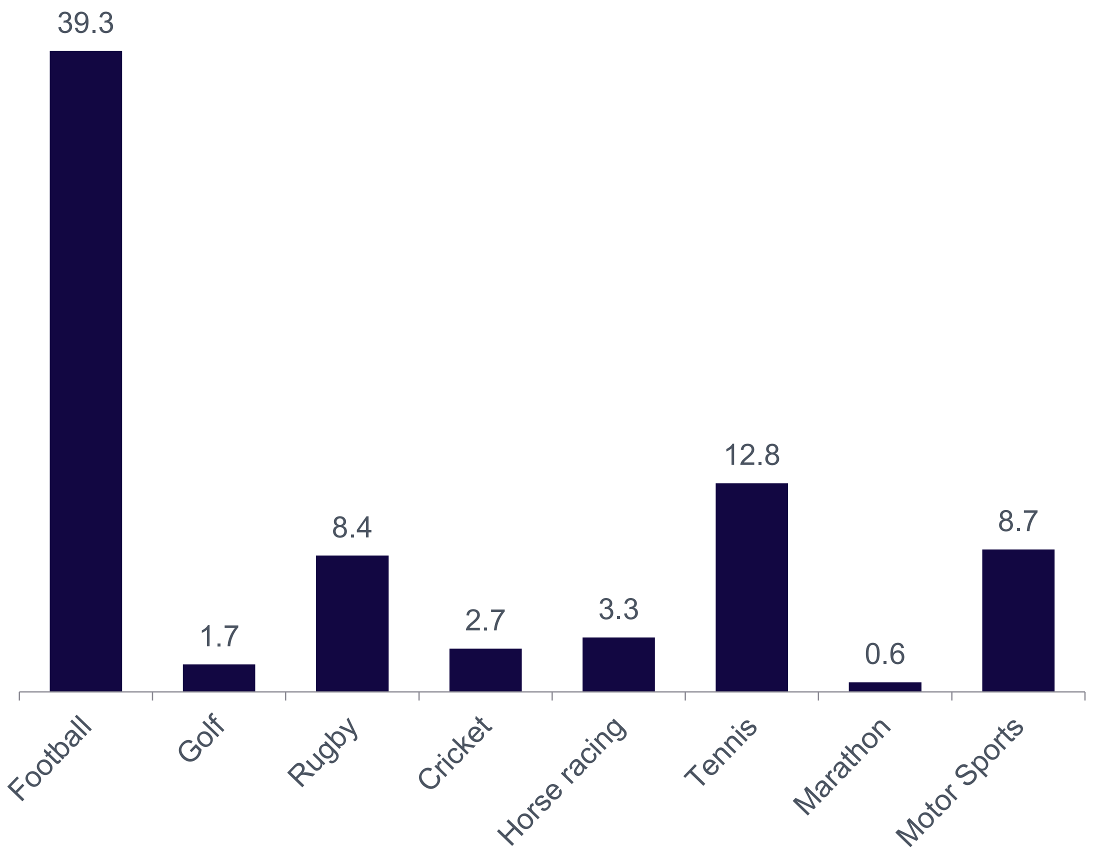
Source: International Passenger Survey by ONS, 2016 (performing arts)

2.1 Inbound activities: sports

Propensity to partake in sports-related activities



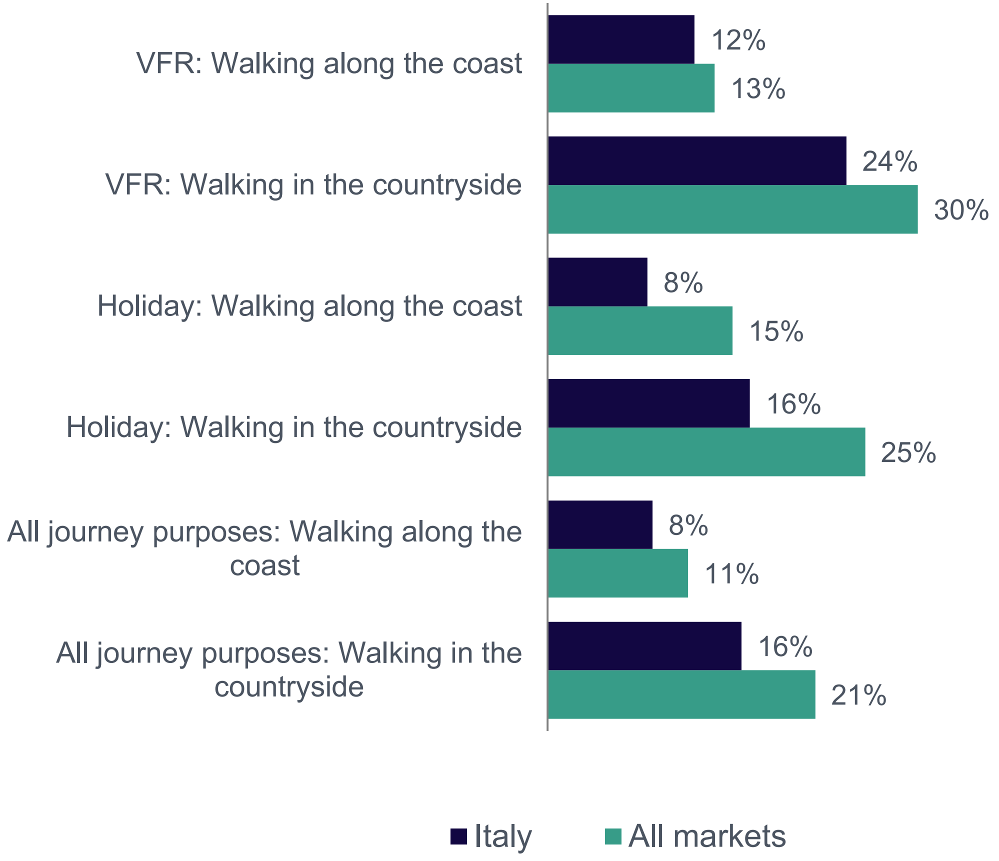
Number who watched sports live during trip (000s)



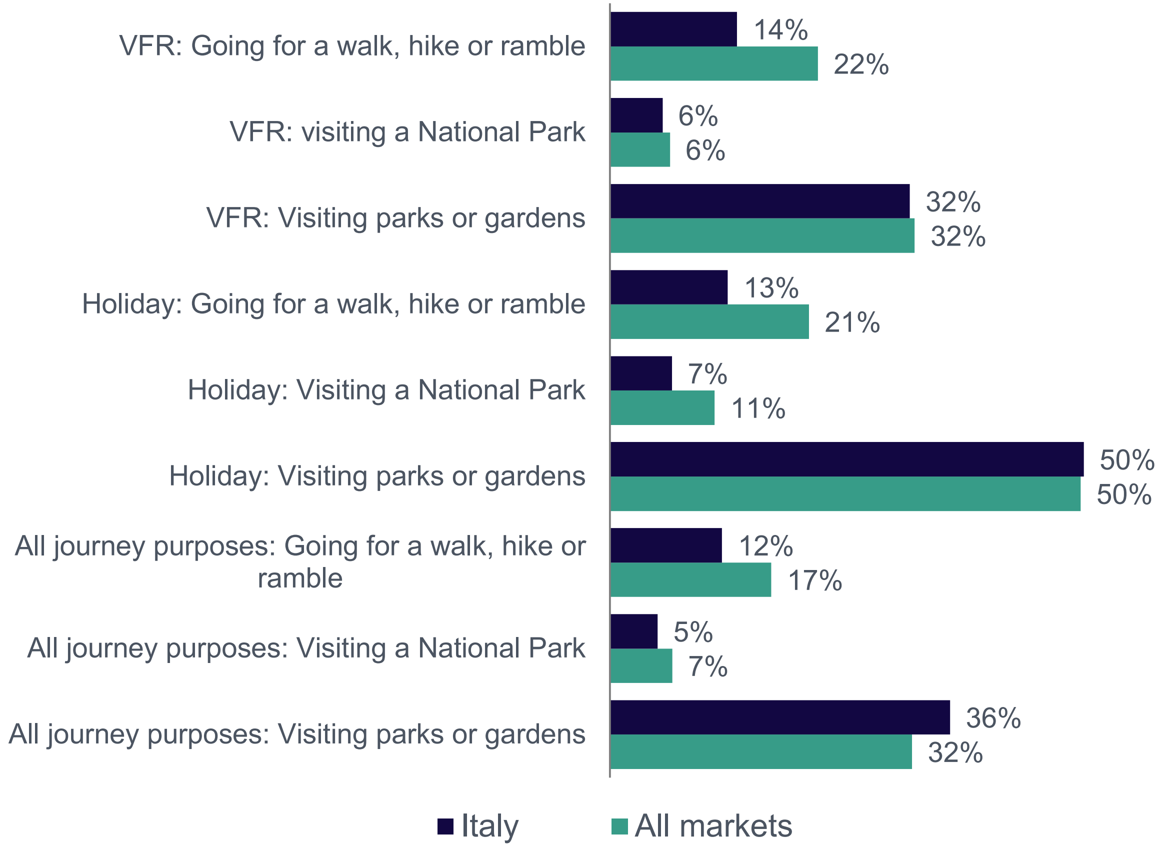
Source: International Passenger Survey by ONS, 2011, 2014 and 2019 (watched sports live)

2.1 Inbound activities: outdoors

Propensity to go walk along the coast or in the countryside



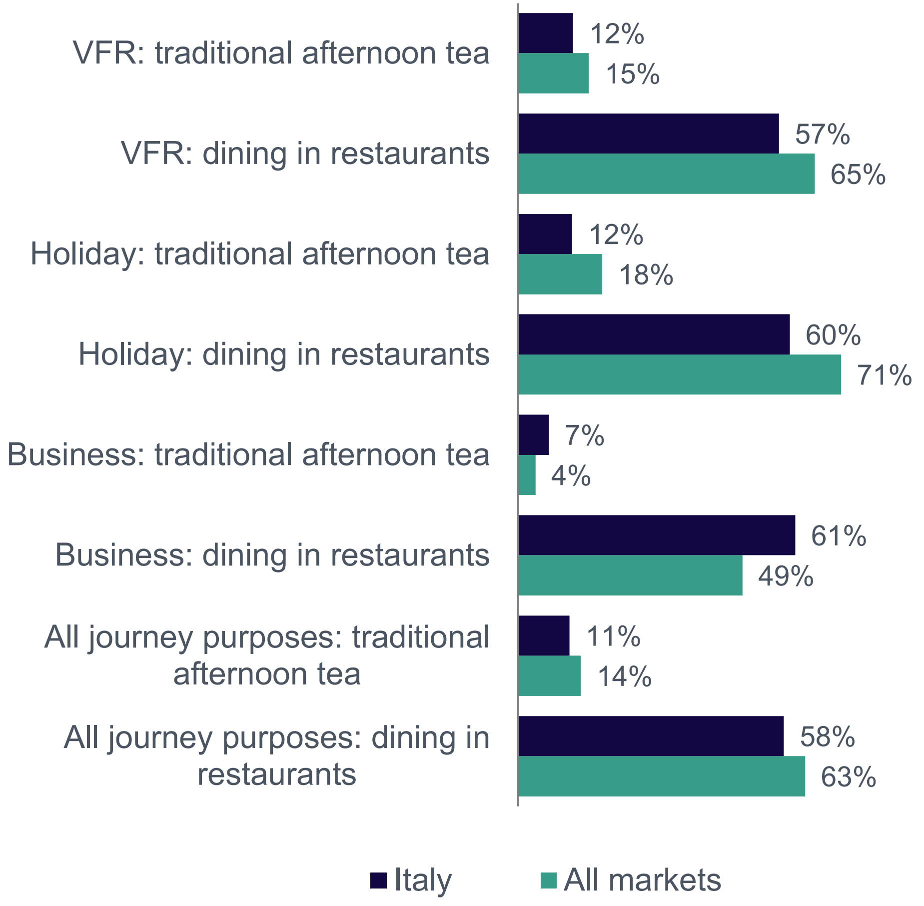
Propensity to enjoy the outdoors



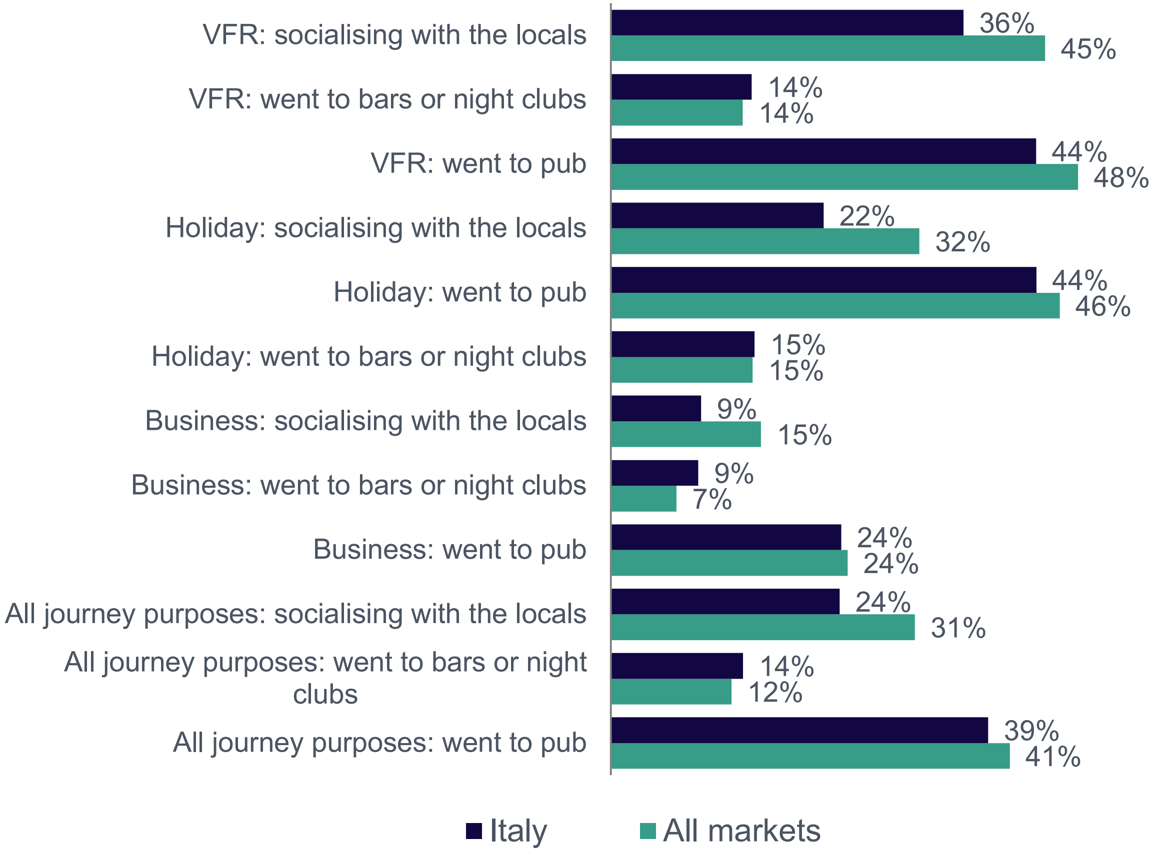
Source: International Passenger Survey by ONS, 2019 (walking along the coast/in the countryside), 2016 (visiting parks and gardens and a national park), 2014 (hiking/rambling)

2.1 Inbound activities: going out

Propensity to go to restaurants, or to have a traditional afternoon tea



Propensity to go to the pub or bars and night clubs, or to socialise with locals

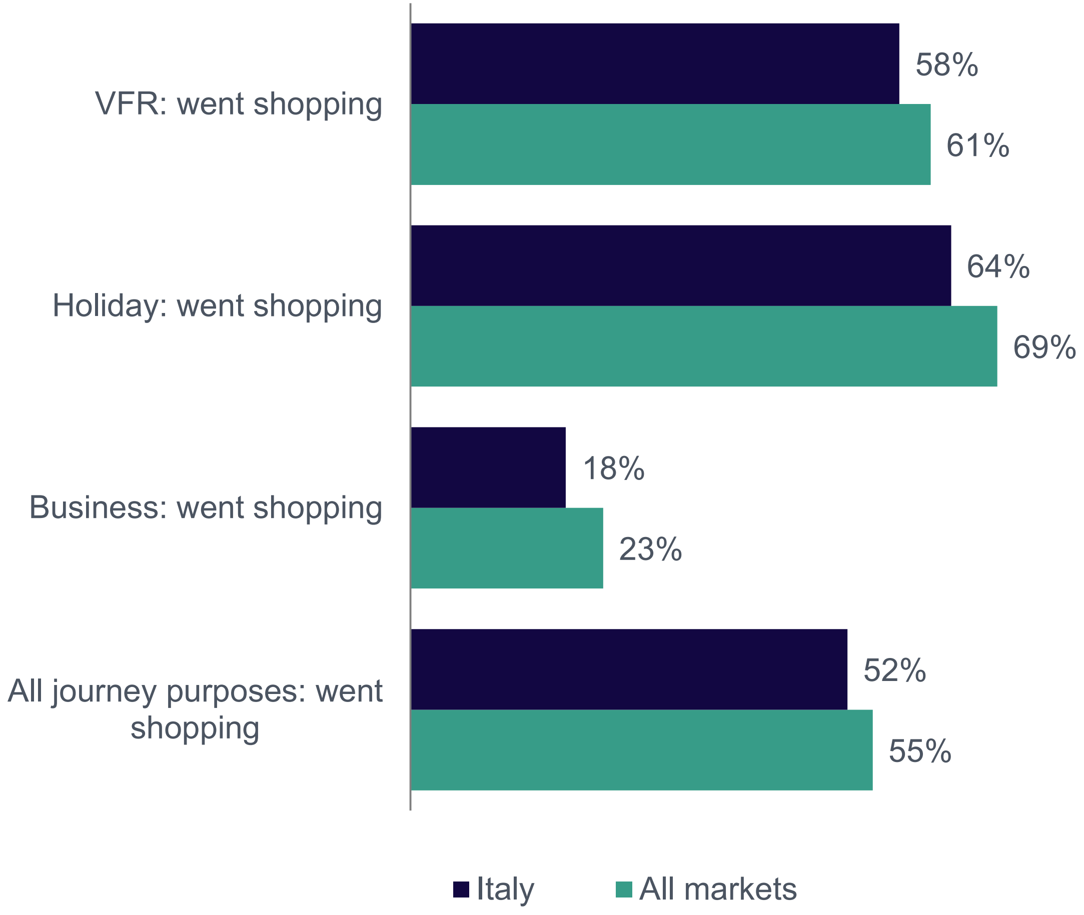


Source: International Passenger Survey by ONS, 2019 (dining in restaurants and having a traditional afternoon tea) and 2017 (all other activities)

