Market and Trade Profile: Italy

Italy – December 2019
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 Italians 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 laid out, 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.
Contents (1/2)

Executive summary (page 5)

Chapter 1: Market statistics
1.1 Key statistics (page 11)
Tourism context, UK inbound overview, key figures on journey purpose, seasonality, duration of stay, accommodation trends, travel companions, repeat visits, and visit types

1.2 Getting around Britain (page 18)
Where visitors stayed in the UK, places they visited, and internal modes of transport

1.3 Visitor demographics (page 23)
Demographic profile of Italian visitors (age, gender)

1.4 The UK and its competitors (page 27)
How visits to the UK compare to main competitor destinations, and long-term trend and forecasts

Chapter 2: Experiences and perceptions
2.1 Inbound activities (page 30)
What activities Italian visitors undertook in the UK

2.2 Welcome and recommending Britain (page 37)
How welcome departing visitors felt in Britain, and how likely they were to recommend a visit

2.3 Perceptions of Britain (page 38)
How people in this source market see Britain, and how it compares to other destinations
Contents (2/2)

Chapter 3: Understanding the Market
3.1 Structural drivers (page 45)
Key demographic, social, economic indicators and exchange rates influencing the outbound travel market
3.2 Consumer trends (page 49)
General and travel-related trends in this source market
3.3 Booking and planning (page 53)
How Italian travellers plan and book their trips to the UK, and their holidays in general
3.4 Reaching the consumer (page 58)
An overview of the media landscape in this source market, and main sources of influences for holiday planning

Chapter 4: Access and Travel Trade
4.1 Access (page 65)
How visits to the UK were made, and an overview of the air connections between this source market and the UK
4.2 Travel trade (page 69)
What the travel trade in market looks like and useful tips to work with travel agents and other main players
4.3 Caring for the consumer (page 75)
Tips to understand Italian travellers and best cater to their needs

Appendix:
Working with VisitBritain (page 77)
Useful resources (page 80)
Definitions, sources and information on this report (page 82)
Executive summary
1: Inbound market statistics

Chapter summary

The Italian outbound market is forecasted to account for almost 45 million trips abroad with at least one overnight stay by 2028. The UK was the fourth most popular destination behind France, Spain and Germany for such trips in 2018.

The Italians rank globally in 10th place for international tourism expenditure with more than US$30.1bn. Italy was the 8th largest inbound source market for the UK for volume and 7th most valuable for spend in 2018.

France was the most considered alternative destination by Italian visitors, whilst about one in four did not consider an alternative destination to Britain.

The Italian source market has a good seasonal spread. London is the leading destination for a trip to Britain, accounting for 47% of visitor nights, but South East, South West and Scotland are also popular (average 2016-2018).

Source: International Passenger Survey by ONS, Oxford Economics (overnight trips), UNWTO, VisitBritain/IPSOS 2016

2018: £784m spend in UK
2: Experiences and perceptions

Chapter summary

Dining in restaurants, shopping and going to the pub feature among the most popular activities of Italian visits in the UK.

About half of Italian holiday visits spend time visiting parks or gardens or involve a trip to museums or art galleries or sightseeing of famous monuments/buildings. Almost as many also feature a visit to castles or historic houses.

More than one in five Italians on holiday in the UK go on a guided tour or like to socialise with locals. A similar proportion of Italians enjoy walking in the countryside.

97% of Italian visitors are either ‘Very’ or ‘Extremely’ likely to recommend Britain for a holiday or short-break.

The Italians rank the UK in top 3 out of 50 countries for its overall nation brand, and for vibrant cities, cultural heritage and contemporary culture.

Source: International Passenger Survey by ONS, Anholt-Ipsos Nation Brands Index 2019
3: Understanding the market

Chapter summary

The volume of overnight trips taken by the resident population in Italy totalled an estimated 78 million, an increase of 20% in 2018 compared to 2017.

Friends, family and colleagues are the most influential source when choosing a holiday destination.

Italians took 36.5m long holiday trips in 2018 with an average duration of 9 nights, followed by 33.6m short holidays with an average length of stay of 2 nights. Italian business trips lasted, on average, 4 nights and there were 8.9 m undertaken in 2018.

More than one in three Italian holiday visitors tend to start thinking about their trip to Britain more than half a year in advance.

Few Italian bookings are made more than half a year in advance. 40% book between three and six months prior to departure but half of holiday bookings of a trip to Britain were made within two months of the trip.

4: Access and travel trade

Chapter summary

Italy and the UK are well connected. 98% of visits to the UK from Italy came by plane in 2018.

Seat capacity from Italy to the UK has grown rapidly since 2013, now at its highest level ever. Many airlines operate flights from Italy to the UK with Ryanair, easyJet, British Airways and Alitalia combined accounting for 88% of annual seat capacity in 2018.

The regional spread of Italian visitors is supported by the connectivity to regional airports in the UK; however, Northern Italy tends to be better connected to regional airports than Central and Southern Italy, with the exception of Rome.

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.

Source: Apex 2018 non-stop flights only
Chapter 1: Inbound market statistics
Key insights

Italy is Britain’s 8th largest source market in terms of visits and 7th most valuable for visitor spending (2018).

The UK welcomed 1.8m visits from Italy in 2018, with these visitors spending a total of £784m here in the same year.

In 2018, 48% of spending came courtesy of holiday visitors, 23% from business visits, and 20% from visits to friends and/or relatives.

London is the leading destination for a trip to Britain but South East, South West and Scotland are also popular (based on the average nights spent in the UK 2016-2018).

59% of holiday visits from Italy to the UK in 2015 were made by repeat visitors (excl. UK nationals).

Most Italian visits were organised independently rather than bought as part of a package or all-inclusive holiday.

Source: International Passenger Survey by ONS, Oxford Economics (overnight trips)
1.1 Key statistics: global context and 10 year trend

**Global context**

<table>
<thead>
<tr>
<th>Measure</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>International tourism expenditure (US$bn)</td>
<td>30.1</td>
</tr>
<tr>
<td>Global rank for international tourism expenditure</td>
<td>10</td>
</tr>
<tr>
<td>Number of outbound overnight visits (m)</td>
<td>34.1</td>
</tr>
<tr>
<td>Most visited destination</td>
<td>France</td>
</tr>
</tbody>
</table>

**Inbound travel to the UK overview**

<table>
<thead>
<tr>
<th>Measure</th>
<th>Visits (000s)</th>
<th>Nights (000s)</th>
<th>Spend (£m)</th>
</tr>
</thead>
<tbody>
<tr>
<td>10 year trend</td>
<td>+10%</td>
<td>-15%</td>
<td>-3%</td>
</tr>
<tr>
<td>2008</td>
<td>1,639</td>
<td>11,189</td>
<td>809</td>
</tr>
<tr>
<td>2009</td>
<td>1,221</td>
<td>8,294</td>
<td>591</td>
</tr>
<tr>
<td>2010</td>
<td>1,472</td>
<td>10,330</td>
<td>722</td>
</tr>
<tr>
<td>2011</td>
<td>1,526</td>
<td>9,676</td>
<td>792</td>
</tr>
<tr>
<td>2012</td>
<td>1,521</td>
<td>10,021</td>
<td>760</td>
</tr>
<tr>
<td>2013</td>
<td>1,636</td>
<td>11,262</td>
<td>816</td>
</tr>
<tr>
<td>2014</td>
<td>1,757</td>
<td>13,396</td>
<td>922</td>
</tr>
<tr>
<td>2015</td>
<td>1,794</td>
<td>13,094</td>
<td>890</td>
</tr>
<tr>
<td>2016</td>
<td>1,990</td>
<td>13,027</td>
<td>980</td>
</tr>
<tr>
<td>2017</td>
<td>1,779</td>
<td>12,558</td>
<td>841</td>
</tr>
<tr>
<td>2018</td>
<td>1,808</td>
<td>9,500</td>
<td>784</td>
</tr>
</tbody>
</table>

**Share of UK total in 2018**

- Visits: 4.8%
- Nights: 3.6%
- Spend: 3.4%

Source: International Passenger Survey by ONS, UNWTO, Oxford Economics
1.1 Key statistics – volume and value

Inbound volume and value

<table>
<thead>
<tr>
<th>Measure</th>
<th>2018</th>
<th>Change vs. 2017</th>
<th>Rank out of UK top markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visits (000s)</td>
<td>1,808</td>
<td>+2%</td>
<td>8</td>
</tr>
<tr>
<td>Nights (000s)</td>
<td>9,500</td>
<td>-24%</td>
<td>9</td>
</tr>
<tr>
<td>Spend (£m)</td>
<td>784</td>
<td>-7%</td>
<td>7</td>
</tr>
</tbody>
</table>

The UK welcomed 799,000 visits from Italy in Jan-Jun 2019 (down 5% on Jan-Jun 2018). This included a weak first quarter and growth in the second. Italian visitors spent a total of £357m in the first six months of 2019 (up 5% on the first six months in 2018).*

Source: International Passenger Survey by ONS. *provisional data for January-June 2019 **small base – may only be used as indicative

