

New Landscape Report

2022

ITALY



TRAVEL
SOUTH
USA

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Factors Affecting Travel

BRIEF OVERVIEW OF ITALY'S ECONOMY AND FORECAST FOR 2022 AND BEYOND

In mid-2021, the country's economic picture was characterized by the negative repercussions of the health emergency crisis balanced by expectations of a significant economic expansion. Italy seemed to have caught up with the international recovery especially due to the positive boosts coming from the European area. Here, the overcoming of the restrictions due to the pandemic was associated to a climate of favorable expectations, fueled by the launch of the Next Generation Europe plan.

The crisis-induced global recession was violent, but short-lived; various support programs along with new measures to contain contagion adopted as from autumn, led to an immediate rebound. In recent months, the containment of the epidemic gave way to strong signs of recovery in international economy, driven by the industrial sector whose production has returned to pre-crisis levels in many countries. The rise in inflation, driven by the recovery in oil and commodity prices, is causing some concern at the macroeconomic level, with a marked increase in the United States and a more modest one in the EMU. Temporary tensions prevail, but the risks on the international scene are by no means insignificant.

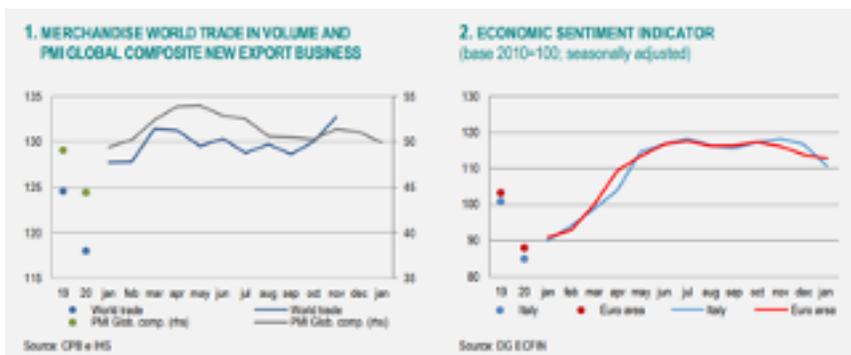
The impact of the health crisis on the Italian economy was particularly severe, causing a fall in GDP by 8.9 percent in 2020, an unprecedented fall since the Second World War. In the first quarter of 2021, despite the prolonged emergency, economic activity stabilized (GDP increased by 0.1 percent), with significant progress in manufacturing, construction, and some service sectors. The prospects for economic recovery have progressively strengthened: in particular, business confidence indices, which were already on the rise, showed a very rapid improvement in May – and even more so in June – reaching particularly high levels, also boosted by the industry and construction sector. Istat (Italian Institute of Statistics) forecasts estimate a robust recovery in activity in 2021, sustained by the demand for consumption and investment, also driven by the launch of the National Recovery Program (NRP): GDP is expected to grow by 4.7 percent and then continue at a slightly slower pace in the following year. Current evidence, also at a European level, suggest that the risks of error in the forecast for 2021 are rather upward; but the risk of a worsening of the health emergency remains in the opposite direction.

In the fourth quarter the Italian Gross Domestic Product increased by 0.6% with respect to the previous quarter (+2.6% in the third quarter). The quarter-on-quarter change was driven by the increase in both industry and services. From the demand side, there was a positive contribution by the domestic component and a negative one by the net export component. The carry-over for 2022 is 2.4%.

Italy economy is strongly supported by Next EU recovery plan, granted 209 billion € to the country in the period 2021-2027.

BRIEF OVERVIEW OF ITALY'S ECONOMY AND FORECAST FOR 2022 AND BEYOND cont...

The political crisis in Eastern Europe is going to have a strong impact on Italian economy. In effect, Italy is the country mostly depending on Russian gas, and the possible decrease of supply may create a problem to Italian manufacturing industry. At the same time exit of Russian banks from SWIFT system, approved by all EU government including the Italian one, will create a stop in exchanges between Italy and Russia that should have an impact of 6 % inflation because of the increase of costs of raw material.



(Source Istat)

VIEW ON COVID-19

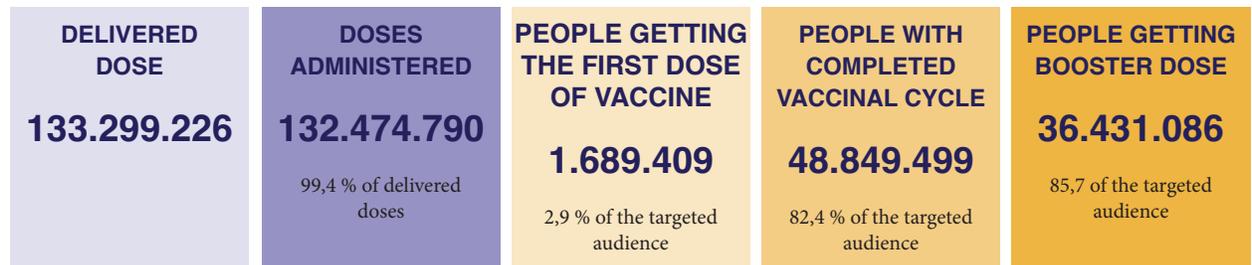
On February 21, 2020, Italy was the first Western country where the virus was discovered in people without direct contact with China. On March 9th the first Western country entering in lockdown to decrease the contagious rate. Italy was in the first phase of the pandemic strongly affected by the virus, especially in the Northern regions, with major mobility. Due to that, containment measures continue to be stricter compared to other countries.

Actual situation of infections:

Last updated on 16th February 2022 at 6PM.



Actual situation of vaccinations:



VIEW ON COVID-19 cont...

Actual containment measures in place

To contain the virus, Italian government decide to push the vaccination process. The complete vaccination process is compulsory for senior over 50, and necessary to all the population to attend quite every kind of activities, such as participate to sport and entertainment events, take public transportation, overnight in hotels, eat in indoor restaurants, enter in non-food or sanitary shops. It is also possible to attend conferences and events too if allowed to the ones who complete the vaccination process.

At the same time, sanitary masks are compulsory indoor, FFP2 type are compulsory in public transportation and generally for the ones having strict contacts with infected.

Measurements are officially in place until March 31st, 2022, when the state of emergency will expire.

Even if starting from beginning 2022 Italy experience a strong decrease in life limitations for fully vaccinated people and no general lockdowns had been put in place, there is still a strong uncertainty about next month, that do not help to return to the pre-covid life. Looking at past two years, the forecast is a sort of normality as summer approach.

	Basis Green Pass	Super Green Pass	Mega Green Pass
How to obtain it	Vaccination Healing certification Negative molecular swab carried out in the preceding 72 hours or rapid in the preceding 48 hours	Vaccination Healing certification	Booster vaccination (3 rd dose)
Where it is requested	<ul style="list-style-type: none"> • go to work • access to shops except <ul style="list-style-type: none"> ○ grocery stores ○ supermarket ○ pet shops ○ sellers of fuel, also for domestic uses and heating ○ sellers of medicines, medical, optical and orthopaedic items ○ sellers of sanitation items 	<ul style="list-style-type: none"> • take a flight, a train or a bus (FFPs mask requested) • overnight in hotel • gym and ski slopes • shows (FFPs mask requested), • museums, • sporting events (FFPs mask requested), • indoor restaurant, bar and catering, • parties and discos, • public ceremonies • exhibitions, congresses and meetings 	<ul style="list-style-type: none"> • Visit health facilities, • alms houses and hospices • go to discos (from January 31)

Activities requesting vaccination in Italy, February 2022

GLOBAL INDUSTRY TRENDS

As per the containment measures within the borders, Italy had been more conservative compared to other countries in allowed international travels, but since March 1st, 2022, it will be possible for fully vaccinated people (both Italian returning back from vacation and foreigners) to enter in Italy without quarantine. Leisure travels are finally permitted to every country in the world, in terms of sanitary measure.

To enter without quarantine in Italy, it is compulsory to present a certification of fully vaccination with one of the vaccines approved by EMA (Pfizer, Johnson & Johnson, Moderna, Astrazeneca, Novavax) or the negative result of a molecular test conducted with a swab in the seventy-two (72) hours before entering Italy or an antigen test conducted with a swab in the forty-eight (48) hours before entering Italy.

Even if the official outbound travel data are not yet shared, independent research confirm a strong interest to return to travel. According to data from the EY Future Travel Behavior observatory, for example, in 2021 over 80% of Italians returned to travel for a holiday, an improvement compared to 2020 (70%), although still lower than pre-pandemic levels. The declared intentions for 2022 confirm this trend: over 60% will return to the same pre-pandemic travel habits and in some cases, 1 in 4, the number of trips will increase. Is it true that most of the sample (2 out of 3) will travel mainly to Italy, to relax and rest (65%), discover new places and make new cultural and gastronomic experiences (61%) and be together with family and friends (46%), even if opened destinations (as long haul quite mainly). The workcation trend is consolidated with 6% of Italians who have planned to work remotely in a holiday resort.

The strong interest to travel was confirmed by the success of the destinations opened to leisure travels because included in the safety list or reached by the travel corridors put in place since November to February. In particular, USA and UAE are the most visited long-haul destinations, while the corridors registered in 2 months 26.606 tourists in total, 7.022 of them in Maldives.

GLOBAL INDUSTRY TRENDS cont...

Where are people from Italy travelling to?

		Travel Demand Index
1	Spain	100
2	France	82.94
3	United States	46.65
4	United Kingdom	38.13
5	Netherlands	30.99
6	Germany	28.83
7	United Arab Emirates	28.63

The general opening of the borders was considered the main step to recovery, but the political crisis and the declaration of a State of Emergency for political reasons until the end of the year create again a stop. In a country traditionally used to book last minute, the uncertainty of the sanitary and political situations increased this attitude, to avoid problems in case of last minute changes.

LONG HAUL OVERSEAS FLIGHTS

Italian airports close 2021 with 80.7 million passengers and a contraction of 58.2% on 2019, the last year not affected by the pandemic, when the number of travelers exceeded 193 million. An overall growth of 52.4% over 2020, but still marked by a profound crisis with 113 million passengers lost compared to 2019.

However, it is positive to note that the first signs of recovery began in June, going from -86% compared to 2019 in the first half to -39 in the second. The recovery can be seen above all on domestic flights (-35.1% on pre-pandemic volumes), while international traffic is still suffering, which stands at -70.4%, thus highlighting a two-speed restart. In fact, flights from the major airports (Rome and Milan in particular) with a strong international and intercontinental vocation are still struggling, due to the maintenance of restrictions for non-EU travel.

At the moment there are only few direct flights from Italy to intercontinental destinations, as per following scheme.

Africa:

- no direct flight

America:

- daily direct flights from Milan and Rome to US (New York first destinations)

Asia:

- 5 direct flights per week from Milan to Singapore
- 2 direct flights per week from Milan to Saudi Arabia
- Daily direct flights from Milan to Beijing, China
- Daily direct flights from Milan and Rome to Abu Dhabi and Dubai

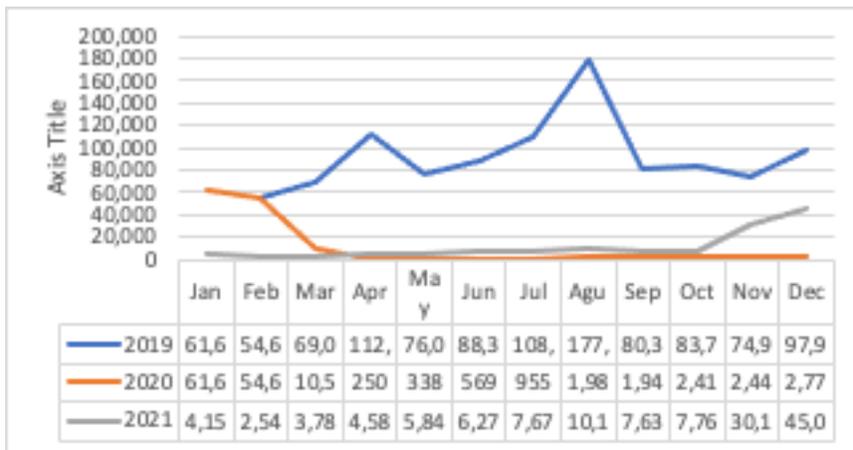
A real restart of international connections was expected in the second half of 2022. Again, the political crisis can affect this recovery. At the moment Russia close the airspace to EU countries, and this can affect the recovery of flights to Far East, that have to stretch out to avoid Russian's space. At the same time, the gas crisis can create an increase of travel costs, making the recovery weaker.

TRAVEL TO THE USA

Travel between Italy and USA are allowed since the introduction of Covid-tested flights in March 2021, even if with limited number of approved airport and strict travel rules. Since that date travel limitations between the two countries continue to decrease, arriving to quite a normal situation for fully vaccinated people with Pfizer, Moderna, Johnson&Johnson, it is only required a negative swab test together with the vaccination certificate.

Looking at statistics, 135.636 Italian people travel to the US in 2021. It is a small number compared to the past, that not allowed Italy to enter in the top 20 destination of the world. Despite of that is very important to notice that the majority of this travelers were counted in November and December, since travels had been opened. 2021 close with a -3,5 % in travelers compared to 2020, when January and February were “normal” months in terms of travels.

The main data to notice is the strong change from October 2021 (7.694 visitors) to November (30.189), when both US and Italy decrease the restrictions, data confirmed in December with 45.062 arrivals. Arrivals are still half compared to pre-pandemic, but the trend shown is very positive indicating a strong request of travel as normal in 2022 onwards.



First intended address chosen by Italian is link to the presence of the main international airports and business opportunity (December 2021 data)

TRAVEL TO THE USA cont...

U.S. State/Territory Of Destination*	Italy
New York	16.459
Florida	9.547
California	4.693
New Jersey	1.511
Texas	1.276
Illinois	1.082
Massachusetts	1.027
Pennsylvania	677
Nebraska	633
Georgia	605
Virginia	443
Washington	376
Michigan	364
Connecticut	357
Nevada	355
Colorado	347
Maryland	317
North Carolina	307
Dist. Of Columbia	294
Arizona	246
Hawaii	230
Ohio	227
Louisiana	178
South Carolina	174
Tennessee	153
Indiana	142
Utah	135
Minnesota	116

U.S. State/Territory Of Destination*	Italy
Wisconsin	115
Missouri	107
Puerto Rico	89
Alabama	88
Kentucky	84
Oregon	82
Rhode Island	79
Idaho	50
Alaska	49
Arkansas	40
Delaware	37
Oklahoma	37
Kansas	36
Iowa	35
Maine	28
New Hampshire	27
Mississippi	23
New Mexico	20
Vermont	20
Montana	18
West Virginia	18
North Dakota	10
South Dakota	7
Guam	6
Wyoming	6
Virgin Islands	0
Not Reported	1.680
Grand Total	45.062

Source: International Trade Administration U.S. Department Of Commerce



Travel Industry Landscape

TRENDS OF THE ITALIAN TRAVEL INDUSTRY

In general, Italian tour operators are going through the pandemic crisis, partly because their small size corresponds to limited costs and partly thanks to the Government support, especially sustaining employees' costs. Mostly of them have included Italy and European destinations in their portfolio, even if the pre-pandemic period these destinations were mostly self-organized by potential tourists, but the choice of including domestic and short haul is linked to need to protect their original business keeping long haul as online suggestions, preventing their closure and meantime non investing on them and waiting for the restart of the outbound travel.