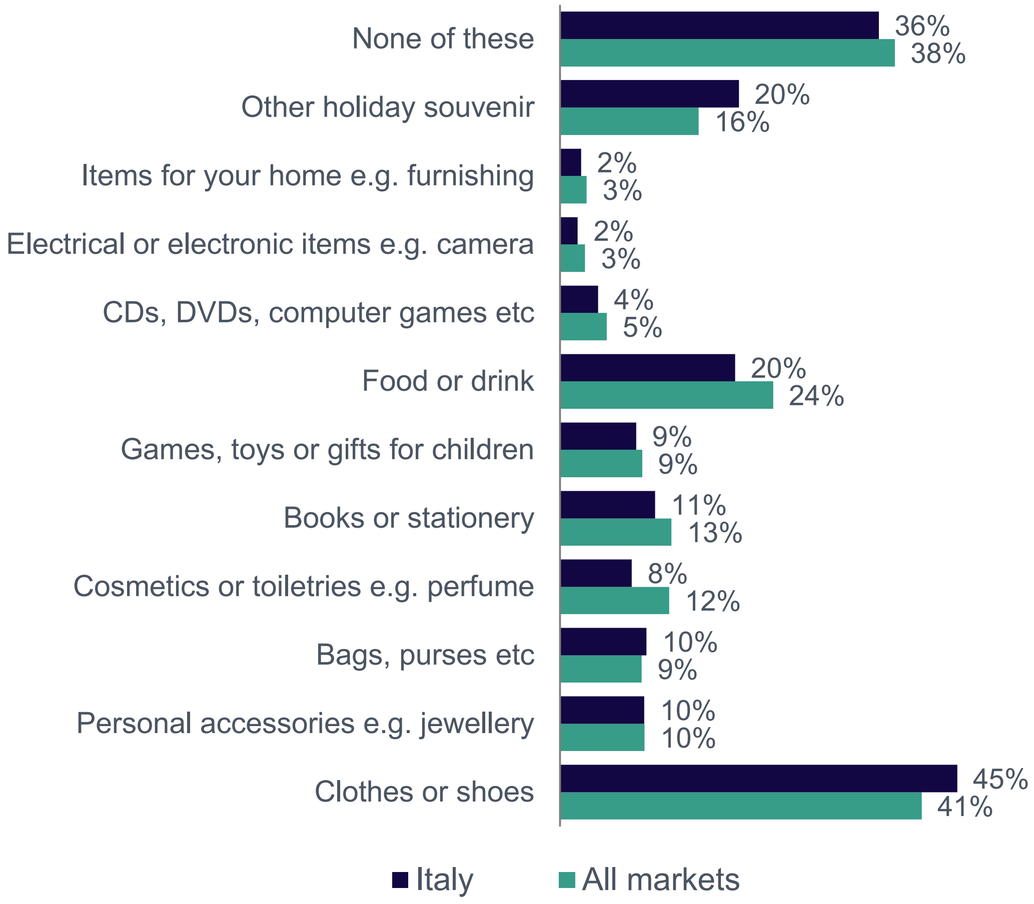
VisitBritain VisitEngland

2.1 Inbound activities: shopping

Propensity to go to shopping



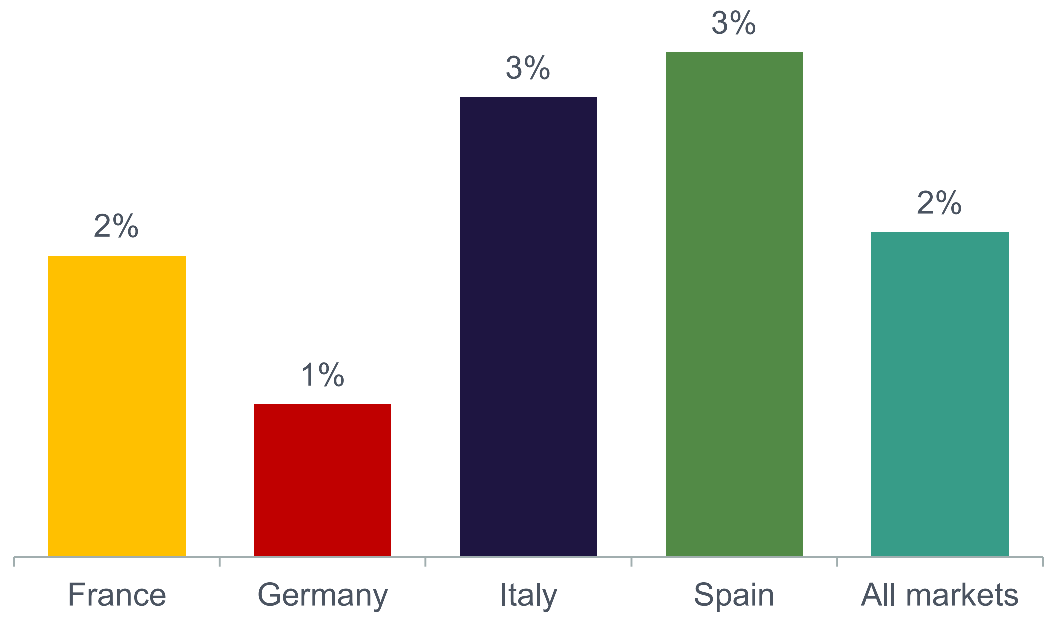
Propensity to purchase selected items



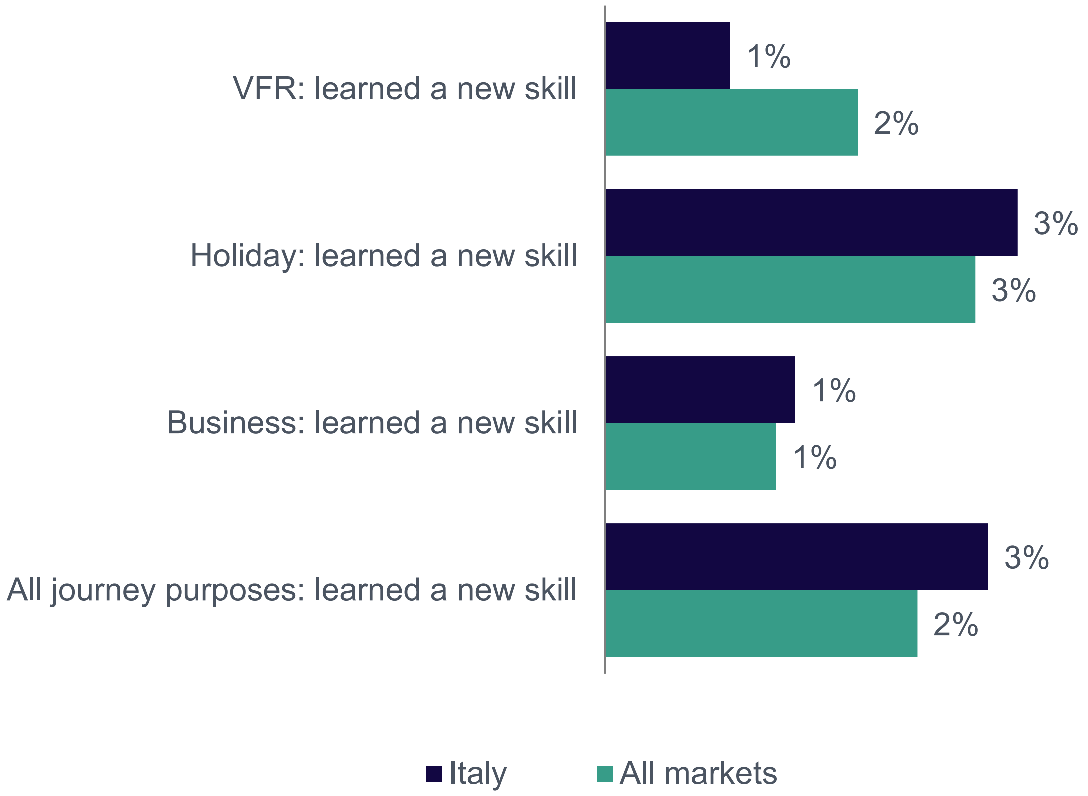
Source: International Passenger Survey by ONS, 2017 (shopping) and 2013 (purchase of selected items) – please note that the data about purchased items is to be updated shortly given the revision of the 2009-2018 IPS data in May 2020

2.1 Inbound activities: learning

Propensity to participate in an English language course during a visit to the UK (share of all visits)



Propensity to learn a new skill or craft



Source: International Passenger Survey by ONS, 2019 (new skills/craft), 2018, Did you go on any English language courses during this visit? Displayed as % of all visits in this market, visits incl. participation in an English language course might be based on a small sample.

2.2 Experiencing a visit to the UK

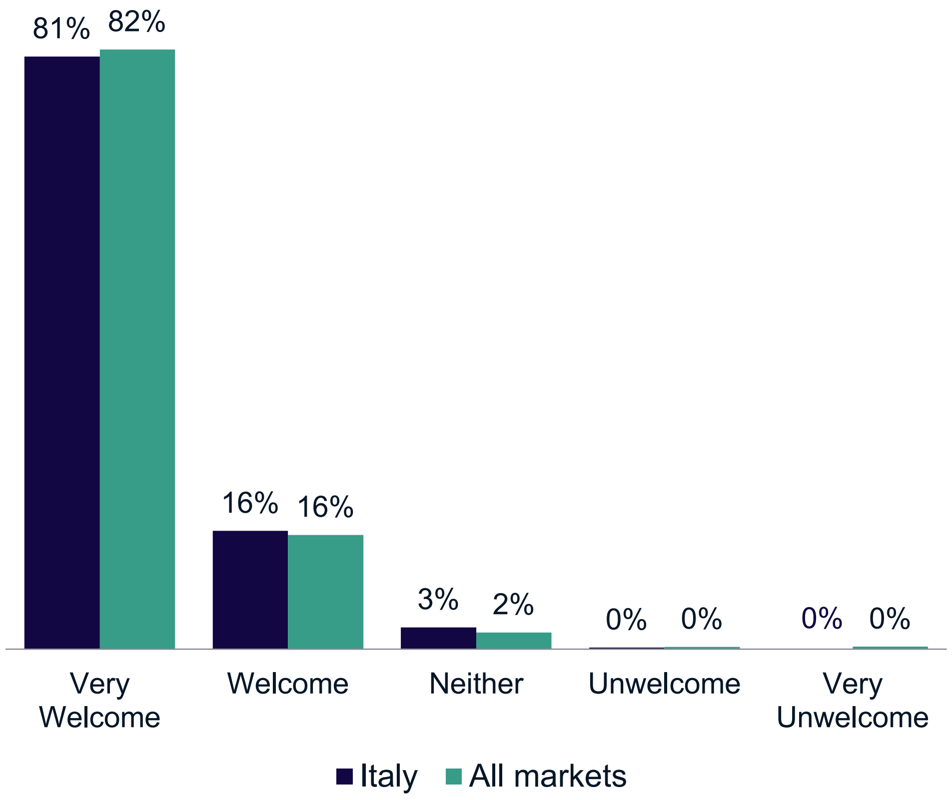
- More than eight-in-ten visitors from Italy felt very welcome during their stay in the UK. Four-in-five of Italian visitors were very likely to recommend a stay in the UK for a holiday or a short break at the end of their visit.
- The propensity to feel welcome or to recommend the UK among Italian visitors is roughly in line with the all-market average.
- Nearly three-in-five holiday visitors from Italy are making a repeat trip to Britain (excluding British nationals, within ten years).
- Asked for reasons which would encourage the Italians to travel back to the UK for a holiday, more than half said that they would like to visit a different part of the UK, a proportion well above the all-market average. Around two-in-five say that the country is easy to get to and to get around in; almost as many state that they would like to go back to visit the sights/attractions that they did not see on their previous visit(s). Roughly a quarter of Italians say that they are motivated to return as Britain caters well for tourists and as they would like to experience an activity that they could not do last time. About one-in-five stated that they experience positive interactions with locals, are attracted by local food and drink, or that they would like to learn a new skill. The Italians over-index on the latter reason.

97%
of Italian visitors would recommend a holiday or short break in the UK*

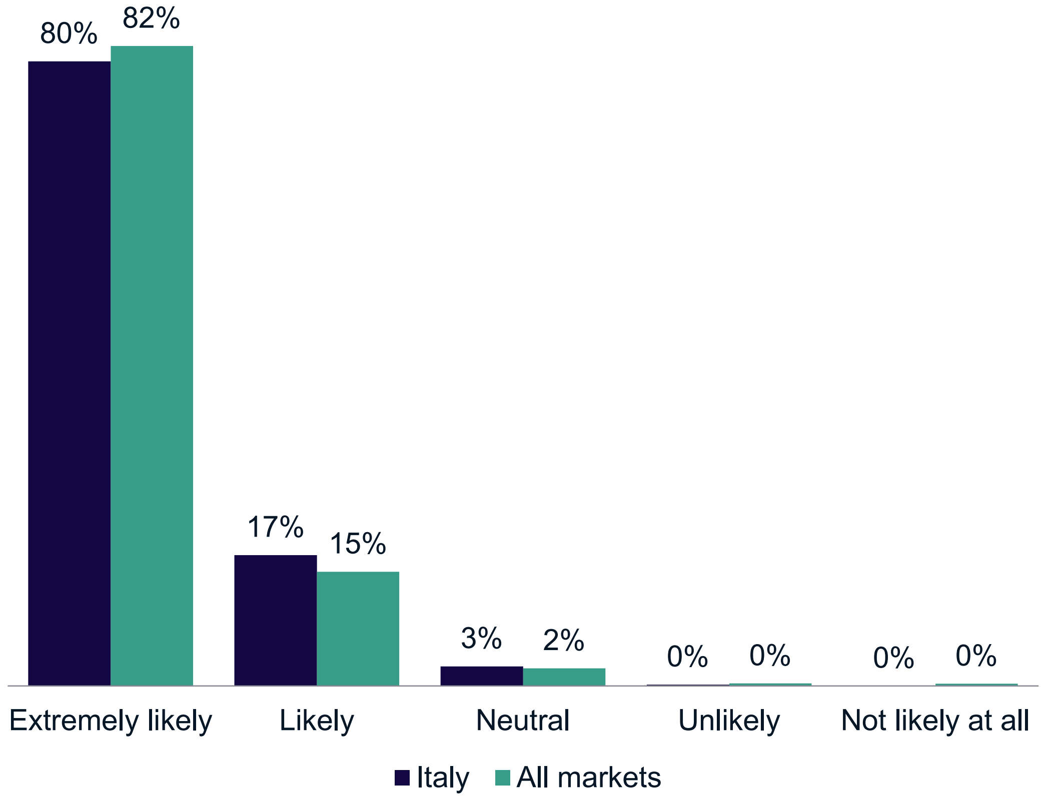
Source: IPS by the ONS (2017; *all visits, excluding UK nationals), Ipsos-Anholt Nation Brands Index 2019 (previous visits refer to previous holiday visit(s) made to the UK)

