Inbound COVID-19 Sentiment Tracker

Market Snapshot – Italy

Read the full report for Wave 4 here (PDF, 8MB)

If you need the data in a different format, please contact research@visitbritain.org

Bristol Balloon Fiesta: Destination Bristol ©Gary Newman
Italy Market Summary

Travel Intentions

Intending to travel abroad for leisure*

<table>
<thead>
<tr>
<th>Wave 1</th>
<th>Wave 2</th>
<th>Wave 3</th>
<th>Wave 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>77%</td>
<td>81%</td>
<td>87%</td>
<td>90%</td>
</tr>
</tbody>
</table>

Journey Purpose

<table>
<thead>
<tr>
<th>Activity</th>
<th>Wave 1</th>
<th>Wave 2</th>
<th>Wave 3</th>
<th>Wave 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Holiday</td>
<td>31%</td>
<td>38%</td>
<td>47%</td>
<td>51%</td>
</tr>
<tr>
<td>Visit friends or relatives</td>
<td>25%</td>
<td>32%</td>
<td>41%</td>
<td>46%</td>
</tr>
<tr>
<td>Other leisure purposes</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
</tr>
</tbody>
</table>

Planning Stage

<table>
<thead>
<tr>
<th>Wave 1</th>
<th>Wave 2</th>
<th>Wave 3</th>
<th>Wave 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>3%</td>
<td>3%</td>
<td>10%</td>
<td>8%</td>
</tr>
</tbody>
</table>

Among leisure trip intenders:

- 78% consider Europe
- 14% consider Britain

Among Britain intenders:

- 60% consider England
- 53% consider Scotland
- 32% consider London
- 20% consider Wales

Travel Preferences

Top Activities

- Iconic tourist attractions: 58%
- History and heritage: 58%
- Visiting cultural attractions: 57%
- Dining out: 52%
- Outdoor nature activities: 50%

Destination Types

<table>
<thead>
<tr>
<th>Category</th>
<th>Wave 1</th>
<th>Wave 2</th>
<th>Wave 3</th>
<th>Wave 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Large city</td>
<td>63%</td>
<td>63%</td>
<td>63%</td>
<td>63%</td>
</tr>
<tr>
<td>Will roam around</td>
<td>53%</td>
<td>53%</td>
<td>53%</td>
<td>53%</td>
</tr>
<tr>
<td>Coastline</td>
<td>32%</td>
<td>32%</td>
<td>32%</td>
<td>32%</td>
</tr>
<tr>
<td>Mountains or hills</td>
<td>24%</td>
<td>24%</td>
<td>24%</td>
<td>24%</td>
</tr>
<tr>
<td>Small/mid-sized city/town</td>
<td>20%</td>
<td>20%</td>
<td>20%</td>
<td>20%</td>
</tr>
</tbody>
</table>

Among Britain intenders:

- 53% consider Scotland
- 32% consider London
- 20% consider Wales

Travel Companions

- With your spouse/partner: 70%
- With friends: 27%
- With children (under 18): 21%
- With adult family members: 15%
- Alone: 14%
- As part of a tour group: 2%

Top Accommodation

- Hotel chain: 64%
- Bed and breakfast: 59%
- Private rental: 37%
- Self catered property: 36%
- Holiday village/centre: 26%

Top Modes of Transport to Britain

- Plane – via nonstop flight: 93%
- Plane – via connecting flight: 86%
- Own/rented vehicle – via Ferry: 59%

- Public transport - Tube/subway: 55%
- Public transport - Train: 52%
- Public transport - Bus: 52%

Wave 1: 2nd-16th Dec 2020
Wave 2: 24th Mar – 6th Apr 2021
Wave 3: 23rd Aug – 6th Sept 2021
Wave 4: 10th-23rd Feb 2022
All data is from Wave 4, unless stated

*(% definitely & probably) in the next 12 months
# Italy Market Summary

### Top travel drivers

#### …for any international trip
- Money-back guarantee should I wish to cancel my trip: 41%
- An attractive offer e.g. discounts on flights or accommodation: 34%
- Decrease in coronavirus cases at destination: 32%
- Hygiene & safety protocols in place at destination: 32%
- Insurance for COVID-19 related travel/regulations changes: 28%

#### …for a trip to Britain
- Money-back guarantee should I wish to cancel my trip: 40%
- An attractive offer e.g. discounts on flights or accommodation: 34%
- Decrease in coronavirus cases at destination: 30%
- Hygiene & safety protocols in place at destination: 30%
- Removal of quarantine policies in destination country: 24%

### Travel Concerns – for travel to Britain*

- Access to healthcare if I contract COVID-19 abroad: 72%
- Other people not following COVID-19 policies/procedures: 67%
- Contracting COVID-19 during my journey/trip: 66%
- Limited / restricted experiences at destination: 66%
- Change in quarantine requirements on my return home: 63%
- Extra admin involved with new policy/rules during the trip: 63%
- Affordability of robust travel insurance: 55%
- Costs of mandatory COVID-19 tests: 54%
- Accessibility of affordable air fares: 52%
- Locals’ attitude towards international tourists: 41%

*% very & somewhat concerned
**% completely & somewhat agree

### Travel attitudes**

- I would be happy to take a pre-trip covid-19 test should that be required: Agree 80%, No opinion 4%, Disagree 16%
- I will think more about sustainability when planning future holidays: Agree 70%, No opinion 9%, Disagree 21%
- I would be comfortable using public transport within the destination: Agree 63%, No opinion 5%, Disagree 32%
- I will look for less crowded places, even if I miss attractions: Agree 62%, No opinion 6%, Disagree 32%
- I will favour international destinations closer to my home country: Agree 59%, No opinion 8%, Disagree 33%
- I will delay my next international trip until Omicron is under control: Agree 58%, No opinion 6%, Disagree 36%
- Booking through a travel agent is a safer option at the moment: Agree 56%, No opinion 7%, Disagree 37%
- I will leave booking until later/last minute: Agree 49%, No opinion 7%, Disagree 43%
- I will be intending to take fewer but longer holidays: Agree 44%, No opinion 10%, Disagree 46%
- I will favour local destinations instead of traveling internationally: Agree 43%, No opinion 6%, Disagree 51%
- I will look for less crowded places, even if I miss attractions: Agree 32%, No opinion 8%, Disagree 60%

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