Nights per visit, spend

<table>
<thead>
<tr>
<th>Averages by journey purpose in 2018</th>
<th>Nights per visit</th>
<th>Spend per night</th>
<th>Spend per visit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Holiday</td>
<td>5</td>
<td>£90</td>
<td>£427</td>
</tr>
<tr>
<td>Business</td>
<td>3</td>
<td>£166</td>
<td>£523</td>
</tr>
<tr>
<td>Visiting Friends/ Relatives</td>
<td>6</td>
<td>£53</td>
<td>£323</td>
</tr>
<tr>
<td>Study**</td>
<td>18</td>
<td>£50</td>
<td>£885</td>
</tr>
<tr>
<td>Miscellaneous**</td>
<td>7</td>
<td>£70</td>
<td>£466</td>
</tr>
<tr>
<td>All visits</td>
<td>5</td>
<td>£83</td>
<td>£434</td>
</tr>
</tbody>
</table>
1.1 Key statistics: journey purpose

Journey purpose 2018

<table>
<thead>
<tr>
<th>Journey purpose</th>
<th>Italy</th>
<th>All markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Holiday</td>
<td>48%</td>
<td>40%</td>
</tr>
<tr>
<td>Business</td>
<td>19%</td>
<td>22%</td>
</tr>
<tr>
<td>VFR</td>
<td>26%</td>
<td>31%</td>
</tr>
<tr>
<td>Study</td>
<td>3%</td>
<td>1%</td>
</tr>
<tr>
<td>Misc.</td>
<td>3%</td>
<td>5%</td>
</tr>
</tbody>
</table>

48% of all visit to the UK from Italy were made for holiday purposes, followed by 26% of visits made to visit friends and/or relatives in 2018. These two journey purposes have led in terms of volume for some time. 2016 was a record year for such Italian visits with 924,000 holiday visits and 547,000 visits to friends and/or family, but these volumes have not been matched by either of those since.

Source: International Passenger Survey by ONS

In 2018, 48% of spending came courtesy of holiday visitors, 23% from business visits, and 20% from visits to friends and/or relatives.

The volume of business visits was roughly on par with the previous year in 2018. It is still short of the record set in 2006 (429,000 business visits) by more than 80,000 visits in 2018.

Looking at growth over the past decade, holiday visits have increased by 17% and visits to friends and/or family by 34%. Business, study and miscellaneous visits all posted lower levels in 2018 (-8%, -28% and -34% respectively.)
1.1 Key statistics: seasonality

In 2018, 28% of visits from Italy to the UK were made in the third quarter (Jul-Sep, traditional high season) followed by the last quarter with 25% (Oct-Dec). The first and second quarter of 2018 each received 23% of Italian visits.

The first three months of 2018 set a new volume record with 423,000 Italian visits (+22% on Q1 2017). The volume of visits saw modest growth, up 2%, in the third and fourth quarters respectively. In contrast, the second quarter of the year has seen a decline since its peak in 2016.

Source: International Passenger Survey by ONS
1.1 Key statistics: length of stay and accommodation

Accommodation stayed in, 2018 (nights, %share)

- Free guest with relatives or friends: 37%
- Hotel/guest house: 35%
- Hostel/university/school: 12%
- Rented house/flat: 7%
- Bed & Breakfast: 4%
- Camping/caravan: 2%
- Paying guest family or friends house: 1%
- Other: 1%

Source: International Passenger Survey by ONS

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. Over the past decade trips of 4-7 nights have shown the strongest growth, up 37%, whilst stays of 15 nights and more have declined by 33%.

Two forms of accommodation dominate the picture with almost three quarters of Italian visitor nights spent either staying as a free guest with family or friends or in a hotel/guest house. Hostels/university or school accommodation are also popular, comprising 12% of nights in 2018, followed by B&Bs (7%).
1.1 Key statistics: repeat visits and package tours

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

<table>
<thead>
<tr>
<th>Region</th>
<th>Proportion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Europe</td>
<td>67%</td>
</tr>
<tr>
<td>Portugal</td>
<td>56%</td>
</tr>
<tr>
<td>Spain</td>
<td>62%</td>
</tr>
<tr>
<td>Italy</td>
<td>59%</td>
</tr>
<tr>
<td>France</td>
<td>58%</td>
</tr>
<tr>
<td>All markets</td>
<td>63%</td>
</tr>
</tbody>
</table>

Proportion of visits that are bought as part of a package or all-inclusive tour in 2018**

<table>
<thead>
<tr>
<th>Purpose</th>
<th>Italy</th>
<th>All markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business</td>
<td>9%</td>
<td>6%</td>
</tr>
<tr>
<td>Holiday</td>
<td>9%</td>
<td>13%</td>
</tr>
<tr>
<td>VFR</td>
<td>5%</td>
<td>3%</td>
</tr>
<tr>
<td>All journey purposes</td>
<td>9%</td>
<td>8%</td>
</tr>
</tbody>
</table>

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 two and three times (a medium average visit frequency compared to other markets) and spent on average £1,267 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%).

Sources: International Passenger Survey by ONS. *2015, excluding UK nationals; **See definition of a package holiday in appendix (p.83)
## 1.2 Getting around Britain

### Average annual visits to the UK (2016-2018)

<table>
<thead>
<tr>
<th>Region</th>
<th>Nights stayed (000)</th>
<th>Visits (000)</th>
<th>Spend (£m)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>11,694</td>
<td>1,858</td>
<td>868</td>
</tr>
<tr>
<td>Scotland (SC)</td>
<td>967</td>
<td>170</td>
<td>92</td>
</tr>
<tr>
<td>Wales (WA)</td>
<td>302</td>
<td>40</td>
<td>19</td>
</tr>
<tr>
<td>Northern Ireland (NI)</td>
<td>15</td>
<td>4</td>
<td>1</td>
</tr>
<tr>
<td>London (LDN)</td>
<td>5,488</td>
<td>1,098</td>
<td>487</td>
</tr>
<tr>
<td>North East (NE)</td>
<td>166</td>
<td>15</td>
<td>7</td>
</tr>
<tr>
<td>North West (NW)</td>
<td>625</td>
<td>97</td>
<td>32</td>
</tr>
<tr>
<td>Yorkshire (YO)</td>
<td>224</td>
<td>39</td>
<td>13</td>
</tr>
<tr>
<td>West Midlands (WM)</td>
<td>405</td>
<td>63</td>
<td>27</td>
</tr>
<tr>
<td>East Midlands (EM)</td>
<td>435</td>
<td>48</td>
<td>19</td>
</tr>
<tr>
<td>East of England (EoE)</td>
<td>781</td>
<td>110</td>
<td>32</td>
</tr>
<tr>
<td>South West (SW)</td>
<td>977</td>
<td>100</td>
<td>51</td>
</tr>
<tr>
<td>South East (SE)</td>
<td>1,267</td>
<td>185</td>
<td>83</td>
</tr>
</tbody>
</table>

*Source: International Passenger Survey by ONS*
1.2 Getting around Britain: regional spread and top towns and cities

### Top towns and cities visited

<table>
<thead>
<tr>
<th>Town</th>
<th>Visits (000s, 2016-2018 average)</th>
</tr>
</thead>
<tbody>
<tr>
<td>London</td>
<td>1,098</td>
</tr>
<tr>
<td>Edinburgh</td>
<td>117</td>
</tr>
<tr>
<td>Manchester</td>
<td>47</td>
</tr>
<tr>
<td>Cambridge</td>
<td>44</td>
</tr>
<tr>
<td>Birmingham</td>
<td>37</td>
</tr>
</tbody>
</table>

### Regional spread (2016-2018)

- **Scotland**: 47% (Spain: 9%)
- **Wales**: 42% (All markets: 9%)
- **London**: 42% (All markets: 46%)
- **Rest Of England**: 0.1% (All markets: 0.9%)
- **Northern Ireland**: 0.1% (All markets: 0.9%)

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

London is the leading destination for a trip to the UK, accounting for 47% of visitor nights, but South East, South West and Scotland are also popular based on the average nights spent in the UK 2016-2018.

Italian visits to Scotland posted a record year in 2018 with 268,000 visits, and total visitor spend of £110m.

Many Italian visits have a below average propensity to feature rural and coastal areas of Britain. 9% of visits from Italy were bought as part of a package or an all-inclusive tour, slightly below the all market average. Most Italian visits to the UK were organised independently in 2018.
1.2 Getting around Britain visits to coast, countryside and villages

Propensity to visit coast, countryside and villages

- VFR: Went to the coast or beaches (Italy: 9%, All markets: 13%)
- VFR: Went to countryside or villages (Italy: 9%, All markets: 17%)
- Holiday: Went to the coast or beaches (Italy: 8%, All markets: 14%)
- Holiday: Went to countryside or villages (Italy: 9%, All markets: 18%)
- All journey purposes: Went to the coast or beaches (Italy: 8%, All markets: 10%)
- All journey purposes: Went to countryside or villages (Italy: 9%, All markets: 13%)

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

- **Car/vehicle you/group brought to the UK**
  - 0% Italy, 1% All markets

- **Hired self-drive car/vehicle**
  - 4% Italy, 5% All markets

- **Private coach/minibus (for group only)**
  - 1% Italy, 2% All markets

- **Public bus/coach (outside town/city)**
  - 6% Italy, 5% All markets

- **Uber**
  - 8% Italy, 9% All markets

- **Taxi**
  - 25% Italy, 27% All markets

- **Train (outside town/city)**
  - 27% Italy, 23% All markets

- **Bus, Tube, Tram or Metro Train (within town/city)**
  - 51% Italy, 48% All markets

- **Domestic flight**
  - 1% Italy, 1% All markets

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 (%)

Italian visitors are very comfortable with taking public transport while in the UK. These travellers have an above-average propensity to use public transport while they are in Britain, both in and outside of cities. The majority of Italian visitors buy their tickets for transport in Britain whilst they are here (with the exception of internal flights). 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.
Visitor characteristics

38% of Italian visits are made by visitors aged under 35, with 25-34 year olds making up the largest share of visits in 2018.