The pandemic has accelerated some trends in the market:

- **Merging of brands:** Alpitour has finalized its rebranding after acquisition of Eden Viaggi and dismissal of Turisanda and Hotelplan brands, Marcelletti had been purchased by Idee per Viaggiare, Valtur by Nicolaus... as per last year trend, historical brands continue to be in the market and are relaunched, even if under a different ownership.
- **Portfolio enlargements:** Tour operators have been keeping enlarging their portfolio of destination, passing from specialization on territories (Africa, Asia...) to one in niches (escorted cultural tours, naturalistic tours, tours with influencers, etc.); following this trend, most of the tour operators have included Europe and Italy in their programs during the pandemic selling them, though, from specific unique story angles.
- **Success of value for money dynamic tour operators** (e.g., Volonline), that increased the market shares, supported by limited investment in terms of allotments and high investment in terms of technology
- **Crisis of village operator model:** village tour operators with strong allotment investments in middle and long-haul mass destinations (Dom. Rep./ Red Sea, Kenya...) continue to live the crisis that began years ago that has conducted to the bankrupt of historical brand (e.g., Viaggi di Atlantide, Condor); today even the main player Settemari is living strong crisis, while the sister company Amo il Mondo – which is specialized in FIT – continues to operate normally.
- **Network as players of verticalization:** in a trade panorama made by more than 10.000 travel agencies, most of them affiliated to travel network to increase their negotiating force versus more than 100 tour operators, these consortia have become important aggregators. Different networks have linked to Tour Operator brands: following the example of Gattinoni, active with an internal tour operator since years, other networks have reinforced their tour operating activities purchasing and relaunching historical brands and hiring recognized tour operator managers to support their activity: Bluvacanze purchased and reinforced Going Tour Operator, Primarete did the same thing with Columbus.

TRENDS OF THE ITALIAN TRAVEL INDUSTRY

cont...

- **Continuous creation of new operators:** with the exception of Alpitour, all other companies remain quite small and linked to the territory. Even during the last 2 years, with the difficulty in selling, professionals having left other big operators have tried to invest in new brands. For instance, several former Eden Viaggi product managers have created Creo.
- **Weakness of airlines market:** pandemic accelerated crisis of the Italian airlines affecting both public (Alitalia, transformed in ITA and still on sales) and private charter ones (Air Italy, Blue Panorama). Only Neos (which is part of the Alpitour group) is considered solid.

Italy confirms to be a dynamic, extremely fragmented market, where the capability to adapt the trade model and to be connected to loyal agents / clients is the key.

T.O.	Totale 2019
Valori medi	6.697.023.002
Costa Crociere	4.318.486.586
Alpitour	1.992.277.000
Veratour Spa	252.111.903
Mistral Tour Internazionale S R L.	134.147.513
Itakamd Travel Agency Srl	109.325.754
Settemari	99.627.133

WORLDWIDE HOTEL LINK S.R.L.	94.497.552
ALBATRAVEL GENOVA SRL	343.484
NICOLAUS TOUR SRL	92.842.145
OUTBY TOUR ACTIVITY SRL	92.001.461
OTA	1.828.165
AEROVIAGGI S.P.A.	87.580.290
ALIDAYS SPA	75.191.319

STATUS OF TOUR OPERATORS WHO HAVE PREVIOUSLY WORKED WITH TRAVEL SOUTH USA

Confirming what had been said, despite the pandemic, most tour operators active on Travel South countries in 2019 are in place.

Aligned to the restrictions in place and to the preference going for independent experiences respecting social distancing, there is a decrease in the offer of group tours, while individual ones have been confirmed or in some case implemented. This is the reason why some small companies used to organize only groups trips needing to be pre-booked (maybe one per year in US Southern States, have at the moment stopped their programs to US to concentrate in short haul trips, easier to sell.

Tour Operator 2020	Alabama	Arkansas	Carolina del Nord	Carolina del Sud	Georgia	Kentucky	Lousiana	Mississippi	Missouri	Tennessee	Virginia	West Virginia	Tour Operator 2022
Airmar				1	1		1	1	1	1	1		Active
Alidays	1		1	1	1		1	1	1	1	1	1	Active
Amoilmondo							1	1		1	1		Active
Aresviaggi			1		1				1			1	Active
Bigmama	1		1	1	1		1	1		1			Active
Blueberry													Active
Boscolo	1						1			1			Active
Utat Viaggi	1		1	1	1		1	1		1	1		Active
Caleido Group (Oltremare-Caleidoscopio)									1				Active
Cielo Azzurro	1		1	1	1	1	1	1	1	1	1		Not active at the moment
Club Paradiso					1		1	1		1	1	1	Active
Creo													NEW!
Eden Made			1	1			1	1	1	1	1		Today Turisanda brand
Enjoy Destinations	1				1			1	1	1			Active
Etnia Travel Concept	1		1	1	1		1	1		1	1		Active
Gastaldi Holidays			1	1	1		1	1	1	1	1		Active
Gioco Viaggi Tour & Cruise Operator											1		Active
Giver Viaggi					1		1	1	1	1	1		US tour on hold

STATUS OF TOUR OPERATORS WHO HAVE PREVIOUSLY WORKED WITH TRAVEL SOUTH USA cont...

Tour Operator 2020	Alabama	Arkansas	Carolina del Nord	Carolina del Sud	Georgia	Kentucky	Lousiana	Mississippi	Missouri	Tennessee	Virginia	West Virginia	Tour Operator 2022
Glamour Viaggi				1	1		1	1		1			Active
Go America			1	1	1	1	1	1	1	1	1		Active
Guinness Travel							1	1	1	1			Active
Hirondelle			1	1	1		1			1		1	Active
I Grandi Viaggi			1				1	1					Active
I Viaggi Del Toghiro	1			1	1	1			1	1			Leisure tour on hold
I Viaggi Dell'airone	1						1	1		1			Active
Idee Per Viaggiare	1			1	1		1	1	1	1			Active
Identity Plus				1	1		1			1	1		Not active at the moment
Impronte A Nord Ovest							1		1	1			Active
Kailas			1	1						1			Active
Konrad Travel T.O.	1		1	1	1	1	1	1	1	1	1		Active
Le Vie Del Nord				1	1		1	1	1		1		Active
Mundo Escondido				1	1					1			Active
Naar	1		1	1	1		1	1	1	1			Active
Neotours					1		1		1	1			Active
Quality Group	1		1	1	1		1	1	1	1	1		Active
Quiiky				1	1		1						Active
Reimatours					1		1	1		1	1	1	Active
Tecnitravel			1		1								Active
Travel Experience									1				Active
Travel Island	1		1	1	1	1	1	1	1	1	1		Active
Versis America	1		1	1	1	1		1	1	1	1		Active
Viaggi Del Delfino					1		1			1			Active
Viaggi Dell'elefante			1				1			1			Active
Viaggi Giovani									1				Active
Viaggidea (Gruppo Alpitour)			1	1	1		1			1	1	1	Today Turisanda brand
Xploreamerica	1	1		1	1	1		1	1	1	1		Active
Yara Tours			1				1	1		1	1		Active

STATUS OF MAIN TOUR PRODUCERS

Alpitour

Alpitour reinforced during the last two years its role of top player in the market. During the 2 years of forced stop of long-haul travel they completed the rebranding process, which had begun with the acquisition of Eden and the dismissal of Hotelplan brand and has developed a stricter division of destinations and targets to avoid internal competition.

The brands of the tour operators currently operating on the market are:

Alpitour, Francorosso, Bravo, Eden Viaggi (hotel & club vacations)

Turisanda (with brand Presstours and Made): itineraries and tailor made

US are today part of Turisanda catalogue only: comparing its offer to the one of 2019, it seems to have a decrease in offer, but in long term this rebranding will reinforce its positioning giving a clear vision to clients.

Example of Travel South itinerary – yesterday and today

Pre pandemic:

Brand offering Southern States programs Hotelplan, (1 escorted tours, 2 fly & drive itineraries), Eden Viaggi (1 escorted tours, 2 fly & drive itineraries), Presstours (1 Escorted Tours, 15 Fly-Drive), Viaggidea (3 escorted tours, 8 fly & drive itineraries).

Example:

Hotelplan brand (escorted tour):

- Landscapes & Music: Departures: June 8 - August 3 – September 7 12 days / 11 nights: NYC – Philadelphia – Washington – Roanoke – Asheville – Nashville - Memphis – Vicksburg – Natchez – Baton Rouge – New Orleans

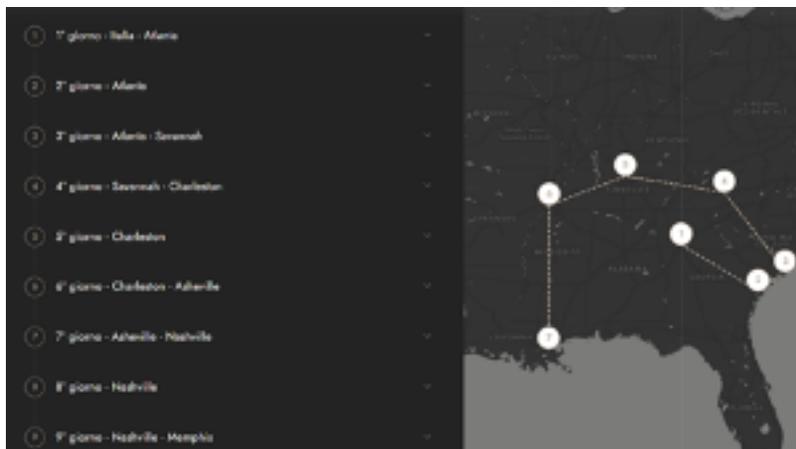
Presstours brand (fly & drive itineraries):

- Southern Beauties: 14 days/13 nights, Atlanta – Blue Ridge – Chattanooga – Nashville – Memphis – Jackson – New Orleans – Destin – Montgomery – Atlanta
- Unforgettable Tennessee Rhythms: 9 days/8 nights: Nashville – Clarksville – Memphis- Lawrenceberg – Chattanooga- Great Smoky NP –Bristol – Knoxville – Nashville
- Historic Southern Harmonies: 8 days/7 nights: Atlanta – Nashville – Memphis – Tupelo – Huntsville – Birmingham – Montgomery – New Orleans

STATUS OF MAIN TOUR PRODUCERS cont...

Post pandemic: website is a display window of suggestions

The only brand featuring US is now Turisanda, featuring on the website a short selection of tour to the States, only one of them dedicated to Southern States, detailed here below. Tailor made packages and fly & drive suggestions will be created on demand.



In the deep South

1. In the deep South: 7 days /6 nights: New Orleans – Baton Rouge - Natchez – Vicksburg – Natchitoches – New Orleans

Alidays

Tour operator with a strong focus on US, in the past they strongly invested in technology allowing travel agents to create their own itinerary.

During the 2 years pandemic they created an Italy section dedicated on local experience, mixing the expertise in the market and the new trend, today ready for international sales too.

With the reopening of US to international travelers, their operativity in the destination has restarted.

Pre-Pandemic

6 Escorted Tours (example):

- American Music, Cities and Mountains: 12 days/11 nights: Departures: June 8- August 10 - Sept. 7 NY – Philadelphia – Washington – Roanoke – Pigeon Forge – Nashville – Memphis – Natchez – New Orleans

22 Fly & Drive Tours (example):

- Deep Southern Culture: 8 days/7 nights Atlanta – Montgomery – Orange Beach – Mobile – New Orleans
- American Civil War: 14 days/13 nights Atlanta – Nashville - Memphis –Vicksburg – New Orleans – Mobile -Atlanta

STATUS OF MAIN TOUR PRODUCERS cont...

Post pandemic

The website already was a window display with example of experiences that could be done in the States, non-comprehensive of all the possible tours. The goal of Alidays has traditionally been portraying their wide offer via thematic tours.

Dallas & the Great South

- 

DALLAS
Hotel: Best Western Market Center
Durata: 2 notti
Camera Standard (prima colazione)
- 

SAN ANTONIO
Hotel: Super 8 Downtown Riverwalk
Durata: 1 notte
Camera Standard (prima colazione)
- 

HOUSTON
Hotel: Comfort Suites Houston
Durata: 2 notti
Camera Standard (solo pernottamento)
- 

NEW ORLEANS
Hotel: Wyndham New Orleans French Quarter
Durata: 3 notti
Camera Standard (solo pernottamento)
- 

VICKSBURG
Hotel: Best Western Vicksburg
Durata: 1 notte
Camera Standard (solo pernottamento)
- 

CLARKSDALE
Hotel: Hampton Inn Clarksdale
Durata: 1 notte
Camera Standard (prima colazione)
- 

MEMPHIS
Hotel: Days Inn Graceland
Durata: 2 notti
Camera Standard (prima colazione)
- 

NASHVILLE
Hotel: Alois Inn & Suites
Durata: 2 notti
Camera Standard (solo pernottamento)

Atlanta & the South East

- 

ATLANTA
Hotel: Hilton Garden Inn Atlanta-Northeast
Durata: 7 notti
Camera Standard (solo pernottamento)
- 

MACON
Hotel: Motel 6 Macon Hwy 92/Highway 160
Durata: 1 notte
Camera Standard (solo pernottamento)
- 

SAVANNAH
Hotel: Comfort Inn Savannah
Durata: 2 notti
Camera Standard (prima colazione)
- 

CHARLESTON
Hotel: Days Inn by Wyndham Charleston Historic District
Durata: 2 notti
Camera Standard (solo pernottamento)
- 

COLUMBIA
Hotel: Hampton Columbia (Hampton Hotel)
Durata: 1 notte
Camera Standard (solo pernottamento)
- 

CHARLOTTE
Hotel: Courtyard by Marriott Charlotte University
Durata: 4 notti
Camera Standard (solo pernottamento)
- 

ASHEVILLE
Hotel: Holiday Inn Express Asheville Mountain View
Durata: 7 notti
Camera Standard (solo pernottamento)
- 

CHATTANOOGA
Hotel: Best Western Great Inn
Durata: 1 notte
Camera Standard (solo pernottamento)
- 

ATLANTA
Hotel: Country Inn & Suites Atlanta North/Atlanta-Fulton County
Durata: 1 notte
Camera Standard (prima colazione)

STATUS OF MAIN TOUR PRODUCERS cont...

