



INTERNATIONAL  
TOURISM GROUP

# Travellers to Italy

Profile of European travels

FEBRUARY 2024

# Metodologia

## **TRAVELLYZE – Personas' analysis**

Analysis of the profile of European travelers (data from France, UK, Germany, Spain, Nordic Countries) interested to travel in Italy

Following personas ad been analyzed:

- Cultural & Adventure enthusiast (10 % of the panel)
- Food Traveler Enthusiast (31,60 % of the panel)
- Active Tourists (14,90 % of the panel)

The first section is an analysis of the different target, while the second section is a deeper analysis about how the target personas change in the main incoming market (France, UK, Germany)



# \_ Tourism to Italy

**European Buyer personas  
analysis**

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# Demography



### Active tourist:

Quite same percentage of male and female  
 Peak age: 25-34 years old, and above average for younger ages  
 Peak education: high school, above average for higher educational rank



### Cultural & Adventure enthusiast:

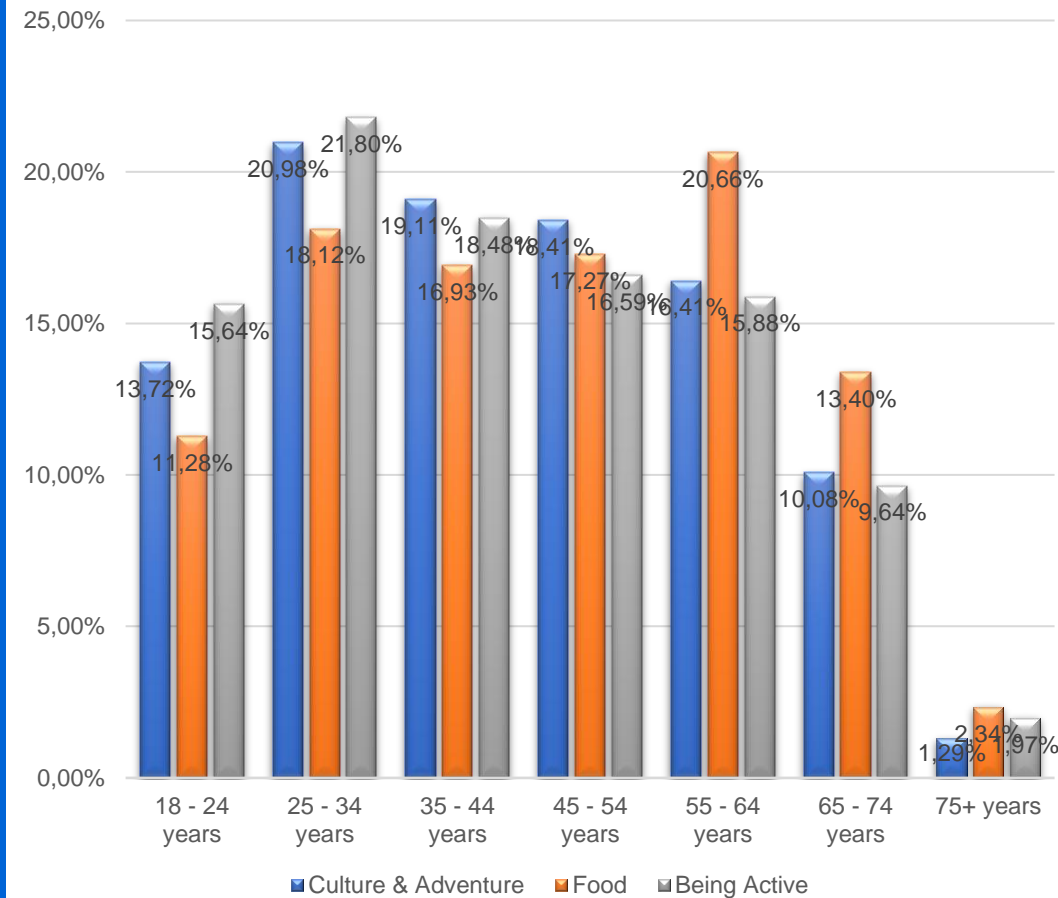
Quite same percentage of male and female  
 Between 35 and 54 years old  
 Peak education: high school



### Food & beverage enthusiast:

More female (51,62 %) than male (48,23 %)  
 Peak age: 55-64 years old, and above average for older ages  
 Peak education: high school, above average for lower educational rank

# → European to Italy

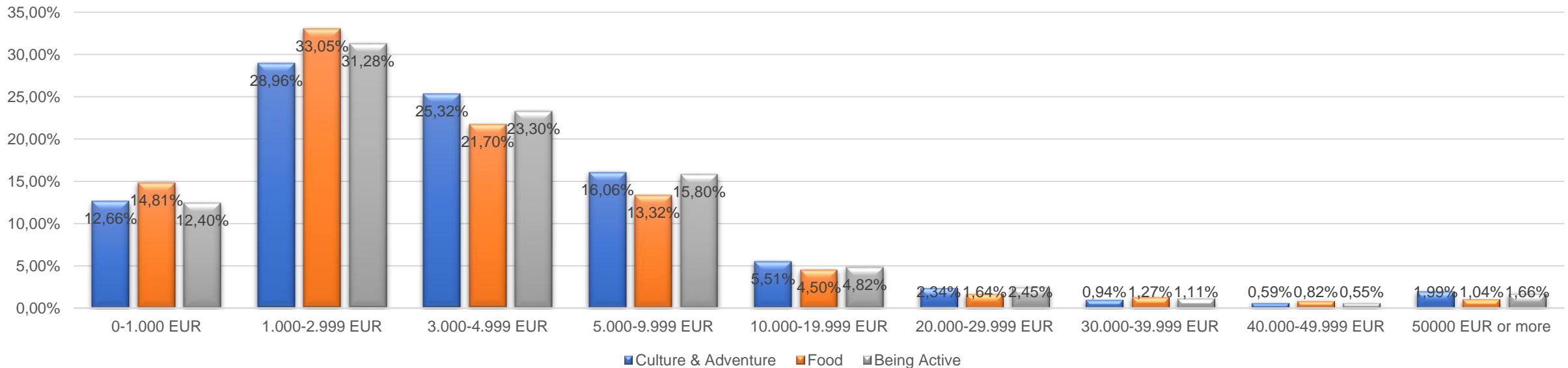




## Travel budget

# → European to Italy

- Travel budget is higher among active tourists and cultural & adventure enthusiasts: these topics require a higher involvement in terms of choice of the destination and the equipment
- Food enthusiasts have generally a lower budget; they look for local taste more than fine dining and they are less linked to a specific experience.