Most visitors to the UK live in or around Milan, Rome or in the Veneto region.

Almost a third of Italian visits are made by travellers on their own and a similar proportion are accompanied by their partners or spouses. 12% travel with adult friends which is slightly above the all-market average.

Most visits from Italy to the UK were made by Italian nationals (92%) and 4% by British nationals in 2018.

Source: International Passenger Survey by ONS, *2015, excluding British nationals
1.3 Visitor demographics: gender and age groups

### Gender ratio of visits (2018):

<table>
<thead>
<tr>
<th></th>
<th>Female</th>
<th>Male</th>
</tr>
</thead>
<tbody>
<tr>
<td>All markets</td>
<td>42%</td>
<td>57%</td>
</tr>
<tr>
<td>Italy</td>
<td>42%</td>
<td>53%</td>
</tr>
</tbody>
</table>

### Gender ratio of visits from Italy by journey purpose (2018):

<table>
<thead>
<tr>
<th>Journey Purpose</th>
<th>Male</th>
<th>Female</th>
</tr>
</thead>
<tbody>
<tr>
<td>Misc.</td>
<td>62%</td>
<td>38%</td>
</tr>
<tr>
<td>Study</td>
<td>37%</td>
<td>63%</td>
</tr>
<tr>
<td>VFR</td>
<td>43%</td>
<td>53%</td>
</tr>
<tr>
<td>Holiday</td>
<td>53%</td>
<td>40%</td>
</tr>
<tr>
<td>Business</td>
<td>70%</td>
<td>30%</td>
</tr>
</tbody>
</table>

Source: International Passenger Survey by ONS, % of ‘don’t know’ for gender ratio not displayed – these visits are also excluded from the age group trend.

### Age group trend (visits in 000s)

<table>
<thead>
<tr>
<th>Year</th>
<th>0-15</th>
<th>16-24</th>
<th>25-34</th>
<th>35-44</th>
<th>65+</th>
<th>Not Known</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td>311</td>
<td>443</td>
<td>344</td>
<td>322</td>
<td>223</td>
<td>106</td>
</tr>
<tr>
<td>2017</td>
<td>311</td>
<td>443</td>
<td>344</td>
<td>322</td>
<td>223</td>
<td>106</td>
</tr>
<tr>
<td>2016</td>
<td>311</td>
<td>443</td>
<td>344</td>
<td>322</td>
<td>223</td>
<td>106</td>
</tr>
<tr>
<td>2015</td>
<td>311</td>
<td>443</td>
<td>344</td>
<td>322</td>
<td>223</td>
<td>106</td>
</tr>
<tr>
<td>2014</td>
<td>311</td>
<td>443</td>
<td>344</td>
<td>322</td>
<td>223</td>
<td>106</td>
</tr>
</tbody>
</table>

Source: International Passenger Survey by ONS.
1.3 Visitor demographics: travel companions

Who have Italian visitors to the UK travelled with?

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 in (000) 2014

The largest proportion of Italian visitors who came to the UK reside in the regions of Lombardia, Lazio and Venice.

The largest urban areas in terms of inhabitants include Rome, Milan, Naples, Turin, Bergamo, Palermo and Genoa.

Visits in 000s | % share of visits

- High
- Medium
- Low

Source: International Passenger Survey by ONS, CIA World Factbook 2019
1.4 The UK and its competitors

Market size, share and growth potential

The UK was the 4th most visited destination by Italian travellers in 2018, behind France, Spain and Germany, ahead of Greece. Forecasts suggest there is the potential for 26% growth in the number of visits to the UK over the next decade (2018-2028).

Of those who came to Britain for a holiday, France was the most considered alternative destination whilst about one in four decided to travel to Britain without looking into alternative destinations.

Of the almost 79 million overnight trips of the resident population in Italy (+20% on 2017), 79% were taken to domestic destinations in 2018. The remaining trips were mostly directed towards EU destination (up 31% on 2017). France was the most frequented destination for short holidays, Spain for long holidays.

Source: Oxford Economics (outbound overnight trips), VisitBritain/IPSOS 2016, Istat 2018
1.4 The UK and its competitors

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

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
Chapter 2: Experiences and perceptions
2.1 Inbound activities

Almost three in five Italian visits involve dining in restaurants; more than half feature shopping. Going to the pub is also very popular.

About half of Italian holiday visitors spend time visiting parks or gardens or involve a trip to museums or art galleries or sightseeing of famous monuments/buildings. Almost as many also feature a visit to castles or historic houses.

More than one in five Italians on holiday in the UK go on a guided tour or like to socialise with locals. A similar proportion of Italians enjoy walking in the countryside.

Around 13,000 Italian visits per annum feature time watching live football.

97% of Italian visitors are either ‘Very’ or ‘Extremely’ likely to recommend Britain for a holiday or short-break.

Source: International Passenger Survey by ONS, rankings based on 2007-2017 data

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

1. Dining in restaurants
2. Going shopping
3. Going to the pub
4. Sightseeing famous monuments/buildings
5. Visiting parks or gardens
6. Visiting museums and 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 consult: visitbritain.org/activities-undertaken-britain
2.1 Inbound activities

Propensity to visit museums and art galleries

- **VFR: visited museums and art galleries**
  - Italy: 29%
  - All markets: 23%

- **Holiday: visited museums and art galleries**
  - Italy: 50%
  - All markets: 48%

- **All journey purposes: visited museums and art galleries**
  - Italy: 35%
  - All markets: 28%

Source: International Passenger Survey by ONS, 2016

Propensity to visit built heritage sites

- **VFR: visited religious buildings**
  - Italy: 17%
  - All markets: 18%

- **VFR: visited castles/historic houses**
  - Italy: 20%
  - All markets: 23%

- **Holiday: visited religious buildings**
  - Italy: 32%
  - All markets: 35%

- **Holiday: visited castles/historic houses**
  - Italy: 45%
  - All markets: 48%

- **All journey purposes: visited religious buildings**
  - Italy: 23%
  - All markets: 20%

- **All journey purposes: visited castles/historic houses**
  - Italy: 30%
  - All markets: 28%
## 2.1 Inbound activities

### Propensity to attend the performing arts

<table>
<thead>
<tr>
<th>Event Description</th>
<th>Italy</th>
<th>All markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Holiday: attended a live music event</td>
<td>7%</td>
<td>10%</td>
</tr>
<tr>
<td>All journey purposes: attended a live music event</td>
<td>5%</td>
<td>7%</td>
</tr>
<tr>
<td>All journey purposes: attended a festival</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>All journey purposes: went to the theatre/musical/opera/ballet</td>
<td>7%</td>
<td>9%</td>
</tr>
<tr>
<td>VFR: attended a festival</td>
<td>2%</td>
<td>3%</td>
</tr>
<tr>
<td>VFR: went to the theatre/musical/opera/ballet</td>
<td>6%</td>
<td>8%</td>
</tr>
<tr>
<td>Holiday: attended a festival</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>Holiday: went to the theatre/musical/opera/ballet</td>
<td>8%</td>
<td>14%</td>
</tr>
</tbody>
</table>

### Number who went to watch sport live during trip (000s)

- **Football**: 13
- **Rugby**: 4
- **Cricket**: 2
- **Horse racing**: 2

Source: International Passenger Survey by ONS, 2016 (performing arts) and 2013 (watch sport live). NB data for watching individual sports is based on a small sample size.
2.1 Inbound activities

Propensity to go for a walk

- **Holiday: Walking along the coast**
  - Italy: 8%
  - All markets: 11%

- **Holiday: Walking in the countryside**
  - Italy: 21%
  - All markets: 26%

- **VFR: Walking along the coast**
  - Italy: 10%
  - All markets: 11%

- **VFR: Walking in the countryside**
  - Italy: 21%
  - All markets: 28%

- **All journey purposes: Walking along the coast**
  - Italy: 7%
  - All markets: 8%

- **All journey purposes: Walking in the countryside**
  - Italy: 16%
  - All markets: 20%

Source: International Passenger Survey by ONS, 2016 (visiting parks and gardens and a national park), 2010 (walking along the coast) and 2007 (walking in the countryside)

Propensity to visit a park or garden, or a national park

- **Holiday: Visiting a National Park**
  - Italy: 7%
  - All markets: 11%

- **All journey purposes: Visiting a National Park**
  - Italy: 5%
  - All markets: 7%

- **VFR: Visiting parks or gardens**
  - Italy: 32%
  - All markets: 32%

- **Holiday: Visiting parks or gardens**
  - Italy: 36%
  - All markets: 51%

- **All journey purposes: Visiting parks or gardens**
  - Italy: 32%
  - All markets: 32%

Source: International Passenger Survey by ONS, 2016 (visiting parks and gardens and a national park), 2010 (walking along the coast) and 2007 (walking in the countryside)
2.1 Inbound activities