Tour Louisiana & Alabama Food & Music



ATLANTA

HOTEL: Courtyard Inn & Suites By Carlson, Atlanta

Durata: 2 notti
Camera Standard (prima colazione)



HUNTSVILLE

HOTEL: Days Inn & Suites Huntsville

Durata: 1 notte
Camera Standard (solo pernottamento)



FLORENCE

HOTEL: Quality Inn

Durata: 1 notte
Camera Standard (solo pernottamento)



BIRMINGHAM

HOTEL: Days Inn Birmingham

Durata: 1 notte
Camera Standard (solo pernottamento)



MOBILE

HOTEL: Super 8 Mobile

Durata: 2 notti
Camera Standard (solo pernottamento)



LAFAYETTE

HOTEL: Days Inn Lafayette

Durata: 1 notte
Camera Standard (solo pernottamento)



NEW ORLEANS

HOTEL: Moxy By Marriott New Orleans Downtown French Quarter

Durata: 4 notti
Camera Standard (solo pernottamento)

Mississippi Blues Trail



ATLANTA

HOTEL: Hyatt Place Galleria

Durata: 1 notte
Camera Standard (solo pernottamento)



BIRMINGHAM

HOTEL: Embassy Suites

Durata: 1 notte
Camera Standard (solo pernottamento)



MEMPHIS

HOTEL: Quality Inn

Durata: 2 notti
Camera Standard (solo pernottamento)



JACKSON

HOTEL: Best Western Executive Inn

Durata: 1 notte
Camera Standard (solo pernottamento)



NEW ORLEANS

HOTEL: The Modern Hotel

Durata: 2 notti
Camera Standard (continental breakfast inclusa)



MONTGOMERY

HOTEL: Hampton Inn & Suites

Durata: 1 notte
Camera Standard (solo pernottamento)

STATUS OF MAIN TOUR PRODUCERS cont...

American Music on the Road



CHICAGO

HOTEL: The Adlon
Durata: 3 notti
Camera Standard (solo pernottamento)



ST. LOUIS

HOTEL: Best Western St. Louis Inn
Durata: 1 notte
Camera Standard (solo pernottamento)



NASHVILLE

HOTEL: Alexis Inn & Suites
Durata: 2 notti
Camera Standard (solo pernottamento)



MEMPHIS

HOTEL: Comfort Inn Downtown
Durata: 2 notti
Camera Standard (solo pernottamento)



VICKSBURG

HOTEL: Vicksburg Inn & Suites
Durata: 1 notte
Camera Standard (continental breakfast)



NEW ORLEANS

HOTEL: Mynham French Quarter
Durata: 2 notti
Camera Standard (solo pernottamento)

Southern USA Literarily Tour



ATLANTA

HOTEL: Canale Place Atlanta Capitol Park
Durata: 2 notti
Camera Standard (solo pernottamento)



SAVANNAH

HOTEL: Inn Central Inn
Durata: 4 notti
Camera Standard (solo pernottamento)



CHARLESTON

HOTEL: Comfort Inn Myrtle
Durata: 2 notti
Camera Standard (solo pernottamento)



ASHEVILLE

HOTEL: Green Place
Durata: 1 notte
Camera Standard (solo pernottamento)



NASHVILLE

HOTEL: Best Western Downtown Music Box
Durata: 2 notti
Camera Standard (solo pernottamento)



MEMPHIS

HOTEL: Days Inn Downtown
Durata: 2 notti
Camera Standard (prima colazione)



VICKSBURG

HOTEL: Vicksburg Inn & Suites
Durata: 1 notte
Camera Standard (solo pernottamento)



NEW ORLEANS

HOTEL: Sonlife House
Durata: 2 notti
Camera Standard (solo pernottamento)



MOBILE

HOTEL: Best Western Airport Inn & Suites
Durata: 1 notte
Camera Standard (solo pernottamento)



COLUMBUS

HOTEL: Hampton Inn
Durata: 1 notte
Camera Standard (solo pernottamento)

STATUS OF MAIN TOUR PRODUCERS cont...

15 Fly-Drive Itineraries

- Southern Coast & Mountains: 9 days/8 nights: Atlanta – Great Smoky Mts. NP – Gatlinburg – Asheville – Charlotte – Myrtle Beach – Pawleys Island – Charleston – Kiawah Island – Savannah – Macon – Atlanta
- Southern Music Roots: 17 days/16 nights: Dallas – Austin – St. Antonio – Houston – New Orleans – Baton Rouge – Vicksburg – Indianola – Tupelo – Birmingham – Chattanooga – Gatlinburg – Great Smoky Mts. NP Athens - Atlanta – Macon – Savannah – Charleston

Post pandemic tours



PARTENZE GARANTITE 2019

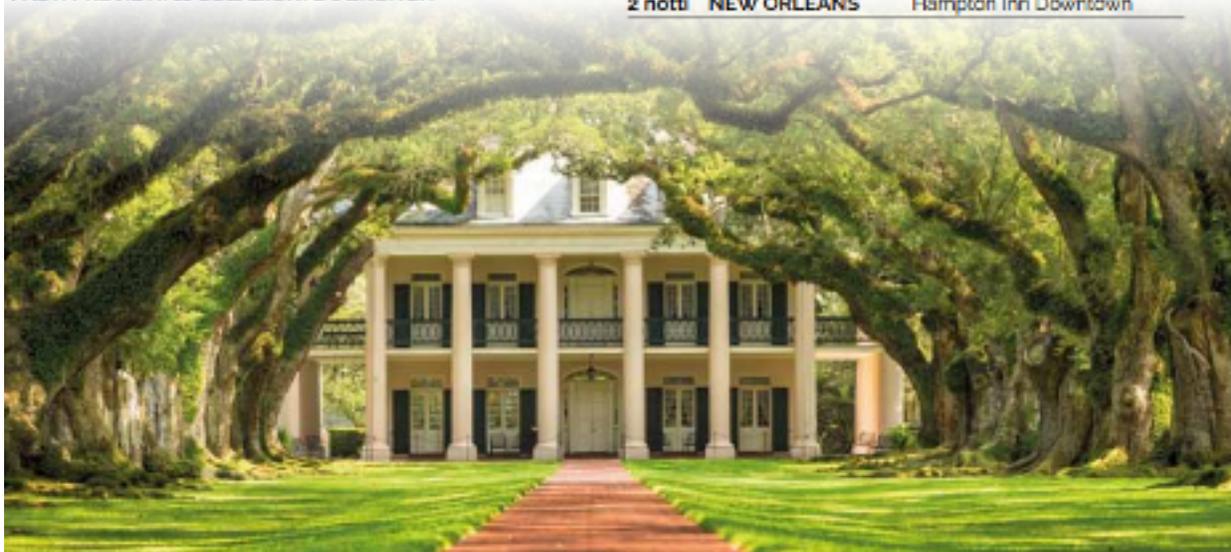
Giugno: 08
 Agosto: 03
 Settembre: 07

GUIDA LOCALE IN ITALIANO

PASTI PREVISTI: 11 COLAZIONI E 1 BRUNCH

ITINERARIO

ITINERARIO		HOTEL
2 notti	NEW YORK	Sheraton New York Times Square
2 notti	WASHINGTON DC	The Wink
1 notte	ROANOKE	Holiday Inn Tanglewood
1 notte	PIGEON FORGE	Holiday Inn Express
1 notte	NASHVILLE	The Inn At Opryland
1 notte	MEMPHIS	Holiday Inn Downtown
1 notte	NATCHEZ	Magnolia Bluffs Casino Hotel
2 notti	NEW ORLEANS	Hampton Inn Downtown



STATUS OF MAIN TOUR PRODUCERS cont...

America World

Quality Group invested a lot during the pandemic period in online tools, training and fidelization of travel agents. Among their brands, Europa World and the new Italyscape one have been reinforced over the last 2 years, but also all the other brands continue with their offer.

135 US itineraries are now offered on their catalogue, giving a lot of suggestions for possible vacations, both for groups and individuals. It is interesting to notice the predominance of self-drive itineraries to Southern States, to avoid pre-reservation services in uncertain periods.

Post pandemic tours

3 Escorted Tours (example)

- Cities & Music: 12 days/11 nights Departures: June 8, August 3, September 7 NYC – Philadelphia – Washington – Roanoke – Asheville – Nashville – Memphis – Vicksburg – Natchez – Baton Rouge - Memphis - Jackson - New Orleans

7 Fly & Drive Tours (example)

- Southern Charm: 14 days/13 nights New Orleans – Lafayette – St. Francisville – Natchez – Vicksburg - Memphis – Nashville – Great Smoky Mts – Atlanta
- The Plantations: 11 days/10 nights New Orleans – Baton Rouge – St. Francisville – Natchez – Vicksburg – Lafayette - New Orleans

Post Pandemic tours

Di gruppo (12 giorni, 11 notti)

Cities & Music

QUOTE A PARTIRE DA: 2526 €

Arte e Al.

LUOGHI VISITATI
New York, Philadelphia, Baltimore, Washington D.C., Roanoke, Asheville, Pigeon Forge, TN, Nashville, Memphis, Natchez, Louisiana State Capitol, Oak Alley Plantation, LA, New Orleans

Individuale (14 giorni, 13 notti)

Rhythms of the South

Selfdrive

QUOTE A PARTIRE DA: 1074 €

Selfdrive

LUOGHI VISITATI
Atlanta, GA, Nashville, Memphis, Vicksburg, New Orleans, Pensacola, Tallahassee, Savannah, Charleston

Individuale (14 giorni, 13 notti)

Southern Charms

Selfdrive

QUOTE A PARTIRE DA: 1048 €

Selfdrive

LUOGHI VISITATI
New Orleans, Lafayette, St. Francisville, LA, Natchez, Vicksburg, Greenwood, Memphis, Nashville, Gatlinburg, TN, Smoky Mountains National Park, TN, Atlanta, GA

STATUS OF MAIN TOUR PRODUCERS cont...



Individuale (15 giorni, 14 notti)

Southern Heritage

Selfdrive

QUOTE A PARTIRE DA: **928 €**

Selfdrive

LUOGHI VISITATI
Orlando, Tallahassee, Pensacola, New Orleans, Vicksburg, Memphis, Nashville, Cherokee, NC, Charleston, Savannah, St. Augustine



Individuale (7 giorni, 6 notti)

The Plantations

Selfdrive

QUOTE A PARTIRE DA: **624 €**

Selfdrive

LUOGHI VISITATI
New Orleans, Baton Rouge, LA, St. Francisville, LA, Natchez, Vicksburg, Natchitoches, LA, Alexandria, LA, Lafayette, Vacherie, LA



Individuale (16 giorni, 15 notti)

La leggendaria Route 66

Selfdrive

QUOTE A PARTIRE DA: **1016 €**

Selfdrive

LUOGHI VISITATI
Chicago, Springfield, IL, Saint Louis, MO, Springfield, MO, Tulsa, Oklahoma City, Amarillo, TX, Albuquerque, NM, Holbrook, Flagstaff, Las Vegas, Santa Monica, Los Angeles



Individuale (14 giorni, 13 notti)

American Music & Movie Trails

Selfdrive

QUOTE A PARTIRE DA: **1095 €**

Selfdrive

LUOGHI VISITATI
Chicago, Saint Louis, MO, Memphis, Vicksburg, New Orleans, Birmingham, Chattanooga, Nashville, Louisville



Individuale (16 giorni, 15 notti)

American Heritage

Selfdrive

QUOTE A PARTIRE DA: **1240 €**

Selfdrive

LUOGHI VISITATI
New York, Washington D.C., Luray, VA, Roanoke, Cherokee, NC, Charleston, Savannah, St. Augustine, Orlando, Sarasota, Miami Beach



Individuale (11 giorni, 10 notti)

American Rhythms

Selfdrive

QUOTE A PARTIRE DA: **756 €**

Selfdrive

LUOGHI VISITATI
New Orleans, Birmingham, Nashville, Memphis, Vicksburg, Natchez, Lafayette

STATUS OF MAIN TOUR PRODUCERS cont...

Go America

Go World group, as per competitors, have invested a lot in increasing its Italian and European products, expanding the brands Go in Italy and Go Europa. Beside its main brand on the US (Go America) the tour operator worked on the destination with niche markets (e.g., GoBiker – Go2Fish).

Go America maintains the pre-pandemic wide range of itineraries. Escorted tours remain especially as niche product (primarily for the bikers' segment).

Pre-pandemic tours

Escorted tours: 4 (example)

- Discovering the South: Departures: July 13, Sept. 7: 11 days/ 10 nights Atlanta – Savannah – Charleston – Asheville – Great Smoky Mts – Chattanooga – Lynchburg - Nashville – Memphis – Clarksdale – Natchez – Baton Rouge – Lafayette – Avery Island - New Orleans

Fly-Drive Itineraries: 14 (including the niche brands)

- Southern Rhythms 1 13 days/12 nights: Atlanta - Nashville - Memphis - Jackson - New Orleans - Pensacola - Tallahassee - St. Augustine - Orlando

Post pandemic tours



Kentucky – Missouri e Illinois tra arte, cultura e cucina

#Kansas City #Louisville #Nashville
#Springfield #St. Louis

Durata: 8 giorni / 7 notti
da € 660 - Voli esclusi



Tour Guidato: Viaggio da New York tra storia e suoni d'America

#Baltimora #Memphis #Nashville #New Orleans
#New York #Philadelphia
#Washington D.C.

Durata: 12 giorni / 11 notti
da € 2445 - Voli esclusi



Self-Drive: American Rhythms

#Lafayette #Memphis #Nashville #New Orleans

Durata: 11 giorni / 10 notti
da € 630 - Voli esclusi

STATUS OF MAIN TOUR PRODUCERS cont...



Self-Drive: Viaggio da Washington – Alla scoperta dell’America Coloniale

#Baltimore #Charlottesville #Colonial Williamsburg #Eastern Shore Annapolis #Gettysburg #Norfolk #Philadelphia #Shenandoah #Skyline Drive #Virginia Beach #Washington D.C.

Durata: 11 giorni / 10 notti
da € 905 - Voli esclusi



Self-Drive: Southern Heritage

#Daytona Beach #Emerald Coast #Great Smoky Mountains #Kennedy Space Center #Memphis #Nashville #New Orleans #Orlando #Savannah #St. Augustine

Durata: 15 giorni / 14 notti
da € 767 - Voli esclusi



Self-Drive: Ritmi del Sud fino ad Orlando

#Atlanta #Memphis #Nashville #New Orleans #Orlando

Durata: 13 giorni / 12 notti
da € 847 - Voli esclusi



Self-Drive: Ritmi del Sud fino ad Atlanta

#Atlanta #Memphis #Nashville #New Orleans

Durata: 14 giorni / 13 notti
da € 851 - Voli esclusi



Self-Drive: L’America tra Musica e Cinema

#Chicago #Louisville #Memphis #Nashville #New Orleans #St. Louis

Durata: 14 giorni / 13 notti
Su richiesta



Self-Drive: Itinerario Usa Est – Panorami d’America

#Charleston #Gatlinburg #Miami #New York #Orlando #Roanoke #Sarasota #Savannah #Shenandoah National Park #St. Augustine #Washington D.C.

Durata: 16 giorni / 15 notti
da € 1210 - Voli esclusi

STATUS OF MAIN TOUR PRODUCERS cont...

GoBiker tours



U.S.A. – THE MUSIC HIGHWAY

#Alabama #atlanta #Blues #Civil Rights
#Crossroads #Delta #Elvis #Georgia
#Graceland #Jack Daniel's #Louisiana
#Martin Luther King #memphis
#Mississippi #nashville #new orleans
#North Carolina #Rock #Smokey
Mountains #Soul #Tall of the Dragon
#Tennessee

Durata: 16 giorni / 14 notti
da € 2280 - THE MUSIC HIGHWAY



ROUTE 66 – THE MOTHER ROAD

#Arizona #California #chicago #End of the
Trail #grand canyon #Illinois #Oklahoma
#Route 66 #San Louis #santa fe #Santa
Monica

Durata: 16 giorni / 14 notti
da € 5130 - DA CHICAGO A LOS
ANGELES LUNGO LA MOTHER ROAD



Fly & Bike: The South and The Music Roots

#Alabama #Georgia #Tennessee

Durata: 10 giorni / 8 notti
da € 1720 - Voli inclusi

Go2Fish



Viaggio di pesca in Alabama, Fairhope – Pesca a mosca a Mobile Bay

#Alabama

Durata: 5 giorni / 4 notti
da € 2027 - Voli inclusi

BRIEF ON OF VACATIONS TO USA

Type: USA are a mature destination for the Italian market and a must destination for every traveler.