## Travel inspiration



### **Active tourist and Cultural & Adventure enthusiast:**

Same top 5 type of source of interest

- Family & friends
- Instagram
- YouTube
- Search Engines
- Online review sites



### **Food & beverage enthusiast:**

Different structure of source of interest

- Family & Friends
- Search Engine
- Online Review Sites
- TV Programs

The target (older, less educated) impact on the preferred type of source, in particular with the preference on traditional TV programs on YouTube

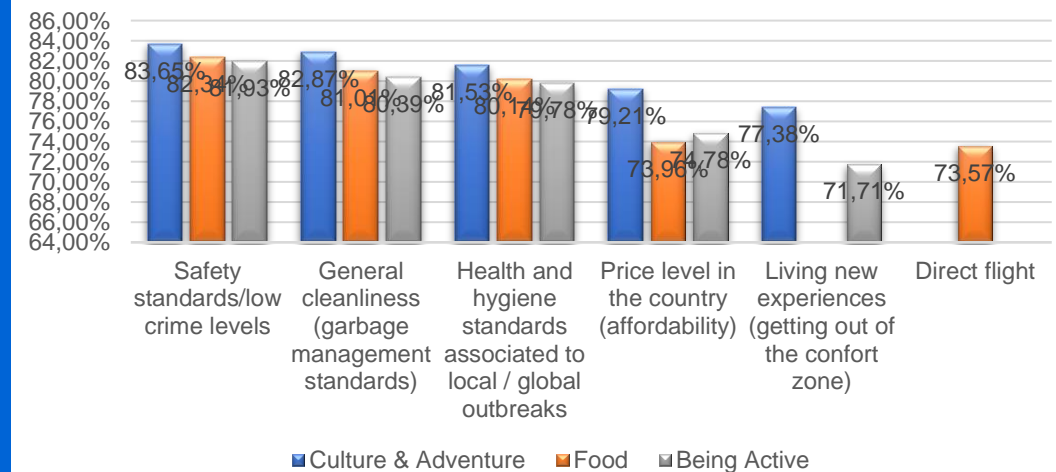
→ European to Italy

# Travel catalysts and enablers

Apart from culture, food and possibility to being active, European travellers in Italy looks for:

- **Nature and outdoor experience** (88,09 % of cultural and adventure enthusiasts, 76,27 % of food enthusiasts)
- **Small and unique towns** (85,5 % of cultural and adventure enthusiasts, 76,93 % of active tourists, 63,80 % of food enthusiasts)
- **Beaches**(72,60 % of active tourists, 67 % of food enthusiasts)

Travel enablers for the choice of destination are similar for the factors(safety, cleanliness, hygiene, followed by affordability). Beside of that, who travel for culture or for being actives living new experience is the most important factor, while for people travel for food (older, less educated, less engaged in the specificity of the destination) direct flights are more important.

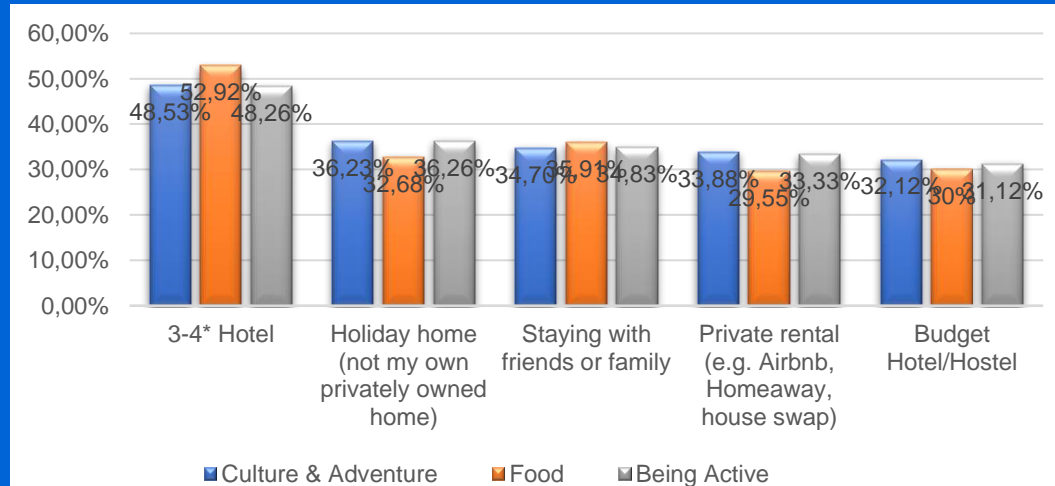


# Type of holidays and accommodation

If the previous ones are the factors to be included in a vacation, top 5 type of holidays remain similar to all the targets:

- Sun & Beach Holidays
- Relaxing
- Visiting friends & family
- Attending festival & Cultural Events (4° rank for culture and active travellers, 5° for food travellers)
- Small & Unique Towns Holidays (5° rank for culture and active travellers, 4° for food travellers)

This differences impact also in the type of accommodation, where holiday homes and staying with friends or family are particularly important (the last one especially for food lovers). In general there is the research of simple accommodations, being affordability one of the main travel factors.