Propensity to go to a pub, and to socialise with locals

- VFR: socialising with the locals
  - Italy: 37%
  - All markets: 45%
- VFR: went to pub
  - Italy: 44%
  - All markets: 49%
- Holiday: socialising with the locals
  - Italy: 22%
  - All markets: 32%
- Holiday: went to pub
  - Italy: 44%
  - All markets: 48%
- Business: socialising with the locals
  - Italy: 10%
  - All markets: 15%
- Business: went to pub
  - Italy: 23%
  - All markets: 24%
- All journey purposes: socialising with the locals
  - Italy: 24%
  - All markets: 32%
- All journey purposes: went to pub
  - Italy: 39%
  - All markets: 42%

Source: International Passenger Survey by ONS, 2008 (dining in restaurants) and 2017 (all other activities)

Propensity to go to restaurants, or bars and night clubs

- VFR: went to bars or night clubs
  - Italy: 14%
  - All markets: 59%
- VFR: dining in restaurants
  - Italy: 59%
  - All markets: 62%
- Holiday: went to bars or night clubs
  - Italy: 15%
  - All markets: 70%
- Holiday: dining in restaurants
  - Italy: 60%
  - All markets: 70%
- Business: went to bars or night clubs
  - Italy: 9%
  - All markets: 52%
- Business: dining in restaurants
  - Italy: 57%
  - All markets: 61%
- All journey purposes: went to bars or night clubs
- All journey purposes: dining in restaurants
2.1 Inbound activities

Propensity to go shopping

- All journey purposes: went shopping
  - Italy: 18%
  - All markets: 21%
  - VFR: went shopping
    - Italy: 51%
    - All markets: 54%
  - Holiday: went shopping
    - Italy: 64%
    - All markets: 69%
  - Business: went shopping
    - Italy: 58%
    - All markets: 61%

Propensity to purchase selected items

- None of these
  - Italy: 36%
  - All markets: 38%
- Other holiday souvenir (not listed)
  - Italy: 16%
  - All markets: 20%
- Items for your home e.g. furnishing
  - Italy: 3%
  - All markets: 3%
- Electrical or electronic items e.g. TVs, mobile phones
  - Italy: 2%
  - All markets: 5%
- CDs, DVDs, computer games etc
  - Italy: 4%
  - All markets: 5%
- Food or drink
  - Italy: 9%
  - All markets: 9%
- Games, toys or gifts for children
  - Italy: 11%
  - All markets: 13%
- Books or stationery
  - Italy: 8%
  - All markets: 12%
- Bags, purses etc
  - Italy: 9%
  - All markets: 10%
- Personal accessories e.g. jewellery
  - Italy: 10%
  - All markets: 10%
- Clothes or shoes
  - Italy: 45%
  - All markets: 41%

Source: International Passenger Survey by ONS, 2017 (shopping) and 2013 (purchase of selected items)
2.1 Inbound activities

Propensity to participate in an English language course during a visit to the UK

- Belgium: 1%
- France: 2%
- Spain: 3%
- Germany: 3%
- Italy: 2%
- Switzerland: 1%

% of all visits

Propensity to visit a literary, music, TV or film location

- Holiday: visited literary, music, TV, or film locations
  - Italy: 8%
  - All markets: 9%

- All journey purposes: visited literary, music, TV, or film locations
  - Italy: 5%
  - All markets: 5%

Source: International Passenger Survey by ONS, 2017 (literary, music, TV or film location) 2018. Did you go on any English language courses during this visit? Displayed as % of all visits to the UK from each country that included participation in an English language course.
2.2 Welcome and recommending Britain

Feeling of ‘welcome’ in Britain

- Very Welcome:
  - Italy: 80%
  - All market average: 82%
- Welcome:
  - Italy: 16%
  - All market average: 15%
- Neither:
  - Italy: 3%
  - All market average: 2%
- Unwelcome:
  - Italy: 0%
  - All market average: 0%
- Very Unwelcome:
  - Italy: 0%
  - All market average: 0%

Likelihood to recommend Britain

- Extremely likely:
  - Italy: 80%
  - All market average: 82%
- Likely:
  - Italy: 17%
  - All market average: 15%
- Neutral:
  - Italy: 2%
  - All market average: 2%
- Unlikely:
  - Italy: 0%
  - All market average: 0%
- Not likely at all:
  - Italy: 0%
  - All market average: 0%

Source: International Passenger Survey by ONS, 2017
2.3 Perceptions of the UK

The Italians rate the UK highly for contemporary culture, vibrant cities, sports and historic buildings and monuments, but less for welcome and scenic natural beauty; the UK was rated 17th and 31st out of fifty nations respectively on these two attributes in 2019. Museums, music, sports, and pop videos are the cultural products/services most strongly associated with the UK among the Italians. A trip to the UK would be expected to be ‘Fascinating’ and ‘Educational’ 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.

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, 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.

Source: Anholt-Ipsos Nation Brands Index 2013, 2018 and 2019, Arkenford 2013
### 2.3 Perceptions of the UK

UK’s ranking (out of 50 nations)

<table>
<thead>
<tr>
<th>Measure</th>
<th>Italian respondents</th>
<th>All respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall Nation Brand</td>
<td>2</td>
<td>4</td>
</tr>
<tr>
<td>Culture (overall)</td>
<td>2</td>
<td>5</td>
</tr>
<tr>
<td>The country has a rich cultural heritage</td>
<td>3</td>
<td>7</td>
</tr>
<tr>
<td>The country is an interesting and exciting place for contemporary culture such as music, films, art and literature</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>The country excels at sports</td>
<td>5</td>
<td>5</td>
</tr>
<tr>
<td>People (overall)</td>
<td>8</td>
<td>7</td>
</tr>
<tr>
<td>If I visited the country, the people would make me feel welcome</td>
<td>17</td>
<td>16</td>
</tr>
<tr>
<td>Tourism (overall)</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>Would like to visit the country if money was no object</td>
<td>5</td>
<td>6</td>
</tr>
<tr>
<td>The country is rich in natural beauty</td>
<td>31</td>
<td>26</td>
</tr>
<tr>
<td>The country is rich in historic buildings and monuments</td>
<td>5</td>
<td>5</td>
</tr>
<tr>
<td>The country has a vibrant city life and urban attractions</td>
<td>3</td>
<td>4</td>
</tr>
</tbody>
</table>

Source: Anholt-Ipsos Nation Brands Index 2019
2.3 Perceptions of the UK

Cultural associations with the UK

- Museums: 47% (Italy), 43% (All markets)
- Music: 34% (Italy), 39% (All markets)
- Films: 30% (Italy), 31% (All markets)
- Sports: 20% (Italy), 23% (All markets)
- Modern Design: 15% (Italy), 14% (All markets)
- Pop videos: 9% (Italy), 11% (All markets)
- Opera: 7% (Italy), 14% (All markets)
- Sculpture: 9% (Italy), 5% (All markets)
- Circus: 9% (Italy), 6% (All markets)
- Street Carnival: 5% (Italy), 9% (All markets)

Adjectives describing a potential trip to the UK

- Educational: 34% (Italy), 35% (All markets)
- Fascinating: 32% (Italy), 38% (All markets)
- Exciting: 21% (Italy), 12% (All markets)
- Relaxing: 17% (Italy), 10% (All markets)
- Romantic: 16% (Italy), 11% (All markets)
- Spiritual: 8% (Italy), 5% (All markets)
- Stressful: 6% (Italy), 4% (All markets)
- Boring: 5% (Italy), 2% (All markets)
- Risky: 5% (Italy), 2% (All markets)
- Depressing: 5% (Italy), 2% (All markets)

Source: Anholt-Ipsos Nation Brands Index 2019
### 2.3 Perceptions of Britain

Holiday wants and % saying destination is best place for...