The destination is one of the most intermediated (more than 100 tour operators used to sell it, with an average of eighteen countries sold per TO), but at the same time one of the beloved destinations for self-booking travelers, considered safe and easy to live.

Intermediation returned, during the pandemic, to be perceived particularly important because it grants assistance in case of changes in travel rules and mainly because of the insurance available in case of cancellation. Self-drive itineraries are particularly interesting because they offer a perfect mix of independent travel and assistance in organization.

Duration: 7 days for **single destination** trips

2 weeks for **multi destinations trips** (especially out of main destinations)

For more famous/sold destinations, often the first approach when one travels to the USA, stay is shorter, while more complex/structured trips, such as the one in Southern states, stays are longer and request a minimum of 2 weeks.

Booking confidence & procedures: Italy is traditionally a last booking market (reservations for long haul are generally done max 3 months in advance) and its peak seasons are summer and New Year's Eve. The uncertainty of pandemic crisis increases this characteristic, with consumers trying to avoid cancellations linked to potential changes in entrance rules. This is one of the main reasons for groups tours declining in 2022, more complex to reserve, while suggestion of individual fly & drive tours became more popular.

The stop of restrictions rules has been considered a good signal to push consumers to restart booking in advance, however the recent international crisis in Russia and Ukraine is impacting on travelers as well, making unpredictable a return to a normal booking window that, also before the pandemic, Tour Operators tried to lengthen through early bird offers.

Mature destinations such as US are not primarily booked via Travel Agents/TOS, most of travelers prefer to build their own trip booking online, but after 2 years of uncertainty percentage of who book packages, online or in a shop, is strongly increasing.

BRIEF ON OF VACATIONS TO USA cont...

Book separate flight and hotel online via different booking portals/travel agencies	34.3%	↓ -1.2%
Book accommodation directly via the accommodation's website	32.8%	↓ -7.9%
Use price comparison site (e.g. Momondo, Trivago, Skyscanner)	25.5%	↓ -11.5%
Book package trip (flight+accommodation) online at travel agency website	23.5%	↑ 14.6%
Book transportation directly via the airline/car rental/rail/coach/cruise website	21.1%	↑ 7.7%
Book package trip (flight+accommodation) with a travel agent in person or via phone/email	15.2%	↑ 23.6%
Book package (flight and accommodation) direct with tour operator	10.3%	↓ -27.5%

Route to market:

Italy has a limited airlines market, which has become even weaker during the pandemic. Over this timing, Alitalia has stopped flying, as well as Air Italy, and even if the first one has been restructured and rebranded with the ITA name, the process is still ongoing. Neos, born as charter company of Alpitour group, is at the moment the only Italian airline expanding its flights, including new routes (e.g., Milan – New York).

Today airlines connections are limited compared to pre-pandemic and concentrated mostly in Milan and Rome to New York, but summer schedule see a return to a strong net of connections involved different airports both in Italy and in the US.

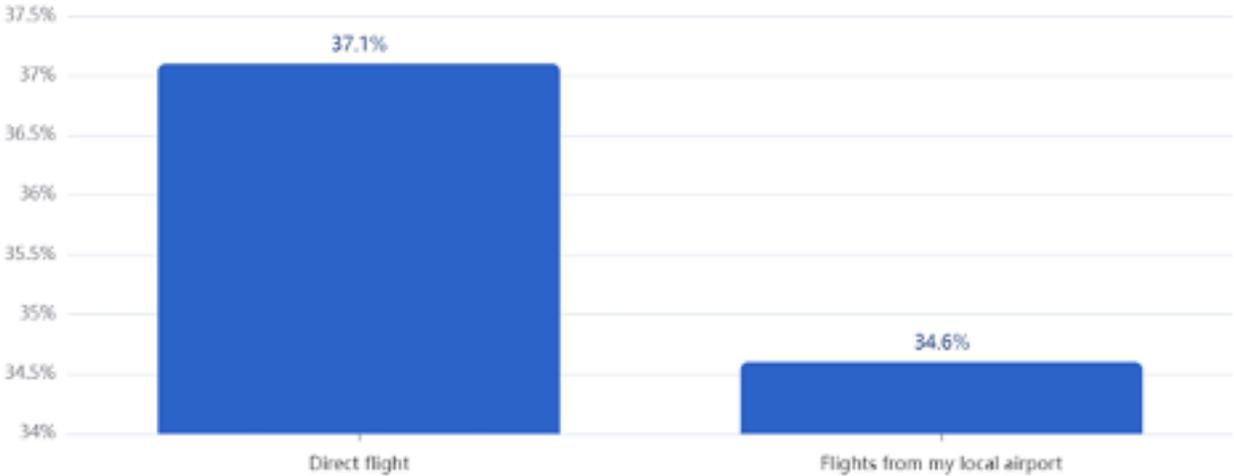
BRIEF ON OF VACATIONS TO USA cont...

Airline Name	Flights to	Code	Flights From	Code2	FREQUENCY PER WEEK
ITA Airways	Boston	BOS	Rome	FCO	2 x week from March 2022
ITA Airways	Miami	MIA	Rome	FCO	3 x week from March 2022
ITA Airways	New York	JFK	Rome	FCO	Daily 2 x day since April 2022
ITA Airways	New York	JFK	Milan	MXP	Daily from April 2022
ITA Airways	Los Angeles	LAX	Rome	FCO	Daily form June
American Airlines	Philadelphia	PHL	Rome	FCO	Daily
American Airliens	Dallas	DFW	Rome	FOC	Daily from May 6th
American Airlines	New York	JKF	Milan	MXP	Daily
United	Chicago	ORD	Rome	FCO	Daily from April 6th 2022
Delta	New York	JFK	Milan	MXP	Daily
Delta	New York	JFK	Rome	FCO	Daily
Delta	New York	JFL	Venice	VCE	5 x week form May 6th 2022 Daily from June 2022
Delta	Boston	BOS	Rome	FCO	3 x week in March 5 x week from April 6 x week from May Daily from Jun
Delta	Atlanta	ATL	Rome	FCO	3 x week since May 2022 daily from June 2022
Delta	Atlanta	ATL	Venice	VCE	Daily form May 207th
Delta	Atlanta	ATL	Milan	MXP	5 x week since May Daily form June
Emirates	New York	JFK	Milan	MXP	Daily
Neos Air	New Your	JFK	Milano	MXP	2 x week
United	New York	EWR	Milan	MXP	Daily
United	New York	EWR	Rome	FCO	Daily
United	New York	EWR	Venice	VCE	Daily from May 7th 2022
United	New York	EWR	Naples	NAP	Daily from May
United	Chicago	ORD	Rome	FCO	Daily form May 7th
United	Chicago	ORD	Milan	MXP	Daily form May 7th
United	Washington	IAD	Rome	FOC	Daily from March 27th

BRIEF ON OF VACATIONS TO USA cont...

Particularly important is the presence of direct flights from 3 different Italian airports to Atlanta (Rome, Milan, Venice). Italians are used to stopover during long haul flights, and as per the first trip to US they often consider New York a must to visit, but part of a travelling trip. The possibility to create an itinerary with direct flight back from a Southern State is a key level to push self-drive itineraries.

Analyzing travel behaviors, 37,1% considered the direct flight a primary element in the choice of a destination, while flying from local airports is a must for 34,6% of travelers.

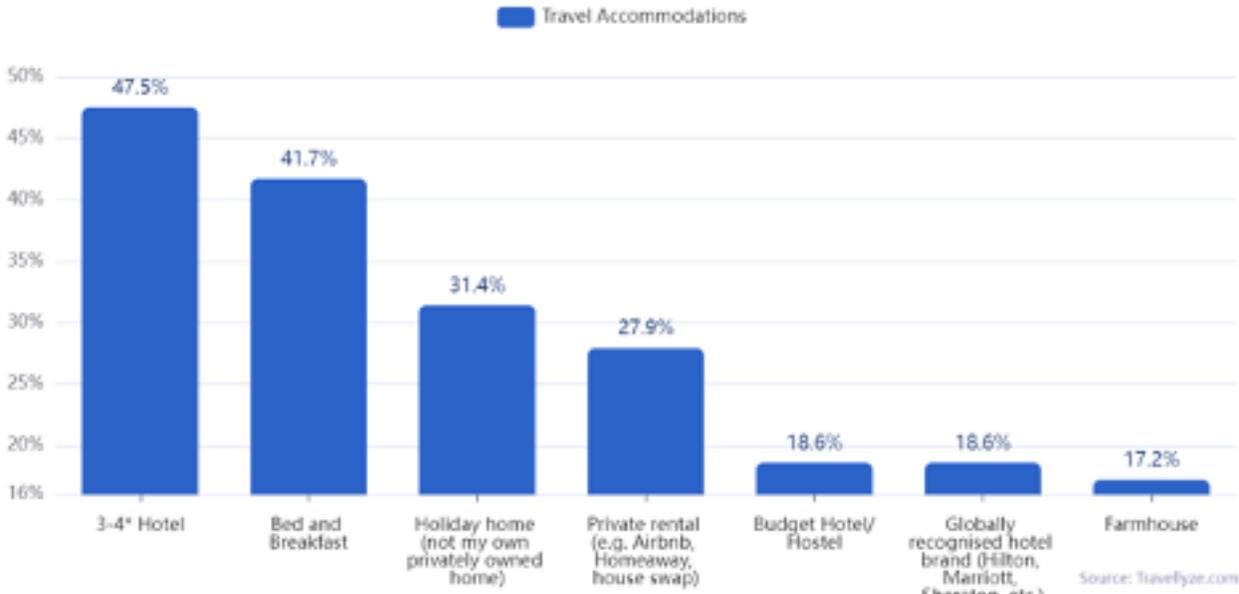


Source: Travelbyze.com

BRIEF ON OF VACATIONS TO USA cont...

Lodging trends:

In general, Italian travelers enjoy travelling independently to destinations which are considered safe and clean. They are not attracted by hotel brands preferring value for money accommodations such as 3-4 stars hotels or Bed & Breakfast (in US inns or motels), preferably with limited number of rooms and possibility of interaction with hosts, looking for a more authentic experience. Bookings are done using booking portals and price comparison sites, giving particular attention to the ratings of previous guests. Choosing accommodation is an important side of the trip organization, travelers often mix Hotels of major chains with independent accommodation trying to have an experience as complete as possible.



Position of tour operators is different; they tend to work with chains to negotiate better rates. Value for money is in any case a primary key. For this reason, Inns chains are usually included in tour operators' packages, both for self-drive and group tours. Working with groups is mandatory to offer a similar level of medium service along the entire trip, which is not the case for self-drive tours. It is quite normal – in the case of self-drive trips – offering to choose between economic (inns) and up level (4 stars) accommodation. Italians are used to have breakfast included, tour operators try to include it especially during group trips.

BRIEF ON OF VACATIONS TO USA cont...

5 stars hotels are sometimes proposed in main cities (e.g., New York) or in seaside destinations (e.g., Caribbean islands), where the hotel experience is considered the main focus of the vacation, but are generally avoided in tours, where the main focus is on the natural / cultural experience.

RVs are not typical of Italian travel experience, but it's a niche market of camping addicted used to buy travels mainly through dedicated channels.



Attractions & experiences:

Self-drive proposals are generally a suggestion of itineraries where attractions are explained but not included. This kind of trip is based on the possibility to directly manage travelers' timings, starting from an not expensive basis, including overnights and car rental (international flights would be not included, but to be added upon reservation to ensure the best available price.

Description of the itinerary and info material are particularly important when selling this kind of trip, generally addressed to experienced travelers.

2.570 €
per persona
10 GIORNI | 9 NOTTI

LA QUOTA COMPRENDE: 14 pernottamenti in 2x2 pernottamenti in 2x2 x3 pernottamenti in 2x2 x3, con assicurazione RCA (per chi non è assicurato in Italia) e assicurazione incendio e furto. Il servizio di noleggio dell'auto è a parte. Il servizio di noleggio dell'auto è a parte. Il servizio di noleggio dell'auto è a parte.

LA QUOTA NON COMPRENDE: Assicurazione RCA (per chi non è assicurato in Italia) e assicurazione incendio e furto. Il servizio di noleggio dell'auto è a parte. Il servizio di noleggio dell'auto è a parte. Il servizio di noleggio dell'auto è a parte.

American Rhythms

10 GIORNI | 9 NOTTI

QUOTA A PARTIRE DA: 2.570 €

LA TUA QUOTA COMPRENDE

- | | |
|--|--|
| <p>LA QUOTA COMPRENDE</p> <ul style="list-style-type: none"> • Sistemazione in Hotel Lodge all'interno dei parchi in servizio di alta qualità. | <p>LA QUOTA NON COMPRENDE</p> <ul style="list-style-type: none"> • Passaggi aerei dall'Italia. • Tasse personali. • Noleggio auto/ferry. • Ingressi ai parchi (se non espressamente indicati). • Pasti, mance ed extra in genere. • Quota di gestione attività. • Tutto quanto non espressamente indicato nella quota comprensiva. |
|--|--|

BRIEF ON OF VACATIONS TO USA cont...

It is different when it goes to group tours. Contents of this product normally include entrance to museums and special experiences are included, while some other are considered as an extra.

Among most common experiences included:

- Ore or more lunch or dinner in typical restaurants
- Guided visits to cities
- Entrance to museums

Average, an entrance per day is included in group trips normally focused on the main topic of the travel: Country Music Hall of Fame, Graceland, Sun Records Studio, BB King Museum, entrance in plantations are typically included in Southern US trips.



LA TUA QUOTA COMPRENDE

LA QUOTA COMPRENDE

11 Pernottamenti in alberghi di prima categoria;
11 colazioni (americane o continentali a seconda dell'hotel);
Trasferimento in arrivo a New York;
Visita delle città di New York, Philadelphia, Washington,
Nashville, Memphis e New Orleans;
Pullman con aria condizionata per tutta la durata del tour (dal 1°
al 11° giorno);
Guida in lingua italiana;
Facchinaggio in hotel (solo New York).

LA QUOTA NON COMPRENDE

Pernaggi aerei dall'Italia;
Tasse aeroportuali;
Pasti e bevande non indicati in programma;
Trasferimento in partenza da New Orleans;
Mance ed extra in genere;
Quota di gestione pratica;
Tutto quanto non espressamente indicato ne "La quota
comprende".

Key travel industry events

Italy hosts 2 main trade events (BIT and TTG Incontri), in different timing of the year, and a series of different regional events.

BIT normally takes place in February in Milan, but due to the pandemic in the last 2 years it has been organized in April (in 2021 only virtually, in 2022 in presence). The fair, both trade and consumer, is living an identity crisis since years, with different changes in dates and locations.