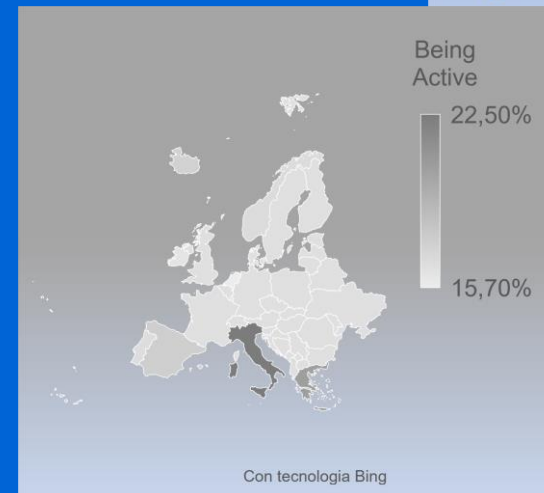
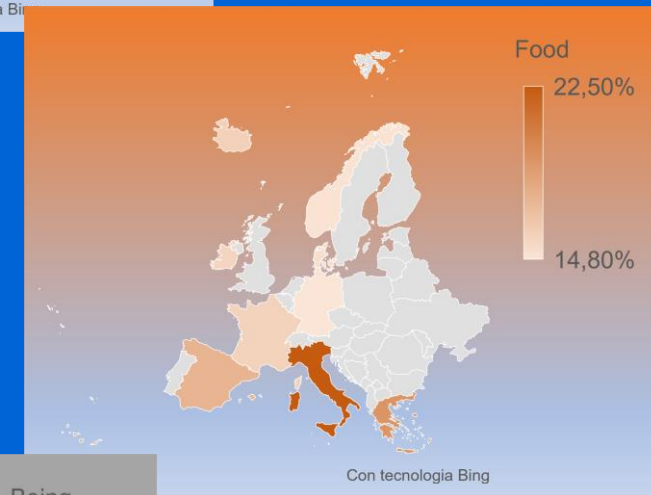
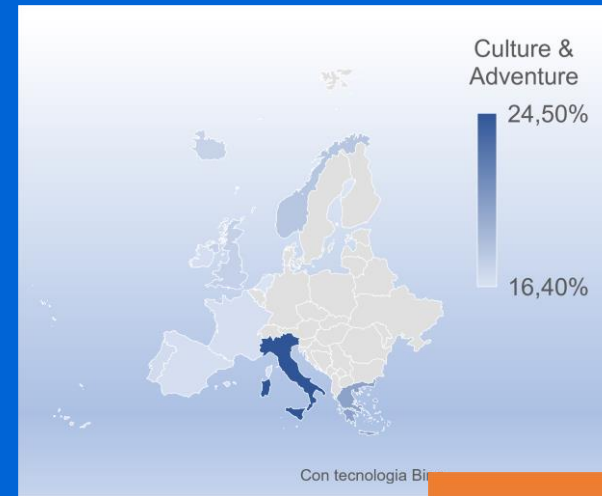


## To recap....

Italy is considered a perfect destination for all European travellers, and it is considered the first short term destination for all examined target.

Type of requested holidays is always a mix of seaside, relax and Italian lifestyle made of food, small cities, nature, but it change based on different age, with a predominance of active tourism among younger target and of food tourisms among the older ones.

Friends & relatives are one of the main travel reason, and this involve the type of accommodation and travel budget.





# \_Cultural & Adventure Enthusiasts

**Analysis of differences among French, British and German travelers to Italy**

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# Demography



**French:**  
More female (51,69%) than male (48,31 %)  
Peak age: 45-64 years old (38,20%)  
Peak education: high school, followed by bachelor degree

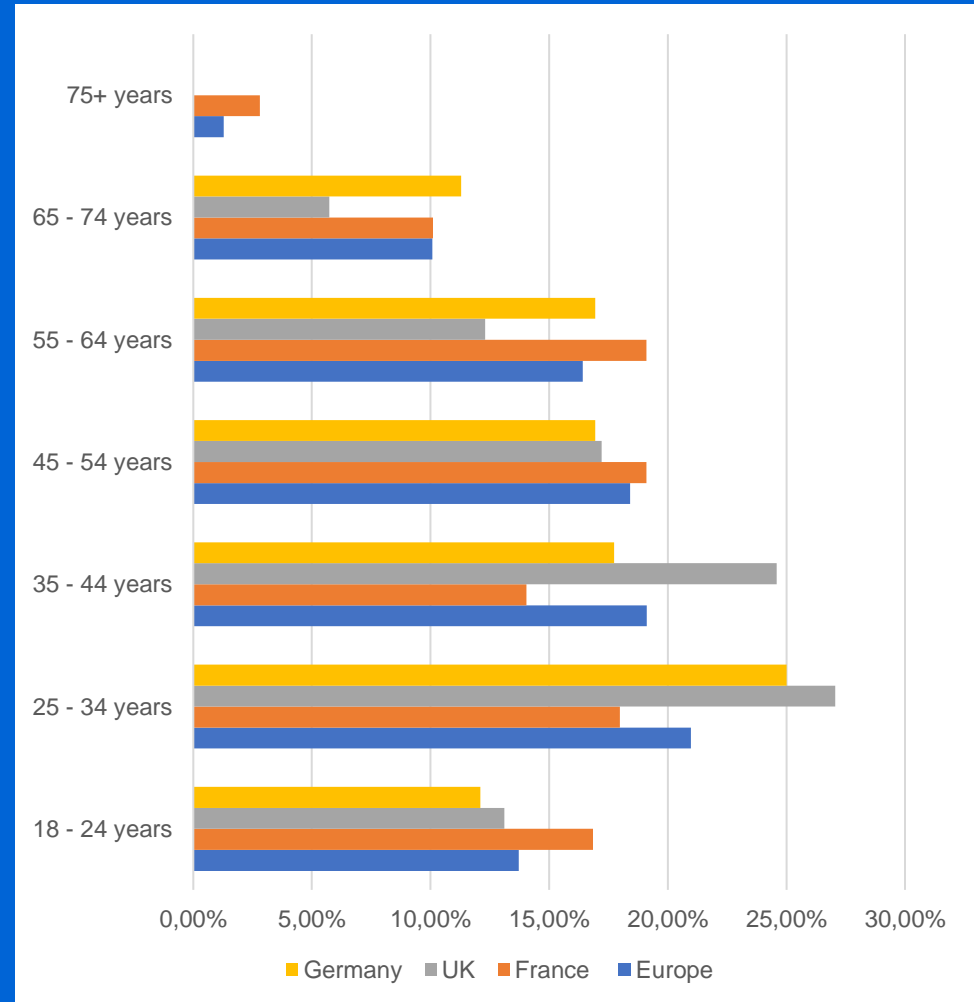


**English:**  
More female (51,64%) than male (46,72 %)  
Peak age: 25-44 years old (51,64%)  
Peak education: bachelor degree or similar