<table>
<thead>
<tr>
<th>Importance</th>
<th>GB</th>
<th>FR</th>
<th>GE</th>
<th>AU</th>
<th>US</th>
<th>NL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Offers good value for money</td>
<td>13%</td>
<td>15%</td>
<td>14%</td>
<td>12%</td>
<td>13%</td>
<td>17%</td>
</tr>
<tr>
<td>Explore the place</td>
<td>14%</td>
<td>15%</td>
<td>11%</td>
<td>51%</td>
<td>41%</td>
<td>15%</td>
</tr>
<tr>
<td>Enjoy the beauty of the landscape</td>
<td>17%</td>
<td>27%</td>
<td>7%</td>
<td>60%</td>
<td>39%</td>
<td>15%</td>
</tr>
<tr>
<td>Do what I want when I want spontaneously</td>
<td>21%</td>
<td>14%</td>
<td>7%</td>
<td>28%</td>
<td>28%</td>
<td>19%</td>
</tr>
<tr>
<td>Have fun and laughter</td>
<td>20%</td>
<td>14%</td>
<td>9%</td>
<td>23%</td>
<td>32%</td>
<td>22%</td>
</tr>
<tr>
<td>The people are friendly and welcoming</td>
<td>16%</td>
<td>17%</td>
<td>13%</td>
<td>30%</td>
<td>25%</td>
<td>20%</td>
</tr>
<tr>
<td>Broaden my mind/ Stimulate my thinking</td>
<td>22%</td>
<td>19%</td>
<td>11%</td>
<td>47%</td>
<td>42%</td>
<td>18%</td>
</tr>
<tr>
<td>Enjoy peace &amp; quiet</td>
<td>10%</td>
<td>16%</td>
<td>8%</td>
<td>38%</td>
<td>10%</td>
<td>16%</td>
</tr>
<tr>
<td>Enjoy local specialties (food and drink)</td>
<td>9%</td>
<td>38%</td>
<td>12%</td>
<td>13%</td>
<td>9%</td>
<td>8%</td>
</tr>
<tr>
<td>Chill/ slow down to a different pace of life</td>
<td>10%</td>
<td>15%</td>
<td>7%</td>
<td>27%</td>
<td>13%</td>
<td>14%</td>
</tr>
<tr>
<td>Experience things that are new to me</td>
<td>21%</td>
<td>14%</td>
<td>11%</td>
<td>62%</td>
<td>49%</td>
<td>15%</td>
</tr>
<tr>
<td>Do something the children would really enjoy</td>
<td>19%</td>
<td>33%</td>
<td>17%</td>
<td>28%</td>
<td>45%</td>
<td>16%</td>
</tr>
<tr>
<td>A good place to visit at any time of year</td>
<td>20%</td>
<td>27%</td>
<td>15%</td>
<td>31%</td>
<td>33%</td>
<td>17%</td>
</tr>
<tr>
<td>Visit a place with a lot of history/historic sites</td>
<td>38%</td>
<td>46%</td>
<td>20%</td>
<td>7%</td>
<td>15%</td>
<td>11%</td>
</tr>
<tr>
<td>Feel connected to nature</td>
<td>11%</td>
<td>11%</td>
<td>7%</td>
<td>64%</td>
<td>27%</td>
<td>11%</td>
</tr>
<tr>
<td>Experience activities/places with a wow factor</td>
<td>15%</td>
<td>16%</td>
<td>10%</td>
<td>52%</td>
<td>48%</td>
<td>10%</td>
</tr>
<tr>
<td>See world famous sites and places</td>
<td>43%</td>
<td>47%</td>
<td>18%</td>
<td>24%</td>
<td>51%</td>
<td>12%</td>
</tr>
<tr>
<td>It offers unique holiday experiences</td>
<td>19%</td>
<td>19%</td>
<td>12%</td>
<td>55%</td>
<td>50%</td>
<td>14%</td>
</tr>
<tr>
<td>Get off the beaten track</td>
<td>10%</td>
<td>9%</td>
<td>9%</td>
<td>38%</td>
<td>17%</td>
<td>12%</td>
</tr>
<tr>
<td>Have dedicated time with my other half</td>
<td>24%</td>
<td>41%</td>
<td>14%</td>
<td>28%</td>
<td>30%</td>
<td>18%</td>
</tr>
<tr>
<td>Provides a wide range of holiday experiences</td>
<td>23%</td>
<td>26%</td>
<td>14%</td>
<td>42%</td>
<td>53%</td>
<td>14%</td>
</tr>
<tr>
<td>Easy to get around by public transport</td>
<td>39%</td>
<td>31%</td>
<td>27%</td>
<td>15%</td>
<td>34%</td>
<td>23%</td>
</tr>
<tr>
<td>Be physically healthier</td>
<td>14%</td>
<td>19%</td>
<td>14%</td>
<td>29%</td>
<td>22%</td>
<td>16%</td>
</tr>
<tr>
<td>Meet the locals</td>
<td>16%</td>
<td>7%</td>
<td>3%</td>
<td>40%</td>
<td>19%</td>
<td>16%</td>
</tr>
<tr>
<td>Revisit places of nostalgic importance to me</td>
<td>24%</td>
<td>27%</td>
<td>13%</td>
<td>15%</td>
<td>25%</td>
<td>4%</td>
</tr>
<tr>
<td>Enjoy high quality food and drink (gourmet food)</td>
<td>11%</td>
<td>43%</td>
<td>10%</td>
<td>12%</td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td>Good shopping</td>
<td>26%</td>
<td>21%</td>
<td>11%</td>
<td>9%</td>
<td>36%</td>
<td>9%</td>
</tr>
<tr>
<td>Party</td>
<td>27%</td>
<td>19%</td>
<td>21%</td>
<td>30%</td>
<td>47%</td>
<td>25%</td>
</tr>
<tr>
<td>Visit places important to my family's history</td>
<td>12%</td>
<td>16%</td>
<td>9%</td>
<td>23%</td>
<td>17%</td>
<td>8%</td>
</tr>
<tr>
<td>Do something environmentally sustainable/ green</td>
<td>19%</td>
<td>12%</td>
<td>32%</td>
<td>44%</td>
<td>13%</td>
<td>36%</td>
</tr>
<tr>
<td>Feel special or spoilt</td>
<td>20%</td>
<td>21%</td>
<td>12%</td>
<td>22%</td>
<td>27%</td>
<td>16%</td>
</tr>
<tr>
<td>Meet and have fun with other tourists</td>
<td>13%</td>
<td>20%</td>
<td>8%</td>
<td>31%</td>
<td>37%</td>
<td>25%</td>
</tr>
<tr>
<td>Do something useful like volunteering to help on a project</td>
<td>18%</td>
<td>17%</td>
<td>13%</td>
<td>26%</td>
<td>15%</td>
<td>24%</td>
</tr>
<tr>
<td>To participate in an active pastime or sport</td>
<td>26%</td>
<td>16%</td>
<td>9%</td>
<td>23%</td>
<td>23%</td>
<td>11%</td>
</tr>
<tr>
<td>Go somewhere that provided lots of laid on entertainment/nightlife</td>
<td>43%</td>
<td>32%</td>
<td>28%</td>
<td>27%</td>
<td>53%</td>
<td>35%</td>
</tr>
<tr>
<td>Experience adrenalin filled adventures</td>
<td>16%</td>
<td>7%</td>
<td>5%</td>
<td>54%</td>
<td>61%</td>
<td>21%</td>
</tr>
<tr>
<td>Watch a sporting event</td>
<td>32%</td>
<td>27%</td>
<td>32%</td>
<td>22%</td>
<td>35%</td>
<td>19%</td>
</tr>
<tr>
<td>Fashionable destination</td>
<td>28%</td>
<td>31%</td>
<td>11%</td>
<td>27%</td>
<td>49%</td>
<td>12%</td>
</tr>
</tbody>
</table>

Source: VisitBritain/Arkenford 2013
2.3 Perceptions of the UK

Motivations for choosing Britain as a holiday destination

- Cultural attractions: 42% (Italy), 45% (All markets)
- Wide variety of places to visit: 27% (Italy), 25% (All markets)
- Wanted to go somewhere new: 25% (Italy), 23% (All markets)
- Vibrant cities: 25% (Italy), 22% (All markets)
- Countryside/natural beauty: 27% (Italy), 22% (All markets)
- Easy to get around: 29% (Italy), 22% (All markets)
- Somewhere English-spoken: 21% (Italy), 22% (All markets)
- Visiting friends or relatives: 21% (Italy), 22% (All markets)
- Ease of getting to the country: 25% (Italy), 21% (All markets)
- A culture different from own: 19% (Italy), 18% (All markets)
- A mix of old and new: 19% (Italy), 18% (All markets)
- Contemporary culture: 18% (Italy), 18% (All markets)
- Try local food and drink: 21% (Italy), 17% (All markets)
- A good deal: 20% (Italy), 16% (All markets)
- Security / safety: 17% (Italy), 16% (All markets)
- Accommodation (variety & quality): 16% (Italy), 14% (All markets)
- Easy to get plan/organise: 17% (Italy), 16% (All markets)
- Meeting locals: 14% (Italy), 12% (All markets)
- Wide range of holiday activities: 13% (Italy), 12% (All markets)
- The climate / weather: 12% (Italy), 12% (All markets)
- Cost of staying in the destination: 11% (Italy), 12% (All markets)
- Watching sport: 9% (Italy), 10% (All markets)
- Visit a film/TV location: 7% (Italy), 8% (All markets)
- Easy to visit with children: 8% (Italy), 5% (All markets)

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

Sought-after Britain activities

- Enjoy a traditional afternoon tea: 61% (Italy), 57% (All markets)
- Take a canal boat tour through the waterways of England: 53% (Italy), 55% (All markets)
- Stay the night in a fairy-tale castle: 54% (Italy), 47% (All markets)
- Visit Windsor Castle where Harry and Meghan got married: 51% (Italy), 50% (All markets)
- Go hiking on the South West coast: 49% (Italy), 40% (All markets)
- Spot wildlife in the Scottish Highlands: 49% (Italy), 42% (All markets)
- A food tour of one of London's best foodie markets: 52% (Italy), 45% (All markets)
- Walk along Hadrian's wall in Northern England: 53% (Italy), 45% (All markets)
- Visit Madame Tussauds: 47% (Italy), 41% (All markets)
- Drive through the countryside of England: 47% (Italy), 41% (All markets)
- Ride the scenic ‘Hogwarts Express’ (Harry Potter train) through the Scottish highlands: 45% (Italy), 39% (All markets)
- Take a street art tour in one of Britain's modern cities: 39% (Italy), 37% (All markets)
- Hunt for The Loch Ness Monster with a boat cruise on Loch Ness: 36% (Italy), 36% (All markets)
- Explore the Beatles Story in their home city of Liverpool: 32% (Italy), 32% (All markets)
- Relax in Bath spa's rooftop pool: 35% (Italy), 35% (All markets)
- Share stories over a pint with locals in a cosy rural pub: 35% (Italy), 34% (All markets)
- Experience a zip line adventure in Wales: 28% (Italy), 27% (All markets)
- Do a cycle tour in Britain: 31% (Italy), 30% (All markets)
- Shop for quirky gifts in a seaside town: 34% (Italy), 34% (All markets)
- Visit locations from my favourite TV/film shows filmed on location in Britain: 30% (Italy), 30% (All markets)

Source: Anholt-Ipsos 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. Top 20 activities shown; for full list please see report at visitbritain.org/understanding-international-visitors
Chapter 3: Understanding the market
3.1 Structural drivers

Demographics & society

The Italian population is about 60 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.

