



Welcome

Session B3- New Market Development:  
Understanding the Profile of International Visitation to  
Indian Country

Wednesday, September 19, 2018  
10:30am – 12:00pm



**AIANTA**  
American Indian Alaska Native  
Tourism Association

**To receive a Certificate of Completion, please provide information requested in the session sign-in sheet for each session attended**



# Expanding Outreach in Europe



Attracting Overseas Visitors to Indian Country from  
Italy and the United Kingdom

U.S. Department of Commerce | International Trade Administration



# Expanding Outreach in Europe

The 20<sup>th</sup> Annual American Indian Tourism Conference  
September 17-20, 2018  
Albuquerque, New Mexico

Chrystal Denys, London, United Kingdom

Luisa Salomoni, Milan, Italy

# Today's Discussion:

- Overview of basic data about the UK and Italy, which impacts your strategy for attracting British and Italian tourists
- Free sources of information for future research to understand the market and to vet potential partners
- Breakdown of UK and Italy outbound trends
- #AIANTAFAM & Promoting Indian Country in the UK and Italy

# Overseas Visitors to Indian Country

Out of 40 million overseas visitors, **2 million (5%)** visit Native American communities

70% of overseas travelers to Native American sites are on a vacation

**VS.**

58% of all overseas travelers are on a vacation

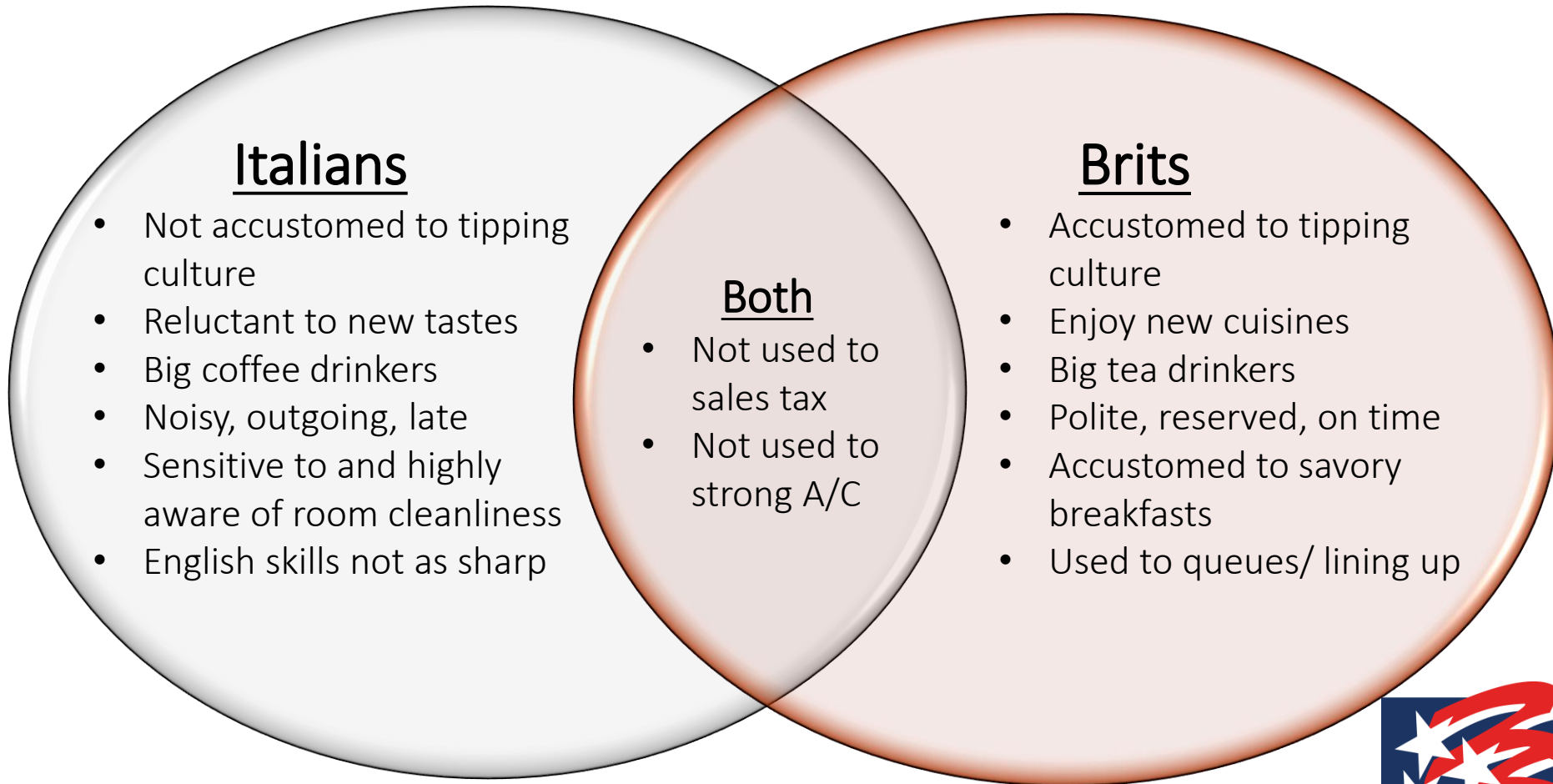
**By 2021, it is estimated that:**

- **48,642** jobs will be supported by international travelers to the U.S. who visit Indian Country
- **2.4 million** overseas travelers will visit Native American destinations

