



An introduction to the UK market

December 2013

Presentation Overview

- Rowan Usher, FTI Consulting – The UK traveller
- Renato Fantoni, ABTOI/ HPS hotels – Understanding people then markets
- Kate Winter, Solos – New opportunities



Rowan Usher, FTI Consulting
The UK traveller

UK travel behaviour

- Overview of UK travel behaviour
- General UK specific facts
- Tourism overview
- Factors that have impacted UK tourists
- Purchasing behaviour patterns – Traditional vs. online
- UK perceptions of Italy

The UK

18-24

Singles

Package
Holidays

Backpacking

Business
Travellers



Economic and social situation

- Eighth-largest economy by purchasing power parity
- UK service sector = 73% of GDP
- London is considered one of the three ‘command centres’ of the global economy (alongside New York City and Tokyo)
- London has the largest city GDP in Europe

Factors that have impacted UK tourists

- Economic crisis
- Terrible weather meant holidaying abroad very popular
- The pound has continued to strengthen = the Eurozone more attractive
- Booking last minute
- Two thirds of UK took a summer holiday this year
- Three quarters of travellers expected to spend the same or more on their main holiday in 2012

Where is the UK tourist going?

UK's favourite destinations:

1. Spain
2. France
3. Ireland
4. USA
5. Italy

<u>School terms and school holidays 2012-2013</u>	
Half term	October 27 to November 4, 2012
Christmas term	22 December 2012 to 7 January 2013
Spring Half term	February 16 to 24
Easter holidays	29 March till the 14 April
Half Term	May 25 to June 3
Summer holidays	24 July to early September

- 20/25 days holiday a year
- July / August for two weeks
- Remainder divided into more short trips throughout the year

Why are they going?

- 56,386,000 (2% increase) trips a year of which 78.9% were in Europe
-14.2% increase to Italy from the UK
- The total expenditure on tourism was 31.7 billion of which 19.1 billion was in Europe
- Average expenditure = £557 and £53 a day

Reason for travel	No. of people that travelled
Leisure	36,819,000
Independent travellers	22,079,000
Business travel	6,846,000
All inclusive packages	14,740,000
Visits to family and friends	11,594,000
Other areas	1,576,000

How are they buying?

UK Social Media Use

- In 2012, 21 million households in Great Britain (80%) had access to the Internet, against 19 million (77%) in 2011
- 67% of adults use the computer every day
- Facebook is the dominant social networking site (51.94%), followed by YouTube (22.50%) and Twitter (3.40%)

- TripAdvisor and Facebook have been of great importance for UK holidaymakers

- TripAdvisor remains the dominant brand used by two thirds of social media users

Flushed with its success

RIMINI: Shocking is the word—but not the behaviour of partygoers in the Italian city on the Adriatic. It's got more to do with the shade anyone turns by Tracy Davies

A Noni Row is Italy's answer to the Rio-Carnival or Mardi Gras—it's just a little bigger. This 24-hour party, which this year falls on July 6, was first held in 2006 as a reward to the region's football clubs after Italy won the World Cup in Germany. What started off as a street party for the ladies has ended up as one of the Adriatic coast's most popular events, with more than 300 shows, concerts and fireworks being strung around Rimini's coastline.

I thought I'm at the opening gala of LA's most famous musical theatre as Pink Night at Rimini's seafood festival. I'm sitting on a pink sofa, sipping cocktails, drinking Martini cocktails and listening to Italian singer Francesco Di Gregori, who's playing three concert venues in Rimini's Piazza Italia.

Despite its Anglo obsession, you can't help but get caught up in the city's carnival mood. The city centres are decked out in a perfectly pink setting, from the beach to the promenade and everyone and their dog is in costume.



Real Hotel, Rimini, Italy. The city is more relaxed than you expect and the one mile of beach is perfect for the occasion—as does the food

of indulgence are, wearing a neon pink wig and away in the direction of Rimini's very much-esteemed Marina Rosa. Local resident Barbara says the party goes on until around dawn: "There, we feast on hot tubs, a double-eye porter that's filled with pink cream, for



As a midlife approach, I grab a bottle of pink beer and women with the lightly scented essence on the beach to watch as the Rimini coast is lit up with fireworks. Above: the beach play and Rimini's beach has and shows crack up the music to help get it into the party's just getting started.

Old Fish Market For centuries, the fishermen of Rimini would sell their wares at Pescheria Vecchia, the Old Fish Market (right). Nowadays it's home to a different type of catch. The heart of the old town's party district has lively street bars, and plays a big part in Rimini's famous nightlife.

RIMINI'S TOP PARTY HOT SPOTS

Beach bars on the promenade During the following summer months, Rimini attracts Italy's young and restless to party on the beach. The white houses of beachside cafes, bars and restaurants (right) in Lungomare di Rimini are well worth a visit. A group of friends can enjoy a drink and leather sofas offers an impressive cocktail bar and a resident DJ who plays hip house tunes to a good crowd at the sun sets over a sea of umbrellas.

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UP TO 50% OFF ALL SUMMER HOLIDAYS

Where Italy is batty about the famous white truffle

The scope of truffle was happy to see it in a purpose-built, stylish restaurant of white oak rooms, all areas that for the first time since the noble quarry of Alba in Piedmont, Italy, was open to the public. It's the first time since the noble quarry of Alba in Piedmont, Italy, was open to the public. It's the first time since the noble quarry of Alba in Piedmont, Italy, was open to the public.

The Bath Chronicle



HARBOUR LIGHTS: Rimini's new harbour

proton. They produce their own virgin olive oil from olive groves on the slopes at the edge of the town, marketing the special harvest as the 'gold of the sea'. It's a real gem, and it's the only one of its kind in the world. It's a real gem, and it's the only one of its kind in the world. It's a real gem, and it's the only one of its kind in the world.

Fact file Rimini This drives to Rimini from London, Italy, is a gateway to the most of the country. It's also a gateway to the most of the country. It's also a gateway to the most of the country.

travel EDITED BY Nigel Thompson

Water music at nightclub

The 21st century isn't going to be about water. It's about water. It's about water. It's about water. It's about water. It's about water. It's about water.

BIG APPLE'S BIG WHEEL

Steve Myall finds that the cuisine is as rich as the history in Italy's Emilia-Romagna region

Mirror WEEKEND Daily Mirror

DAILY Mirror

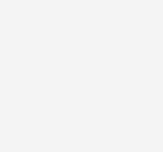
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The Portofino of San Leo



The sea bridge in Rimini's old town



Paola, chef at

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News

Foody Exhibitions

More exhibitions news coming soon.

Italy Riviera Di Rimini Not only is Riviera Di Rimini the centrepiece of Italy's Adriatic Riviera and famous for its sandy beaches with year round entertainment but food is also an integral part of the town's character. There are a number of food and wine events taking place in the Emilia Romagna region between now and the end of a rich calendar of events celebrating olive oil, Fossa cheese, Truffles, pork and garlic as well as Parma ham, Parmigiano-Reggiano cheese, Balsamic Vinegar Modena, and Sangiovese and Lambrusco wines.

From the editor The Foody Traveller recently celebrated its first birthday. In the intervening year the website has attracted more and more hits and we are receiving wonderfully encouraging comments from readers. Read more...

F T I CONSULTING

UK perceptions of Italy

	What people want from Italy	What Emilia Romagna has to offer
Artistic and cultural heritage	X	X
Mediterranean lifestyle		X
Warm climate	X	X
Accessibility		X
Diverse tourist offering	X	X
Quality Product Service		X
Beaches	X	X
Food		X
Landscape		X
Nature tourism		X