



**An introduction to the UK market**

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# Presentation Overview

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**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
<b>Leisure</b>	<b>36,819,000</b>
<b>Independent travellers</b>	<b>22,079,000</b>
<b>Business travel</b>	<b>6,846,000</b>
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