**German:**  
Quite same percentage of male and female  
Peak age: 24-34 years old (25 %), and slow decrease stable(17-11 %) from 35 to 64 years old  
Peak education: high school

# European differences



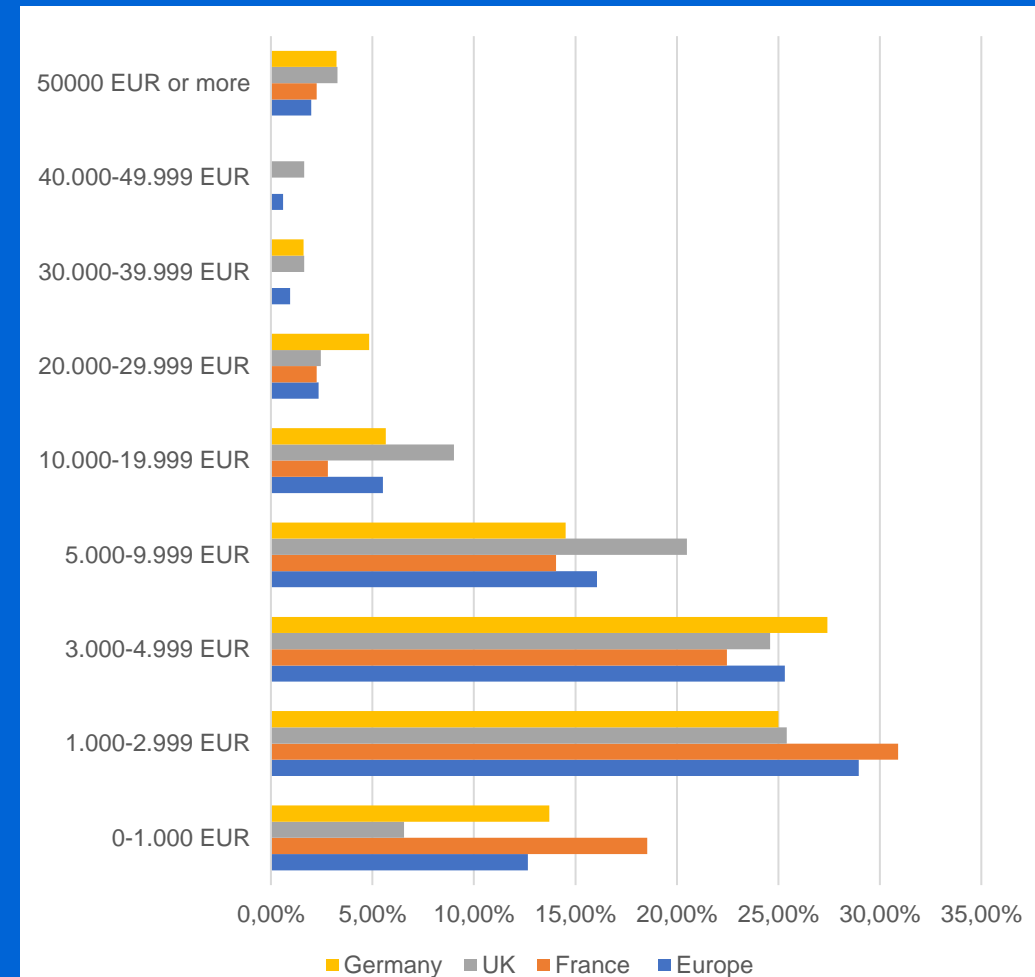


## Travel budget

- Travel budget is generally concentrated between 1,000 € and 4,999 € in all the markets.
- German tourists budget is above the average especially for the € 3,000-4,999 range
- UK tourists budget is above the average starting from € 5,000: British people are the one available to allocate higher budget in travel
- French tourists budget is above the average for range of maximum 2,999 €: French people are the ones putting smaller budget in travel.
- In general budgets are stable, especially for German travelers (49,19 % declare to have the same budget than last year compared to 41,57 % French and 41,80 % British), which are also the ones mainly declare a decrease of the budget (37,10 % compared to 34,83 % French and 36,07% British). British are the one declared to be more available to increase the travel budget (16,39 % compared to 14,61 % French and 9,68 % German)



## European to Italy





## Travel inspiration



### **Friends & Relatives:**

First source of information for every nationality examine:

- 70,79 % French,
- 59,68 % German,
- 55,74 % British



### **Online research:**

Direct research via Search engines are preferred by French (41,01%) and German (55,64 %), while online review sites are preferred by French 41,01 % and British (45,08 %)



### **Social media:**

Instagram is the only social media indicated in the top 5 in all 3 market (39,87 % French, 44,26 % British, 45,16 % German). British (51,64 %) and German (55,65 %) indicate also YouTube, while French (36,52 %) prefer Facebook.

### **Other Sources:**

German trust in travel agencies (45,16 %) while British prefer TV advertising (48,36 %).. And for Italian printed magazines are still important (43,75 %)

→ European to Italy

# Travel catalysts and enablers

Travel enablers for the choice of destination are similar for the main first voices (safety, cleanliness, hygiene, followed by affordability), even if with small differences (for German most important factor is affordability, for French and British hygiene).