2.2 Welcome and recommending Britain

Feeling of ‘welcome’ in Britain



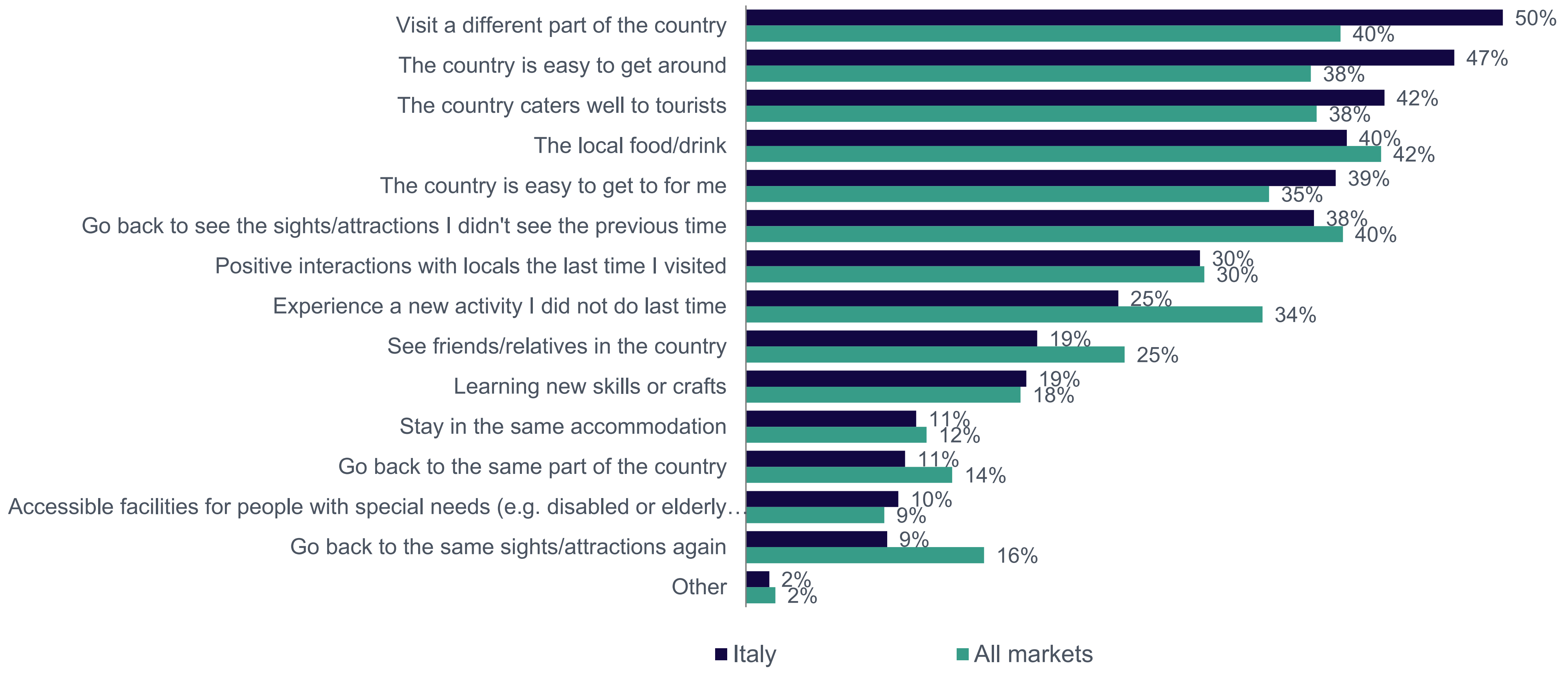
Likelihood to recommend Britain



Source: International Passenger Survey by ONS, 2017 (excl. UK nationals and nil nights)

2.2 Reasons to return to a holiday destination

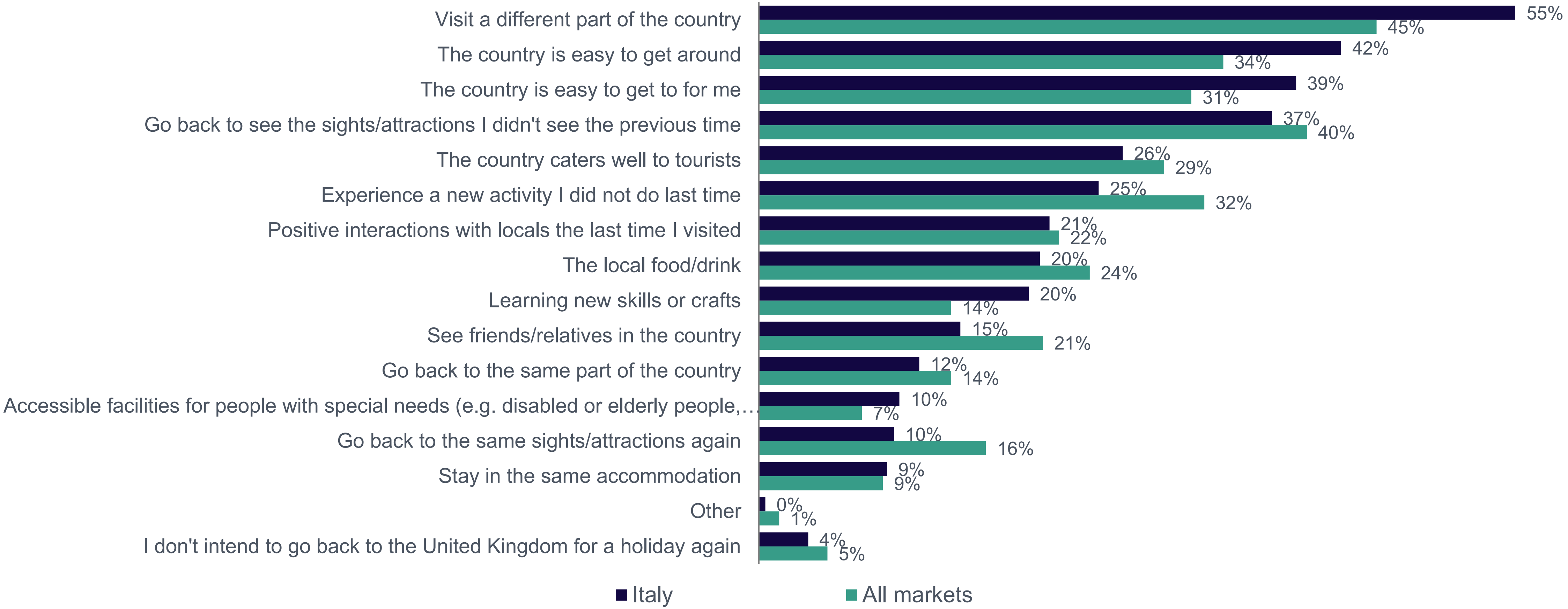
Reasons to return to a destination in general



Source: Anholt-Ipsos Nation Brands Index 2019

2.2 Reasons to return to the UK

Reasons to return to the UK



Source: Anholt-Ipsos Nation Brands Index 2019

2.3 Perceptions of the UK (1)

- The Italians rate the UK within the top five out of fifty countries for contemporary culture and culture overall, vibrant cities, but perceptions of natural beauty and welcome remain weak; the UK is rated 31st and 13th on these two attributes respectively.
- Museums are the cultural products or services the Italians most strongly associated with the UK, closely followed by music, pop videos, sports and films.
- A trip to the UK would be expected to be 'Fascinating' (33%) as well as 'Educational' (30%) and 'Exciting' (28%) by the Italians.
- Australia and the USA are the destinations that the Italians consider the 'best place' for delivering the things they most want from a holiday destination.
- Areas of strength for the UK include: 'famous sights', 'nightlife/entertainment', 'ease of getting around', and 'a place with a lot of history/historic sights'; few consider Britain for 'food and drink'. Culture is the biggest draw for choosing Britain for a holiday.
- Activities that appeal to potential visitors from Italy include having traditional afternoon tea, taking a canal boat tour in England, staying the night in a fairy-tale castle, a visit to Windsor Castle, going hiking on the South West coast, spotting wildlife in the Scottish Highlands, taking a tour of one of London's best foodie markets and walking along Hadrian's Wall in North England.

Areas of strength for the UK:

Contemporary culture, culture in general, and vibrant city life

Source: Ipsos-Anholt Nation Brands Index 2020 and 2018, VisitBritain/Ipsos 2016, VisitBritain/Arkenford 2013

2.3 Perceptions of the UK (2)

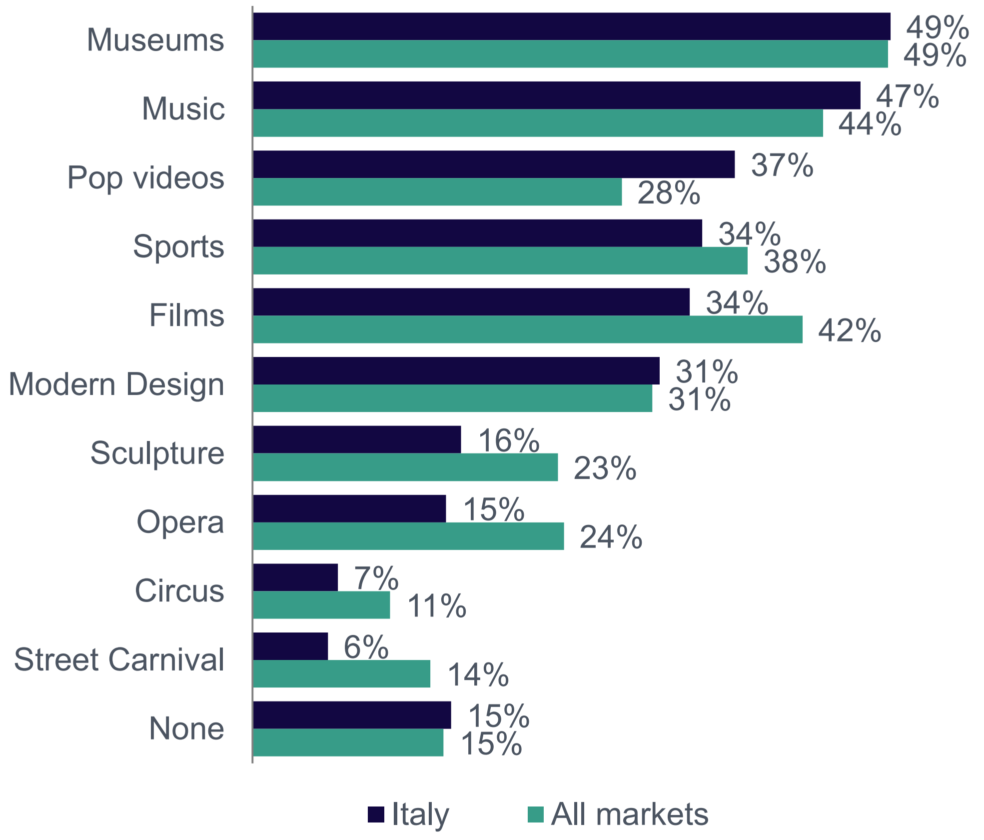
UK's ranking (out of 50 nations)

Measure	Italian respondents	All respondents
Overall Nation Brand	**4**	**2**
Culture (overall)	**4**	**3**
The country has a rich cultural heritage	7	6
The country is an interesting and exciting place for contemporary culture such as music, films, art and literature	3	4
The country excels at sports	7	3
People (overall)	**7**	**4**
If I visited the country, the people would make me feel welcome	13	11
Tourism (overall)	**7**	**4**
Would like to visit the country if money was no object	8	5
The country is rich in natural beauty	31	23
The country is rich in historic buildings and monuments	6	5
The country has a vibrant city life and urban attractions	4	4

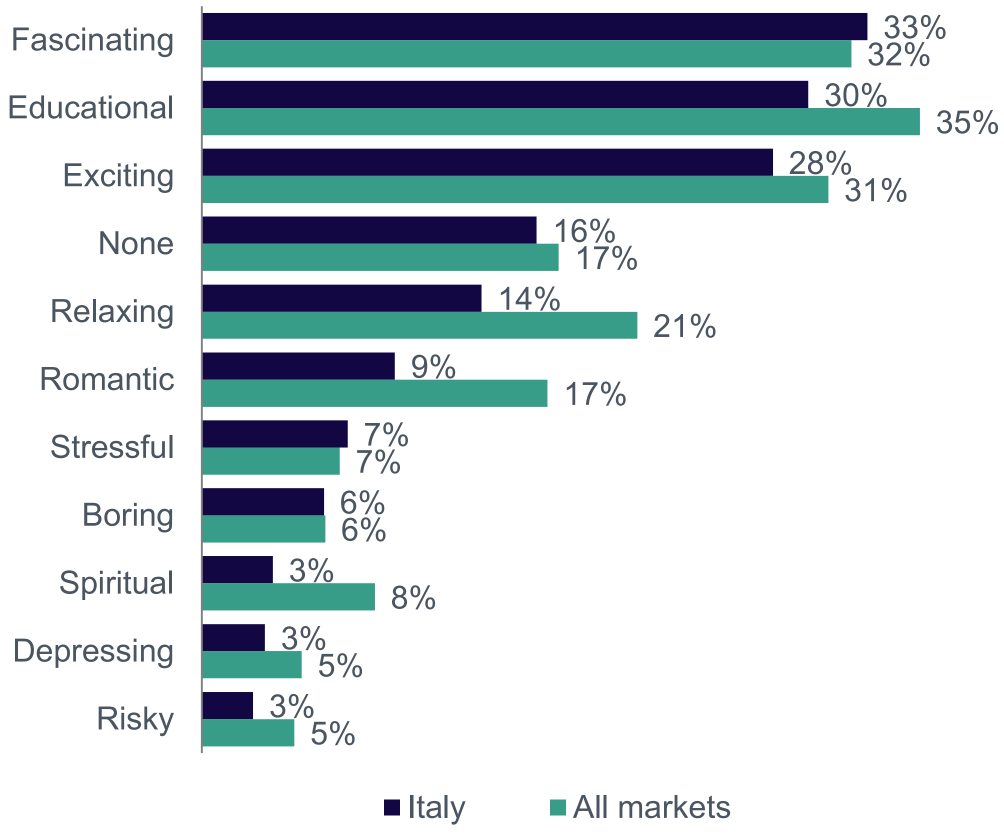
Source: Ipsos-Anholt Nation Brands Index 2020

2.3 Perceptions of the UK (3)

Cultural associations



Adjectives describing a potential trip to the UK



Source: Ipsos-Anholt Nation Brands Index 2020

2.3 Perceptions of the UK (4)

Holiday wants and % saying destination is best place for… top 20

Importance	Perception	GB	FR	GE	AU	US	NL
6.09	Offers good value for money	13%	15%	14%	12%	13%	17%
6.02	Explore the place	14%	15%	11%	51%	41%	15%
6.00	Enjoy the beauty of the landscape	17%	27%	7%	60%	39%	15%
5.94	Do what I want when I want spontaneously	21%	14%	7%	28%	28%	19%
5.83	Have fun and laughter	20%	14%	9%	23%	32%	22%
5.81	The people are friendly and welcoming	16%	17%	13%	30%	25%	20%
5.80	Broaden my mind/ Stimulate my thinking	22%	19%	11%	47%	42%	18%
5.78	Enjoy peace & quiet	10%	16%	8%	36%	10%	16%
5.78	Enjoy local specialities (food and drink)	9%	35%	12%	13%	9%	8%
5.75	Chill/ slow down to a different pace of life	10%	15%	7%	27%	13%	14%
5.75	Experience things that are new to me	21%	14%	11%	62%	49%	15%
5.66	Do something the children would really enjoy	19%	33%	17%	28%	45%	16%
5.66	A good place to visit at any time of year	20%	27%	15%	31%	33%	17%
5.62	Visit a place with a lot of history/historic sites	38%	46%	20%	7%	15%	11%
5.62	Feel connected to nature	11%	11%	7%	64%	27%	11%
5.61	Experience activities/places with a wow factor	15%	16%	10%	52%	48%	10%
5.61	See world famous sites and places	43%	47%	18%	24%	51%	12%
5.52	It offers unique holiday experiences	19%	19%	12%	55%	50%	14%
5.46	Get off the beaten track	10%	9%	9%	38%	17%	12%
5.43	Have dedicated time with my other half	24%	41%	14%	28%	30%	18%

Source: VisitBritain/Arkenford 2013

2.3 Perceptions of the UK (5)

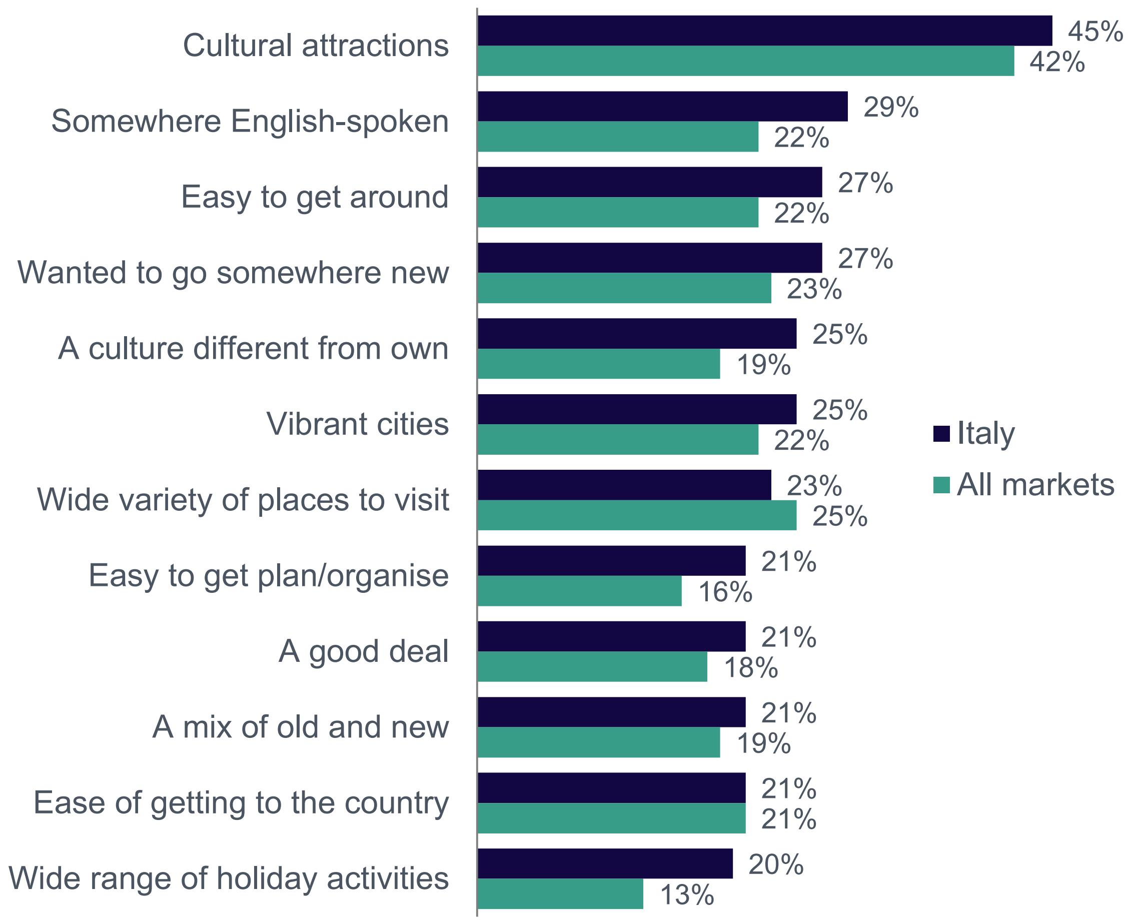
Holiday wants and % saying destination is best place for… bottom 20