TTG Travel Expo is organized in October in Rimini. Due to the timing, it has been organized in presence even in 2020 and 2021. Even if most of the international operators have not been present, being confirmed even in a such difficult timing and being one of the only marketplaces not cancelled in Europe, its reputation has increased and is now considered the best show in the market.

Among the regional event, **BMT** is the most important. Organized in Naples in March, it is the most important trade event of Southern Italy, whit a minor presence of tour operators and a major presence of travel agencies.

BRIEF ON OF VACATIONS TO USA cont...

Beside that, some niche market events are organized all over Italy during the year: EUDI for diving, Salone del Camper for RVs, Fieravacalli for horse tourism, etc. These fairs are attended by people not only interested in traveling but they attract very motivated potential tourists.

Being Italy a wide market, with strong regional roots, events organized locally by tour operators and NTO's are particularly important, allowing to spread promotion all over Italy. The lack of a main trade fair is compensated by a full calendar of events with strong topics.



Media Landscape

COVERAGE OF THE USA AND TRAVEL SOUTH USA REGION

Pandemic has stopped leisure communication of international destinations on the market, and this has also affected but US in general and Travel South, as we know.

While the second one has immediately had to stop communication, Brand USA - only and official organ of communication for the States has kept working until the end of 2020.

Communication, though, has mostly been focused on technical information and reassuring news about the entrance policies and the measures applied to contain pandemic.

Exactly the same has applied not only to American States and cities active in the market (traditionally Las Vegas, California, Massachusetts, Boston and New York) but, at a larger scale, to all extra EU destinations keeping an operation on the market.

It is important to underline that without a proactive approach, media have never been spontaneously published tourist, lifestyle articles about international destinations.

Trends have been focusing attention on domestic offer, not even proposing European destination, unless being fed by Press Offices with contents. The attention of media has been concentrated on publishing what was sellable, so the selection has been made on the basis of opening of destinations to Italian for leisure travels. Only now that Italy is opening up to the world some attention is also given to international destinations, but this is the real beginning and no coverage is visible yet.

In this scenario that has seen leisure contents on long haul destinations basically disappear from Italian media, exceptions are given by destinations like Middle East countries - preserving their investments in communication all through the pandemic - and by Brand USA that, at the end of 2020 has chosen to organise an online media event focused on American Parks and Rangers gathering the following coverage:

10 articles with a total coverage of 4 million shifted between 3.2 M printed media and 846 K social media.

This is the only major coverage that can be listed within Pandemic era.

It is also important to underline, though, how media are only keen to be fed with contents that are not only interesting from the content point of view but also sellable to consumers, so to avoid disappointing them with stories they will never be in the position to experience.

CHANGES IN PUBLICATIONS, DIGITAL AND PRINT, POST-COVID

Italian media scenario changed a lot in recent years, a small revolution affected the most important Italian editorial houses. Some of them became stronger, someone else disappeared. Covid-19 crisis strongly and furtherly affected it. In this context, there is the Cairo paradox. Since the late '90s, the companies controlled by Cairo Group begin an intense process of acquisitions that develops over the long term. In 2016, following the acquisition of control of RCS MediaGroup S.p.A. (59,69%), Cairo Communication Group becomes a large multimedia publishing group, with a leadership ranging from publishing to TV.

Over the last decade, Italian publishing industry experienced a sharp slowdown in sales volume. Online media, blogs and influencers broke the rules of media scenario.

The Italian media landscape is characterized by the dominant role of television in comparison to other media platforms. Italy is a “television centered” country, in which citizens spend a large amount of time watching television while press circulation remains low. New trends as Netflix, Amazon Prime Video and Sky changed are turning upside down Italian TV consumption.

Compared with other countries, Italy has a big number of local newspapers, but they have a minor circulation and play a limited role in agenda setting.

Unlike the print media, online and television increased their global revenues also during lockdown in Italy. Global consumption trends provoked the Italian Online & TV sector to undergo a number of transformations, both in terms of distribution and content.

EMERGING TRENDS IN CONSUMER AND TRAVEL TRADE PRESS

1. THE NEW NORMAL MEDIA DIET:

Covid-19 and following lockdowns and the measures taken by the Italian government to deal with them have brought back the attention of users for **online information**, especially (but not only) local. According to Audiweb in November **24 out of 37 online newspapers increased their audience**, some with very high percentages such as TPI and Fanpage (+23%), Il Post (+18%), HuffPost (+14%). As for several months now, **Corriere della Sera remains at the top of the ranking with 17.3 million unique users**, 10% more than in the second week of October 2020. On the other hand, **radio is struggling to recover from Covid** due to advertising investments still in decline (-7.2%). It was mostly due to the high budgets requested to invest in radio ADV.

According to several official data and surveys, the time monthly spent by Italians grew by 17% compared to pre Covid situation. News websites have seen their unique users increase by 5% on annual basis. Even more significant is the growth of time spent online compared to 2020 (+ 26%). Significant year-over-year audience growth also for **lifestyle and beauty** (+ 36%), sports (+ 29%) and **cooking/food** (+ 20%) websites.

Looking to the future, the advertising market is expected to record a **partial recovery in 2022**, given the contribution that will come from the desirable recovery of most of the canceled/frozen ADV campaigns in 2020 and 2021.

The **number of Italians who read newspapers online rose from 54% to 57%**, mainly thanks to newspapers with a wider readership such as Corriere.it, IlSole24ore.it, Repubblica.it. A **greater propensity for online information** confirms the new habit of Italians to frequently search for news. The **audiovisual audience** (TV and video streaming) also recorded a change in habits, the figure on those who claim to regularly use **at least one streaming or video on-demand service went from 72% to 75%**, a statistically significant difference. Another sector positively affected by the pandemic is **audio streaming**.

EMERGING TRENDS IN CONSUMER AND TRAVEL TRADE PRESS cont...

2. SOCIAL MEDIA PLATFORMS:

On the other side, in Italy there is still a growing trend Internet adoption and social media platforms: every day **84% of the population accesses Internet** (+2% compared to 2020) and 68% are **active on social channels** (+6% compared to 2020), used in a diversified way, for entertainment, information, sharing and conversation.

As reported in the most recent surveys, online people “**consume**” content, **especially video (93%)**, but increasingly also audio with 61% listening to streaming music and 25% using podcasts. And they play, with different types of devices, according to 81% of Italians.

Digital trends in 2021 and 2022 also highlight an evolution in the ways in which people search for information online, including about brands. Alongside the use of traditional search engines, 37% of Italians now use voice search technologies and 33% use social channels.

3. FIGHT AGAINST DISINFORMATION:

The crisis due to COVID-19 has brought the issue of disinformation to the fore. Society faces an uncertain future, and this uncertainty has created a hotbed of disinformation, with false stories whose resonance can have a major impact. 2021 and 2022 are years that brands and social media channels are focusing on highlighting the truth and authenticity of experiences.

4. THINK POSITIVE MEDIA TRENDS:

In 2020 the world totally changed, and consequently visual communication. In 2021 and 2022, brands (both corporate and consumer) will have to investigate new consumer needs, priorities, and pain points, redefine the concept of authenticity and treat their audiences with bite-sized video content and more dynamic designs.

3 key concepts will impact on Media Trends:

Optimism: audiences will be more engaged and remain loyal to brands that convey positive and optimistic messages. The essentials in 2021 and 2022 for creatives are vibrant color palettes that reflect joy and hope for a bright future, as well as rounded fonts that look friendly and inviting.

Authenticity: audiences are constantly looking for more authentic content. In the past, people have been attracted by glossy pictures; now they look for visual that translated well real emotions and images they could identify with, which perfectly represented authentic lifestyles.

The baby boomers’ revenge: 2020 and 2021 was a particularly important year for a generation that had always been ignored by media and digital marketers: baby boomers. Complicit in the pandemic, this demographic group has begun to “hang out” more on social networks, play online games, and make virtual payments that they previously avoided. New forms of digital literacy have developed that are turning into new habits that are destined to stay.

EMERGING TRENDS IN CONSUMER AND TRAVEL TRADE PRESS cont...

5. 2022, IT'S STILL THE YEAR OF PODCAST:

For a few years now podcast has been the word of the year. In Italy, the phenomenon had started in 2019, but 2020 was the year of its consecration and 2021 its final confirmation. Storytel, Spotify, Deezer, Google Podcasts and many other platforms are changing the rules of the game and the way to intercept the people during their customer journey.

OPPORTUNITIES AND TRENDS FOR EDITORIAL PITCHING

After two years of complete stop in live events, trips and engaging experiences, media are eager to get back to live events and meeting opportunities and are extremely keen to join events and live projects.

Based on the trends that have been listed in former pages, opportunities are multiple and variegated.

This is the time to be creative and it is the time to go back to live events and projects.

Luncheons and dinners, not necessarily with crowd of people but also tailor-made for any targeted media are an opportunity to design ad hoc opportunities capable to be designed based on the needs and interests of any of the engaged media.

Media are now much more into green and slow life stories, open air concepts, exclusive opportunities where social distancing is still a key point.

Media are eager to be fed with stories going beyond the simplistic presentations of itineraries and products. Given the crisis of travel media, the main opportunity is to be featured on lifestyle and feminine media with columns open to welcome curiosities and stories from all over the world.

After the timing of conservative stories that reassured travellers about the possibility to enjoy what they read, now it is time to inspire them opening their mind about the wide variety of offers both in terms of products and of experiences to be lived again all over the world.

Italy is officially open to travel; this is the time making travellers confident again in doing it.

FUTURE OF PRESS TRIPS

Press trips are back! Trips to short haul destinations have already started and even the need to go through a PCR test before traveling or once coming back is not a limit for journalists.

It is important, although, not to charge media with such cost when traveling.

Trips, even more than before, are now a tool appreciated by media and advisable to go for, within promotional strategy, in order to give them a first-hand experience not mediated by screen or digital connections.

It is now time to live again to reassure people about the feasibility of traveling around the world and the fact of getting ambassadors - being them media or social contents creators - that can witness first-hand the variety of opportunities that the world of travels still offers is and should be a priority in terms of strategy.

As per direct experience, the feedback of media to trips invitation is super positive and there is no doubt nor concern when it is up to get a flight and going experiencing a destination offer.

KEY MEDIA EVENTS

Italy is not particularly rich in media events. When it goes to literature and books world, the story is different, there is plenty of book exhibitions - which may be an opportunity - to portrait destinations through a different story angle but media visibility opportunities, prizes and events, the market is slow.

One of the events that traditionally takes place in the market is the ADUTEI media event, awarding the best story (either in printed media or digital channels) published over the year.

This is open, though, only to the members of ADUTEI - being the Italian association of international tourist boards. ADUTEI is open to single countries.

Opportunities may rise through Visit USA which is planning a development in their PR/ Communication approach and strategy.

CAMPAIGNS & ADVERTISING

Before suggesting or studying campaigns and advertising opportunities it is vital to design the goals of Travel South on the market.

Beyond the differentiation between pure brand awareness or conversion strategy, there are a few elements that are basic and fundamental to consider when approaching any advertising strategy:

- **Going Multi Channel:** nearly all Italian media today offer printed version, online version and social. Maximising investments and capability to reach the identified targets, going cross media is vital to choose media that can offer complete packages of visibility, including a consistent amplification on social media.
- **Point out interesting contents:** Do not just portray the beauty of a natural landscape or the modernity of an urban offer. Go straight to the USP of each destination, present the unknown, create a curiosity beyond what is known already.
- **Be aspirational:** Italian are sensitive to what is fashionable, and they like to dream. Does not matter what the real economic capability is, let them dream about what is unique, show the best face of the destination, its best offer. They will dream about the highest opportunity and will eventually buy what is aligned to their purchase capability.
- **Tell stories, share contents:** meaning Advertorial. Do not limit advertising to pure images, give contents and elements to “train” and give consistency of what is advertised in terms of contents that will help clients to be fed and trained about a consistent part of the United States.



Social Media & Influencers

DESCRIBE HOW KEY TARGET DEMOGRAPHICS USING AND RESPONDING TO SOCIAL MEDIA

More than half of the Italian population is active on social platforms, experienced as daily sources of information, entertainment, and conversation - specifically, we're talking about almost 50 million people online and 35 million people present and active on social networks.

Recent research has confirmed that Italy is a mature, connected, and social country with a growing tendency to be more and more friendly towards internet, social and new technologies.

During the pandemic, the time Italians spend online has grown: 6 hours on the internet and 1 hour and 57 minutes on social networks every day - figures that are increasing compared to those recorded in previous years.



Each social media has profoundly changed the habits of Italians and each of them responds to different but specific needs.

Instagram is still the platform with the most evident growth from 2019, from 55% to 67%.

DESCRIBE HOW KEY TARGET DEMOGRAPHICS USING AND RESPONDING TO SOCIAL MEDIA cont...

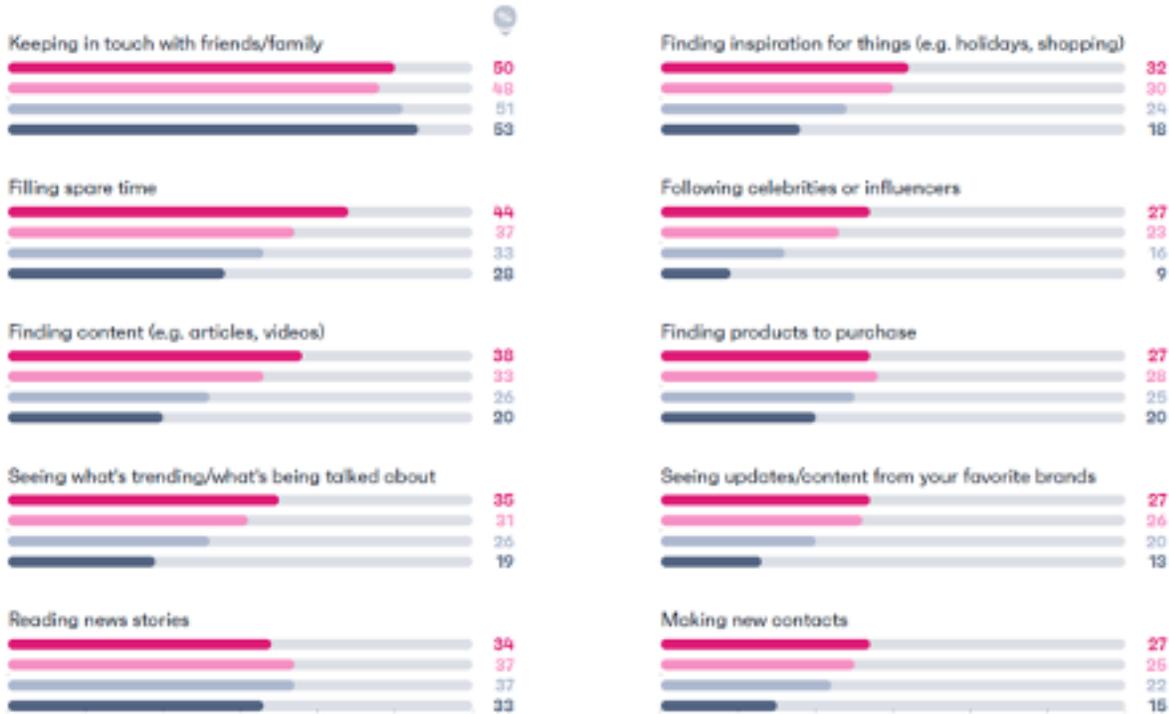
There are today four media segments that today use and respond to social media:



20% of baby boomers use social media to find products to purchase, not far behind Gen Z at 27%

Why they're using social media

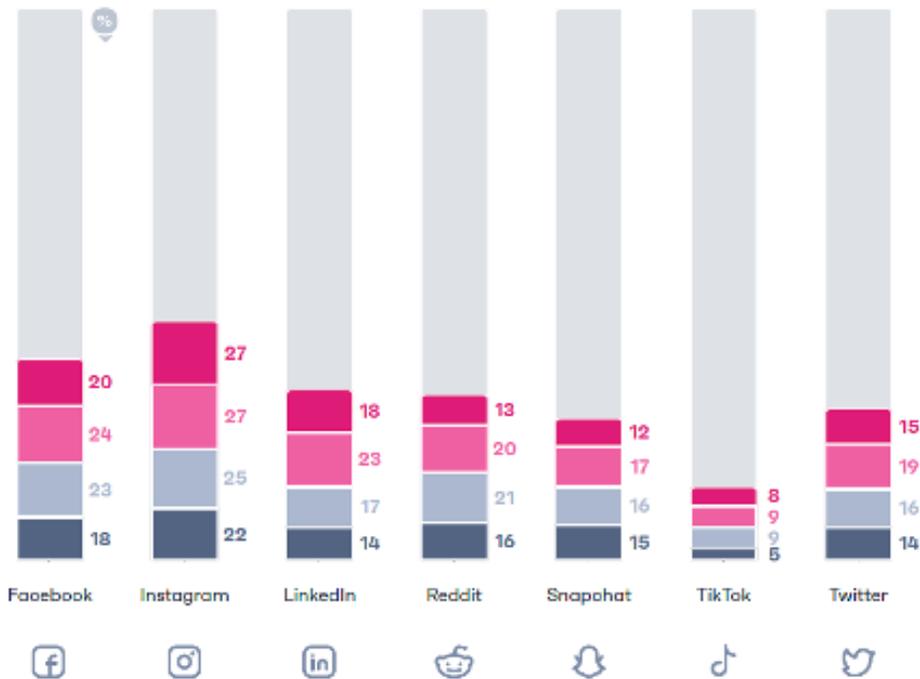
% of each generation who use social media for the following reasons



DESCRIBE HOW KEY TARGET DEMOGRAPHICS USING AND RESPONDING TO SOCIAL MEDIA cont...

Targeted social ads, what's their reach?

% of weekly users of the following platforms outside of China who've clicked on a promoted post/ad in the last month on that platform

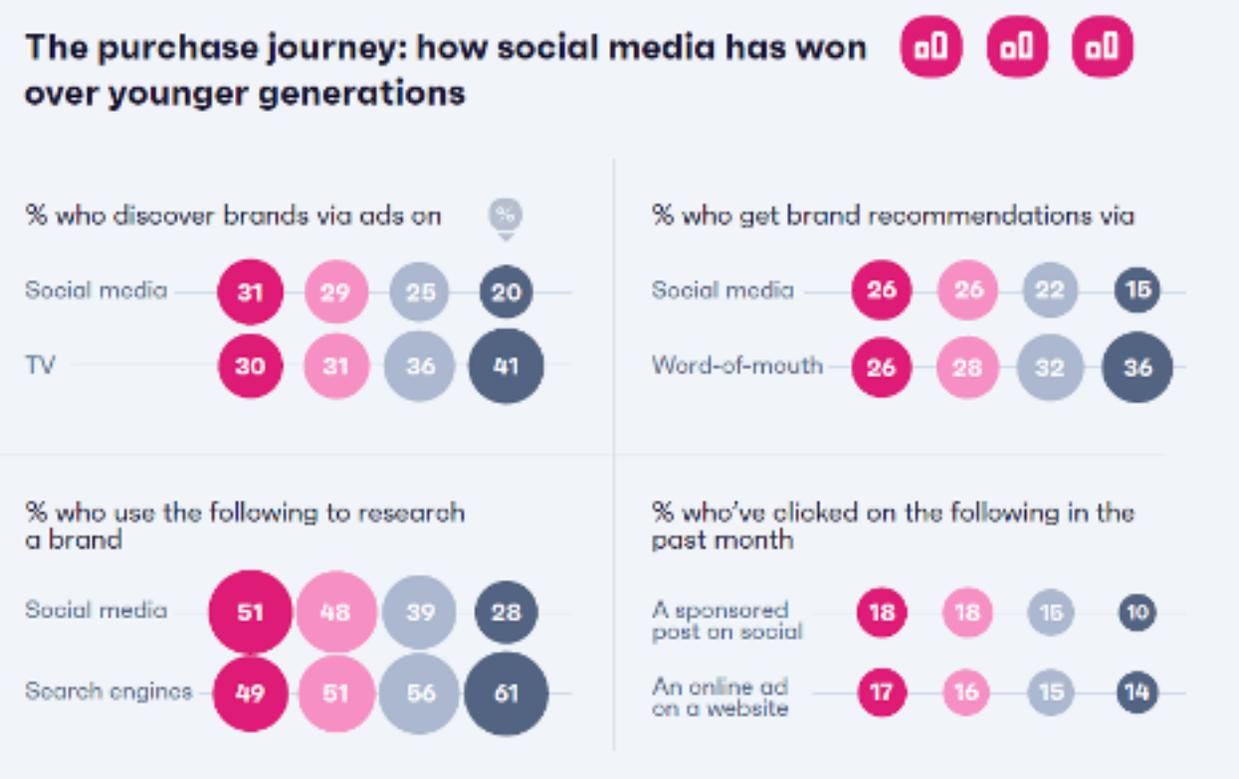


Social Media Consumption throughout pandemic.



DESCRIBE HOW KEY TARGET DEMOGRAPHICS USING AND RESPONDING TO SOCIAL MEDIA cont...

Between Q2 and Q4 2020, Gen Z grew 15% more likely to say that social media gives them anxiety



INFLUENCERS, CONTENT CREATORS, PODCASTS AND MICRO INFLUENCERS AND INVESTMENT

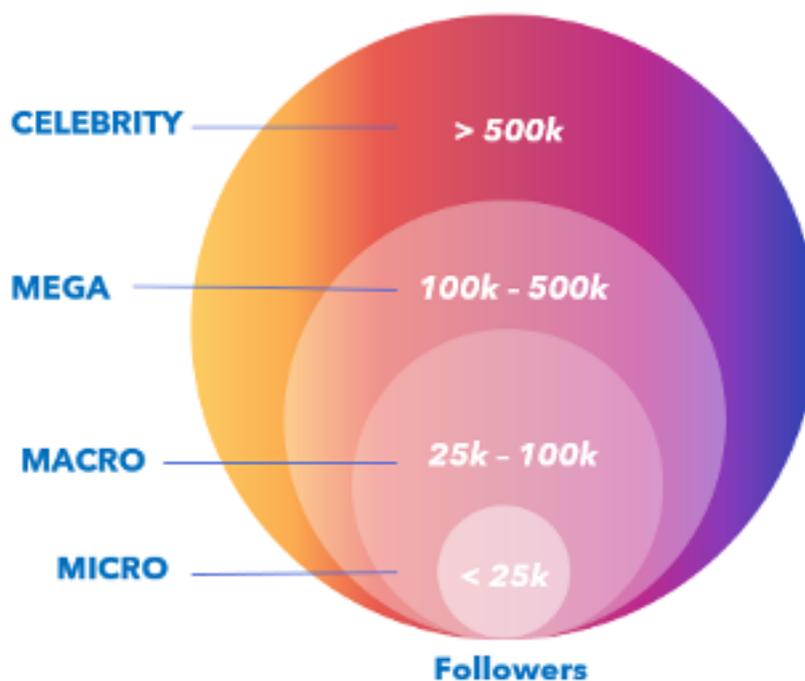
Italian travellers pay a lot of attention and trust information found on the internet only if it comes from an «authority».

These new authorities are the influencers, become key, direct and effective element in any marketing and tourism communication project because they are able to INTERCEPT AND REALLY INFLUENCER THE CUSTOMER JOURNEY.

Influence → conversion

In Italy there are more than 400 influencers who define what is new and trendy, also from a tourism point of view.

Their presence and role evolved over the years: from a virtual source of travel advice to real travel consultants who work alongside the major players in the Italian tourism industry to CONVERT THEIR SOCIAL POPULARITY INTO RESERVATIONS.



INFLUENCERS, CONTENT CREATORS, PODCASTS AND MICRO INFLUENCERS AND INVESTMENT cont...

A recent survey revealed that micro influencers “perform” 5 times better than big names and proposed a new classification of their audience

WHAT REALLY MATTERS when engaging influencers?

The objective of the social media action is the answer!

Engagement rate: relation between followers’ total amount and interaction with them. Without forgetting Stories Views, now more performing than posts.

CPE: direct relation between budget spent (travelling costs, influencers fee, etc) and total engagement (likes, comments, posts reach, stories views)

Booking Conversion: Hotel engagement with Swipe Up or promo code in Posts and IG Stories.

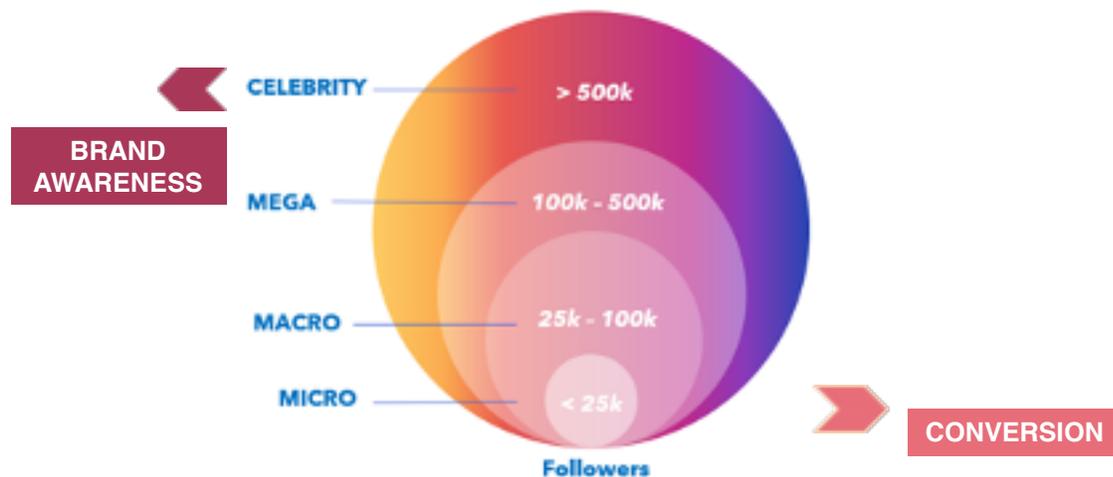
As mentioned, post ads are living a phase of particular success and, especially in middle - high segment, attention toward the product is particularly high.

Several media are enriching their offer with the podcast product, making cross media strategies even wider.

Micro Influencers, potentially not “interesting enough” to be engaged for international trips with direct experiences can, on the contrary, be extremely productive for in-market initiatives that can be beneficial and low investment for any client.

OPPORTUNITIES FOR TRAVEL SOUTH USA

As per the media environment previously analysed, there are two ways to approach the marketing influencer marketing:



BRAND AWARENESS: invitation for top influencers from the world of travel, food, fashion, and lifestyle to experience the destinations' offers

gentlemen agreement to produce content dedicated to the stay to be agreed according to the number of nights and activities included in the trip

CONVERSION: Creation of a personalized promo code with a specific discount on the trip in partnership with a tour operator

Free trip during which the promo code will be sponsored, and the itinerary promoted with agreed contents.

OPPORTUNITIES FOR TRAVEL SOUTH USA cont...

Ways to approach and engage influencers, depending on the size and engagement capability they can guarantee is various. Let's just list a few different examples, also based on former initiatives already activated:

- **PRESS TRIPS:** The best known and traditionally used. Macro influencers can be engaged for trips, preferably on an individual basis, in order to replicate such experience for various players and guarantee a flow of communication over the months. Why macro and not mega? Because macro and not mega? First because budget engagement would be higher, secondly - and most important - because mega, as well as celebrities, give a very short-lived impact and quickly switch to another opportunity, experience, activation.
- **IN MARKET EXPERIENCES:** Engage influencers in local based experiences. Let's select them and engage them in life experiences in targeted restaurants, cooking lessons, outdoor experience that can replicate or inspire what they would enjoy at destination. This may be played in order to maximise visibility - relaunched on dedicated social - themed hashtags, contents.
- **HOME EXPERIENCES:** Send them gifts, share with them flavours of Travel South, inspire them, engage them playing with items that relaunch the images of Travel South.
- **BE CREATIVE:** if you want to limit investments, otherwise select the ambassadors and design with them a structured plan of visibility and engagements



Consumers

KEY TARGET DEMOGRAPHICS FOR TRAVEL SOUTH USA REGION (aspirations/concerns)

First approach to the US from the Italian market is generally linked to the visit of the main landmarks of the country, New York, or California. South East states are mainly visited by repeaters who are interested to go deeply into the different souls of America.

Following data represent the demographic segment profile portraying those willing to return to the US after a previous experience. As per Travelyze research, this represents the 13,6 % of the adult Italian population (7.345.700 people).



The segment is mostly made by couples, where women are the decision makers.

In terms of age rank, US repeaters are mostly concentrated in the segments 35-64 years old: people with higher income, often in couple and able to travel without children.

The first decade (35-45) shows a strong increase in intention to travel, while with the increase of the age this percentage decreases. It is interesting to see how the interest about repeating a travel to the US is increasing within the younger segments (18-24, 25-34), that should be particularly important in long term promotion.

Type	Percentage	Change
18 - 24 years	7%	↑ 62.8%
25 - 34 years	14.9%	↑ 41.9%
35 - 44 years	25.1%	↑ 81.9%
45 - 54 years	19.3%	↓ -21.9%
55 - 64 years	20.4%	↓ -7.7%
65 - 74 years	11.5%	↓ -47.5%
75+ years	2.9%	↓ -13.8%

KEY TARGET DEMOGRAPHICS FOR TRAVEL SOUTH USA REGION (aspirations/concerns) cont...

Travel budget indicated as available for travel is not so high (in general < € 3.000) but it is interesting to see how it is increasing compared to 2021. This is a signal that after two years forced to short haul vacations, the ones desiring travelling are more available to invest timing and money in their dream. Talking about timing, unfortunately, travels are as usual concentrated between July and August. It has always been a trait of the Italian tourism, especially for people in working age, but in pandemic years this trend has been reinforced because of the feeling of the decrease of contagious and restrictions, during summer months.