Then, things change: French travellers indicate access to medical facilities (81,76 %), British direct flights (81,67 %), German new experiences (85,25 %)

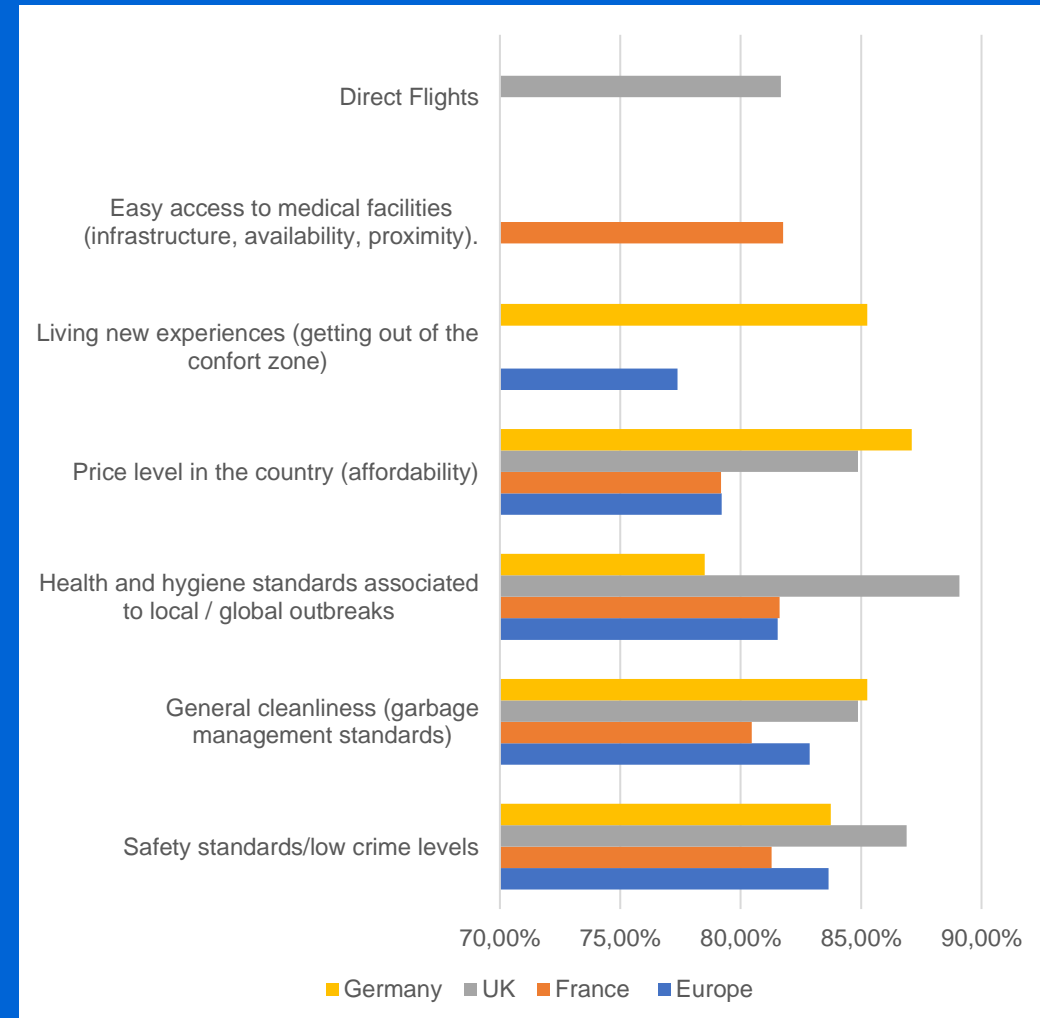
Apart from culture, food and possibility to being active, Cultural & Adventure travellers to Italy looks for:



**French:**  
 Small towns (87,57 %)  
 Mountains (84,74 %)  
 Big cities (84,18 %)

**English:**  
 Nature /outdoor (90,16 %)  
 Small town (86,61 %)  
 Food & Wine (88,52 %)

**German:**  
 Nature /outdoor (91,06 %)  
 Small town (83,61 %)  
 Beach (75,61 %)



# Type of holidays and accommodation

If the previous ones are the factors to be included in a vacation, also top 5 type of holidays change per nationality



## French:

- Sun & Beach (78,09%)
- Events / Festival (71,9 %)
- Small towns (44,38 %)
- Group vacations (41,57 %)
- Relax (37,08 %)



## English:

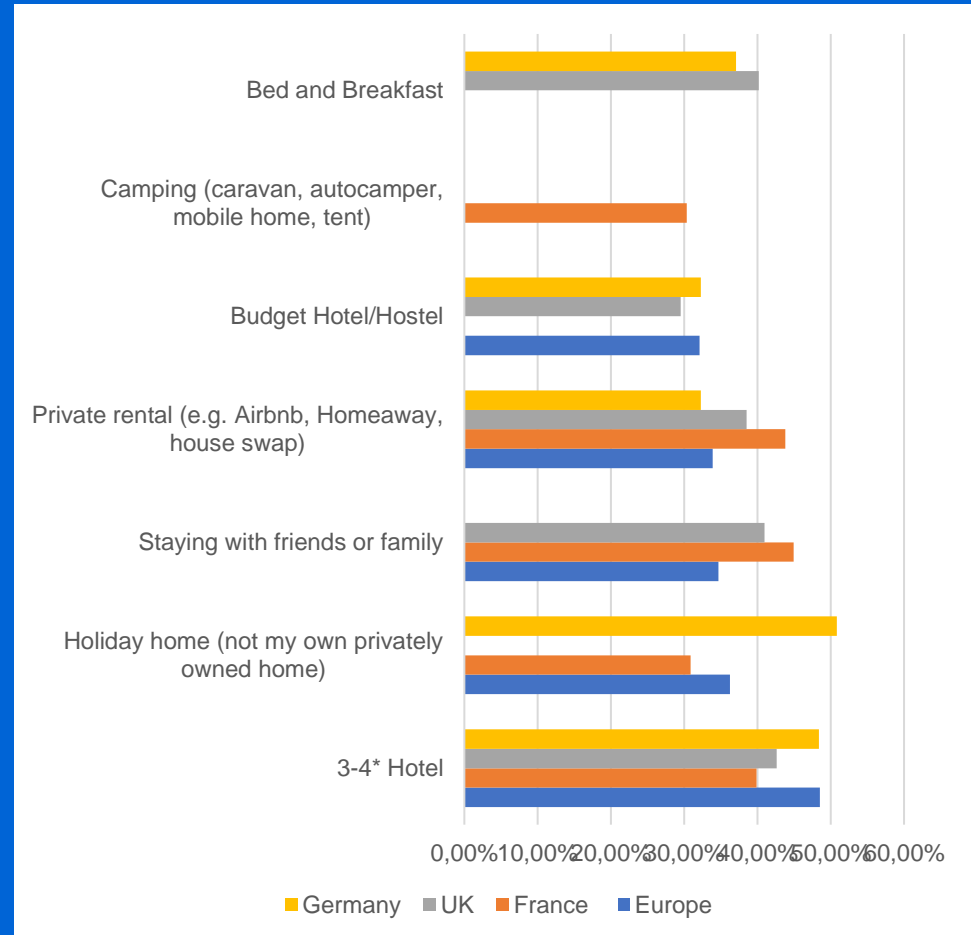
- Sun & Beach(73,77 %)
- Events / Festival (62,30 %)
- Group vacations (52,46 %)
- Relax (49,18 %)
- Small towns (39,34 %)



## German:

- Relax (71,77 %)
- Sun & Beach(61,71 %)
- Big cities (61,29 %)
- Friends & relatives (53,23%)
- Culture (47,58 %)

In terms of accommodation, it general everyone prefer 3-4 stars hotels. Beside of that German prefer holiday homes, budget hotels and B&B, while French are more for family and friends and private rental and British for B&B, family homes or private rental.