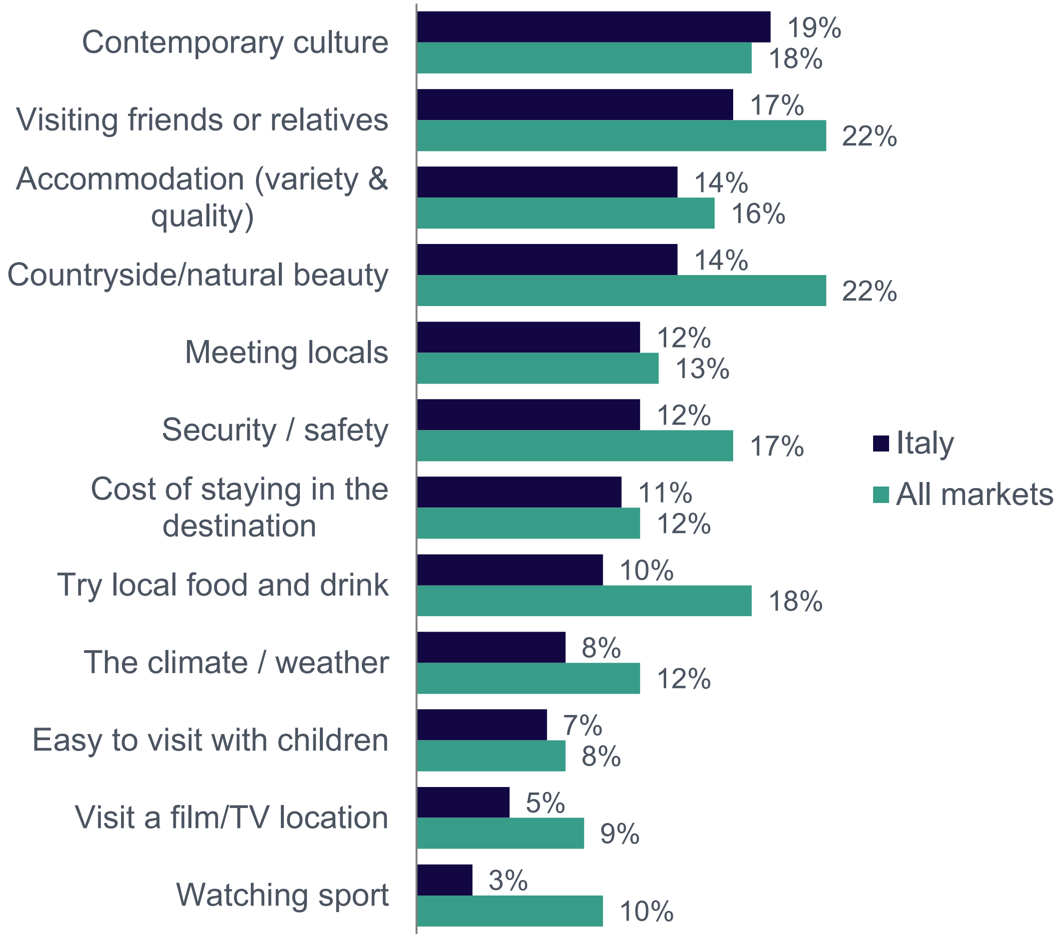
Importance	Perception	GB	FR	GE	AU	US	NL
5.37	Provides a wide range of holiday experiences	23%	26%	14%	42%	53%	14%
5.34	Easy to get around by public transport	39%	31%	27%	15%	34%	23%
5.31	Be physically healthier	14%	19%	14%	29%	22%	16%
5.30	Meet the locals	16%	7%	3%	40%	19%	16%
5.18	Revisit places of nostalgic importance to me	24%	27%	13%	15%	25%	4%
5.14	Enjoy high quality food and drink (gourmet food)	11%	43%	10%	12%	10%	10%
5.07	Good shopping	26%	21%	11%	9%	36%	9%
4.87	Party	27%	19%	21%	30%	47%	25%
4.86	Visit places important to my family's history	12%	16%	9%	23%	17%	8%
4.84	Do something environmentally sustainable/ green	19%	12%	32%	44%	13%	36%
4.78	Feel special or spoilt	20%	21%	12%	22%	27%	16%
4.69	Meet and have fun with other tourists	13%	20%	8%	31%	37%	25%
4.47	Do something useful like volunteering to help on a project	18%	17%	13%	26%	15%	24%
4.43	To participate in an active pastime or sport	26%	16%	9%	29%	23%	11%
4.29	Go somewhere that provided lots of laid on entertainment/nightlife	43%	32%	28%	27%	53%	35%
4.24	Experience adrenalin filled adventures	16%	7%	5%	54%	61%	21%
3.87	Watch a sporting event	32%	27%	32%	22%	35%	19%
3.52	Fashionable destination	28%	31%	11%	27%	49%	12%

Source: VisitBritain/Arkenford 2013

2.3 Perceptions of the UK (6)

Motivations for choosing Britain as a holiday destination





Source: VisitBritain/IPSOS 2016, adjusted data, base: visitors (Market scores have been adjusted so that the sum of all motivations for each market is equivalent to the global total, to enable meaningful comparisons)

2.3 Perceptions of the UK (7)

Sought-after Britain activities – top 18

Source: Ipsos-Anholt Nation Brands Index 2018; Rankings based on market-level scores that have been adjusted so that the sum of all activities for each market is equivalent to the all-market total, to enable meaningful comparisons, including across markets

2.3 Perceptions of the UK (8)

Sought-after Britain activities – bottom 17

Source: Ipsos-Anholt Nation Brands Index 2018; Rankings based on market-level scores that have been adjusted so that the sum of all activities for each market is equivalent to the all-market total, to enable meaningful comparisons, including across markets

Understanding the market

Chapter 3

3.1 Structural drivers

- The Italian population is about 59 million.
- There are 15 regions: Abruzzo, Basilicata, Calabria, Campania, Emilia-Romagna, Lazio, Liguria, Lombardia, Marche, Molise, Piemonte, Puglia, Toscana, Umbria and Veneto.
- There are also 5 autonomous regions: Friuli-Venezia Giulia, Sardegna, Sicilia, Trentino-Alto Adige and Valle d'Aosta.
- The population is fairly evenly distributed in most parts of the country with coastal areas, the Po River Valley and urban areas being more densely populated.
- The official language is Italian. German, French and Slovene are also spoken in some parts of the country. English is taught as a foreign language in school.
- Italian employees receive an average of 30 days annual leave.

59.3m

Italian population
(2021)

Source: Oxford Economics, CIA World Factbook 2021

3.1 Structural drivers: general market overview

General Market Conditions

- Italy is the UK's sixth largest and sixth most valuable inbound source market overall in terms of visits and visitor spending in 2019.
- Prior to the COVID-19 pandemic, the Italian economy had still not fully recovery from the financial crisis in 2008/2009. The Italian economy had fallen into a third recession in a decade in the second half of 2018. The pandemic had deteriorated the economic output with severe effect on GDP which stood not higher than in 2000 in 2020, well behind the Eurozone.
- As of 13 May, Oxford Economics confirms an only marginal decline of GDP in the first quarter of 2021 and amid easing restrictions and an overhauled recovery plan, the rebound in the second quarter of 2021 and beyond is expected to be robust. This will be dependent on a continuation of the steady pace of the vaccine rollout, a continued reopening of the economy which started in May and continued fiscal support. Risks to the downside remain.

Key demographic and economic data

Measure (2021 data)	Italy	Eurozone
Population (m)	59.3	339.8
GDP per capita PPP (US$)	37,576	43,286
Annual average GDP growth over past decade (%)	-0.5	0.7
GDP growth year-on-year (%)	4.6	4.2

Economic indicators

Indicator (%)	2019	2020	2021	2022
Real GDP growth	0.3	-8.9	4.6	5.0
Real consumer spending growth	0.3	-10.7	3.7	6.2
Unemployment rate	9.9	9.1	9.7	9.7

Source: Oxford Economics

3.1 Structural drivers: demographic and social indicators

Population dynamics

Measure	Estimate
Total population (2021)	59.3
Median age (2020 est.)	47 years old
Overall growth rate (2021-2024)	-0.1%

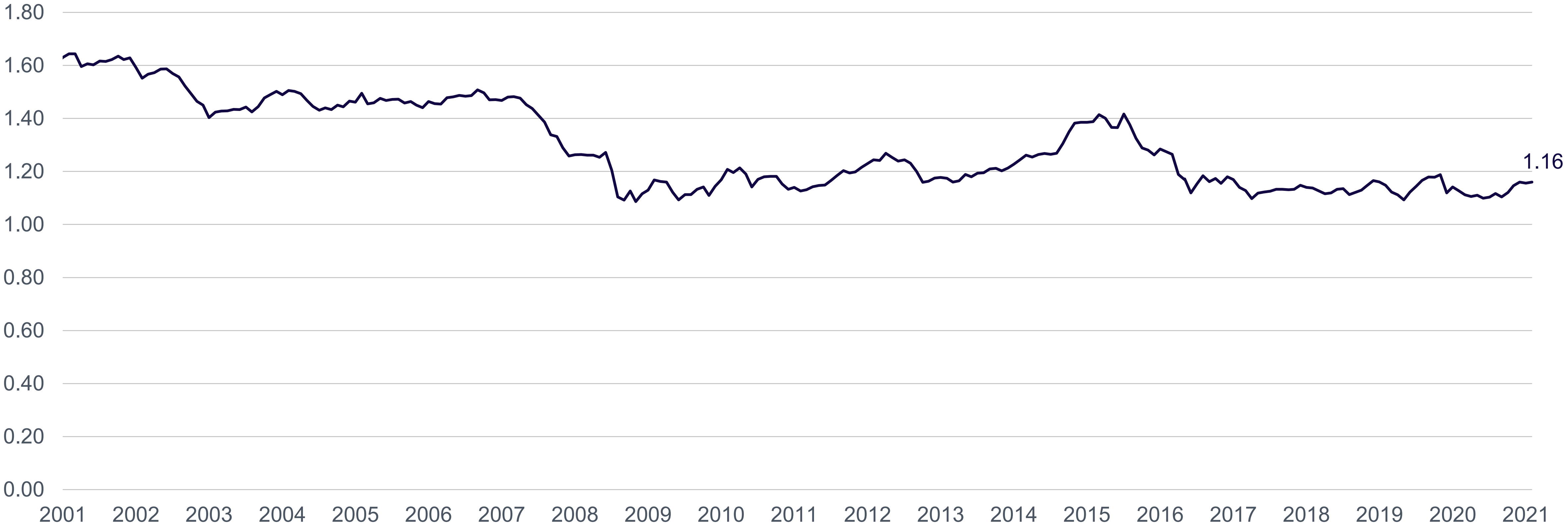
Indicator	1980	2015	2030	2050
Median age (in years)	34.1	45.4	50.8	53.6

- Italy's population has a population of 59 million with a median age of 47 years. The Italian population is ageing and shrinking. Italy currently has the third highest median age in Europe, fifth highest globally.
- Most people in Italy are well-educated and enjoy a good standard of living; however, real GDP per capita in purchasing power parity terms is almost US$38,000, lower than the Eurozone average.
- More than 71% of Italians live in cities (World Bank est. 2019).
- English is taught as a foreign language in school, however, information for visitors in Italian is welcome.
- The usual annual leave entitlement is 30 days.
- According to the Capgemini World Wealth Report 2020 there were 298,000 High Net Worth Individuals (HNWI)* resident in Italy in 2019, up 8% on 2018. It is Europe's fifth largest and globally the ninth largest HNWI population.

Source: Oxford Economics, CIA World Factbook 2021, World Bank 2021, Statista 2021, Capgemini World Wealth Report 2020 *definition in appendix

3.1 Structural drivers: exchange rate trends

Exchange rate trends (cost of GBP in EUR)



Please find the most up-to-date exchange rate trend based on monthly averages on our website.

Source: Bank of England

3.2 Consumer trends

- Of the almost 72 million overnight trips taken by the resident population in Italy in 2019, 76% were taken to domestic destinations. The remaining trips were mostly directed towards EU destinations.
- As a result of the coronavirus pandemic, Istat reports that travel by Italian residents hit the lowest levels recorded since 1997 in 2020 with a total of just over 37.5 million overnight trips.
- The volume of holiday trips made decreased by 45% to about 35 million accounting for the bulk of trips taken in 2020, while business travel was hit even harder (-68%). Despite the severe overall effect, holidays in the summer fared comparatively better, just down 19%.
- The average duration of trips slightly increased to 6.2 nights (6.3 nights for holiday trips), driven by increases of holidays of 4 or more nights compared to 2019 (from 9.3 nights to now 9.8 nights). The average duration of business trips remained stable at 3.5 nights.
- With relevant measures such as vaccination, testing and hygiene protocols addressing the focus on health and safety, more than four in five Italians consider travelling abroad for leisure within the next 12 months showing a very strong desire to resume leisure trips. More than three in five would like to go on holidays but have not decided where, showing strong potential to influence.

72 million
Volume of overnight trips taken by resident population in Italy in 2019.

Sources: Istat 2019 and 2020, TCI/VisitBritain/VisitScotland/Visit Wales/London & Partners published May 2021, NB: Sentiment data is from a tracking study, and results may change in subsequent waves

3.2 Consumer trends: overall travel trends

Travel trends

- Italian tourism experienced a crisis of severe proportions during the COVID-19 pandemic. In 2020, overnight trips almost halved compared to 2019 (-47%) accounting for 37.5 million such trips, the lowest levels recorded since 1997. The number of nights spent on such trips also fell strongly to just over 231 million in the same year (-43%).
- Business travel was the hardest hit segment in the crisis which is now down to about a third of all business trips which were taken in 2019 (-68%) and now only makes up 7% of all Italian trips and 4% of all such visitor nights. According to EY, Italians will likely make fewer business trips in future but the desire to meet face-to-face prevails with few showing a preference for virtual meetings.
- The drastic drop in tourist flows in 2020 can be observed across all motivations and types of holidays taken by residents of Italy: leisure/pleasure holidays decreased by 44% year-on-year and visits to friends or relatives almost halved (-48%).
- Visits to natural heritage maintained their share (around 13% in 2019) and were less affected by the pandemic than cultural visits.
- The average duration of trips slightly increased to 6.2 nights (6.3 nights for holiday trips), driven by increases of holidays of 4 or more nights compared to 2019 (from 9.3 nights to now 9.8 nights). The average duration of business trips was stable at 3.5 nights.
- Italy saw the appeal of staycations improve strongly in 2020.
- Among the activities featuring during a trip, summer visits to towns and villages are confirmed as the most popular (share of 86% in 2020, 78% in 2019), followed by visits to monuments and historical or archaeological sites (44%, stable in 2020 compared to 2019) and visits to typical local markets (29%, 34% in 2019).
- Visits to museums and exhibitions decreased (from 26% in 2019 to 22% in 2020) and, above all, participation in shows and events fell (from 30% in 2019 to 11% in 2020). On the other hand, participation in food and wine-related activities remained stable at 20%.
- The consequences of the pandemic had a negative impact on collective accommodation, which, compared to 2019, lost a total of 53% of resident trips and 55% of visitor nights. Private accommodation, on the other hand, suffered a more limited effect (-42% of trips, -35% of nights). In 2020, the share of trips in private accommodation therefore rose to 57% (52% in 2019).
- Among all trips with accommodation booked on the web in particular, the use of online intermediaries decreased dramatically (-72%).