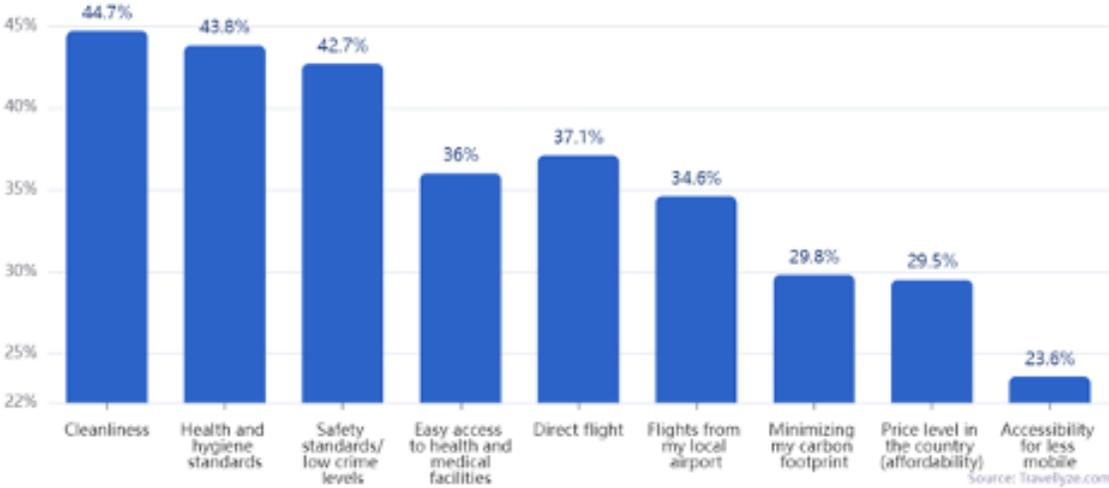
Position ↑	Travel Budget ↑	Percentage	Change
1	0-1.000 (EUR)	38%	↑ 18.8%
2	1.000-2.999 (EUR)	35.6%	↓ -13.8%
3	3.000-4.999 (EUR)	19.1%	↓ -25.5%
4	5.000-9.999 (EUR)	2.8%	↑ 233.2%

In a year poor in bank holiday, April, May, June, and September should be particularly interesting for ones trying to recover weddings and honeymoons.



DESTINATION FACTORS

The two years pandemic influence how Italians are choosing travel destinations. Sanitary factors (cleanliness, health and hygiene standards, safety standards/low crime level, easy access to medical facilities) have become more and more important, as well as possibility of outdoor activities (nature/outdoor experience, going to the beach).

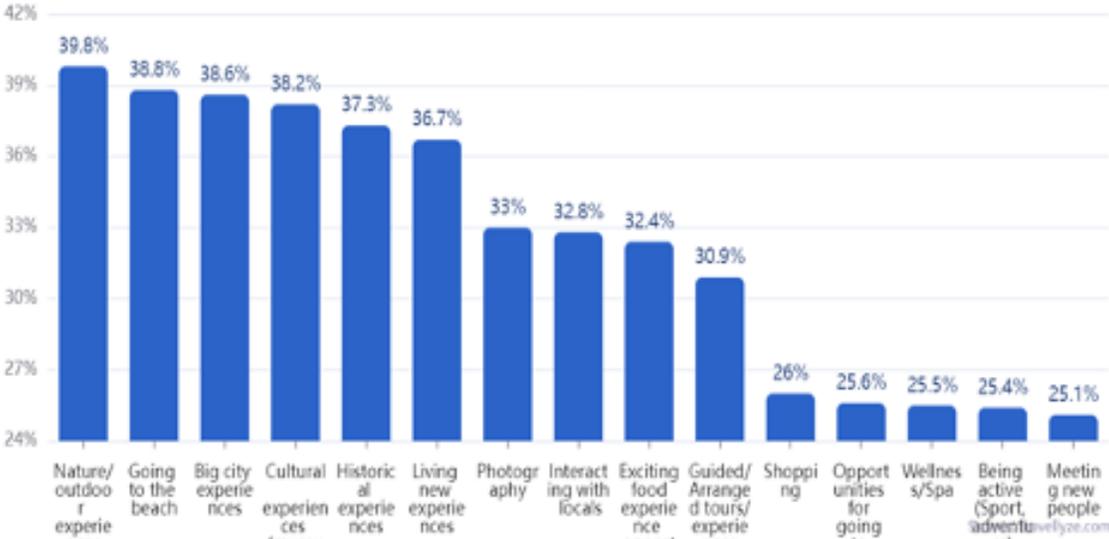


It is important to notice cleanliness and safety are considered more important than affordability.

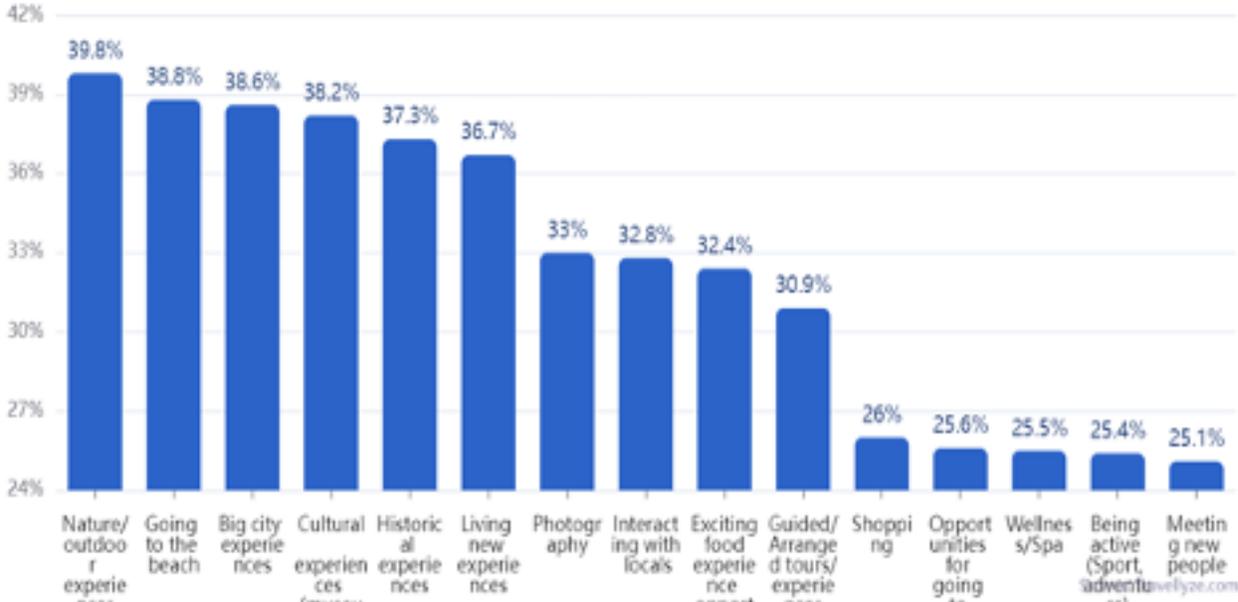
Accessibility for less mobile and LGBTQ+ friendless are not considered key points, the second one (20,8 %) not so high to be included in the chart of main factors.

At the same time, direct flights and flights from local airports are considered very important in choosing travel destinations, even if when choosing an itinerary, such as the one done in the US, most important thing is to arrive to an airport in country and then have good local connections.

Drive to the destination (28,7 %) is more important than shopping!



DESTINATION FACTORS cont...



Thinking at the US, big experiences are the key: nature, beaches, big cities are the main reasons to travel. big cities, in particular, are more important for US repeaters than to the global panels.

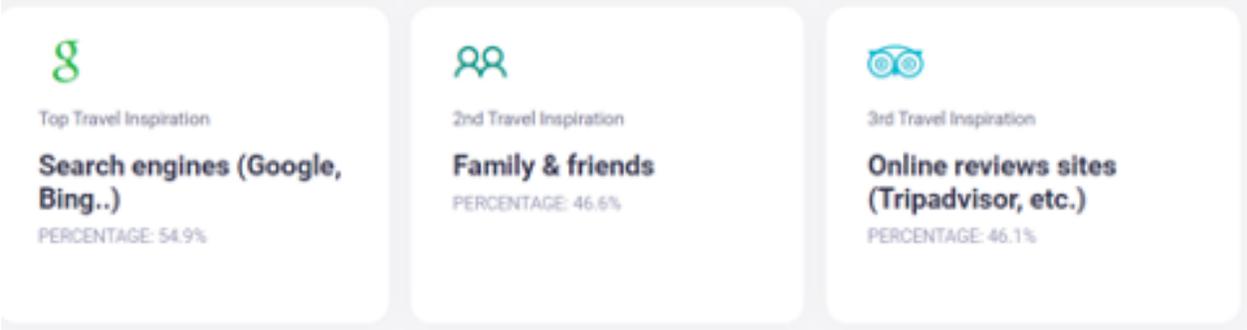
A second important group of experiences are made by the interaction with people and ambience: photography, food experiences, interactions with locals, guided tours allow to deeply discover the destinations. In this sense, South States are particularly interesting for those would like to live an American experience.

Shopping, spa, sports, visits to theme parks are considered as a side reason why to visit a country. An addition, for sure important while the itinerary has been organized, but not key reason for the choice.

WHO AND WHAT IS INFLUENCING CONSUMER DECISIONS

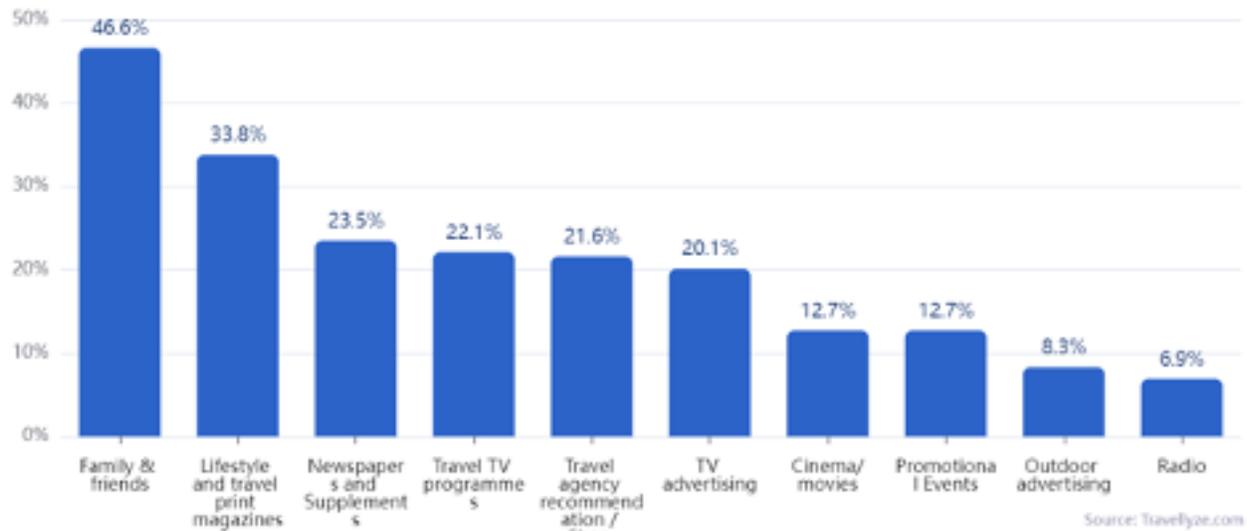
Influencing travels is becoming more and more difficult in a word where everyone is subject to continuous news and info. Inspiration is more and more done by a mix of online and offline tools, with similar functions.

Word of mouth, which has always been the first source of inspiration, is today done both through family and friends in person and by social media. Media are often replicated in offline and online versions, one with more visibility, the other one able to ensure a longer life to the news. Booking tools are today a source of inspiration too, before being a practical and technical tool, because they allow to verify travel times, read reviews, check the possibility to organize the trip as imagined.



WHO AND WHAT IS INFLUENCING CONSUMER DECISIONS cont...

Offline travel inspiration



Traditional channels are still very important. Family and friends are the first travel inspiration source, followed by printed media, even preferred than to the online version. Printed media are particularly important because they can be kept and read over different time.

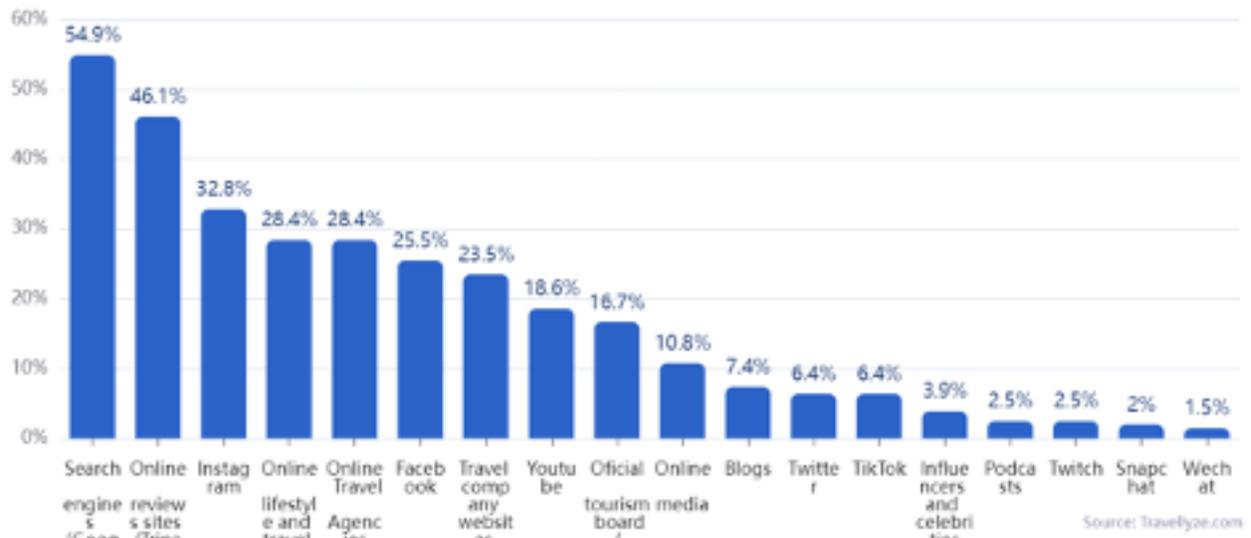
Travel shows are considered more reliable than TV advertising (but it is to notice there is only few tourism boards investing in TV advertising due to the high costs.

Promotional events and outdoor advertising are considered less important also because of a limited presence in the territory: they are generally organized in main cities (e.g., metro in Milan and Rome), while Italian travellers are not limited to single areas.

Particularly important the role played by travel agencies: even if maybe they are not the first decision maker to choose the destination, they are particularly important to transform dreams into real experiences, giving suggestions for the organization of travels.

WHO AND WHAT IS INFLUENCING CONSUMER DECISIONS cont...

Online travel inspiration



Looking at online media, you can identify different groups:

- **Information and booking** (search engine, online review, online travel agencies, travel companies): are the main online tools in terms of travel inspiration. Using these tools, people can create their own itinerary, research for practical suggestions, having the feeling to completely manage the trip.
- **Online media** (lifestyle and tourism, general media): even if they are among the main online tools, they are considered less important than in the printed version, even if they allow to reach a higher number of people.
- **Social media:** Instagram is today the king of social media because of the possibility to inspire with photos and reach through hashtags a higher number of potential people interested in the same topic, even if not included in own followers list. It is followed far away by Facebook (today more institutional and fuller with advertising) and YouTube (often used as a source portal for content shared in other media or social media), the other ones, including Twitter and Tiktok have minor importance.
- **Blogs and influencers** are not considered key media, but in effect they share their influence through social media (mainly Instagram) where they are main content creators.

