Italy Market Profile

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Size of the Italian market to the island of Ireland

	2005	2006	2007	2008	2009	2010e	2011e
Outbound holiday trips (000)	14,862	15,386	15,553	17,466	16,112	16,981	17,108
Total visits (000)	196	253	271	234	274	223	215
Holiday visits (000)	96	134	176	125	135	134	137
Promotable visitors (000)	133	167	203	149	155	161	155

All Euro (€) / Sterling (£) conversions have been carried out at a rate of €1 = £0.86798
(Revenue does not include carrier receipts or international air and sea fares)
Promotable visits = Holiday, Conference/Incentive & EFL (English as a foreign language)

%'s may not add to 100% due to rounding

Tourism Ireland
Marketing the island of Ireland overseas

Holidaymakers at a glance ...

August continued to be the most popular month for our Italian holidaymakers to visit in 2011.

Almost half (44%) of our Italian holidaymakers visited for a short break of 1-5 nights.

Hotels and Guesthouses & B&B's were equally popular and combined represented two-thirds of accommodation bed-nights.

Dublin proved very popular (92%) among Italian holidaymakers with almost all overnighting there, though half of these visited another region too. The Western and South West regions were also visited by one third of Italian holidaymakers.

Approximately one-in-every-three (32%) Italian holidaymakers hired a car during their stay.

Independent holidays are very popular among Italians with the majority (90%) on this type of holiday. Online bookings are made by a similar proportion (87%) of Italian holidaymakers.

Almost four-fifths of Italian holidaymakers arriving in 2011, were setting foot on the island of Ireland for the first time. This is the second largest proportion of first time visitors across all markets.

Two-thirds of Italian holidaymakers were in the C1 socio economic group and tended to be younger, and travelling with other adults. In fact, the island of Ireland attracted the largest proportion of under 35 year olds and those travelling with other adults from Italy than from any other market.

The majority (84%) of Italian holidaymakers described themselves as Sightseers and Culture Seekers, the second largest market of this type of holidaymaker. Italians are more likely than other holidaymakers to visit sites of historical interest.

The Lazio, Lombardia and Emilia-Romagna regions combined represented 60% of Italian holidaymakers in 2011.

When do holidaymakers arrive?

Month Of Arrival	2005	2006	2007	2008	2009	2010	2011
January - March	***9%***	***14%***	***13%***	***15%***	***15%***	***14%***	***14%***
January	3%	3%	5%	5%	8%	4%	2%
February	1%	3%	4%	7%	3%	5%	3%
March	5%	8%	4%	3%	5%	6%	9%
April	5%	5%	9%	6%	11%	6%	12%
May	7%	6%	5%	8%	6%	4%	4%
June	14%	11%	10%	16%	13%	11%	12%
July	12%	16%	20%	18%	17%	9%	12%
August	28%	27%	21%	17%	16%	25%	21%
September	7%	4%	4%	5%	8%	13%	12%
October	6%	8%	11%	8%	4%	10%	5%
November	4%	6%	2%	2%	3%	7%	2%
December	8%	3%	5%	5%	6%	2%	7%
October - December	***17%***	***16%***	***18%***	***16%***	***13%***	***19%***	***13%***

When did holidaymakers decide to visit?**

Month Decided to visit	2005	2006	2007	2008	2009	2010	2011
Pre-September (previous year)		0%	2%	1%	4%	3%	0%
Oct-December (previous year)		12%	11%	17%	17%	17%	21%
January		8%	10%	9%	9%	5%	7%
February		12%	7%	9%	9%	5%	11%
March		7%	10%	6%	17%	6%	10%
April		13%	11%	14%	10%	9%	8%
May		11%	10%	13%	7%	7%	13%
June		9%	10%	7%	7%	15%	13%
July		16%	9%	7%	5%	10%	3%
August		5%	7%	6%	7%	14%	6%
September		3%	6%	6%	6%	7%	5%
October		2%	2%	2%	2%	1%	2%
November		1%	3%	2%	1%	0%	0%
December		0%	0%	0%	0%	0%	0%

* some misattribution into previous year (Pre September and Oct-December)

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Jump into Ireland

When did holidaymakers make a reservation?**

Month reserved part of trip	2005	2006	2007	2008	2009	2010	2011
Pre-September (previous year)		0%	1%	0%	3%	2%	0%
Oct-December (previous year)		13%	9%	15%	14%	15%	17%
January		6%	7%	9%	6%	4%	6%
February		12%	5%	9%	7%	5%	12%
March		7%	13%	8%	17%	6%	9%
April		13%	13%	7%	9%	8%	8%
May		11%	9%	18%	14%	8%	12%
June		11%	14%	9%	6%	12%	15%
July		14%	10%	9%	8%	10%	8%
August		7%	7%	5%	7%	13%	6%
September*		4%	7%	7%	6%	14%	5%
October*		2%	2%	2%	1%	1%	2%
November*		1%	3%	2%	2%	0%	0%
December*		0%	0%	0%	0%	0%	0%

* some misattribution into previous year (Pre September and Oct-December)

How do holidaymakers travel to the island of Ireland?