Sources: Istat 2020, The EY Future Travel Behaviors observatory

3.2 Consumer trends: impact of COVID-19

The impact of COVID-19 on Italian travel behaviour

- 2020 saw an estimated 80% year-on-year decline in volume and in value of visitation from Italy to the UK as a result of the COVID-19 pandemic.
- The second wave of VisitBritain's international recovery sentiment tracking research reveals: 81% of the Italian considered taking an international leisure trip in the next 12 months (fieldwork 24th March – 5th April 2021), showing a very strong desire to travel. Of them, 70% are considering Europe and 14% Britain.
- Britain ranks 4th for consideration of the Italians hoping to go on a European leisure trip, behind Spain, France, Greece.
- As of spring 2021, 85% of Italians indicate that they are happy to take pre-trip tests if required, almost four-in-five are hoping to travel as soon as they are vaccinated, followed by more than seven-in-ten who look for less crowded places to visit even if this might mean missing some must-see attractions, and a similar proportion of Italians say they will think more about sustainability and the environmental impact when planning future holidays.
- More than one-in-five Italians had not given much thought to planning their next leisure trip abroad, yet, and 41% had started thinking about it but not yet decided where to go, showing a considerable opportunity to influence destination choice and bookings which are now most commonly made at short notice.

Key activators for an international leisure trip	Italy	All markets
Receiving a COVID-19 vaccination	48%	43%
Money-back guarantee should they wish to cancel their trip	40%	34%
Hygiene & safety protocols at destination	37%	27%
A significant decrease in coronavirus cases at destination	31%	34%
An attractive offer e.g. discounts on flights or accommodation	29%	24%
The introduction of a vaccine passport	29%	22%

Source: Oxford Economics/VisitBritain, TCI/VisitBritain/VisitScotland/Visit Wales/London & Partners published May 2021, NB: Sentiment data is from a tracking study, and results may change in subsequent waves

3.3 Booking and planning

- Prior to the COVID-19 pandemic, more than one in three Italian visitors tend to start thinking early about their trip to Britain, i.e. half a year or more in advance of their journey; 40% did this three to six months in advance.
- 66% made their decision to travel to Britain at least three months before the actual journey (most commonly between three and six months ahead).
- 40% of bookings were made in the three to six month window before arrival in Britain. 30% of Italian visitors booked between one and two months in advance and 20% of Italian bookings happened within one month before the trip.
- Most bookings to Britain were made online. When travel and accommodation are booked together, more than one in four visitors made the booking face-to-face.
- Around one-in-five Italian visitors made a booking for the performing arts or guided tours in advance of their trip and more than a quarter for tourist attractions, but for the latter category almost half of Italian visitors have a propensity to book them during their stay in Britain.
- Sentiment research conducted in spring 2021 shows that more than three in five of Italian respondents plan to book late/last minute and that 60% of Italian respondents regard booking through a travel agent as a safer option at the moment for limiting uncertainties around trip planning.

50%

of Italian visitors booked within two months of their arrival in Britain

Source: VisitBritain/IPSOS 2016; TCI/VisitBritain/VisitScotland/Visit Wales/London & Partners published May 2021, NB: Sentiment data is from a tracking study, and results may change in subsequent waves

3.3 Booking and planning: booking channels and ticket sales (1)

How trips to Britain were booked

Booking method	Italy	All markets
Online	91%	85%
Face-to-face	7%	10%
By phone	1%	4%
Don’t know	1%	1%

- Italian visitors have become increasingly comfortable with booking their trips to Britain online, especially when they book travel (i.e. transport to Britain).
- 28% of bookings were made face to face when they booked a holiday arrangement (i.e. travel and accommodation combined. This compares to the global average of 26%.

How trips to Britain were booked: accommodation only

Booking method	Italy	All markets
Online	73%	70%
Face-to-face	9%	6%
By phone	1%	3%
Did not book/stayed with friends/relatives	16%	18%
Don’t know	1%	2%

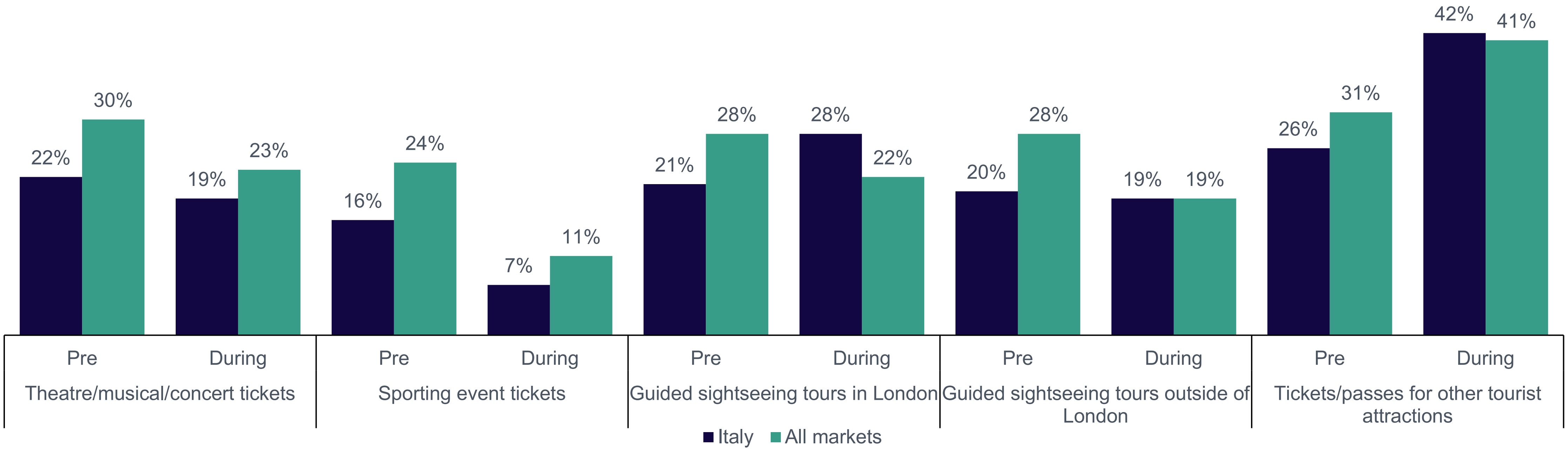
How trips to Britain were booked: travel + accommodation

Booking method	Italy	All markets
Online	68%	64%
Face-to-face	28%	26%
By Phone	2%	9%
Don’t know	2%	1%

Source: VisitBritain/IPSOS 2016, base: visitors (online survey)

3.3 Booking and planning: booking channels and ticket sales (2)

Propensity to make a purchase before or during trip



- Prior to trip: Across all categories, at least one in five Italian respondents made a booking prior to the trip to Britain, with the exception of sporting event tickets.
- During the trip: Tickets to guided sightseeing tours in London and tickets/passes for other tourist attractions were most likely to be bought during the trip.

Source: VisitBritain/IPSOS 2016, base: visitors (online survey)

3.3 Booking and planning: lead-times (1)

Decision lead-time for visiting Britain

Starting to think about trip

Lead time	Italy	All markets
6+ months	36%	49%
3-6 months	40%	31%
1-2 months	16%	13%
Less than 1 month	7%	5%
Don't know	2%	3%

Deciding on the destination

Lead time	Italy	All markets
6+ months	19%	32%
3-6 months	47%	38%
1-2 months	24%	19%
Less than 1 month	8%	7%
Don't know	2%	3%

Looking at options/prices

Lead time	Italy	All markets
6+ months	13%	21%
3-6 months	46%	37%
1-2 months	28%	27%
Less than 1 month	10%	12%
Don't know	2%	4%

Booking the trip

Lead time	Italy	All markets
6+ months	7%	14%
3-6 months	40%	32%
1-2 months	30%	28%
Less than 1 month	20%	21%
Don't know	3%	5%

Source: VisitBritain/IPSOS 2016, base: visitors

3.3 Booking and planning: lead-times (2)

Decision lead-time for visiting Britain

- More than one in three Italian visitors tend to start thinking early about their trip to Britain, i.e. half a year or more in advance of their journey; 40% did this three to six months in advance.
- 66% made their decision to travel to Britain at least three months prior to the actual journey (47% between three and six months prior to departure).
- Almost half of Italian visitors looked at options and prices between three and six months ahead of the trip and 40% made the booking in the same time frame. 28% were more spontaneous and looked at options between one and two months before the trip and 10% within one month.
- 30% booked their trip to Britain between one and two months before and 20% in the month leading up to the departure. Very few Italians make bookings more than 6 months in advance of a trip to Britain (7%) – this compares to the global average of 14%. A slight tendency to make the booking closer to the departure in the Italian market is evident and even more pronounced now. Sentiment research conducted in spring 2021 shows that more than three in five of Italian respondents plan to book late/last minute and that 60% of Italian respondents regard booking through a travel agent as a safer option at the moment for limiting uncertainties around trip planning.

Half
of the Italians booked within two months of arrival in Britain even prior to the COVID-19 pandemic.

Source: VisitBritain/IPSOS 2016, base: visitors; TCI/VisitBritain/VisitScotland/Visit Wales/London & Partners published May 2021

3.4 Reaching the consumer

- The most influential source for destination choice for Italian visitors are friends, family and colleagues followed by websites providing traveller reviews, information on search engines and price comparison websites. Online sources are very popular for researching and making a destination choice.
- Almost half of Italians state some degree of influence of literary, movie or TV locations on their holiday destination choice.
- Italians now spend the longest average time watching TV in five years with close to 6 hours a day, lead by news consumption but also by escapism during the pandemic. Streaming services continue to experience a boom and print and online newspapers and magazines have adapted during the COVID-19 crisis featuring e.g. a “Trips in waiting list” to keep potential travellers engaged with their content.
- The traditional Italian media landscape remained very robust despite the Coronavirus pandemic.
- Internet penetration in Italy is very high and Italians are very digitally savvy. Youtube and WhatApp are the most used social media platforms among Italians aged 16-64 in January 2021.

Friends, family & colleagues

#1 Influence for the destination choice of the Italians

Source: VisitBritain/IPSOS 2016, Ipsos-Anholt Nation Brands Index 2017, Advanced Television, PWC Entertainment & Media Outlook in Italy 2020-2024, Datareportal Digital 2021: Italy

3.4 Reaching the consumer: broadcast media and radio

Broadcast media

- There is a consolidation of TV consumption, often accompanied by the purchase of smart TVs. In fact, there is a strong increase in both streaming and on-demand TV viewing, not only on the online channels of traditional publishers but also through the use of proprietary platforms such as Netflix and Amazon Prime.
- After the lockdown, the explosion in demand for TV streaming content seems to have consolidated. Demand for free and paid TV streaming content, paid or free, grew by 7% from 2019 to 2020, with 17.4 million Italians using this mode and 11.3 million using it several times a week. (Auditel)
- Italians are spending 356 minutes a day in front of the TV screen, the longest seen in five years and this represents an increase of 108 minutes compared to the same period the previous year according to Auditel and Nielsen data. The lockdown has led to a 20 per cent growth in the consumption of news and in-depth analysis programmes. However, Italians are also seeking to escape from news on the COVID-19 pandemic by watching more TV series, movies and entertainment. (Advanced Television)
- In Italy, as of September 2020, Rai held the largest market share in terms of audience of television companies (34%). It was followed by Mediaset, which reported a average daily audience share of 32%, Discovery with 9%, Sky 7%, Cairo Communication (la7) 4%, others 16%. (Statista)
- The main VoD platforms have seen a 18% growth in the reference period, with the highest peaks registered by Amazon Prime Video (+511% interactions), Timvision (+128 %), Infinity (+85%), Disney+ (+243%), and Netflix (+15%). (Advanced Television)

Radio

- The radio confirms its strength and its central role in the lives of Italians even in a very special year like 2020, strongly influenced by the health emergency linked to COVID-19. It has always been a popular medium in Italy. More than 33 million Italians listen to the radio every day, rising to 43 million per week.
- According to recent data by Radio TER, the official survey on the Italian radio audience, for the second half of 2020, the average number of daily listeners (over 14 years of age) was almost 33.7 million (-3% compared to the same period in 2019) and about 6.3 million in the average quarter of an hour (-4%).
- Now Italians listen to the radio not only in the car but increasingly also in different ways and places including via smartphones, TV, tablets, DAB, smart speakers and PCs. Radio convinces Italians with a high degree of credibility, which is considered as accurate, timely, reliable and authoritative.
- Most popular channels by number of listeners (change in 2020 vs. 2019): 1. RTL 102.5 – 6.992.000 (-314.000); 2. Radio Deejay – 5.001.000 (-194.000); 3. Radio Italia S.M.I. – 4.964.000 (-173.000); 4. RDS – 4.914.000 (-596.000); 5. Radio 105 – 4.361.000 (-228.000); 6. Rai Radio1 – 3.566.000 (-64.000); 7. Radio Kiss Kiss – 3.158.000 (+36.000); 8. Virgin Radio – 2.698.000 (-206.000); 9. Rai Radio2 – 2.470.000 (-169.000): 10. Radio 24 – 2.357.000 (-27.000)

Source: K Marketing Digital scenario and media consumption in 2020, Auditel, Advanced Television, Radio TER

3.4 Reaching the consumer: newspapers and magazines

Newspapers and magazines

- Overall print readership fell by 3% while digital editions are on the rise up 31% (newspapers up by 24%, magazines by 77%)
- Approximately 36 million Italians read a press title (print or its digital replica). It's the 68% of the adult population (aged 14+).
- On an average day almost one in four Italians (i.e. 13,671,000 readers with almost 20 million reads) access information by reading one of the main newspapers in print or digital editions, with a large share of regular readers (65%). In the segment of periodicals, there are 17.5 million reads every week among the most important weekly titles (10,977,000 readers, i.e. 21% of adults aged 14 years or over) and every months there are 16.5 million reads for the majority of monthly titles (for 10,225,000 readers, i.e. 19% of Italians).
- The main publishing houses are gathered in Milan (RCS for Il Corrierre della Sera, Dove), Hearst (Elle, Marie Claire, Cosmopolitan), Conde Nast (Vogue, Vanity Fair, GQ), and Rome (La Repubblica).
- There are 49 newspapers (national and regional dailies) in Italy read by 13.7 million Italians (26%). 47% is aged 55 plus, 34% 35-54, and 19% 14-34. The largest national newspapers include (circulation in thousands): Il Corriere della Sera (1,948) La Repubblica (1,624), Il Sole 24 Ore (742), Quotidiano Nazionale – Il Giorno (206), Il Resto del Carlino (1,025), La Nazione (1,809) and La Gazzetta dello Sport (2,478).
- Almost all newspapers have weekly travel or lifestyle sections and/or supplements with travel content sourced internally, or produced by news agencies or freelance journalists.
- In online editions, there is always a travel section.
- There are 20 weekly magazines in Italy, read by 11 million Italians (21%), 70% women and 30% men. 49% are aged 55 plus, 32% 35-54, and 19% 14-34
- There are 26 monthly magazines in Italy read by 10,2 million Italians (19%). 34% are aged 55 plus, 39% 35-54, and 27% 14-34
- Among the most valuable titles for Tourism in Italy there are Dove, Touring (Edited by Touring Club Italiano), Bell'Europa, Vanity Fair, Tu Style, Donna Moderna.

Online media

- There were 50.54 million internet users in Italy in January 2021. The number of internet users in Italy increased by 1.1 million (+2.2%) between 2020 and 2021. Internet penetration in Italy stood at 84% in January 2021.
- There were 41.00 million social media users in Italy in January 2021. The number of social media users in Italy increased by 2.2 million (+5.7%) between 2020 and 2021 and is now at an equivalent of 68% of the total population in January 2021.
- There were 77.71 million mobile connections in Italy in January 2021. The number of mobile connections in Italy decreased by 1.8 million (-2.2%) between January 2020 and January 2021, and was equivalent to 129% of the total population, indicating more than one per user.