EMERGING DEMOGRAPHICS AND HOW TO ENGAGE THEM

Summarizing, it is possible to choose some key targets.

Dink Travelers

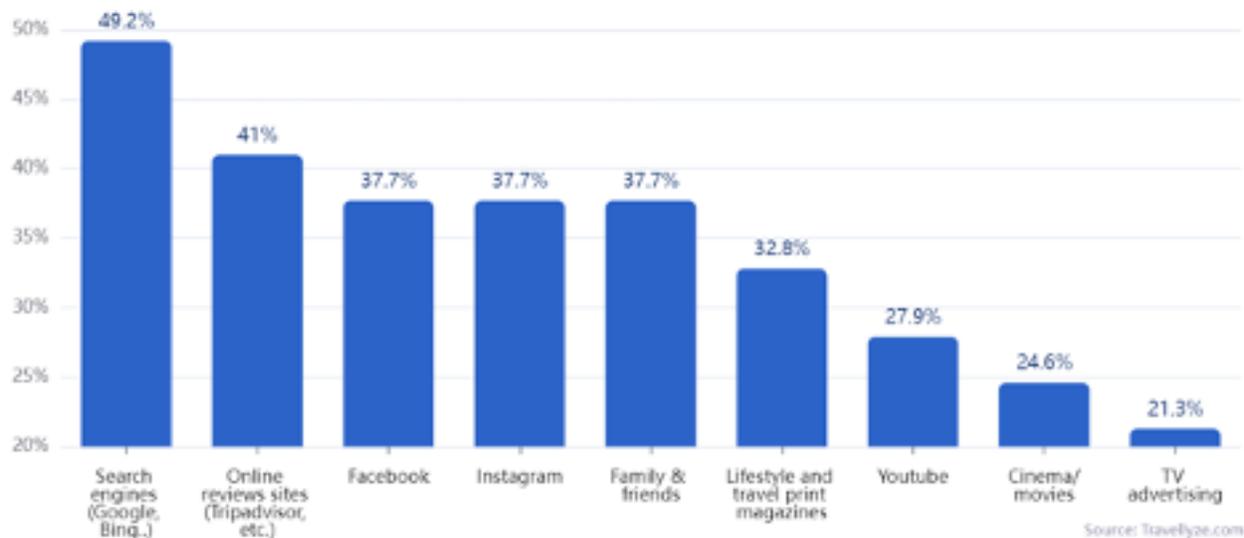
- Couples under 45 with high income.
- Trend hunters, they love to discover something new that their friends have not yet experienced.
- Often based in big cities, their idea of a holiday is to take their mind off their hectic everyday lifestyle and to go somewhere to stimulate their mind.
- They go on holiday a few times a year and they like to treat themselves to fine dining and affordable luxury accommodations.

They are the main target market for Southern States, experienced travelers who would like to live during their vacation a deep experience about the visited country. They love to travel independently and self-drive tours are a perfect product to them.

How to engage them:

This target is used to social media and technology. Facebook and Instagram are the most used social networks. It is a target used getting information from a wide range of media, from printed media to cinema and TV advertising, so a wide presence in different tools grant to easily reach the target.

They need to receive suggestions about original motivations to travel to destination, based on their passions (e.g.music, outdoor experience), out of the usual mass market products.



EMERGING DEMOGRAPHICS AND HOW TO ENGAGE THEM cont...

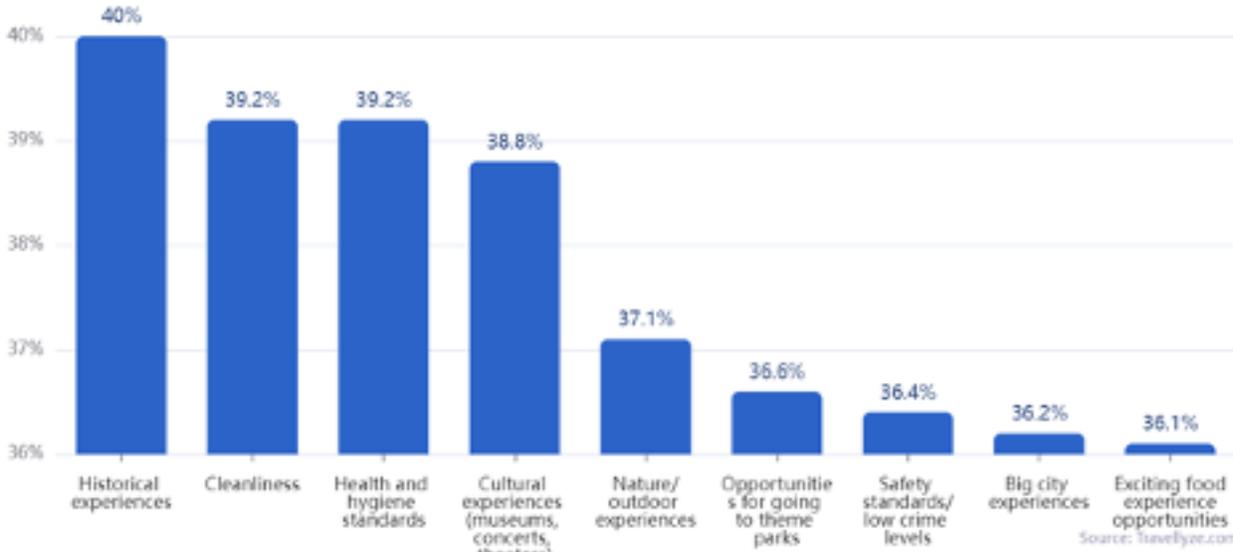
B-leisure

- Cross-age people, mostly men. According to a recent survey, they usually take more than six business trips per year, and they are hungry for sunshine, sightseeing and cuisine.
- Choices are influenced by weather, nature, historical monuments, or easy access to outdoor activities.
- Leading factors are also great entertainment opportunities, iconic or bucket list destinations, easy-to-navigate destinations.

Due to the strong economical links between Italy and US, b-leisure is a very interesting target. The leisure extension to the business trip is generally shorter than a normal tour, but generally repeated different times.

How to engage them:

Travelling often for work, they need to receive practical suggestions tips about activities to enrich their stay. Historical and cultural experience, but also outdoor and fine dining are among the main destination factors for them. Being forced to return often to a destination they want to experience it quite as a local, looking for something out of the main mass market routes. They are Internet and social media (Facebook, Instagram) addicted, used to look for info via search engine and watch video via YouTube.



EMERGING DEMOGRAPHICS AND HOW TO ENGAGE THEM cont...

Honeymooners

- 25 – 35 years old, typically living in the biggest Italian cities, good spending power, very active on social media.
- Honeymoons are a key moment of their life, the trip of a lifetime.
- The choice of the destination is highly influenced by word of mouth, Instagrammability, and experts' advice.

Honeymoon is a very important trip for Italian couples, often made by a mix of tours and seaside relax. US are one of the preferred tours destinations, it is important to stress on the content offered by different states to attract the target.

How to engage them:

Being honeymoon the one-on-the-lifetime trip, the organization is different from the other normal vacations. Budget is higher, often is the paid with family and friends' gifts, it is longer (2 weeks in average) and has to be a special adventure for the new couples. Generally, it is booked via travel agency, who exhibits in honeymoon fairs to promote the different packages. It is important to add to all trips a special romantic addition to the trip, such as special dinner or room upgrade, and an easy connection to a seaside destination, where to relax after the tour.

Sharing (romantic) images of the honeymoon is a must: Instagrammability of the destination is part of the choice factors.

EMERGING DEMOGRAPHICS AND HOW TO ENGAGE THEM cont...

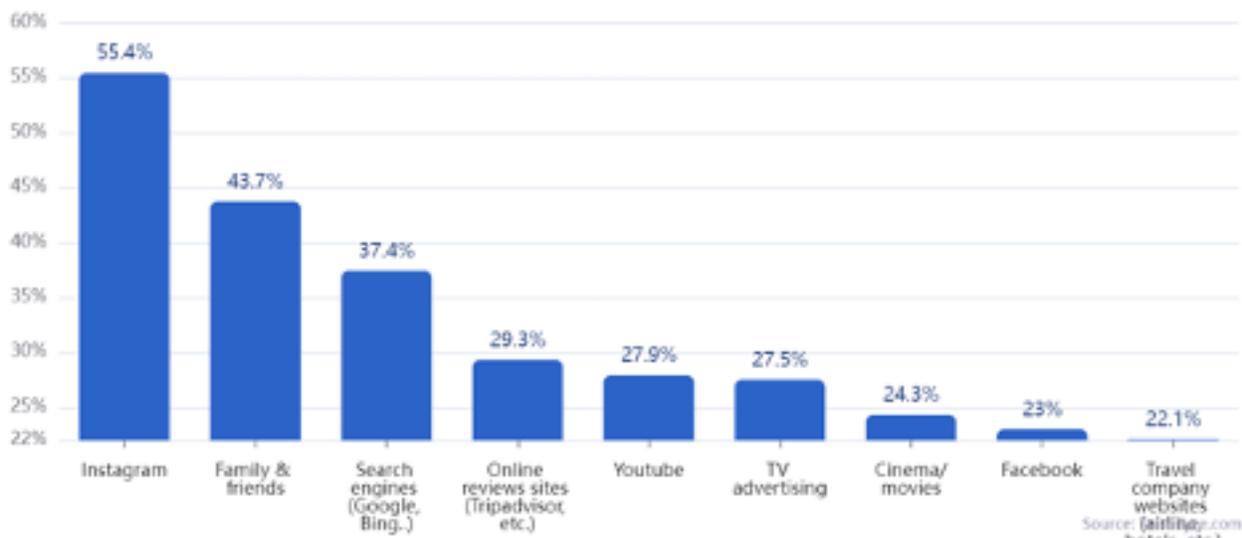
Generation Y-Z

- Under 30.
- Single women are the majority.
- They travel in couple or in group.
- They decide their trip based on common passions.
- They are particularly influenced by Instagram.

Younger people are often students or early workers, looking for value for money options. They are interested in exploring new places, meeting new people, living new experiences. Trips must enrich people in experiences, because “You Only Lives Once”

How to engage them:

Single women discovering the world finding inspiration on Instagram, online review sites, YouTube. Their main desire is to live new experiences, in the cities or outdoor. They should mostly be engaged using online tools and creating group packaged through dedicated brands. They live the moment, looking for adventure, they need to receive tips about wow effect to live.



WHAT VACATIONS CONSUMERS WILL WANT IN 2022 AND BEYOND

Predicting trends and departures for 2022 is unfortunately not easy.

If until a few weeks ago, the crisis of covid seemed to be nearly over and this could be the seed of a global recovery for several economic sectors, including tourism, recent events happening in Eastern Europe are pushing global environment back to uncertainty again.

There are a few elements which are negatively marking current situation and trends:

FEAR: a sentiment which has been linked to the health uncertainties in the past two years and which has now moved to scare about war and an enlarging of the conflict.

EMPLOYMENT: Italian government has been widely supportive for the past two years to employment, with the goal to prevent economic players to reduce occupation and protect all workers.

However, the end of 2021 has marked the closure of most of the economic supports granted by the government, making people finally facing the reality of employment or salaries reduction.

ECONOMY: Partly because of the covid and partly for the most recent events, economy is facing a double face crisis.

On one side there is a consistent reduction in economic power of a variety of business environments: tourism of course, but also sports, entertainment, food, and beverage.

On the other side, the Russian- Ukraine crisis has already started affecting costs of gasoline, energy, and some necessities items (wheat, sunflower oils,..) pushing them to a consistent increase affecting many players among which Airlines have to be included, affecting air ticket costs.

Summer 2022 will be the first one for Italian to travel all over the world - given opening of borders at destination - and reaction of consumers also based on the critical elements mentioned before is difficult to be predicted.

There is a positive element though, a trip to the US is by itself not a cheap one, targeted consumers won't be the same who will prefer a seaside vacation with an all-inclusive package, like those offered by middle haul destinations such as Red Sea or northern coast of Africa.

Consequently, potential buyers will be selected automatically by their purchase capacity which, ideally, is stronger by itself and less affected by the negative elements mentioned before.

The same applies for the segments of B-Leisure and Honeymooners, their purchase capacity remaining high will be affected less by international economic crisis and this reassuring for the destination.

WHAT VACATIONS CONSUMERS WILL WANT IN 2022 AND BEYOND cont...

In this sense, the differentiating element remains FEAR of an uncertain situation linked to the war between Russia and Ukraine but also of what will be happening with Covid in the Quarter 4 of 2022 when revamps of the pandemic may still be possible.

Trying to summarize what will be the profile of travelers to Travel South in 2022, ideally, he will be medium high profile - not only from the economic but also from the cultural point of view - used to travel and, therefore less frightened from moving out of the country and a mature traveler by himself.

Going into numbers, there is no way - considering these assumptions as realistic, that 2022 will go back to 2019 numbers. Everything will depend, first and in short term, to the evolution of current international crisis and, secondly and middle term, to the potential return of covid variants.

Unfortunately, an answer today is really difficult to be given.



Opportunities & Next Steps

OPPORTUNITIES

The first opportunity needing to be caught is the partnership with private sectors players, although we must consider that they are limiting their financial resources and limit in human resources (always a consequence of the past 2 years impact).

Leveraging on the TOS interest to relaunch a destination which is today open and economical interesting for them to invest in, would guarantee Travel South a spread of communication on the market granting a continuous visibility always associated with a call to action to guarantee a conversion.

Opportunity is linked to creativity! It is the time to take a distance from the online events that have been preferred all over the past two years. Now even more than before the challenge is scouting interesting and appealing initiatives capable to attract players (without charging them of huge costs) and engage them BUT supporting. Private sector needs today more than ever national tourism organizations and boards to sustain their promotion never forgetting the vision to create conversion in the middle-long term.

Opportunities are also linked to advertising which shall be organic and capable to fish as many fishes as possible, widen brackets of audience.

Beyond that, advertising needs to be more than before rich in contents. After 2 years of impossibility to travel, news and developments, offers and original story angles have to be shared in detail with consumers in order to feed them and training them about the offer beyond seducing them with images and fascinations.

The last element to be mentioned is the opportunity linked to the selling component of the industry: Travel Agents, despite the crisis and their need to convert into new models (consultants more than sellers), are the opportunity to show how their messaging as an ambassador of the destination is vital to sustain sales.

NEXT STEPS

DEVELOP THE STRATEGY

On the basis of the information gathered over these pages it is now the time for Travel South to figure out the status of facts, the interesting segments and goals and study a strategy that can meet short and middle term expectations of the destination.

ANALYZE THE MARKET

Identify priorities in terms of activations: trade vs media vs advertising vs influencers and, consequently, approach and engage those players who better meets the need of the destination

KEEP THE FLOW

Start getting visible again, share info, feed the market, enrich it with contents, stories, original curiosities.

BE CONSISTENT

Yes, it is always time to seduce - no it is not the time to just selling dreams. People need to be reassured. Practical information, containment measures, normal life spots need to be shared within the market.

BE SELECTIVE, BE EFFICIENT, BE CREATIVE

When it comes to public budget and even more when it goes to the private sector one, the need is to be selective and effective. Keep as a mantra the concept of MAXIMISE RESULTS MINIMISING INVESTMENT.

Creativity will be the primary tool to reach such goal.