## To recap....

Italy is considered the first cultural & adventure destination for all the 3 nationalities (25,98 % for French, 23,90 % for British, 16,70 % for German).

In general French cultural tourists are older, with small budgets, while German are younger and British have an higher budget.

What the different nationalities add to complete the vacations in Italy change a little bit, with a particular interest in small cities for all 3 groups.





# \_Food Enthusiasts

**Analysis of differences  
among French, British and  
German travelers to Italy**

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# Demography



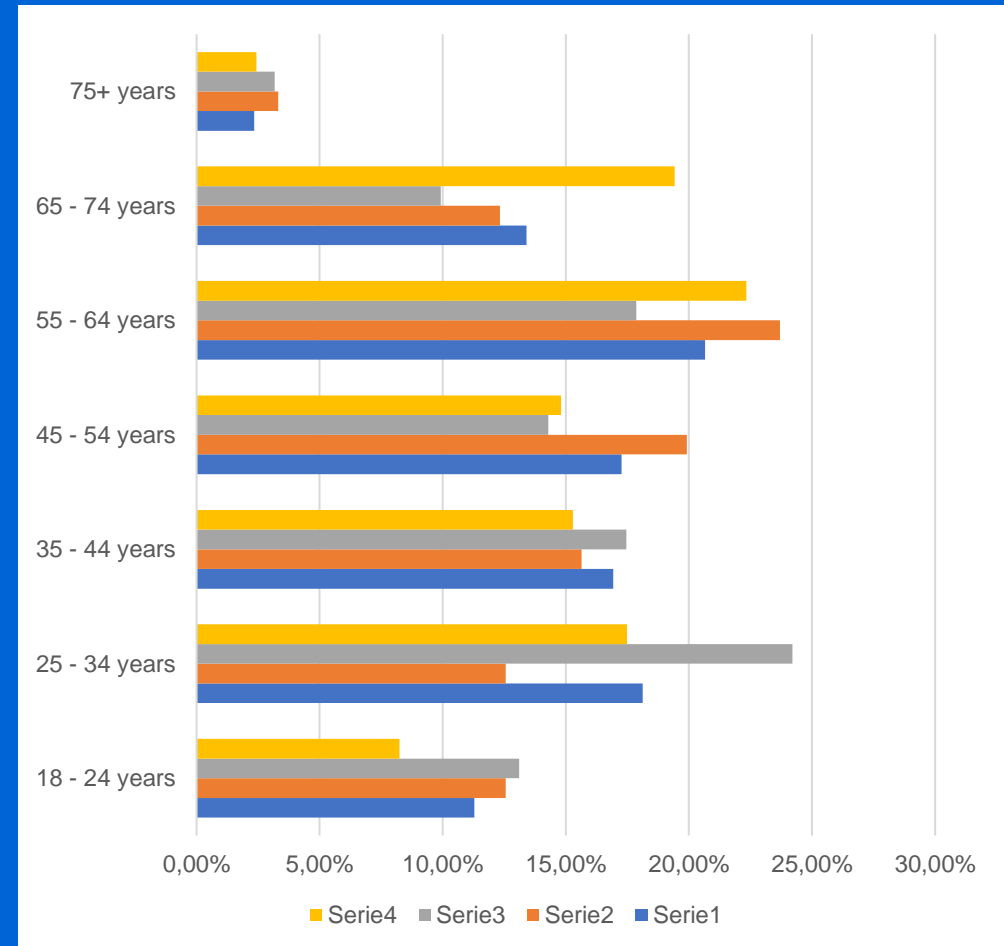
**French:**  
Quite same percentage of male and female  
Peak age: 55-64 years old (23,70%)  
Peak education: high school (33,41 %) and, quite similar bachelor degree (32,46 %)

**English:**  
More female (53,17%) than male (46.63 %)  
Peak age: 25-34 years old (24,21%)  
Peak education: bachelor degree or similar (36,51 %)



**German:**  
Quite same percentage of male and female  
Peak age: 55-64 years old (22,33%)  
Peak education: high school (67,23 %)