Source: www.audipress.it, Datareportal Digital 2021: Italy

3.4 Reaching the consumer: magazines and online media

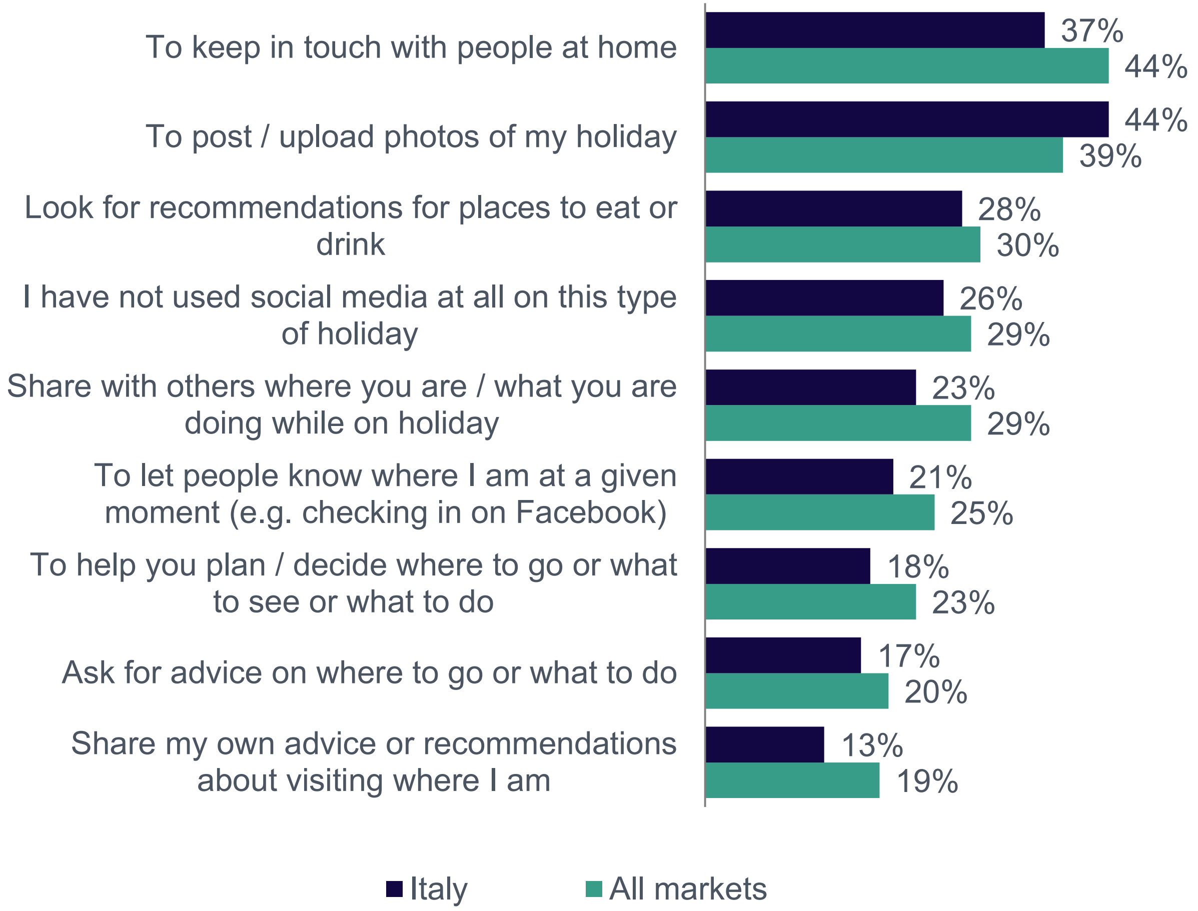
Media trends

- Travel sections are still featured in the most-read female/male weekly and monthly magazines even if in a reduced way and mostly on domestic destinations nowadays.
- The online editions continue to grow and are well regarded. The online versions of the main newspapers have dedicated travel sections that can be accessed for free.
- Online magazines started to feature new sections e.g. with a “Trips in waiting list” during the pandemic, and in general leisure tourism articles appeared alongside others more focused on the tourism industry in general, i.e. on re-openings, COVID-free destinations, and rules to access attractions.
- Lifestyle in general, including food & drink trends, are very fashionable and widely featured in many outlets, even if reduced during the pandemic in favour of a more intimate way to cook at home, home interior design
- Niche themes such as cycling routes, green holidays, outdoors and sustainable holidays are also featured.
- The media landscape, especially the traditional one, remained quite stable. Rather than closures, the number of print titles was flat rather than growing, even for niche segments, due to the economic uncertainty.
- The coronavirus pandemic in 2020 caused a sharp contraction in magazine revenue for that year. Publishers have tried to support consumers during the crisis with offers of free online subscriptions, webinars, children’s entertainment magazine channels and other initiatives which could help boost digital circulation in the long term.
- Streaming TV experiences have boomed.
- Players in the pay-TV sector have also invested heavily in high quality content to keep subscribers engaged, and in late 2019 Sky Italia announced the full integration of Netflix into its advanced Sky Q set top box, bundling the service into some customer packages, an added-value move to reduce churn.
- Spotify has invested significantly in podcasts to bolster its platform, by acquiring a host of podcast companies and signing exclusive deals with talent such as Joe Rogan. By expanding their content offerings in these ways, services can review their subscription pricing strategies in order to maximise revenues.
- TV and video SVOD continue to drive the Italian OTT market, with Disney+, the biggest rival to Netflix and Amazon, with the launch in Italy in March 2020. In the traditional sector, public licence fees are the only driver of growth across the forecast period, but the overall sector will contract at a -0.8% CAGR to 2024. While TV viewing has boomed under lockdown conditions as a result of COVID-19, broadcasters have not seen a surge in TV ad spend to the same extent.

Source: PWC Entertainment & Media Outlook in Italy 2020-2024

3.4 Reaching the consumer: social media on holiday

Use of social media on holiday

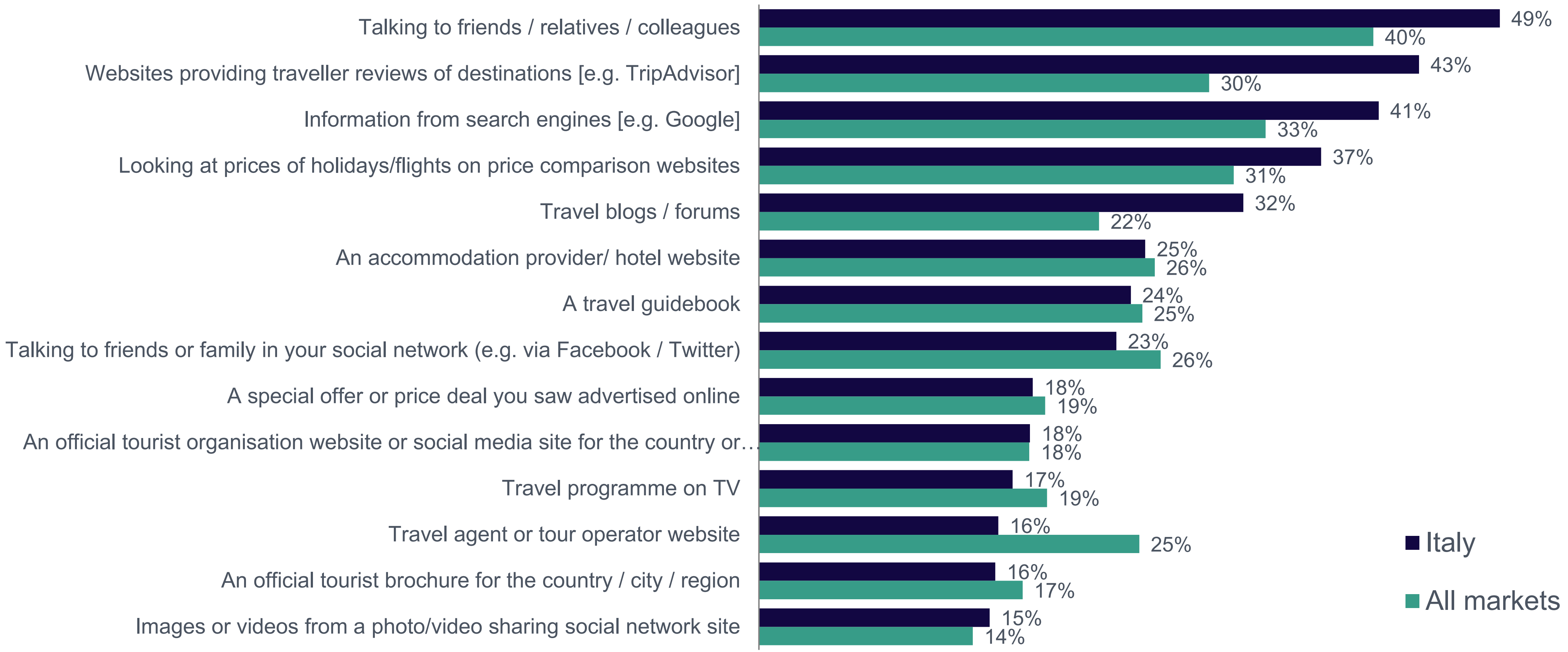


- The Italians are heavy users of social media and digitally savvy in general. Most used platforms as of January 2021 were Youtube and WhatsApp (both 85% of Internet users aged 16-64 who have used the platform in the past month), Facebook, Instagram, and Facebook Messenger.
- 44% like to post/upload their holiday photos and 37% like to keep in touch with their people at home.
- 72% like to stay connected whilst they are on holiday and 79% regard a smartphone as essential whilst they are on holiday, above the all-market average of 73%.
- 86% of Italian travellers love to take photos when they are on holiday, above the all-market average of 78%.
- 81% of Italian travellers have shared holiday photos online or would like to do so and 70% have shared holiday video content or would like to do so. More Italian respondents than the average from other markets have already used location technology to find places to visit (65%) and a further 21% are interested in using it. 51% enjoy writing reviews on social media of places they have been to on holiday and 61% place trust in reviews on social media from other tourists; both of these are higher than in most European markets.

Source: VisitBritain/IPSOS 2016, base: all respondents: Have you used social media in any of the following ways whilst on your last holiday to Britain (visitors) /on your last holiday to a foreign destination (considerers)?, Datareportal Digital 2021: Italy

3.4 Reaching the consumer: influences (top 14)

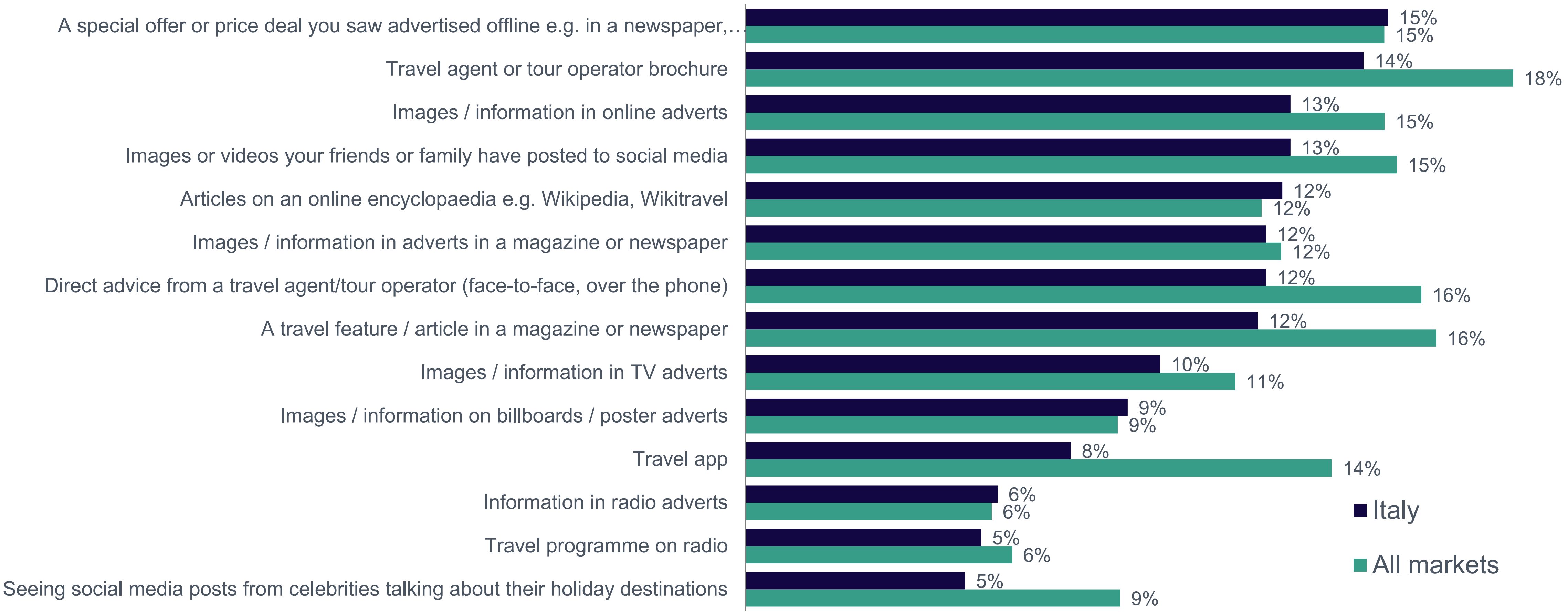
Influences on destination choice – top 14



Source: VisitBritain/IPSOS 2016, base visitors & considerers. Which of the following sources influenced your choice of destination? (Market scores have been adjusted so that the sum of all influences for each market is equivalent to the global total, to enable meaningful comparisons)

3.4 Reaching the consumer: influences (bottom 14)

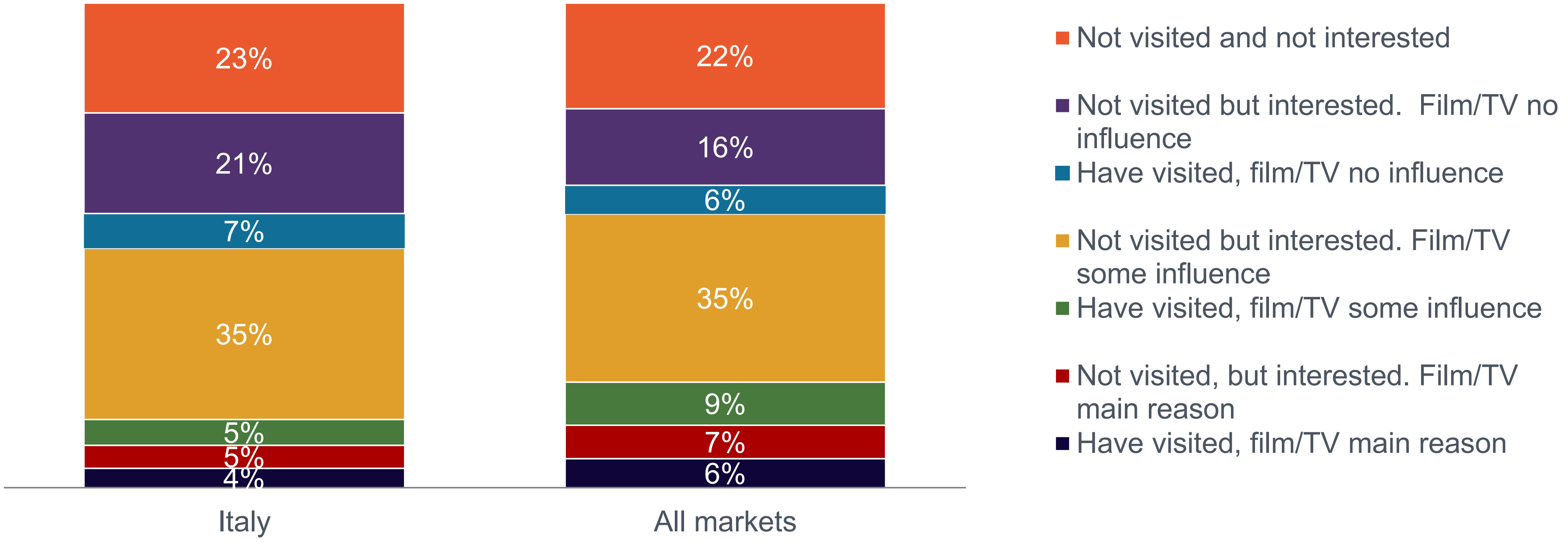
Influences on destination choice – bottom 14



Source: VisitBritain/IPSOS 2016, base visitors & considerers. Which of the following sources influenced your choice of destination? (Market scores have been adjusted so that the sum of all influences for each market is equivalent to the global total, to enable meaningful comparisons)

3.4 Reaching the consumer: influences

Likelihood to visit a place featured in a movie, TV series or book



- Almost half of Italians state some degree of influence of literary, movie or TV locations on their holiday destination choice.

Source: Ipsos-Anholt Nation Brands Index 2017: Have you ever visited a film or TV location whilst on a holiday/vacation abroad? If yes: To what extent was the film or TV location a reason for you choosing to take a trip to that destination? If no but would be interested: To what extent would a film or TV location be the reason for you choosing to take a trip to a specific destination?

VisitBritain VisitEngland

Access and travel trade

Chapter 4

VisitBritain/ Guy Richardson

4.1 Access: key facts

- 96% of Italian visits to the UK were made by plane. It is a short non-stop flight: usually between 2-4 hrs flight time, depending on the departure and arrival airports.
- Annual seat capacity has shown strong growth again since 2013 up to more than 9 million seats in 2019. Seat capacity on non-stop flights between Italy and the UK declined by 66% in 2020 compared to 2019 as a result of the COVID-19 pandemic.
- 77% of annual seat capacity in 2019 from Italy came on routes to the London airports.
- Italian visitors departing Britain by air pay £13 in Air Passenger Duty.
- The regional spread of Italian visitors is supported by the connectivity to regional airports in the United Kingdom. Italy's North tends to be better connected to regional airports than Central and Southern Italy, with the exception of Rome.
- The small annual share of some regional airports can be due to seasonal connectivity e.g. only included in the summer schedule.

Almost all of Italian visits to the UK are made by plane.

