

## Holidays to Italy - UK - September 2010

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### What is this report about?

The recession hit holidays to Italy harder than trips to many of its rival destinations. Volume dropped in both 2008 and 2009, outpacing the fall recorded to all overseas destinations by some margin. The comparatively expensive nature of the destination meant that when the flight to value came, Italy was less appealing than many other countries to the consumers that altered their holidaymaking behaviour.

This report examines the future of holidays to Italy, looking at consumer trends, innovations of relevance, the market environment, the country's competition and includes exclusive consumer research on the frequency of, types of holiday taken in and attitudes regarding holidaying in Italy.

### What have we found out?

- Holidays to Italy were hit particularly hard by the recession and began falling in number in 2008, before the majority of overseas destinations saw any negative change year on year. In 2009 volume fell further, dropping by a whole quarter, far outpacing the near 16% drop across all overseas destinations.
- Almost four in ten consumers have holidayed in Italy at some point, and approximately one in four have holidayed in the country in the last five years. Holidaymakers to Italy are most likely to be older, to have household income of £50,000 or above and to have no dependent children in their household.
- One in fourteen respondents say they are more likely to visit in 2010/11 than they were in 2008/09.
- The currently under-served (in holiday terms) but growing single population of the UK are particularly keen on holidays to Italy – over four in ten have never been to Italy but want to in the future, compared with three in ten consumers overall.
- Overall, holidays to Italy were approximately 6% more expensive than the average overseas trip in 2009, with rivals such as Spain, France and (increasingly) non-eurozone destinations significantly cheaper. A developing package market to 2007 was dealt a severe blow by the recession, with the downturn-caused concentration in the market of wealthier, more likely independent holidaymakers shrinking packages to 30% of all holidays in 2009/10.
- Consumers who have never been to Italy and think themselves unlikely to go in future are most likely put off by expense (and the perception of expense). Almost half of all people from households earning under £15,500 per year fall into this group, for example, compared to less than one in ten £50,000-plus earners.

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**EMEA:** +44 (0)20 7778 7151  
**Americas:** +1 (312) 932 0600  
**APAC:** +61 (0)2 8284 8100