



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

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



Renato Fantoni, ABTOI
Understanding people then markets



Association of British Travel
Organisers to Italy

LAKE COMO GRAND HOTEL MENAGGIO

A Classic Hotel Since Victorian Times

HPS HOTELS

THE SPECIALIST HOTEL AGENT SINCE 1971

Experts in booking quirky and unusual hotels plus hard-to-find rooms in Italy and everywhere else on earth for any purpose and length of stay.

Believed to be the UK's longest established independent booking agent, we are still run by a small team of passionate travel experts. We provide a personal booking service for people requiring hotels, villas, self-catering and transfers. We support leisure and business travel agents for individuals and groups...

BOOK HERE



FLIGHTS



HOTELS



CAR HIRE



CRUISES

Search for Hotels

Destination City:

Search by Property Type:

All Properties

Check in:

December 17

Check-out:

December 19

Rooms: Adults: (age 19+) Children: (0-18)

1 2 0



Home

[Renato Fantoni](#)

[TO THE BLOG](#)

Work-Place coaching, assessing, training and mentoring - specializing in Hotels and Travel

What I can do to help you?

As an experienced leadership and management coach, I specialize in one to one coaching, mentoring and training. My key focus is in helping people to become more successful through better understanding and communications resulting in improved productivity.

28 years experience in the hotel/travel industry, working in both hands-on and support roles, in hotels, exhibitions, conferences, travel agents and tour operators. I have had a great deal of first hand experience of the industry and instinctively know what works for whom, where and when.

As Head of Learning for the UK's longest established independent hotel booking agent, I have extensive experience of supporting managers and colleagues in all departments of running successful hotel and travel companies - particularly in customer facing areas.

My task in the business is to listen and help you define your aims and objectives and assist you in selecting the right level of support to meet them.

In addition to one to one coaching and mentoring sessions that focus on specific work-place challenges, I deliver seminars and training workshops on communication skills, business leadership and team development. These give you and your team the ability and assurance to run your work-place smoothly by taking advantage of your strengths and helping to root-out and improve the areas where you have less experience and prowess.

In recent years I have been working with a variety of enterprises, supporting them in these areas:

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Chi e' presente?
Noi 'buyers' britannici
Voi venditori italiani

Chi e' fuori?
Il mercato italiano
Il mercato europeo
Il mercato inglese
Il mercato mondiale

Ma se dimentichiamo le nostre "etichette" potremo raggiungere
risultati **10 volte piu potenti.**

Esercizio!

1. Cerca una persona che non conosci
2. Hai 5 minuti per scoprire:
 - 4 cose che avete in comune
 - 10 cose sulle quali differite

L' arte di comunicare bene: la giusta proporzione!



2:1



Lo scopo dell'esercizio

1. La miglior maniera di conoscere il potenziale del cliente e' di ascoltare.
2. Ora pensiamo al mercato **come individui con necessita' proprie**
3. Ci vuole pazienza e organizzazione.

Ma questo va bene, avete gia' le capacita' (anche se non lo sapete).
Voi siete i comunicatori e i venditori.

Conosci prima le persone e poi il mercato

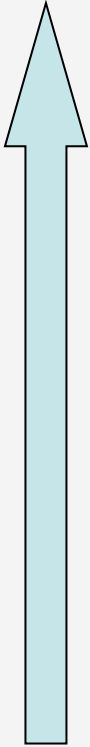
Gli psicologi dicono che noi abbiamo bisogno di quanto
sto per spiegarvi per condurre vite normali.