Source: Oxford Economics, CIA World Factbook 2019
3.1 Structural drivers: general market overview

General market conditions

Italy is the UK’s eighth largest source market in terms of visits and seventh most valuable for visitor spending in 2018.
The Italian economy grew marginally by 0.1% in the third quarter of 2019. GDP levels in 2018 and 2019 were very similar and the trend is forecast to continue for 2020 to show only little growth just above zero.

As a result domestic demand remains weak and the external environment (e.g. slowing in the Eurozone) provides further potential headwinds which pose a risk to the downside.
Whilst inflation remains low, the labour market continues to struggle in an almost stagnant environment. Job creation, however, picked up in H1 2019, but remained more volatile in Q3 2019.
A new government was sworn in in September 2019.

Key demographic and economic data

<table>
<thead>
<tr>
<th>Measure (2018 data)</th>
<th>Italy</th>
<th>Eurozone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Population (m)</td>
<td>60.4</td>
<td>338.4</td>
</tr>
<tr>
<td>GDP per capita PPP (US$)</td>
<td>37,738</td>
<td>43,551</td>
</tr>
<tr>
<td>Annual average GDP growth over past decade (%)</td>
<td>-0.3</td>
<td>0.8</td>
</tr>
<tr>
<td>Annual average GDP growth in 2018 (%)</td>
<td>0.7</td>
<td>1.9</td>
</tr>
</tbody>
</table>

Source: Oxford Economics

Economic indicators (%)

<table>
<thead>
<tr>
<th>Indicator</th>
<th>2017</th>
<th>2018</th>
<th>2019</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Real GDP growth</td>
<td>1.8</td>
<td>0.7</td>
<td>0.2</td>
<td>0.3</td>
</tr>
<tr>
<td>Real consumer spending growth</td>
<td>1.5</td>
<td>0.8</td>
<td>0.4</td>
<td>0.3</td>
</tr>
<tr>
<td>Unemployment rate</td>
<td>11.3</td>
<td>10.6</td>
<td>10.0</td>
<td>9.9</td>
</tr>
</tbody>
</table>

Source: Oxford Economics
3.1 Structural drivers: demographic and social indicators

Population dynamics

<table>
<thead>
<tr>
<th>Measure</th>
<th>2018 estimate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total population (m)</td>
<td>60.4</td>
</tr>
<tr>
<td>Median age</td>
<td>46 years old</td>
</tr>
<tr>
<td>Overall growth rate (2018-2022)</td>
<td>-0.8%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Indicator</th>
<th>1980</th>
<th>2015</th>
<th>2030</th>
<th>2050</th>
</tr>
</thead>
<tbody>
<tr>
<td>Median age in years</td>
<td>34.1</td>
<td>45.4</td>
<td>50.8</td>
<td>53.6</td>
</tr>
</tbody>
</table>

Italy's population has a population of about 60 million with a median age of 46 years. The Italian population is ageing and this country 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 70% of Italians live in cities (World Bank est.). 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 2019 there were 275,000 High Net Worth Individuals (HNWI)* resident in Italy in 2018, slightly up on 2017. It is Europe’s fifth largest and globally the ninth largest HNWI population.

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 at visitbritain.org/visitor-economy-facts.

Source. Bank of England
3.2 Consumer trends

Most overnight trips taken by the Italian resident population are trips within Italy to domestic destinations (79%) with outbound trips comprising 21% (in 2018).

Most of the overnight travel abroad is to other countries in Europe (84%). Among non-European destinations the USA was the most visited country for long holidays.

The average duration of trips slightly dropped to 5.5 nights (5.7 nights for holiday trips and 4.1 for business trips), corresponding to an amount of 432 million nights in 2018 (although the number of nights rose +14% compared with 2017, as the volume of trips was up).

Trips to the sea are the most common type of leisure trips in each destination (46% of leisure trips). Although in 2018 there was an increase of more than 30% in holidays in Italian cities, destinations abroad continue to attract more tourists than Italy amongst those who want to go on a cultural city trip (69% vs. 34%).

Sources: Istat 2019, Flash Eurobarometer 432 by EC 2016: During 2015, how many times did you travel for professional or personal reasons where you were away from home for a minimum of one night?
3.2 Consumer trends: overall travel trends

Travel trends

In 2018, the resident population in Italy took more than an estimated 78 million overnight trips (an increase of 20% on 2017), totalling at more than 431 million nights away from home (+14%).

Most of these overnight trips were taken for leisure (89%). Just over one in ten (11%) of the overnight trips had a business purpose.

Taking a closer look at the purpose of holidays, about half of all such trips taken in 2018 were for recreation and relaxation. 21% of Italian holidaymakers were looking for cultural activities. Holidays visiting artistic, architectural and archaeological heritage were more often to a destination abroad (38%) than within Italy (17%).

Italians most often went on holidays by car (59% of such trips) in 2018, especially for short holidays (71%, up 28% on 2017). Airplane and train were less used by Italians (20% and 10% respectively).

France was the main destination for short holidays taken by Italians in 2018 (18% of outbound short trips).

13% of long holidays taken by Italians were spent in Spain in the same year, and Spain also was the preferred country for business trips (13% of all business trips taken abroad). Among non-European destinations, the USA was the most visited country for long holidays (2%) and also for business trips (4%).

In 2019, almost one in four Italian travellers (23%) used a travel agency to make their reservation. Among the prevailing motivations, they stated the peace of mind of being given the correct information (32%), the management of the entire travel package – including the insurance – (29%), the experience of the agent or consultant (26%) and the assistance in the planning phase (25%).

The Italian travel market was worth €58.3bn in 2018 which marks a 2% increase on 2017. The growth was mainly driven by the digital side of the market which generated a total value of €14.2bn in 2018 (up 8% on the previous year) (Osservatorio Innovazione Digitale nel Turismo della School of Management del Politecnico di Milano).

Source: Istat 2019, Phocuswright 2017- (Osservatorio Innovazione Digitale nel Turismo della School of Management del Politecnico di Milano)
3.2 Consumer trends: motivation and attitudes to holidays

Volume of Italian trips in 2018 by duration and journey purpose (000s)

<table>
<thead>
<tr>
<th>Type</th>
<th>Volume</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business trips</td>
<td>8,870</td>
</tr>
<tr>
<td>Long holidays (4 nights +)</td>
<td>36,480</td>
</tr>
<tr>
<td>Short holidays (1-3 nights)</td>
<td>33,590</td>
</tr>
</tbody>
</table>

Average length of stay of Italian trips in 2018 (nights)

<table>
<thead>
<tr>
<th>Type</th>
<th>Length</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business trips</td>
<td>4.1</td>
</tr>
<tr>
<td>Long holidays (4 nights +)</td>
<td>9.1</td>
</tr>
<tr>
<td>Short holidays (1-3 nights)</td>
<td>1.9</td>
</tr>
</tbody>
</table>

Motivation and attitudes to holidays

For Italians, top motivations to choose Britain as a holiday destination include: cultural attractions, somewhere where English is spoken, a place that is new to them, the ease of getting around, vibrant cities and a culture that is different from their own.

The Italian traveller, in general, tends to be exigent and places high importance on good living. Authenticity of the travel experience and value for money are often important to them.

Sources: Flash Eurobarometer 432 by EC 2016: During 2015, how many times did you travel for professional or personal reasons where you were away from home for a minimum of one night?, VisitBritain/IPSOS 2016, Istat 2019
3.2 Consumer trends: reasons for holidays

### Main reasons for going on holiday (%)

<table>
<thead>
<tr>
<th>Reason</th>
<th>Italy</th>
<th>EU28</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sun/beach</td>
<td>36%</td>
<td>39%</td>
</tr>
<tr>
<td>Visiting family/friends/relatives</td>
<td>28%</td>
<td>38%</td>
</tr>
<tr>
<td>Nature</td>
<td>18%</td>
<td>31%</td>
</tr>
<tr>
<td>City trips</td>
<td>13%</td>
<td>36%</td>
</tr>
<tr>
<td>Culture</td>
<td>30%</td>
<td>26%</td>
</tr>
<tr>
<td>Wellness/Spa/health treatment</td>
<td>16%</td>
<td>13%</td>
</tr>
<tr>
<td>Sport-related activities</td>
<td>9%</td>
<td>12%</td>
</tr>
<tr>
<td>Specific events</td>
<td>9%</td>
<td>9%</td>
</tr>
</tbody>
</table>

Amongst the main reasons for going on a holiday for Italian travellers are: sun/beach and city trips followed by culture and visiting family/friends/relatives.