*Source: U.S. Department of Commerce, International Trade Administration, National Travel and Tourism Office*

# Italians and Brits on Holiday

## *Things to Know*





# Expanding Outreach in Europe



United Kingdom

# The United Kingdom

- Country Overview
- Sources of UK Market information
- Travel Trends
- Holiday Habits
- Flight Frequency
- Trade Shows





# Country Overview

- **Population**
  - 66.65 million
  - Approximately equivalent to the population of California and Florida combined
- **Geographic area**
  - Twice the size of Pennsylvania and slightly smaller than Oregon



# Sources of UK Market Information



Companies House



# UK Travel Trends

## Number of Visitors

In 2017, there were 72.8 million visits abroad by UK residents.

This 3% increase comfortably surpasses the previous record of 70.6 million set in 2016.

## Countries Visited

- |                |       |
|----------------|-------|
| 1. Spain       | 15.8m |
| 2. France      | 8.8m  |
| 3. Italy       | 4.1m  |
| 4. Ireland     | 3.4m  |
| 5. USA         | 3.4m  |
| 6. Germany     | 2.9m  |
| 7. Portugal    | 2.8m  |
| 8. Poland      | 2.7m  |
| 9. Netherlands | 2.6m  |
| 10. Greece     | 2.4m  |

## Spending

In 2017, there was a 3% rise in UK visitor spending globally.

However, UK visitor spending in the United States declined 11% from 2016, falling from \$5.89bn to \$5.26bn in 2017.

*Source: UK Office for National Statistics, Travel Trends 2017*



# UK Holiday Habits

## Booking Methods

Over 83% booked online, up from 75%. In-person bookings are holding steady at 17%, while Telephone bookings are down to 16%.

People from most affluent households are most likely to book in store. Also, 25% of young families.

## Devices Used to Book

PC's continue to be the most popular device used, but this is falling.

Tablet bookings are steady, while bookings using mobile devices are growing rapidly (7% increase from last year).

## Mobile Bookings

This method of booking has seen growth across all age groups, to an average of 20%. Specifically:

18-24	37% (19%)
25-34	35% (27%)
35-44	26% (19%)
45-54	16% (6%)
55-64	6% (0%)
65+	4% (1%)

*Source: Association of British Travel Agents, Holiday Habits 2017*

# Flight Frequency and Gateways

## Flights and Airlines

Depending on seasonality, there are an average of **1,000** direct non-stop flights between the U.S. and the UK **each week**.

### Airlines/Carriers:

American, British Airways, Delta, United, Virgin, Air NZ, Norwegian, Jet2, Thomas Cook, Thomson

## Top 10 U.S. Cities With Most UK Flights

1. New York (JFK)
2. Newark (EWR)
3. Los Angeles (LAX)
4. Chicago (ORD)
5. Boston (BOS)
6. San Francisco (SFO)
7. Orlando (MCO)
8. Washington, DC (IAD)
9. Atlanta (ATL)
10. Miami (MIA)

## Top 5 UK Airports With Flights to the US

Of the airports sending passengers Stateside, London Heathrow sends over 75% of those flights!

1. London Heathrow (LHR)
2. London Gatwick (LGW)
3. Manchester (MAN)
4. Edinburgh (EDI)
5. Glasgow (GLA)

*Source: U.S. Transportation Security Administration (TSA)*

# Upcoming Trade Shows





# Expanding Outreach in Europe



Italy

# Italy

- Country Overview
- Sources of Italian Market information
- Flight and destination
- Travel Trends
- Italian Travel Industry
- Opportunities
- Trade Shows



# Country Overview

- **Population**
  - 62.1 million
  - Approximately equivalent to the total population of California and Texas)
  - Population distribution is fairly even with more attraction on the coastal areas, in the Po River Valley and in the urban centers, in particularly Milan, Turin, Rome and Naples.
- **Geographic area**
  - Approximately the size of New Mexico or Arizona combined





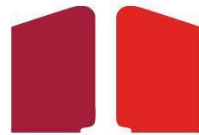
# Sources of Italy Market Information



**U.S.  
COMMERCIAL  
SERVICE**  
*United States of America  
Department of Commerce*



**Farnesina**  
Ministero degli affari esteri  
e della Cooperazione Internazionale



**Istat**  
Istituto Nazionale  
di Statistica



AGENZIA NAZIONALE DEL TURISMO

# Flight and Destinations

## Flights and Airlines

There are approximately 30 direct flights from Italy to the U.S. in addition to the seasonal ones (Spring/Summer).