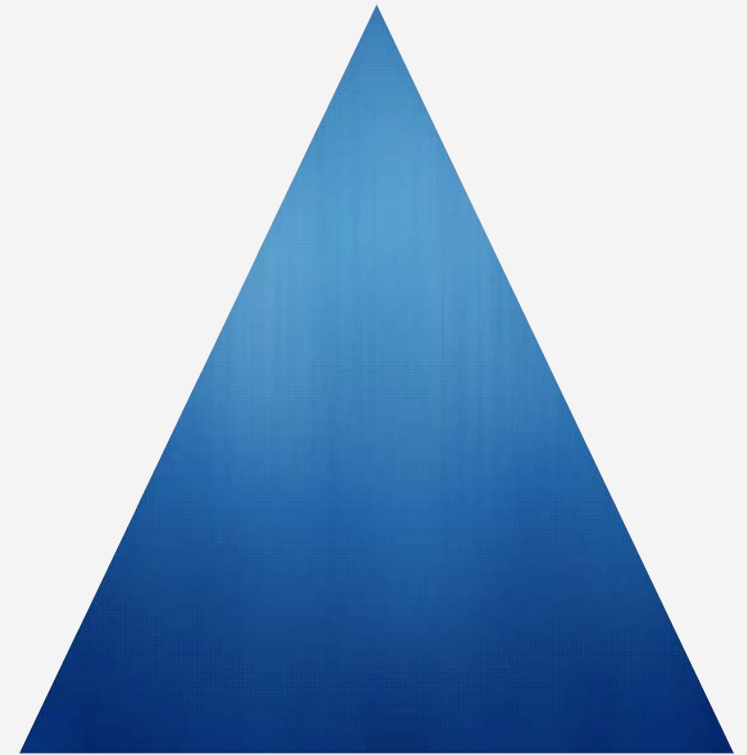
Necessita' della psicologia umana



The Maslow Hierarchy of needs

Se i turisti\viaggiatori e la societa'
avessero gli stessi bisogni questo sarebbe il modello

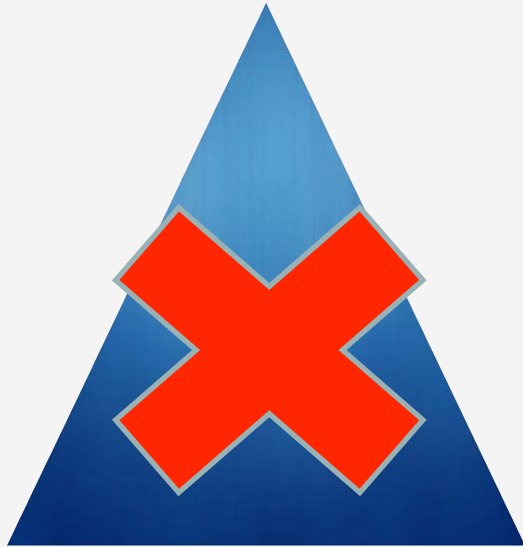
- 
5. “ **Fantastico! Ci ritornerò** ”
 4. Questa e' la qualita' che mi aspettavo
 3. Accogliente, amichevole, sorridente
(contatto umano)
 2. Puntuale, fidato, sicuro
 1. Strutture solide e funzionanti (letti e
sedie aggiustati, riscaldamento che
funziona, porte che si chiudono)



NO, questa logica non e' applicabile.

Viaggiare non e' "sopravvivenza"

"FANTASTICO, ci ritornero' " e' importante quanto un buon letto



Necessita' psicologiche delle persone viaggiatori



Necessita' psicologiche dei

Come attrarre clienti per svago o lavoro

- Non ci sono formule segrete. Niente e' cambiato ma dobbiamo dare piu' dettagli e un approccio personalizzato
- Educationals, visite di famigliarizzazione, visite di giornalisti
- Creare amici e sostenitori come Jamie Oliver, Theo Randall, Andrew Graham-Dixon



Tour Operator Comments



- As a fairly large tour operator, we are able to produce itineraries and organise ground arrangements ourselves. We have an office in Italy, therefore have no need for incoming agents.
- Incoming agents are used more for group holidays when help is needed to handle large amounts of people and someone needs to be ‘on the ground’ in case of emergencies. Therefore the ability to provide good ‘back up’ is essential and to understand the importance of representing the operator in Italy
- We sometimes use incoming agents for our cycling holidays but only because they require a ‘back up’ in case something goes wrong with bike, etc. Therefore the ability to be resourceful and efficient is again necessary.