Air vs. Sea	2005	2006	2007	2008	2009	2010	2011
Air	96%	97%	97%	98%	99%	97%	98%
Sea	4%	3%	3%	2%	1%	3%	2%

What is the length of stay for holidaymakers on the island of Ireland?

Length of stay	2005	2006	2007	2008	2009	2010	2011
1-5 nights	31%	41%	55%	48%	51%	46%	44%
6-8 nights	32%	29%	28%	30%	35%	32%	27%
9-14 nights	31%	23%	13%	16%	12%	17%	23%
15+ nights	6%	7%	4%	6%	2%	5%	6%
Average number of nights	*8.1*	*7.7*	*6.2*	*6.9*	*7.6*	*8.9*	*7.1*

Where do holidaymakers stay? (Distribution of bednights)

Accommodation	2005	2006	2007	2008	2009	2010	2011
Hotels	28%	24%	40%	16%	22%	26%	34%
Guesthouses & B&B's	18%	43%	42%	41%	32%	19%	33%
Rented	20%	7%	6%	13%	13%	30%	2%
Caravan/Camping	3%	2%	0%	1%	1%	2%	5%
Friends & Relatives	26%	22%	5%	10%	18%	6%	9%
Other	5%	3%	7%	19%	14%	18%	18%

Where do holidaymakers visit on the island of Ireland?

Regions visited	2005	2006	2007	2008	2009	2010	2011
Dublin	78%	79%	86%	83%	84%	85%	92%
Midlands East	11%	9%	4%	13%	9%	5%	6%
South Eastern	26%	21%	12%	21%	14%	13%	21%
South West	43%	38%	30%	29%	27%	23%	34%
Midwest	22%	24%	17%	21%	14%	13%	13%
Western	42%	43%	35%	35%	33%	39%	34%
Northwest	11%	15%	9%	9%	13%	14%	11%
Northern Ireland	7%	9%	6%	7%	5%	12%	9%

How many holidaymakers use a car?

Car Usage	2005	2006	2007	2008	2009	2010	2011
Car Not Used	62%	59%	71%	62%	72%	70%	66%
Car Hire	34%	39%	26%	37%	27%	28%	32%
Car Brought	4%	2%	3%	1%	1%	2%	2%

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How do holidaymakers make their travel arrangements?

Travel Arrangement	2005	2006	2007	2008	2009	2010	2011
Package	20%	10%	19%	18%	13%	20%	10%
Independent	80%	90%	81%	82%	87%	80%	90%

Use of internet to book part of trip**

	2005	2006	2007	2008	2009	2010	2011
Yes		77%	64%	74%	86%	81%	87%
No		23%	36%	26%	14%	19%	13%

Items booked online**

	2005	2006	2007	2008	2009	2010	2011
Air-Sea tickets		73%	59%	70%	81%	76%	82%
Accommodation		37%	46%	58%	63%	57%	70%
Car hire		19%	10%	20%	16%	19%	22%
Other		1%	0%	1%	0%	0%	0%

Sites visited if using the internet**

	2005	2006	2007	2008	2009	2010	2011
Travel Agent's website		3%	2%	1%	6%	5%	7%
Specific accommodation provider's website		19%	13%	22%	28%	16%	11%
Specific Air/Sea Carrier's website		58%	41%	49%	63%	68%	57%
General holiday search portal		11%	20%	20%	18%	11%	24%
Tourist Board's website		19%	16%	12%	13%	10%	18%
Other site with general info on Irish holidays		18%	12%	8%	8%	2%	12%
User Generated Sites e.g. Blogs / Trip Advisor		n/a	3%	3%	1%	3%	5%
Car Hire Website		n/a	5%	12%	11%	9%	9%
Social Networking Sites e.g. Facebook		n/a	n/a	n/a	n/a	n/a	0%
Other		3%	1%	3%	0%	0%	4%

Have holidaymakers been to the island of Ireland before?

Familiarity	2005	2006	2007	2008	2009	2010	2011
First visit	72%	71%	81%	82%	78%	78%	78%
Repeat visit	26%	29%	19%	18%	22%	21%	22%
Born on the island of Ireland	2%	0%	0%	0%	0%	1%	0%

What is the social class profile of holidaymakers?

Social Class	2005	2006	2007	2008	2009	2010	2011
AB	22%	21%	25%	16%	15%	23%	22%
C1	69%	70%	63%	72%	71%	58%	67%
C2	8%	5%	8%	12%	14%	15%	9%
DEF	2%	4%	3%	0%	1%	4%	3%

What age are holidaymakers?

Age	2005	2006	2007	2008	2009	2010	2011
Under 16	6%	5%	2%	10%	5%	3%	4%
16-24	16%	22%	20%	35%	26%	33%	29%
25-34	39%	34%	35%	30%	38%	30%	33%
35-44	13%	14%	19%	11%	15%	18%	19%
45-54	11%	11%	12%	10%	9%	11%	10%
55+	15%	14%	12%	3%	7%	5%	5%

Who do holidaymakers travel with?