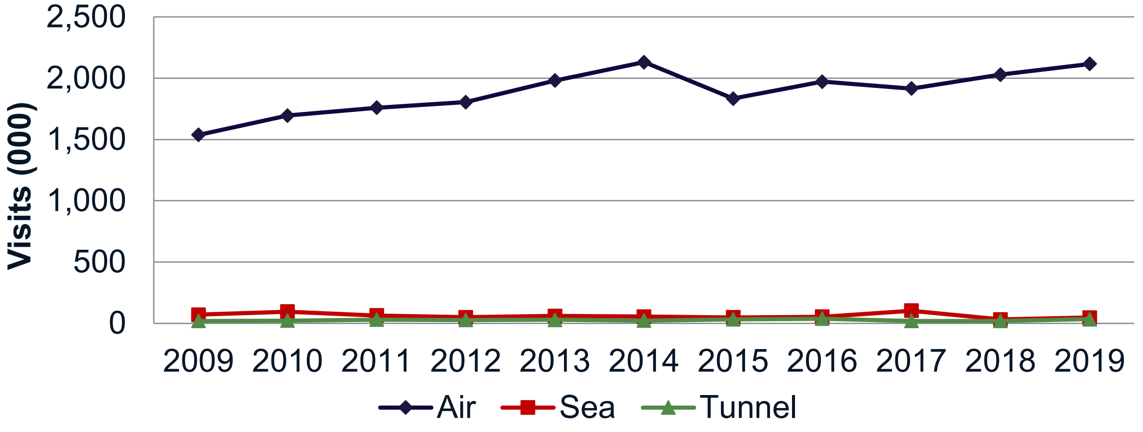
Access to Britain

Measure	2019
Weekly aircraft departures	1,061
Weekly seat capacity	178,138
Airports with direct routes in Italy	28
Airports with direct routes in Britain	22

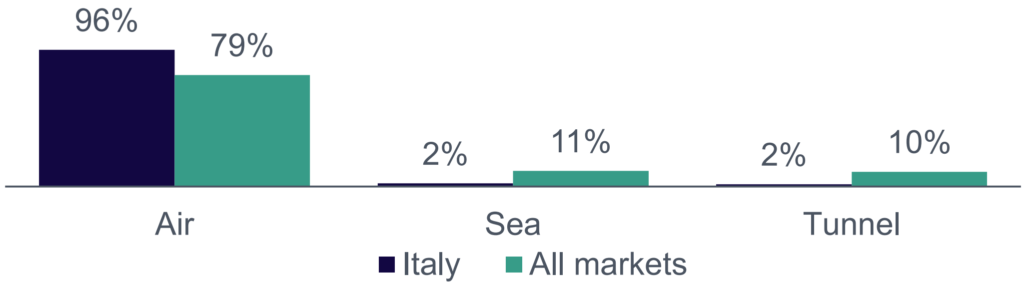
Source: Apex, non-stop flights only, International Passenger Survey by ONS

4.1 Access: mode of transport

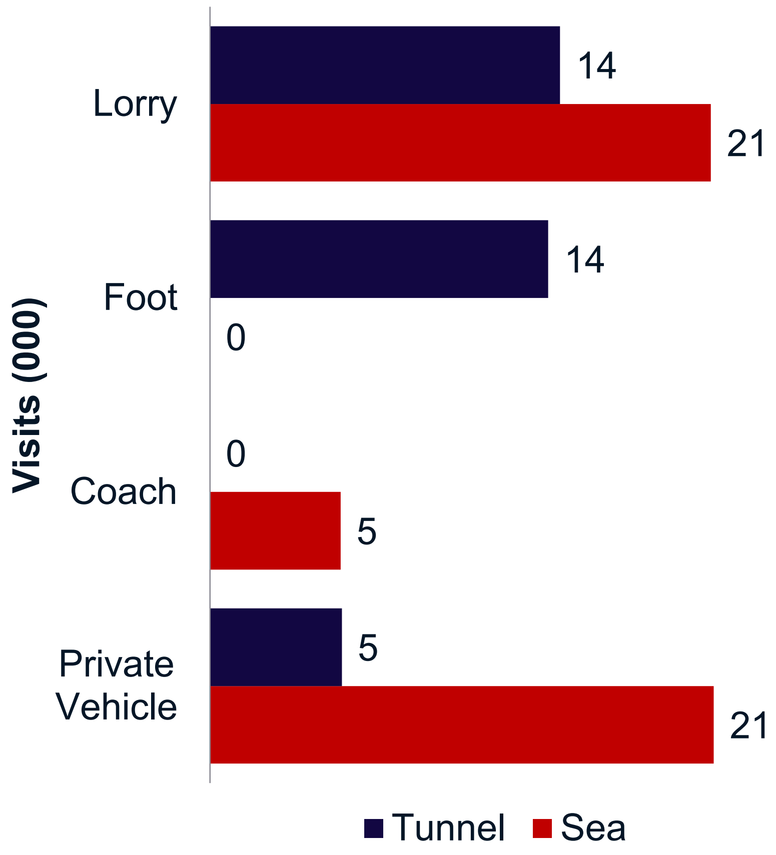
Visits by mode of transport



Annual share by mode (2019)



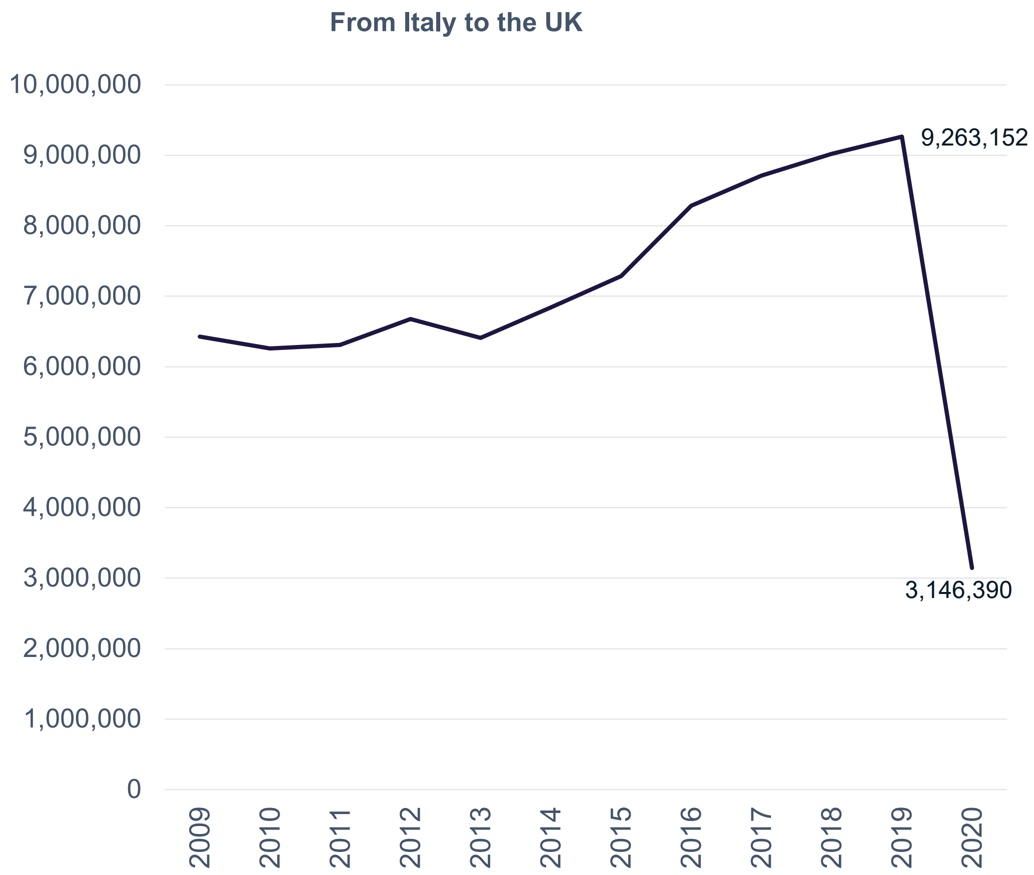
Sea and tunnel travel (000s) in 2019



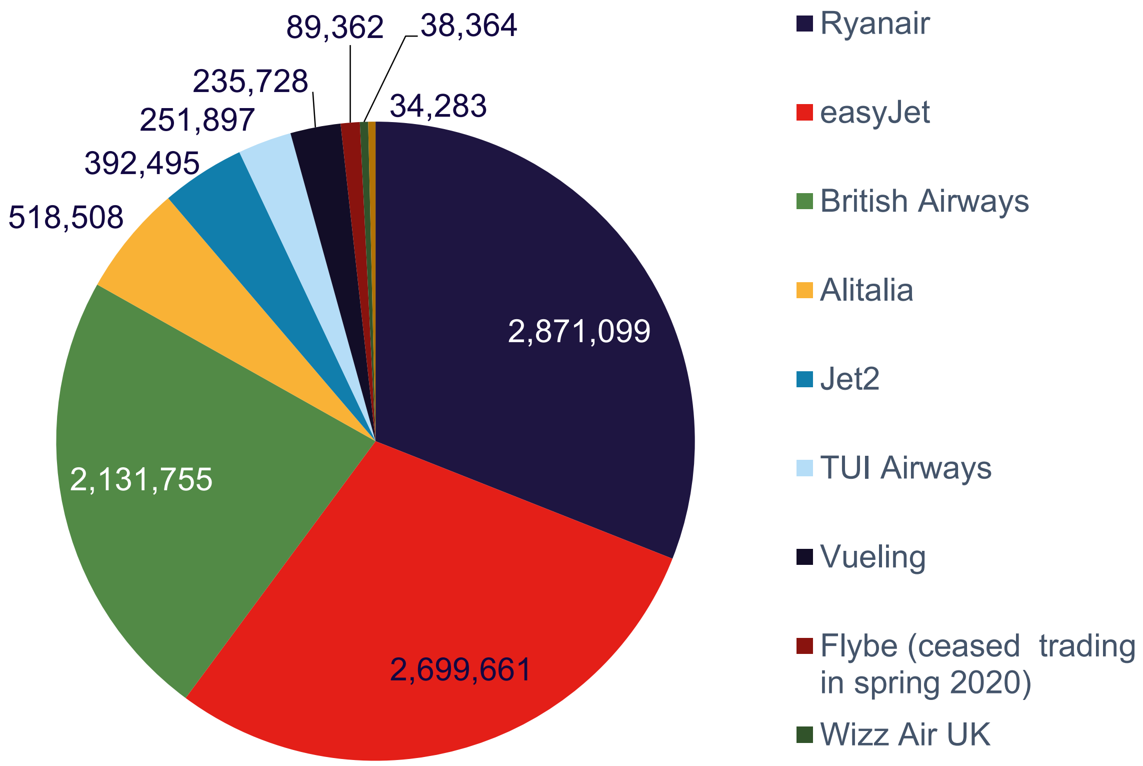
Source: International Passenger Survey by ONS

4.1 Access: capacity (1)

Annual airline seat capacity trends



Airline seat capacity by carrier (2019)

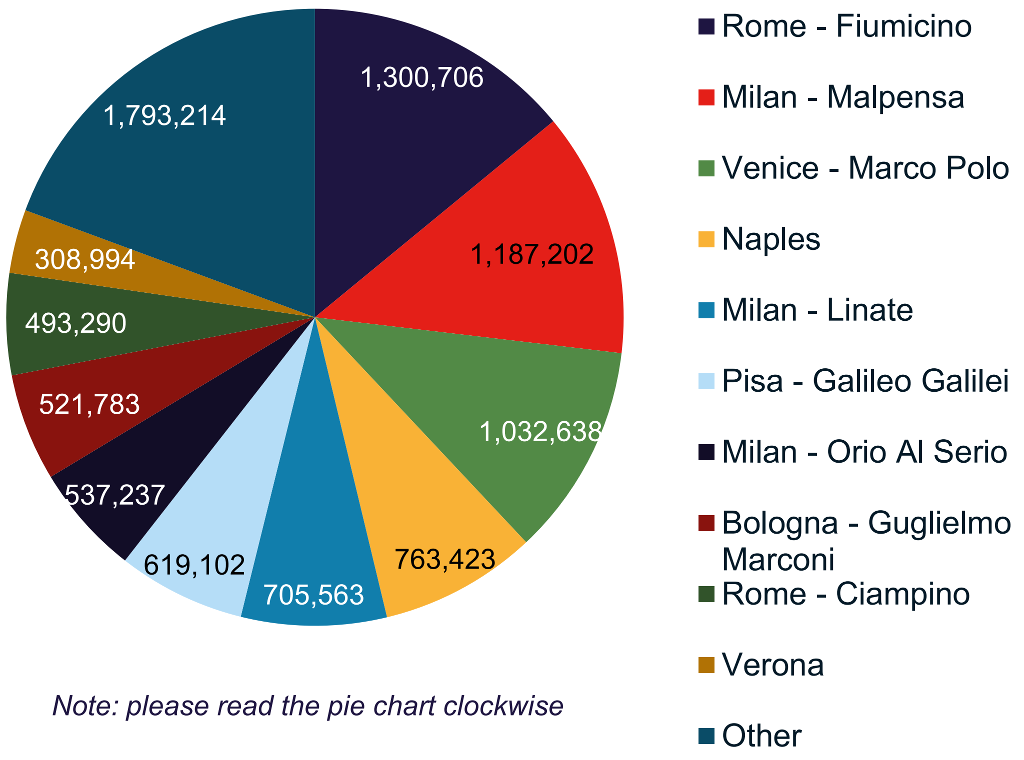


Note: please read the pie chart clockwise

Source: Apex, non-stop flights only. Other groups:Thomas Cook Airlines, Blue Air, Norwegian, Neos, Air Malta, Air Baltic and Germania

4.1 Access: capacity (2)

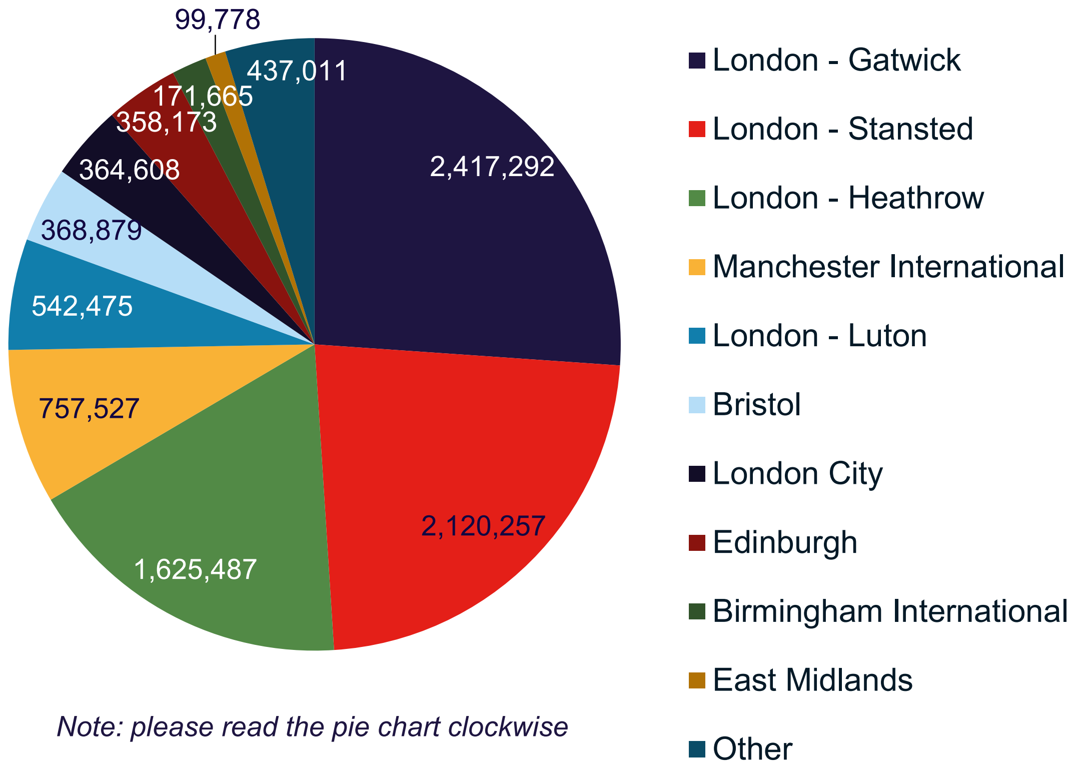
Origin airport annual seat capacity (2019)



Note: please read the pie chart clockwise

Other in origin airports groups: Turin-Caselle, Catania-Fontanarossa, Bari-Palese, Palermo-Punta Raisi, Florence-Peretola, Venice-Treviso, Genoa-Crisoforo Colombo, Olbia-Costa Smeralda, Cagliari-Elmas, Brindisi-Papola Casale, Ancona-Falconara, Perugia-Sant Egidio, Pescara-Liberi, Alghero-Fertilia, Lamezia Terme, Trieste, Rimini-Miramare, Comiso

Destination airport seat capacity (2019)



Note: please read the pie chart clockwise

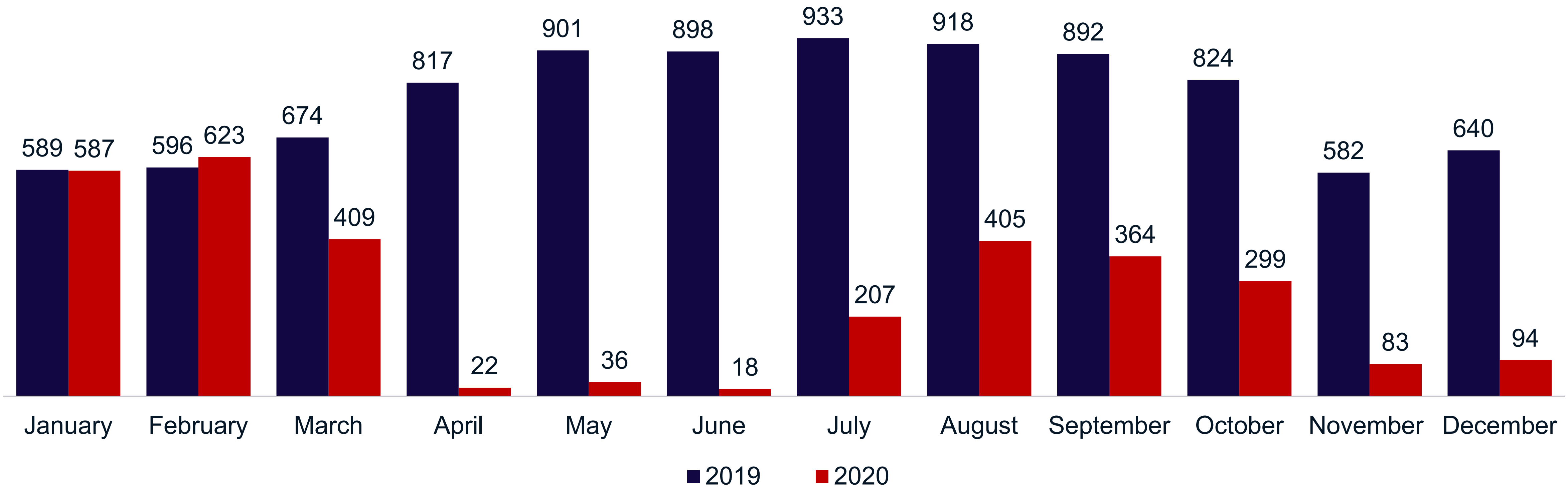
Other in destination airports groups: Liverpool-John Lennon, Glasgow International, Leeds/Bradford, London Southend, Belfast International, Newcastle, Cardiff, Glasgow Prestwick, Exeter International, Doncaster Sheffield, Southampton, Bournemouth International

Source: Apex, non-stop flights only.