...continued



- Incoming agents are used by smaller ops who may not have offices, just a website. They can rebrand itineraries produced by the incoming agent. This is a case where packages of 7 days or more can be put together. However, most operators would require something **tailor made**. Therefore the ability to be **flexible** is important, especially because the UK operators do not all want the same package.
- Often hotels like to deal direct with the tour operator and vice versa in order to form a **'relationship'**. This is not possible when there is a middle person i.e. incoming agent.





Arblaster and Clarke – Wine Tours

Una volta usammo un incoming agent ma **ci hanno deluso**.

Abbiamo bisogno:

- **Fiducia**
- **Efficienza**
- **Conoscenza specializzata**

**UNA BUONA CONNESSIONE TRA FORNITORE
(DI VACANZE O EVENTI) E CLIENTE
INCOMINCIA CON
QUESTE BASI SOLIDE**

(CON LA POSSIBILITA' DI MIGLIORARE)

self-
actualization

esteem

love & belonging

safety

physiological needs



Activity specialist, fairly large. We **DO** use an incoming agent!

We did buy a package but change it to suit the programme. Therefore, a package can be **a good thing** but be prepared to **be flexible** with it!

When looking for an operator we looked at **their attitude**. They required a company with an **open mind** on how to run things (**not the Italian way..**)
{SONO PAROLE LORO NON MIE!}

The incoming agent must be prepared to visit all the hotels used and check the **Health and Safety regulations**. This is (a legal) priority.

A problem is that the UK has the most stringent laws which are not understood by much of Europe's agents. UK operators abide by the Duty of Care Law and expect this to be understood by the incoming.



‘Alberghi Boutique devono offrire quello che manca nelle grandi catene’

“BOUTIQUE” e un’attitudine

The screenshot shows the Hotel Industry Magazine website. At the top, there is a navigation bar with links for 'About Us', 'Hi! Community', 'Topics', 'Directory', and 'Advertise'. Below this is a banner for 'HOSPITALITY TECHNOLOGY EXPO' with the text 'For all hospitality IT professionals to source, learn & network'. The main content area features several articles. On the left, there is a large article titled 'Leading Light: David Guile of Macdonald Hotels and Resorts' with a photo of David Guile. In the center, there is a section titled 'In This Issue' with several smaller article teasers, including 'Win a stand at Hospitality Technology Expo', 'Never more than 15 ft from a rat?', and 'The Luxury Guest Experience, Part 1: Current Guest Strategy'. On the right, there is an 'Expert View' section with the article title '“Boutique hotels must do what big brands fail to deliver”' and a photo of Conor Kenny. Below this is a section titled 'International Hotel Announcements' with two bullet points: 'Just for You: Rezidor Hotel Group offers personalised Gift Card' and 'New Renaissance Edmonton Airport Hotel to Open in Summer 2013'. A red circle highlights the 'Expert View' article title, and a red arrow points from the text '“BOUTIQUE” e un’attitudine' to it.

