



Italian Market Factsheet

Market Overview and Trends

- Exciting airline routes development from Italy to the USA with more routes originating from new different cities (example: Naples/NY by United Airlines - Bologna/Philadelphia by AA - Rome/Washington by Alitalia - **Rome/Boston by Norwegian** - Milan/Los Angeles by Air Italy - Milan/San Francisco by Air Italy)
- More small tour operators willing to engage in the selling process of the NEW ENGLAND for individual FITs as well as mini groups (10 pax)
- Increasing disintermediation of booking process: more travel agents reaching out directly for FITs and small groups
- 31% of travelers still request the assistance of a travel agency although the non-digital tourist is extinct.
- Travel agents have learned to exercise a more virtuous behavior, proving a guarantee of expertise and self confidence, empathy and customization.
- OTA represents 29% of the non-direct selling, with an increase of 14% over 2017.
- A growing dynamic market-segment is represented by the "activities in the destination" (cultural, sport, culinary, shopping etc.) and by the experiential services (parking, access to reserved areas, avoid the line etc) both vital components of the travel experience. Often these elements are the motivation of the trip for many Italians: 11% of tourist travels for shopping. Services represent 26% of the vacation budget (Source: Milan School of Management)
- 98% of Italians search the web to find travel information
- Mobile transactions are increasing rapidly and represent 18% of the digital market. (+46% versus 2017)
- Smartphone is widely used to track travel info: 89% for the long-haul travels, and also to settle payments (20%).
- Consumer in general are becoming more and more sensible to planet resources and the health of it. Sustainable business practices and sensitive solutions may become the main solid strategy of growth for travel and tourism entities. A more focused oriented info on sustainable destinations, environmental leadership and the well-being of the local communities will become an integrated experience for the travelers.
- Improved number of Italian travelers to the USA versus previous year 2017 (+3%) showing a progressive stable increase year-after-year until 2023 between 3% and 4%.
- Each month over 40 million Italians (75,9% of the adult population) choose to use contents via the printed or digital media, resulting in a positive increase of readership (8 adults out of 10): +0,2% dailies, +1,2% weeklies, +0,6 monthlies (source: Audipress Italia)
- NEW ENGLAND perceived as the less commercial North East USA for repeaters, and cultural tourists
- NEW ENGLAND also combined with Eastern CANADA or NY City
- Average length of trip to NEW ENGLAND: 12/15 days
- Way of travel: self drive tours by car mainly

Things to Know: why Europeans are not alike!

- The main vacation season for Italians is Summer: the majority of firms, corporations and commercial outlets close for 15 days holidays in August.
- School Summer vacations start mid June and last until early September. Xmas Holidays start 23rd December until January 7. Easter Holidays last one full week. Labor day in EU is on May 1st.



- Italians have 26 paid vacation days - A typical wedding leave benefits of 2 weeks
- Italians usually DO NOT eat Italian food while in America: they are curious about local food and drinks (American beer and wines too). Do Not make the effort to promote Italian food: promote your locally grown products and Farm-To-Table!
- Italians spend a valuable time and budget for meals: eating is a lifestyle issue. One of the most requested info before leaving Italy for a trip to NE is the list of the MUST restaurants to experience.
- Italians - similarly to other Mediterranean people - usually eat dinner as of 8.00 pm. Breakfast are small, and Italian espresso coffee is a must. While traveling Italians do not like at all to eat breakfast outside the hotel where they lodge.
- Italians like to plan a self drive trip in America, and tend to be very independent. Elder people are attracted by rail trips and coach escorted group tours.
- Family with kids travel to the USA during summer time.
- New England is a travel destination for Italian Baby Boomers and X Generation, not for Millennials, but for the Generation Z since traveling with parents.
- Italians are less tourism based on '*rambling*' while in New England: they definitely prefer sightseeing
- Snow vacations, skiing and other related winter outdoor activities are mostly experienced in the EU Alps, certainly more appealing, proximate and less expensive.
- Italians love the seaside and the beaches, and of course all related water sports.

Analysis of the Region

- **Strengths:** unique natural environment with a balanced harmony between various landscapes (sea-countryside and mountains) - perfectly fitting aesthetics and technology in symbiosis with one another / Very poignant and lyrical region of the USA / nice collection of HISTORIC SITES by NPS / NE perceived as a less commercial and tourist destination, suitable to real travelers / a less predictable region, open to new travel experiences and new imagination for contemporary travel styles / the region is the portrayal of the intimate and romantic journey with a new sensorial dimension: intimacy of spaces, deep rooted traditions and strong American heritage, inspiration to freedom, a stimulus for social cohesion and engagement / New England has a strong appeal due to the strong EU heritage, and represents a "comfort-zone" in America / Tasty cuisine, excellent seafood.
- **Weaknesses:** lack of familiarization trips addressed to travel agents / poor short promotional video clips portfolio circulating in the media "storm" and addressed to the wider non-English speaking markets / Long cold winter season not drawing travelers.
- **Opportunities:** Amtrak train travel experience / motorcycling adventurous travel experiences with EagleRider / NE Cruising and seafaring / niche travel products (cooking classes, design and architectural tours, literary tours, wildlife watching, flea-markets and Americana tours, etc) / A help-tool leaflet of DNE in Italian / Adopt selected international market seller to become testimonial of DNE while endorsing NEW ENGLAND travel experiences and travel stories (use DNE Summit as main arena for series of video-clips during post fairs and use in-language subtitles).
- **Threats:** Reduced travel industry promotions would jeopardize main travel professionals engagement with the region / repeated shutdown events would discourage travelers / Exchange rate, US\$ fluctuation.



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