Party Composition	2005	2006	2007	2008	2009	2010	2011
Alone	28%	21%	20%	16%	19%	20%	19%
Couple	45%	47%	46%	43%	38%	44%	37%
With family	13%	14%	12%	16%	11%	11%	11%
Other Adult Party	14%	18%	22%	25%	32%	25%	33%

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Segments

Best Description of Holiday Needs	2005	2006	2007	2008	2009	2010	2011
S&CS's	88%	85%	80%	85%	71%	79%	84%
Outdoor Actives	1%	1%	0%	2%	1%	0%	0%
Family & Loved Ones	3%	4%	3%	1%	4%	5%	3%
Affinity Groups	0%	0%	3%	1%	5%	3%	3%
Luxury Lovers	0%	0%	0%	0%	0%	1%	0%
Relaxers	6%	8%	9%	9%	11%	6%	4%
Social Adventurers	1%	2%	5%	2%	8%	5%	7%

What sites of historical interest do our holidaymakers visit?**

	2005	2006	2007	2008	2009	2010	2011
Any Of The Below		85%	90%	86%	85%	90%	92%
Historic Houses/Castles		74%	76%	71%	77%	80%	86%
Monuments		67%	74%	65%	78%	75%	79%
Heritage/Interpretative Centres		44%	53%	55%	42%	54%	71%
Museums/Art Galleries		52%	61%	56%	57%	66%	77%
Other Sites Of Cultural Historical Interest		3%	14%	11%	12%	10%	22%
None Of These		15%	10%	14%	15%	10%	8%

What pastimes/events do our visitors engage in?**

	2005	2006	2007	2008	2009	2010	2011
Visited Gardens		30%	22%	37%	48%	43%	53%
Visited National Parks/Forests		n/a	n/a	n/a	45%	45%	49%
Attended An Organised Sporting Event		2%	2%	4%	4%	2%	2%
Tracing Roots/Geneology		0%	1%	1%	0%	0%	0%
Attended Cultural Event/Festival		7%	7%	6%	8%	11%	12%
Used Spa Facilities		0%	1%	1%	3%	3%	0%
None Of These		n/a	n/a	59%	41%	35%	33%

What activities do our holidaymakers engage in?**

	2005	2006	2007	2008	2009	2010	2011
Fishing		1%	1%	0%	2%	0%	0%
Equestrian Pursuits		1%	1%	3%	1%	1%	2%
Cycling		5%	3%	2%	6%	8%	1%
Golf		2%	2%	1%	0%	0%	2%
Hiking/Cross-Country Walking		7%	15%	8%	22%	17%	17%
Other Water Based Activities		1%	1%	1%	2%	2%	1%

How much travelling do our holidaymakers do in Ireland?**

Regionality Segments	2005	2006	2007	2008	2009	2010	2011
Dublin Only		38%	51%	45%	52%	51%	51%
Tourer		40%	28%	33%	29%	31%	36%
Static Regional		14%	8%	9%	7%	7%	5%
Two Bases		9%	13%	13%	10%	10%	8%

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Where do our holidaymakers come from?**

	2005	2006	2007	2008	2009	2010	2011
Val D'aosta	1%	1%	0%	1%	1%	0%	0%
Piemonte	6%	6%	5%	12%	10%	10%	11%
Liguria	2%	1%	2%	4%	1%	3%	3%
Lombardia	21%	22%	11%	11%	14%	18%	17%
Trentino-Alto Adige	1%	2%	3%	4%	5%	2%	1%
Veneto	12%	13%	21%	10%	7%	8%	9%
Friuli-Venezia Giulia	4%	1%	3%	4%	2%	1%	2%
Emilia-Romagna	10%	9%	9%	3%	9%	17%	15%
Toscana	5%	4%	9%	6%	8%	3%	2%
Marche	1%	1%	0%	5%	1%	3%	3%
Umbria	1%	1%	1%	0%	2%	2%	0%
Lazio	24%	29%	17%	24%	23%	21%	28%
Abruzzi	2%	1%	1%	6%	2%	3%	1%
Molise	0%	0%	1%	0%	1%	0%	0%
Campania	2%	5%	4%	3%	6%	4%	4%
Puglia	2%	1%	5%	1%	3%	3%	1%
Basilicata	1%	1%	0%	0%	0%	0%	0%
Calabria	2%	1%	6%	0%	1%	0%	2%
Sicily	2%	2%	0%	3%	2%	1%	0%
Sardinia	1%	1%	1%	2%	2%	0%	1%

sources: Failte Ireland's Survey of Travellers (SOT) and NITB / NISRA's Northern Ireland Passenger Survey (NIPS)
** Tables annoted with two stars are extracted from the SOT only ,so while they include holidaymakers who travel to Northern Ireland via the Republic of Ireland, holidaymakers using air or sea ports in Northern Ireland are not included in the statistics.

Ireland's Image

What are the top things Italians hope to see, do or experience in Ireland?

source: Tourism Ireland's Global Brand Tracker 2012 - 1000 Italians surveyed at home

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