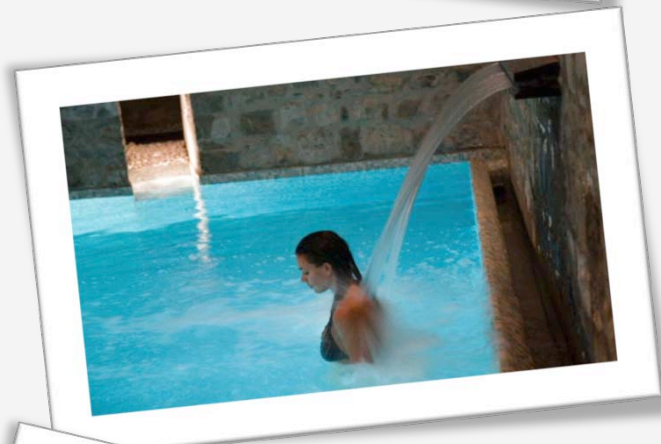
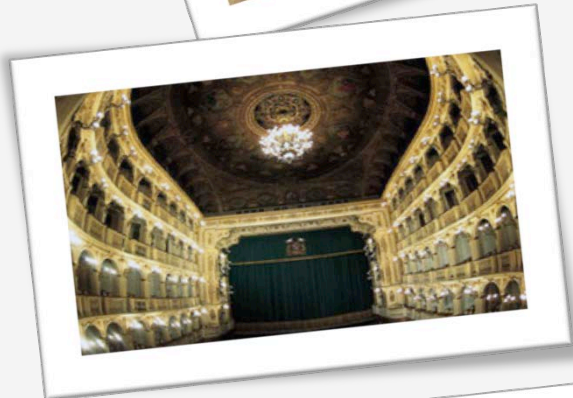
The Filthy, Fecund Secret of Emilia-Romagna

It's Italy's unsung region, yet its food has conquered the world—or at least the table. Think prosciutto di Parma, Parmesan, porcini, and half of all pastas known to man (just for starters). The source of its power? Po Valley dirt—fine, dense, almost chocolatey, accumulated over millennia. **Patrick Symmes** feasts on the cities of the plain



... Emilia-Romagna is a kind of lost region for foreigners, known, if at all, for its gemlike cities—**Parma, Modena, Bologna, Ferrara, Ravenna**

What the region has to offer...





Kate Winter, Solos
New opportunities

Solos

The UK Singles Market & Solos

- The UK Singles Market
- Issues facing the Single Traveller
- About Solos
- How to target the single traveller
- How to market yourself in the UK

The Singles Market in the UK



- 1 in 10 UK holidaymakers travelled alone in the last 12 months
- 1.2 million single travellers take 4 or more trips abroad
- 3.3 million solo travellers in the UK
- Who is the Singles Market?

Fastest growing sector in the UK travel industry



- Change in attitude towards being single
- Dating/relationship websites
- Continued increase in divorce and separation
- By 2033 it is estimated that 44% of the population of the UK will be single
- The biggest challenges

What is Solos?



- Sell direct to 95% of our customers
- Role of a Tour Leader
- 2012 capacity
- What's in store for 2013 and new opportunities

The Italian offer

Destinations – UK, Europe & Worldwide – across 12 Categories

Italy in the top 5 destinations

12 Categories:-

- Short/City Breaks Bologna, Verona Opera, Rome
- Discovery Lake Como, Italian Riviera, Sorrento, Treasures of Tuscany*
- Food & Drink Italian Style, A Taste of Piceno
- Sun *currently none*
- Cruise 4 of the 13 itineraries
- Activities North Italy Active
- Walks & Treks Madonna di Campiglio & Umbria & Marche
- Ski Val di Sole, Madonna di Campiglio & Folgaria
- Tennis Italian Dolomites - new
- Golf *currently none*

What niche markets need from you

- Competitive Hotel Rates
- Hotel Room Allotment for a Group
- Location, Location ...
- Flexibility of Board Basis
- Travel Dates in High Season
- Product Quality/Standards
- New Product Added Value
- Exceeding Expectations

Checklist of things to do...

1. Research
 - Online
 - Offline
2. First Impression
3. Tailor made approach
4. Presentation
5. Follow-up
6. On-going relationship

Break Out

How can the Emilia Romagna region target the UK Market?

- What changes would you make in the way you currently approach the UK Market?
- What services would you highlight to a UK tour operator (mainstream or specialist/niche) to influence them to choose you as a hotelier/DMC/supplier?

Wrap up, conclusion and final Q&A

TARGET

- **T** - Targeted
- **A** - Attitude
- **R** - Relationship
- **G** – Generate new ideas
- **E** – Exceed
- **T** – Two to one