### Reasons to return to the same destination for a holiday (%)

<table>
<thead>
<tr>
<th>Reason</th>
<th>Italy</th>
<th>EU28</th>
</tr>
</thead>
<tbody>
<tr>
<td>The natural features</td>
<td>34%</td>
<td>45%</td>
</tr>
<tr>
<td>The quality of the accommodation</td>
<td>17%</td>
<td>32%</td>
</tr>
<tr>
<td>Cultural and historical attractions</td>
<td>26%</td>
<td>31%</td>
</tr>
<tr>
<td>The general level of prices</td>
<td>16%</td>
<td>24%</td>
</tr>
<tr>
<td>How tourists are welcomed</td>
<td>23%</td>
<td>21%</td>
</tr>
<tr>
<td>The activities/services available</td>
<td>13%</td>
<td>20%</td>
</tr>
<tr>
<td>Accessible facilities for people with special needs</td>
<td>2%</td>
<td>6%</td>
</tr>
</tbody>
</table>

Asked for reasons which would make them come back, about one in three Italians tend to value natural features. Cultural and historical attractions and the welcome are also found to be key for roughly one in four Italian respondents.

Source: Flash Eurobarometer 432 by EC 2016: What were your main reasons for going on holiday in 2015? Firstly? And then? and Which of the following would make you go back to the same place for a holiday? Firstly? And then?
3.3 Booking and planning

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.

Source: VisitBritain/IPSOS 2016
3.3 Booking and planning: booking channels and ticket sales

### How trips to Britain were booked: travel only

<table>
<thead>
<tr>
<th>Booking method</th>
<th>Italy</th>
<th>All markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online</td>
<td>91%</td>
<td>85%</td>
</tr>
<tr>
<td>Face-to-face</td>
<td>7%</td>
<td>10%</td>
</tr>
<tr>
<td>By phone</td>
<td>1%</td>
<td>4%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>1%</td>
<td>1%</td>
</tr>
</tbody>
</table>

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, vs. 27% global average).

### How trips to Britain were booked: accommodation only

<table>
<thead>
<tr>
<th>Booking method</th>
<th>Italy</th>
<th>All markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online</td>
<td>73%</td>
<td>70%</td>
</tr>
<tr>
<td>Face-to-face</td>
<td>9%</td>
<td>7%</td>
</tr>
<tr>
<td>By phone</td>
<td>1%</td>
<td>3%</td>
</tr>
<tr>
<td>Did not book/stayed with friends/relatives</td>
<td>16%</td>
<td>17%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>1%</td>
<td>2%</td>
</tr>
</tbody>
</table>

### How trips to Britain were booked: travel and accommodation (holiday)

<table>
<thead>
<tr>
<th>Booking method</th>
<th>Italy</th>
<th>All markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online</td>
<td>68%</td>
<td>64%</td>
</tr>
<tr>
<td>Face-to-face</td>
<td>28%</td>
<td>27%</td>
</tr>
<tr>
<td>By phone</td>
<td>2%</td>
<td>8%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>2%</td>
<td>1%</td>
</tr>
</tbody>
</table>

Source: VisitBritain/IPSOS 2016, base: visitors (online survey)
3.3 Booking and planning: booking channels and ticket sales

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 (1/2)

#### Decision lead-time for visiting Britain

<table>
<thead>
<tr>
<th>Lead time</th>
<th>Italy</th>
<th>All markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>6+ months</td>
<td>36%</td>
<td>45%</td>
</tr>
<tr>
<td>3-6 months</td>
<td>40%</td>
<td>31%</td>
</tr>
<tr>
<td>1-2 months</td>
<td>16%</td>
<td>13%</td>
</tr>
<tr>
<td>Less than 1 month</td>
<td>7%</td>
<td>5%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>2%</td>
<td>3%</td>
</tr>
</tbody>
</table>

#### Looking at options/prices

<table>
<thead>
<tr>
<th>Lead time</th>
<th>Italy</th>
<th>All markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>6+ months</td>
<td>13%</td>
<td>21%</td>
</tr>
<tr>
<td>3-6 months</td>
<td>46%</td>
<td>37%</td>
</tr>
<tr>
<td>1-2 months</td>
<td>28%</td>
<td>27%</td>
</tr>
<tr>
<td>Less than 1 month</td>
<td>10%</td>
<td>12%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>2%</td>
<td>4%</td>
</tr>
</tbody>
</table>

#### Deciding on the destination

<table>
<thead>
<tr>
<th>Lead time</th>
<th>Italy</th>
<th>All markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>6+ months</td>
<td>19%</td>
<td>32%</td>
</tr>
<tr>
<td>3-6 months</td>
<td>47%</td>
<td>38%</td>
</tr>
<tr>
<td>1-2 months</td>
<td>24%</td>
<td>19%</td>
</tr>
<tr>
<td>Less than 1 month</td>
<td>8%</td>
<td>7%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>2%</td>
<td>3%</td>
</tr>
</tbody>
</table>

#### Booking the trip

<table>
<thead>
<tr>
<th>Lead time</th>
<th>Italy</th>
<th>All markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>6+ months</td>
<td>7%</td>
<td>14%</td>
</tr>
<tr>
<td>3-6 months</td>
<td>40%</td>
<td>32%</td>
</tr>
<tr>
<td>1-2 months</td>
<td>30%</td>
<td>28%</td>
</tr>
<tr>
<td>Less than 1 month</td>
<td>20%</td>
<td>21%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>3%</td>
<td>5%</td>
</tr>
</tbody>
</table>

Source: VisitBritain/IPSOS 2016, base: visitors
3.3 Booking and planning: lead-times (2/2)

Decision lead-time for visiting Britain: commentary (see tables on previous slide)

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.

Source: VisitBritain/IPSOS 2016, base: visitors
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.

Whilst online sources are very popular for researching and making a destination choice, still about one in four Italians consult travel guidebooks.

More than 90% of the Italian population regularly watch TV. The reach of radio among Italians is higher than the Internet or newspapers.

The patterns of information consumption have changed with now more than three quarters of Italians using several sources across different media in 2018. Whilst access to multiple sources of media increases the exposure and reach, consumption is also often marked by fragmentation and increasingly short attention spans.

Source: VisitBritain/IPSOS 2016, Istat 2019, AGCOM 2018
3.4 Reaching the consumer: broadcast media, radio and papers

**Broadcast media**

Television is still the medium with the greatest information value, both as the most frequently used medium and for information purposes (both for perceived importance and reliability), reaching 91% of the population on an average day and thus ranking first.

At the end of 2018, there were 421 television channels that could be received nationwide on the main platforms. There are 138 free channels (DTT and TivùSat) and 222 paid services within the main national bouquets. Among the free channels, 104 are available on the DTT platform. Of the paid-for channels, 212 channels are available via satellite, while 25 can be accessed on DTT (Sky and Mediaset Premium). Pay offers have a total of 80 channels in high definition, of which 3 on DTT.

National public TV channels include RAI (main RAI1, RAI2, RAI3), Mediaset (Canale 5, Italia 1, Rete 4), La7

Netflix has 2 millions subscribers in Italy.

Sky's television offer consists of around 180 thematic channels, divided into packages. In addition to these, there are 25 pay-per-view channels of cinema, entertainment, sports and more (including 15 in HD), 5 optional channels with separate subscriptions and, for subscribers to TV, Family and Cinema packages, the channels Mediaset Premium at no additional cost.

**Radio**

52% of the population listen to the radio on an average day, placing it ahead of the Internet which is used by 50% on an average day, and also ahead of newspapers which 29% of the Italian population access on an average day.

The radio programmes are mainly characterised by music and entertainment programmes, while the information programmes are often aired for a shorter time (incl. radio news which cover sports, in-depth features, surveys, debate, commentary). RTL 102.5 is the leading channel with almost 7million listeners on an average day.

Source: Auditel/Censis 2019
3.4 Reaching the consumer: magazines and online media

Newspapers
Approximately 15.9 million Italians read a newspaper (print or its digital replica). It's the 30% of the adult population (aged 14+). 36% are women, 64% are men. The higher percentage of the readers (44%) are from 55yo onwards, followed by 35-54 (36%) and 14-34 (20%)
The main publishing houses are gathered in Milan (RCS for Il Corriere della Sera) and Rome (La Repubblica)
There are 21 national dailies and 44 regional dailies in Italy. The largest national newspapers include: Il Corriere della Sera (293,393) La Repubblica (254,970), Il Sole 24 Ore (91,938), Quotidiano Nazionale – Il Giorno, il Resto del Carlino, La Nazione (253,140) and La Gazzetta dello Sport (229,963).
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.

Source: Audipress Edition 2019/II, FIEG

Magazines
41 weekly magazines registered (FIEG), including newspaper supplements (13.3m Italians read a weekly magazine, 25% of the adult population, 68% of women, 47% of those aged 55+, followed by 33% of those aged 35-54) and 52 monthly magazines (11.8m Italians read a monthly magazine, 22% of the adult population, 40% of those aged 35-54, 32% of those aged 55+). Top 5 Italian travel magazines by circulation: Dove, Bell’Europa, Touring, In Viaggio and National Geographic Italia.

Media trends:
Travel sections are still featured in the most-read female/male weekly and monthly magazines. The online editions continue to grow and are well regarded. The online versions of the main newspapers have dedicated travel sections. Lifestyle in general, including food&drink trends, are very fashionable and widely featured in many outlets. Niche themes such as cycling routes, green holidays, and wellbeing are also featured. The media landscape, especially the traditional one, is quite stable.
3.4 Reaching the consumer: magazines and online media

Online and social media

There are 54.8 million Internet users in Italy which corresponds to 92% market penetration (an increase of 27% on 2018). There were 35 million social media users as of 2019 (+3% of 2018). Most Italians still browse the web via their desktop (59%) while 35% use their mobile phone.