### Airlines/Carriers:

Air Italy, Alitalia, American, Delta Airlines, United, Norwegian.

## Airports with Direct Flights to the US

### ***Daily***

1. Milan Linate (LIN)
2. Milan Malpensa (MXP)

### ***Seasonal/Season Daily***

1. Venice Marco Polo (VCE)

## Top U.S. Destinations

1. New York (47%)
2. California (22%)
3. Florida (20%)
4. Nevada (11%)
5. Washington D.C. (7%)
6. Arizona (6%)
7. Texas (5%)
8. Massachusetts (4%)
9. Illinois (4%)

Source: U.S. Transportation Security Administration (TSA) and Air Companies

# Travel Trends | 2017-18

In 2017, USA was the most visited Country for long holidays among the non-European destinations

## Traveller Profile

- Looking for active & cultural trips
- Average age between 35 and 54
- Seniors represent an emerging segment
- Mainly from urban areas with medium-high social/cultural profile
- Decision making is in the hands of women
- Preferred organized tours with Italian speaking guides
- Last minute bookers
- Increase of direct booking

## Number of Visitors

In 2017, there were 66.3 million visits abroad by Italian residents of which slightly over 1 million to the U.S.

An increase of 4.4% compared to 2016, and an increase of 9.1% in the long holidays.

In first quarter of 2018 there is an increase of 0.4% compared to same period of 2016.





# Travel Trends | 2017-18

## Traveler Characteristics for Italians to the U.S. and to Indian Country

<i>Characteristic</i>	<i>to U.S.</i>	<i>to Indian Country</i>
First Trip	35%	45%
Business	13%	7%
Vacation	65%	83%
# of nights	13%	25%
# of States Visited	1.6/ 2.2	3.0/4.6
In hotel/motel	76%	87%

## Booking Methods

Over 55% direct booked online, over 36% without booking and 7.4% via travel agency.

In 2017 an increase of 5% in Internet bookings and 3.2% on total travels compared to 2016 of which 22% vs. foreign countries.

Online booking is more and more complex, several mass market website to “save money”.

# Italian Travel Industry

## TOUR OPERATORS

More than 280 Tour Operators, only 4 exceeding 100 M euro/year.

Small/medium sized companies are the real engine of the market.

## TRAVEL AGENCIES

Approximately 8500 Travel Agencies, most associated to a travel network.

- 54% of sales of travel agents are Tour Operators products.
- 46% is defined as “self tour operating” with direct negotiations between the Italian travel agent and the inbound and/or hotel/destination.

## TOP 5 TRAVEL NETWORKS

1. Welcome/Geo
2. Bluvacanze
3. Gattinoni Mondo di Vacanze
4. UVET
5. Robintour

# Travel - Opportunities

Full time workers are entitled to a minimum of 33 days of paid leave annually. This leave does not include public closure days (Bank Holidays).

## National Public Holidays

14 days including the Saint Patron's day  
(different day from city to city)

## Public Schools Holidays

### *Carnival*

1-3 days forty days before Easter

### *Easter*

5-7 days including Easter Day and Easter Monday (it can change depending on the region)

### *Summer*

Approx. three months, June-September (start date depends on the region)

# Upcoming Trade Shows



<https://en.ttgincontri.it/>

October 10<sup>th</sup> - 12<sup>th</sup>, 2018

*Rimini Fiere*

**TTG Travel Experience** is the main marketplace in Italy for negotiating and networking between International offer and the intermediaries of the tourist product. It is the only appointment in Italy where exhibitors can meet all the main Italian travel agencies and tour operators in a context which is exclusively b2b



# Upcoming Trade Shows



<http://bit.fieramilano.it/?lang=en>



February 10<sup>th</sup>-12<sup>th</sup>, 2019

*The pavilions of Fieramilanocity and Milan*

**BIT International Travel Exhibition** returns to Milan, a historic event organized by Fiera Milano, which since 1980 has brought tourists and travelers from all over the world to Lombardy.

# Upcoming Trade Shows



SHOW  
CASE  
USA ITALY  
2019

March 2-5, 2019 | Bergamo, Italy  
*Centro Congressi "Giovanni XXIII"*

The 22<sup>nd</sup> edition of **Showcase USA-Italy**, the annual B2B matchmaking event organized by the U.S. Commercial Service in Milan and the Visit USA Association Italy.

<https://2016.export.gov/italy/forms/showcaseusa-italy2019/index.asp>





# Expanding Outreach in Europe



## #AIANTAFAM

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# #AIANTAFAM

The AIANTA FAM (Familiarization) tour helped educate international travelers about Indian Country, and will help bring more visitors from high-spending markets directly to Native American businesses.



**AIANTA**

American Indian Alaska Native  
Tourism Association



Visit  
TheUSA  
.com



# Thank you for your attention!

## Thank you

Please download additional resources here:

<http://itaoioeur.adobeconnect.com/aianta/>

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