

## Tools for International Tourism Success



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## Today's Discussion Objectives:

- Understand the characteristics and motivation of travelers from Italy and the UK
- Learn the latest trends and market information from Italy and the UK
- Learn about practical steps, programs, and tools you can use to attract more Italian and British Visitors

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# Italians and Brits on Holiday

## *Characteristics and Motivation*

### Italians

- Not accustomed to tipping culture
- Reluctant to new tastes
- Big coffee drinkers
- Noisy, outgoing, late
- Sensitive to and highly aware of room cleanliness
- English skills not as sharp

### Both

- Not used to sales tax
- Not used to strong A/C

### Brits

- Accustomed to tipping culture
- Enjoy new cuisines
- Big tea drinkers
- Polite, reserved, on time
- Accustomed to savory breakfasts
- Used to queues/ lining up

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## United Kingdom

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## 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



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## Sources of UK Market Information



Companies House



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# UK Travel Trends

## Number of Visitors

In 2018, there were 71.7 million visits abroad by UK residents.

This 1% decrease follows 2 years of record-breaking numbers of UK travelers in 2017 and 2016.

## Countries Visited

1. Spain 15.6m
2. France 8.6m
3. Italy 4.3m
4. **USA 3.5m**
5. Ireland 3.2m
6. Portugal 2.8m
7. Germany 2.8m
8. Netherlands 2.7m
9. Poland 2.5m
10. Greece 2.5m

## Spending

In 2018, there was a 1% rise in UK visitor spending globally.

Though an increase, it is a much smaller increase than in previous years.

Source: UK Office for National Statistics, Travel Trends 2018

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# 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)

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# UK Holiday Habits

## Booking Methods

Online bookings stabilized at 81% (83% in 2017)

In-person and telephone bookings down slightly, both at 15%

Over 65s most frequent telephone bookers.  
Families most likely to book in person.

## Devices Used to Book

PC's continue to be the most popular device used.

Tablet bookings and mobile phone bookings are falling, after growing rapidly.

*Source: Association of British Travel Agents, Holiday Habits 2018*

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Italy

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# 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

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# Sources of Italy Market Information



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# 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:

Alitalia, American, Delta Airlines, United, Norwegian.

## Airports with Direct Flights to the US

### Daily

1. Milan Linate (LIN)
2. Milan Malpensa (MXP)
3. Rome Fiumicino (FCO)

### Seasonal/Season Daily

1. Venice Marco Polo (VCE)
2. Bologna Guglielmo Marconi (BLQ)

## 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

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# Travel Trends | 2018-19

In 2018, 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 2018, there were 67 million visits abroad by Italian residents of which slightly over 1 million to the U.S.

An increase of 4% compared to 2017.

In the first 7 months of 2019 there is an increase of 0.4% compared to same period of 2018.

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# Italian Travel Industry

## Booking Methods

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

In the last several years, Internet bookings have increased in order to avoid travel agency fees, despite the complexity of online bookings.

## Travel Agencies

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

- 54% of sales of travel agents are Tour Operators products.
- 46% defined as “self tour operating” with direct negotiations between the Italian travel agent and final provider.

## 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.

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# Travel - Opportunities

## Paid Time Off

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)

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# Where to start?

## **U.S. Export Assistance Center (USEAC) - [www.export.gov/locations](http://www.export.gov/locations)**

The U.S. Commercial Service has over 100 U.S. Export Assistance Centers located in cities throughout the United States. If you are not already in touch, use the link above to find your nearest USEAC. US-based trade specialists can advise on export readiness and can connect you across to the international network of over 80 countries.

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# International Opportunities

## **Market Research and Intelligence**

## **Business Counselling**

## **Webinars**

## **Matchmaking Services/Connecting with Travel Trade**

## **Trade Events – International and U.S.**

- WTM, BIT, Showcase Italy, ITB, IPW, TTG

## **Trade Missions – Inbound and Outbound**

- Sales Missions, Familiarization (FAM) Tours

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# Thank you for your attention!

## Thank you

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