35 million of active social media users in Italy which corresponds to 59% of the population.

The most popular social media platforms (by share of users in 2018) are Facebook (90%), Youtube (58%), Instagram (46%), Twitter (24%), Google+ (19%), LinkedIn (15%), Pinterest (14%) and Tumblr (4%).

Source: Statista 2018, We are social/Hootsuite 2019
3.4 Reaching the consumer: social media on holiday

Use of social media on holiday

- To keep in touch with people at home
- To post/upload photos of my holiday
- Look for recommendations for places to eat or drink
- I have not used social media at all on this type of holiday
- Share with others where you are / what you are doing while on holiday
- To help you plan / decide where to go or what to see or what to do
- Ask for advice on where to go or what to do
- Share my own advice or recommendations about visiting where I am

The Italians are heavy users of social media and digitally savvy in general.

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)?
3.4 Reaching the consumer: influences

Influences on destination choice

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)
Chapter 4: Access and travel trade
4.1 Access: key facts

98% 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. 78% of annual seat capacity in 2018 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.

Source: International Passenger Survey by ONS, Apex 2018, non-stop flights only
4.1 Access: mode of transport

Visits by mode of transport

Visits (000)

<table>
<thead>
<tr>
<th>Year</th>
<th>Air</th>
<th>Sea</th>
<th>Tunnel</th>
</tr>
</thead>
<tbody>
<tr>
<td>2005</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2006</td>
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<td></td>
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<tr>
<td>2017</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2018</td>
<td></td>
<td></td>
<td>1,763</td>
</tr>
</tbody>
</table>

Annual share by mode (2018)

- **Air**: 98% (Italy: 77%)
- **Sea**: 2%
- **Tunnel**: 1%

Sea and tunnel travel (000s) in 2018

- **Lorry**: 6 Tunnel, 12 Sea
- **Foot**: 5 Tunnel, 1 Sea
- **Coach**: 2 Tunnel, 1 Sea
- **Private Vehicle**: 4 Tunnel, 14 Sea

Source: International Passenger Survey by ONS
4.1 Access: capacity

Annual airline seat capacity trends

Source: Apex 2018: non-stop flights only.
*Please note that Thomas Cook Airlines ceased trading in 2019 and is grouped in ‘Other’ here.
4.1 Access: capacity

Destination airport annual seat capacity

- London - Gatwick: 26%
- London - Stansted: 23%
- London - Heathrow: 19%
- London - Luton: 8%
- Edinburgh: 6%
- Bristol: 4%
- Other: 4%

Origin Airport annual seat capacity

- Rome - Fiumicino: 15%
- Milan - Malpensa: 15%
- Milan - Linate: 11%
- Naples: 10%
- Rome - Ciampino: 9%
- Bologna - Guglielmo Marconi: 8%
- Turin - Caselle: 7%
- Other: 6%

Destination Airports with less than 4% annual seat share grouped in 'Other': Birmingham, Liverpool, East Midlands, Leeds/Bradford, Glasgow Intl. and Prestwick, Belfast, Cardiff, Newcastle, London Southend, Bournemouth, Doncaster Sheffield, Southampton, and Humberside.

Source: Apex 2018: non-stop flights only

Origin Airports with less than 3% annual seat share: Catania, Bari, Palermo, Florence, Genoa, Olbia, Cagliari, Brindisi, Ancona, Perugia, Pescara, Alghero, Trieste, Lamezia Terme, Comiso, Rimini, and Crotone.
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, with 1,617 companies, followed by Milan with 891. It is followed by Naples with 841.

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.

Tour operators and travel agents increasingly hold a presence on social media, mainly on Facebook and Instagram. Online travel agencies (OTA) 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%).

English language courses are also an important selling point for the trade and Britain is the most requested destination followed by Ireland and Malta.

Sources: TTG Italia 2018, trade feedback, Phocuswright, www.officinaturistica.it
4.2 Travel trade: Italian tour operators

Top operators in Italy in 2017/18

<table>
<thead>
<tr>
<th>Top Ten Tour Operators</th>
<th>Turnover €m</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alpitour</td>
<td>1,680</td>
</tr>
<tr>
<td>Gattinoni Group</td>
<td>820</td>
</tr>
<tr>
<td>Veratour</td>
<td>177</td>
</tr>
<tr>
<td>Quality group</td>
<td>150</td>
</tr>
<tr>
<td>Valtur &amp; Nicolaus</td>
<td>100</td>
</tr>
<tr>
<td>Boscolo Tours</td>
<td>100</td>
</tr>
</tbody>
</table>

The top major tour operators with a comprehensive Britain programme are:

Sources: Lagenzia di viaggi magazine, Travel Quotidiano, ANSA, Eden travel group, I Grandi Viaggi, Veratour, Gattinoni
4.2 Travel trade: Italian holidays

Public and local holidays

### National public holidays in 2020

<table>
<thead>
<tr>
<th>Date</th>
<th>National Holiday</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 January</td>
<td>New Year's Day</td>
</tr>
<tr>
<td>6 January</td>
<td>Epiphany</td>
</tr>
<tr>
<td>13 April</td>
<td>Easter Monday</td>
</tr>
<tr>
<td>25 April</td>
<td>Liberation Day</td>
</tr>
<tr>
<td>1 May</td>
<td>Labour Day</td>
</tr>
<tr>
<td>2 June</td>
<td>Republic Day</td>
</tr>
<tr>
<td>15 August</td>
<td>Assumption Day</td>
</tr>
<tr>
<td>1 November</td>
<td>All Saints Day</td>
</tr>
<tr>
<td>8 December</td>
<td>Immaculate Conception Day</td>
</tr>
<tr>
<td>25 December</td>
<td>Christmas Day</td>
</tr>
<tr>
<td>26 December</td>
<td>St. Stephen's Day</td>
</tr>
</tbody>
</table>

### Local Holidays in 2020

<table>
<thead>
<tr>
<th>Date</th>
<th>Local Holiday</th>
<th>Region</th>
</tr>
</thead>
<tbody>
<tr>
<td>29 June</td>
<td>Saint of the city</td>
<td>Rome</td>
</tr>
<tr>
<td>7 December</td>
<td>Saint of the city</td>
<td>Milan</td>
</tr>
</tbody>
</table>
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

Caring for the Consumer:

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.
Appendix
Useful links and further information
Appendix 1: Working with VisitBritain

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

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 ‘**I Travel For…**’ marketing campaign.

• **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.

To find out more information, browse:
- VisitBritain’s mission
- The Government’s Tourism Action Plan
- VisitBritain’s events
- ‘I Travel For…’ campaign
- The tourism sector deal
Appendix 1: Working with VisitBritain

VisitBritain’s global audience segments

In 2017-2019, VisitBritain 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 Understanding our consumers.

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

<table>
<thead>
<tr>
<th>Segments</th>
<th>Global market share</th>
<th>Market share in Italy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Buzzseekers</td>
<td>38%</td>
<td>25%</td>
</tr>
<tr>
<td>Explorers</td>
<td>23%</td>
<td>29%</td>
</tr>
<tr>
<td>Adventurers</td>
<td>16%</td>
<td>18%</td>
</tr>
<tr>
<td>Sightheers</td>
<td>12%</td>
<td>12%</td>
</tr>
<tr>
<td>Culture Buffs</td>
<td>12%</td>
<td>16%</td>
</tr>
</tbody>
</table>

Source: VisitBritain/Kubi Kalloo, 2017-2019
Appendix 2: Useful research resources

We have dedicated research and insights available which include:

- Latest monthly and quarterly data from the International Passenger Survey by ONS as well as by area of the UK
- Inbound Tourism Trends by Market
- Inbound activity data
- Sector-specific research
- 2020 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 pages or our inbound research & insights or contact us directly (Email: research@visitbritain.org)
Appendix 2: Useful research resources

We have dedicated market-specific research and insights available which include:

- Perceptions of Britain overseas
- Planning, decision-making and booking cycle of international leisure visitors to Britain on understanding international visitors
- Gateways in England, insights on overseas visitors to England’s regions, participation in leisure activities, multi-destination trips and more on visitor characteristics and behaviour
- 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 pages or our inbound research & insights or contact us directly (Email: research@visitbritain.org)
Appendix 3: Definitions, sources and information on this report

How to read the information in this market profile

Details on main sources

• The International Passenger Survey (IPS) is a UK-widespread 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. You can find out more and consult the release calendar, on our IPS webpage.

• Oxford Economics last updated the ‘Global Travel Service’ databank on 8th November 2019, other information on Italy on 19th November 2019.

• Apex was last updated with December 2018 data.

• UNWTO data are based on their latest Tourism Barometer and Statistical Annex, September 2019.

• 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 Anholt-Ipsos Nation Brands Index (NBI), was carried out online in July 2019 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.
Appendix 3: Definitions, sources and information on this report

How to read the information in this market profile

Useful definitions and abbreviations

• **VFR** means Visiting Friends and/or Relatives.

• **Misc** 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 USD1 million.

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 2018. 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

December 2019