4.1 Access: impact of the COVID-19 pandemic

Impact of the COVID-19 pandemic on connectivity

Monthly seat capacity on flights from Italy to the UK (000s)



- Seat capacity on non-stop flights between Italy and the UK declined by 66% in 2020 compared to 2019 as a result of the COVID-19 pandemic. The impact was felt most since April 2020, and monthly seat capacity was at least 56% behind 2019 levels in subsequent months with the worst hit months in April to June and November and October after a short summer uplift.
- The effect of the pandemic was also felt severely in Channel Tunnel and sea connectivity.

Source: Apex, non-stop flights only.

4.2 Travel trade: general overview

- The Italian trade structure is very fragmented with about 11,925 tourism companies. The first city in terms of tourism businesses is Rome, followed by Milan and Naples.
- The trade sells Britain mainly as a short break destination during the autumn/winter season and with coach tours and holidays in the spring/summer season. London is the top destination followed by the rest of England and Scotland.
- Online travel agencies (OTAs) are well established in the market. They often can be more flexible than traditional tour operators with lead-in times. Among OTAs Booking holds the largest market share of 57%, followed by Expedia (24%), Lastminute.com Group (7%), and eDreams Odigeo (6%). Other operators had a combined share of (6%).
- Turnover of travel eCommerce reached €15.5 billion in 2019. 83% of agencies reported growth in turnover and digital is becoming a competitive factor for the entire supply chain. Almost all agencies (94%) now collect information on their customers in digital format to better understand their behaviour.
- English language courses are also an important selling point for the trade and Britain is the most requested destination followed by Ireland and Malta. In 2020, this selling point was severely affected by the pandemic.

The Italian trade structure is very fragmented.

Source: Travel trade magzine, trade feedback, Phocuswright, www.officinaturistica.it, Osservatori.net

4.2 Travel trade: update on the pandemic impact

- Contrasting the second quarter of 2020 against the same time five years earlier, Italian travel agencies reported a decrease in turnover of -93%; the hotel industry -88%, air transport -79% and restaurant services -64%.
- In 2020, only a third of the number of business trips made in 2019 were taken by Italians, showing this segment was severely affected (-68% of trips and nights); it accounted for just 7% of all trips and 4% of nights spent travelling.
- Some tour operators shifted their offer to domestic trips within Italy and they adapted their programmes to feature fewer coach tours and more FIT and fly & drive tours.
- Recent sentiment research shows that 60% of Italian respondents regard booking through a travel agent as a safer option at the moment for limiting uncertainties around trip planning. SmartAds reports the prevailing reasons driving this behaviour as the safety of having all the correct information, the management of the whole package, experience and assistance in planning.

3 in 5

Italian leisure travellers feel booking through a travel agent is currently the safest option to mitigate risk amid pandemic uncertainty.

Source: Travel trade magzine, trade feedback, TCI/VisitBritain/VisitScotland/Visit Wales/London & Partners published May 2021, NB: Sentiment data is from a tracking study, and results may change in subsequent waves; SmartAds.it

4.2 Travel trade: Italian tour operators

Top operators in Italy in 2019

Top Ten Tour Operators	Turnover €m
Alpitour	1,992
Gattinoni	320
Veratour	245
Quality group	165
Mistral	133
Nicolaus Tour	91
Boscolo Tours	78

Top major tour operators with a comprehensive Britain programme are:

Source: Lagenzia di viaggi magazine, Travel Quotidiano, ANSA, Eden travel group, I Grandi Viaggi, Veratour, Quality Travel.it

4.2 Travel trade: Italian holidays

National public holidays:

2021	National public holidays
1 January	New Year's Day
6 January	Epiphany
5 April	Easter Monday
25 April	Liberation Day
1 May	Labour Day
2 June	Republic Day
15 August	Assumption Day
1 November	All Saints Day
8 December	Immaculate Conception Day
25 December	Chirstmas Day
26 December	St. Stephen's Day

Source: Officeholidays.com

Selected local holidays:

2021	Local holiday	Region
29 June	Saint of the city	Rome
7 December	Saint of the city	Milan

4.2 Travel trade: practical information

General practical information:

- Business hours are usually flexible; typically 09:00 – 13:00, 14:00 - 18:00. In summer a longer lunch break is common and changes the usual afternoon working hours to 15:30 – 19:30.
- Italians are very friendly and appreciate an open and welcoming approach. A firm handshake is the most traditional form of greeting. It is better to start using a person's title and surname until invited to use their first name.
- Avoid scheduling meetings before 9:30 and after 18:00 and it is best to try to avoid the summer months (mid-July until early September) as many are on holiday. It is a good idea to plan the visit before the preparation of new brochures/catalogues.
- Dress code: Business dress tends to be understated, formal and conservative.
- Business Meeting Etiquette: Appointments are mandatory and should be made in advance and reconfirmed the day before. They like to meet the people the work with to build relationships. Please phone if you get delayed and try not to cancel a meeting at short notice.
- Relationships in Italy are extremely important. Try to visit your contacts at least twice a year and keep in regular contact with them even when you are back in Britain.
- Meetings tend to vary by area: there is a tendency for them to be more informal in the south of Italy and more formal in the North. Allow time for the decision making process. It can be slow and it is good to be flexible.
- Try to provide your printed material available in Italian and English.

4.2 Travel trade: sales calls

Sales calls

The Italian trade structure is very fragmented. The main Tour Operators are based in the bigger cities, Milan, Rome and Naples, even if the structure particularly amongst small operators is very regionalised. Therefore, before you embark on a sales visit to Italy, VisitBritain recommends that you take the following steps:

- Provide the operators you are visiting with a comprehensive information pack about your products in Italian if possible. It is often appreciated.
- On your return to Britain ensure that you follow up quickly and renew contact regularly.
- The planning cycles of the Italian trade tends to have a shorter turn-around time than in many other European markets: summer catalogues tend to be planned in February/March and winter catalogues in September/October.
- Keep in touch with VisitBritain; let us know about your progress. Regular market intelligence is essential for our future plans and activities.
- It is also important to note that a significant number of the key Britain players attend the VisitBritain's ExploreGB workshop, Best of Britain, BIM Marketplace and VisitScotland Expo. Please contact VisitBritain London for details of those attending. Some operators also visit World Travel Market but register with the organisers independently.

4.2 Travel trade: hospitality etiquette

Hospitality etiquette

If there is the opportunity it is definitely a good idea to take your Italian business partner out for a meal or coffee – either to build up a relationship or to thank for business given in the past. Here are some practical tips to help you plan this:

- Credit cards are usually accepted in all restaurants (only double check with the small ones). VISA and Mastercard are commonly accepted but in some restaurants American Express cards are not accepted. In Southern Italy it is not as common to use credit cards as in other parts of the country, especially in smaller towns. It is best to bring cash if you are going there.
- Arrive on time and if possible, before the invite, as punctuality indicates reliability.
- If you order water you will be asked if you want still or sparkling mineral water.
- Bread is always served and you can order refills any time.
- Italians normally drink wine with their meals, although not always at lunch time.
- Service charge and VAT are included in the price, therefore tipping is limited. Tips are only given if you are happy with the service provided and rarely more than €5.

4.3 Caring for the consumer

Advice on caring for Italian consumers

- Food is one of the great passions of Italian people. Their perceptions of British food tend to be below average, albeit they have seen improvements more recently.
- In Italy the main meal is usually dinner. A three-course dinner is usually taken at about 8pm. When eating Italian cuisine, “primo” refers to the pasta or rice course. ‘Secondo’ refers to a fish or meat dish. Fresh bread and water should be plentiful. Fresh fruit should be offered as a dessert option.
- Lunch during the week is very light with fresh salad, sandwiches or a dish of pasta is the norm. On Sunday when the family is together lunch becomes the meeting point for all to spend some spare time together. Lunch is normally eaten about 1pm.
- Last but not least a good meal tends to finish with an excellent espresso (usually short and strong) sometimes with fresh milk.
- Italians tend to generally be conservative eaters and when travelling abroad choose to eat simple British fare or Italian food. The younger traveller has a higher propensity to sample a wider variety of options including ethnic and Asian cuisine.
- Italy is one of the most important vegetarian markets in Europe; it is recommended to have vegetarian dishes in the menus. There is increasing interest in health and nutrition in daily life.
- Many Italians love wine but they often are not large consumers of alcohol, and excessive drinking tends to be frowned upon. In Italy it is impolite to fill a glass too full.
- Cleanliness is paramount and expectation levels for standards and services are high – any issues should be resolved promptly.
- Independent travellers tend to prefer good value accommodation and often opt for accommodation provided by well-known chains.
- It would be advantageous to have important signs and information material printed in Italian and to know a few basic phrases in Italian to make Italian visitors welcome. The degree of fluency in English tends to vary.
- Italians are used to paying by credit card.

Useful links and further information

Appendix

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Appendix 1: Working with VisitBritain (1)

We can help you extend your reach through:

- Digital and social media such as through Twitter, our Facebook page – Love GREAT Britain, or Pinterest.
- Press and PR by sending us your newsworthy stories or partnering to host journalists, influencers, and broadcast shoots
- Leisure, and the business travel trade via our programme of sales missions, workshops and exhibitions or promotion to our qualified Britagents and supplier directory
- Retailing your product through the VisitBritain shop
- Joining the Tourism Exchange GB platform – giving you access to a wide range of international customers, via connected distributors. Connection to the platform is free.
- Or as a major campaign partner

We are here to support you and look forward to working with you. To find out more browse our:

Opportunity search or trade website

or contact the B2B events team
(Email: events@visitbritain.org)

or campaign partnerships team
(Email: partnerships@visitbritain.org)

or trade support team
(Email: tradesupport@visitbritain.org)

or VisitBritain shop team
(Email: product@visitbritain.org)

Appendix 1: Working with VisitBritain (2)

VisitBritain's strategy to grow tourism to 2025

- **Developing world-class English tourism product:** VisitBritain has collaborated with VisitEngland to develop and deliver the **Discover England Fund** since April 2016
- **Collaborating globally:** VisitBritain's network extends in four regions: Europe, the Americas, APMEA and North East Asia. Meet those teams and their trade partners at VisitBritain's different trade events, VIBE, ExploreGB, or Destination Britain events in market.
- **Inspiring the world to explore Britain** as a **GREAT Britain** campaign partner and through our global and regional marketing campaigns.
- **Acting as trusted partner and advisor** to the industry, but also our Government and Public Diplomacy partners by generating and offering them world-class market insights.

VisitBritain also develops and promotes products for Business Events, food & drinks, rail, luxury, regional gateways, and the Discover England Fund. Find out more at our Discover England Fund page.

To find out more information, browse:

VisitBritain's mission

The Government's Tourism Action Plan

VisitBritain's events

Business Recovery Webinars

Appendix 1: Working with VisitBritain (3)

VisitBritain's global audience segments

- From 2017, VisitBritain has carried out a research project across all its main inbound target markets to define global audience segments and identify best opportunities in each of those international travellers' market. On the right is a summary of VisitBritain's 5 global audience segments. To learn more visit our page on understanding our customers.

- In Italy, VisitBritain focuses on two audience segments among the international travellers:
  - **Buzzseekers in Italy:** Often young independent travellers, looking for adventure, buzz and immersive experiences
  - **Explorers in Italy:** Empty nesters and families who look for active outdoor experiences as well as immersing themselves in culture

Segments (& global attributes)	**Global market share**	**Market share in Italy**
Buzzseekers (free spirited and spontaneous, they like holidays full of action and excitement)	38%	25%
Explorers (they enjoy outdoors, must-see sites, and embracing local cultures at a more relaxed pace)	23%	29%
Adventurers (they live to go off the beaten track, spending time outdoors and trying out new experiences)	16%	18%
Sightseers (they prefer staying within comfort zone, preferring cities to countryside, planning in advance)	12%	12%
Culture Buffs (image and brand conscious, travel is seen as a status symbol; they like well-known, safe destinations)	12%	16%

Source: VisitBritain/Kubi Kalloo, 2017

Appendix 2: Useful research resources (1)

We have dedicated research and insights available which include:

- Latest monthly, quarterly overall and quarterly by area data from the International Passenger Survey by ONS.
- Inbound Tourism Trends by Market
- Inbound activity data
- Inbound nation, region and country data
- Inbound town data
- Sector-specific research which includes topics such as accomodation, countryside and coast, culture heritage and attractions, food and drink, football tourism, shopping, transport and visits with a health condition or impairment.
- 2021 Inbound Tourism Forecast
- Britain's competitiveness

We are here to support you and look forward to working with you.

To find out more about Italy or other inbound markets browse our:

Markets & segments

Inbound research & insights

Or contact us directly
(Email: research@visitbritain.org)

VisitBritain VisitEngland

Appendix 2: Useful research resources (2)

We have dedicated research and insights available which include:

- COVID-19 consumer sentiment tracker
- Perceptions of Britain overseas
- Planning, decision-making and booking cycle of international leisure visitors to Britain
- Gateways in England, insights on overseas visitors to England's regions, participation in leisure activities, multi-destination trips and more
- Food & drink research

We are here to support you and look forward to working with you.

To find out more about Italy or other inbound markets browse our:

Markets & segments

Inbound research & insights

Or contact us directly
(Email: research@visitbritain.org)

Appendix 3: Definitions, sources and information on this report (1)

Details on main sources:

- The **International Passenger Survey** (IPS) is a UK-wide departure survey, carried out by the Office for National Statistics (ONS). All data are based on data collected as visitors are about to leave the UK about what they did, not on their intentions or perceptions. Except when specified, IPS refers to people according to their country of residence, not nationality. Where we talk about mode of transport, it refers to what is used on departure to leave the UK, with the presumption that shares are similar on arrival. To find out more and consult the release calendar, browse our IPS page.
- **Oxford Economics** tourism forecasts are from the 2 March 2021 update of the 'Global Travel Service' databank. Other information on Italy and the Eurozone were updated 7 May 2021.
- **Apex** data was last updated with January 2021 data.
- **UNWTO** data are based on their latest Tourism Barometer and Statistical Annex, March 2021.
- **VisitBritain/IPSOS 2016** refers to the 'Decisions & Influences' research project carried out in Australia, Brazil, Canada, China, Denmark, France, GCC (UAE and Saudi Arabia), Germany, India, Italy, Japan, Netherlands, New Zealand, Norway, Russia, South Korea, Spain, Sweden, and USA. Its all-market averages are based on weighted average of those markets. Only international travellers participated, half of each market sample having travelled to Britain before.
- The **Ipsos-Anholt Nation Brands Index** (NBI) was carried out online in July/August 2020 in Argentina, Australia, Brazil, Canada, China, Egypt, France, Germany, India, Italy, Japan, Mexico, Poland, Russia, South Africa, South Korea, Sweden, Turkey, UK and USA. Its all-market averages are based on those markets. It is based on nation-wide representative samples. More detail in our 'How the world views the UK' foresight.

Appendix 3: Definitions, sources and information on this report (2)

Useful definitions and abbreviations

- **VFR** means Visiting Friends and/or Relatives.
- **Misc** journey purpose means Miscellaneous – other journey purposes.
- In IPS, to be defined as a **package**, a holiday must be sold at an inclusive price covering both fares to and from the UK and the cost of at least some accommodation. Neither the respondent nor the travel agent from whom the package was bought will know how much of the inclusive price is accounted for by fares or by accommodation.
- **High Net Worth Individuals**, or HNWIs, are people with liquid assets valued over USD1million.

Other useful information

- **Top 10 activities in Britain** is based on propensity for visitors to have undertaken activities whilst in Britain, data having been collected between 2007 and 2019. Where an activity was asked about more than once, only the most recent answers were taken into account.
- **Repeat visits** are visits made by people who had already visited the UK before; British expats have been excluded for better representation of the market's propensity to visit Britain repeatedly. IPS question asked in 2015.
- **Likelihood to recommend Britain** as a destination is based on holiday visits, of at least one night, excluding British expats.

Market and Trade Profile: Italy

June 2021

Destination Bristol ©Gary Newman