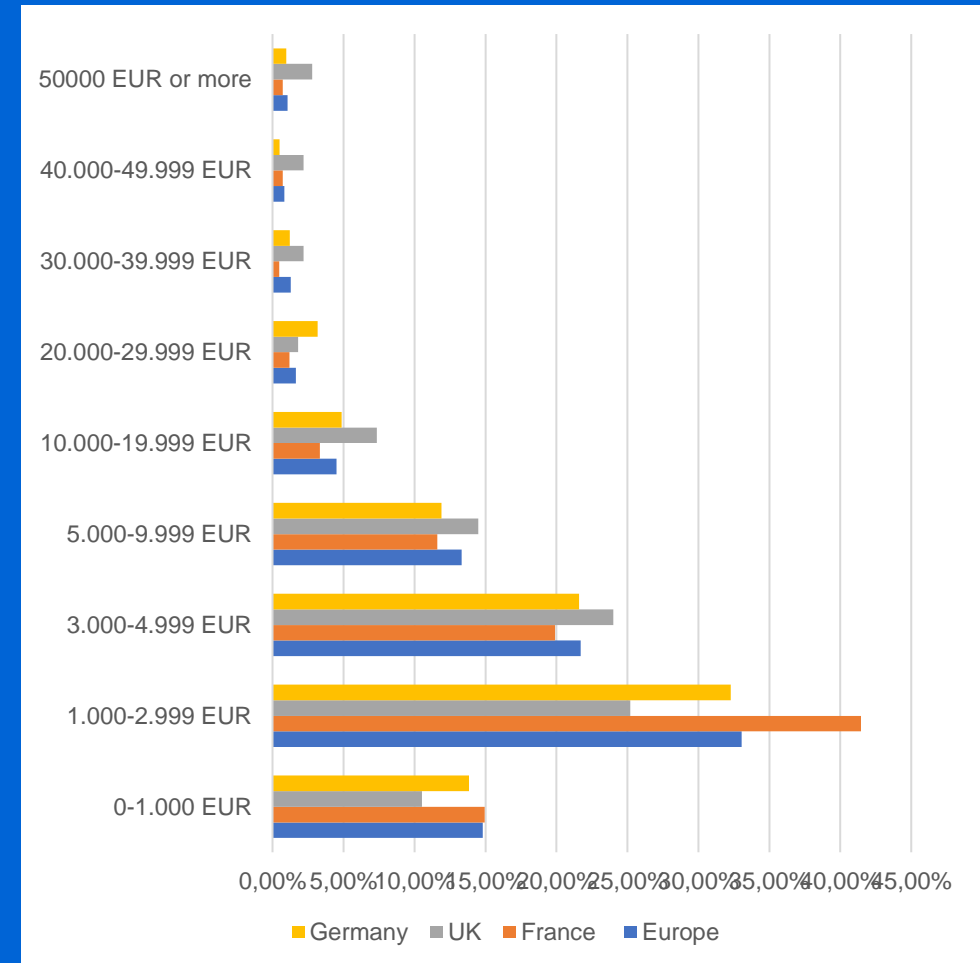
# European differences



## Travel budget

- Travel budget of food enthusiast is lower compared to other targets, and the peak of the available budget is concentrated among € 1,000 and € 2,999
- German tourists budget is generally aligned to the European average.
- UK tourists budget is above the average starting from € 5,000, even with lower percentage compared to other targets: British people confirm they are the one available to allocate higher budget in travel
- French tourists budget is above the average for only between 1,000 and 2,999 €: they confirm the ones putting smaller budget in travel (at least when they travel short haul, to Italy)
- Even if budget are stable, it is important to notice that in this segment both French (37,44 % against 34,83 %), British (37,90 % against 36,07 %) ( and German (38,11 % against 37,10) declare di invest a lower budget compared to last year, while people declare to have an higher budget is for all nationality a lower percentage

## → European to Italy





## Travel inspiration



### **Friends & Relatives:**

First source of information for every nationality examine:

- 64,619 % French,
- 54,37 % German,
- 65,15% British



### **Online research:**

Direct research via Search engines are preferred by French (45,97%) and German (54.37 %), while online review sites are British (53,178 %)



### **Social media:**

Instagram is the only social media indicated in the top 5, and only by French people (29,32 %)

### **Other Sources:**

German trust in travel agencies (38,35 %) while British prefer TV advertising (39,29 %) and travel companies website (39,69 %) and French trust in Tourism Board website (33,41 %).. And for Italian printed magazines are still important (43,75 %)



# European to Italy



# Travel catalysts and enablers

First travel enablers for the choice of destination is cleanness, followed by hygiene and safety. Affordability is for everyone the 4<sup>th</sup> factor. Than, things change: French and German travellers indicate the possibility to live new experience British prefer direct flights

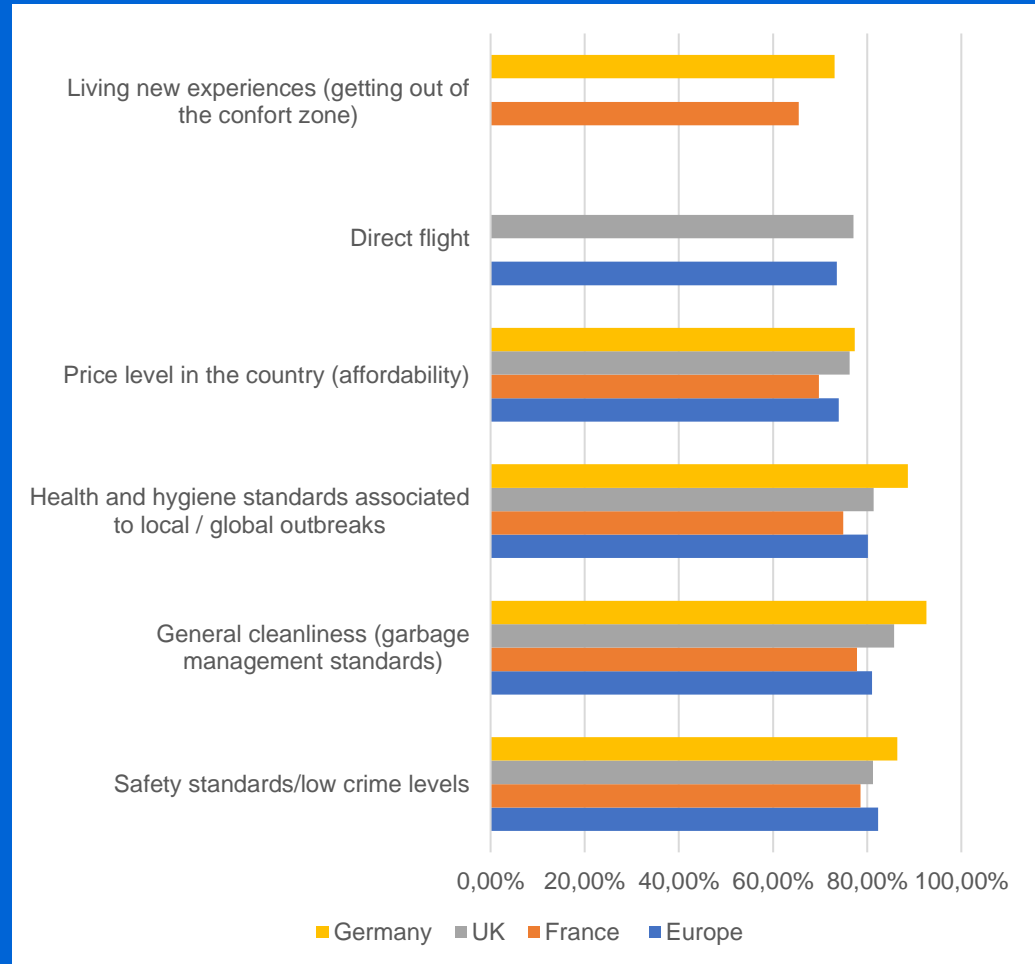
Apart food and wine, European travellers in Italy looks for:



**French:**  
 Fine dining (83,17 %)  
 Small towns (82,62 %)  
 Mountains(80,76 %)  
 Nature (73,03 %)

**English:**  
 Small town (69,58 %)  
 Nature (69,32 %)  
 Beach(66,53 %)  
 Culture (59,72 %)

**German:**  
 Beach (76,11 %)  
 Small town (69,27 %)  
 Nature (60,64 %)  
 Culture (57,91 %)



# Type of holidays and accommodation

If the previous ones are the factors to be included in a F&B vacation, also top 5 type of holidays change per nationality, maintaining more or less the same structure than for other target



## French:

Sun & Beach (73,46%)  
 Events / Festival (67,54 %)  
 Small towns (47,63 %)  
 Group vacations (39,34 %)  
 Relax (37,44 %)



## English:

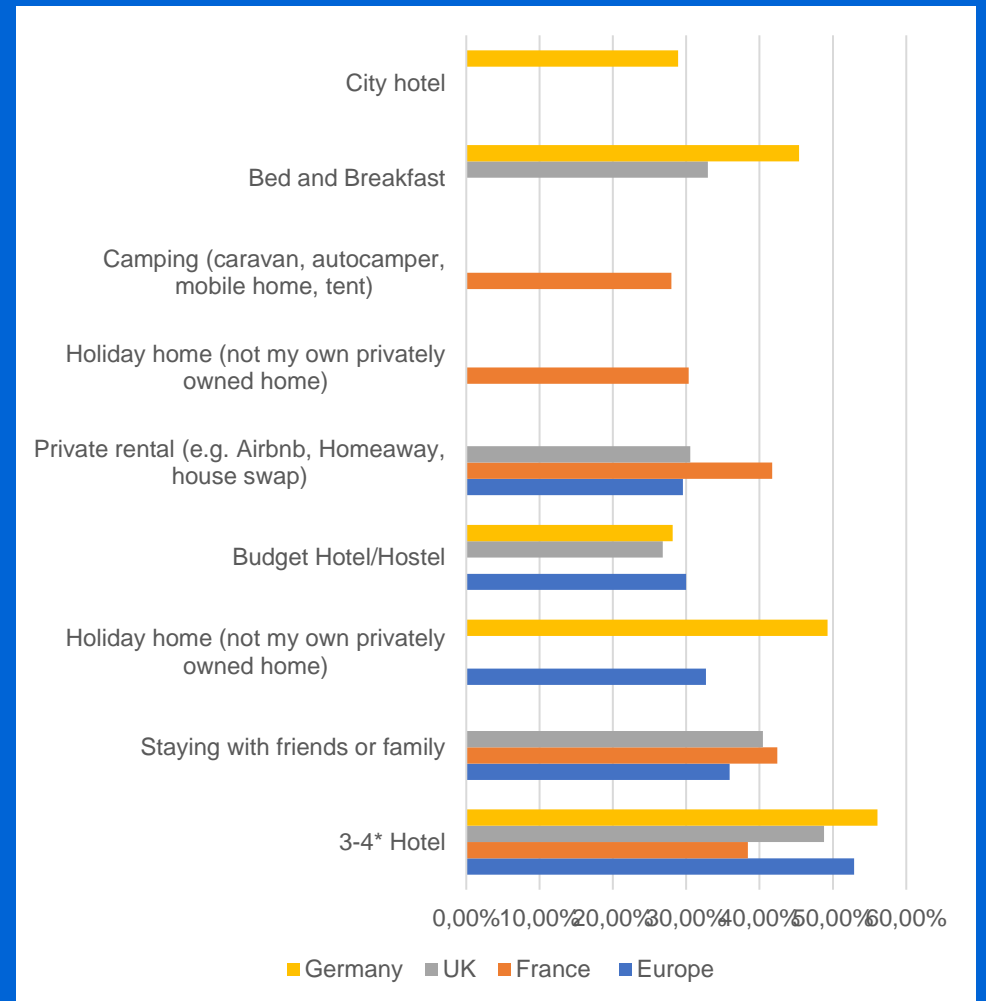
Sun & Beach(73,21 %)  
 Events / Festival (58,93 %)  
 Small towns (52,38 %)  
 Group vacations (36,11 %)  
 Relax (31,94 %)



## German:

Sun & Beach(73,54 %)  
 Relax (70,63%)  
 Big cities (58,01 %)  
 Friends & relatives (52,43%)  
 Culture (42,48 %)

Accommodation are a little bit different: French prefer independent stay in homes (from friends, or renting a house) or camping, while British prefer hotels and B&B and German more structured accommodation, as B&B and city hotels.



## To recap....

Italy is considered the first Food & Beverage destination for all the 3 nationalities (24,108 % for French, 20,50% for British, 19,690% for German) for short terms vacations..

In general food enthusiasts are quite older, except for the UK market, where they are more young cities

What the different nationalities add to complete the vacations in Italy change between different nationalities, having similarity about presence of beaches, small town, nature. French prefers add fine dining, while German are more interested in adding cultural aspects to the vacations.





## \_Being Active

**Analysis of differences  
among French, British and  
German travelers to Italy**

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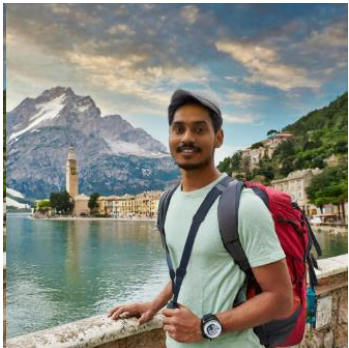


# Demography



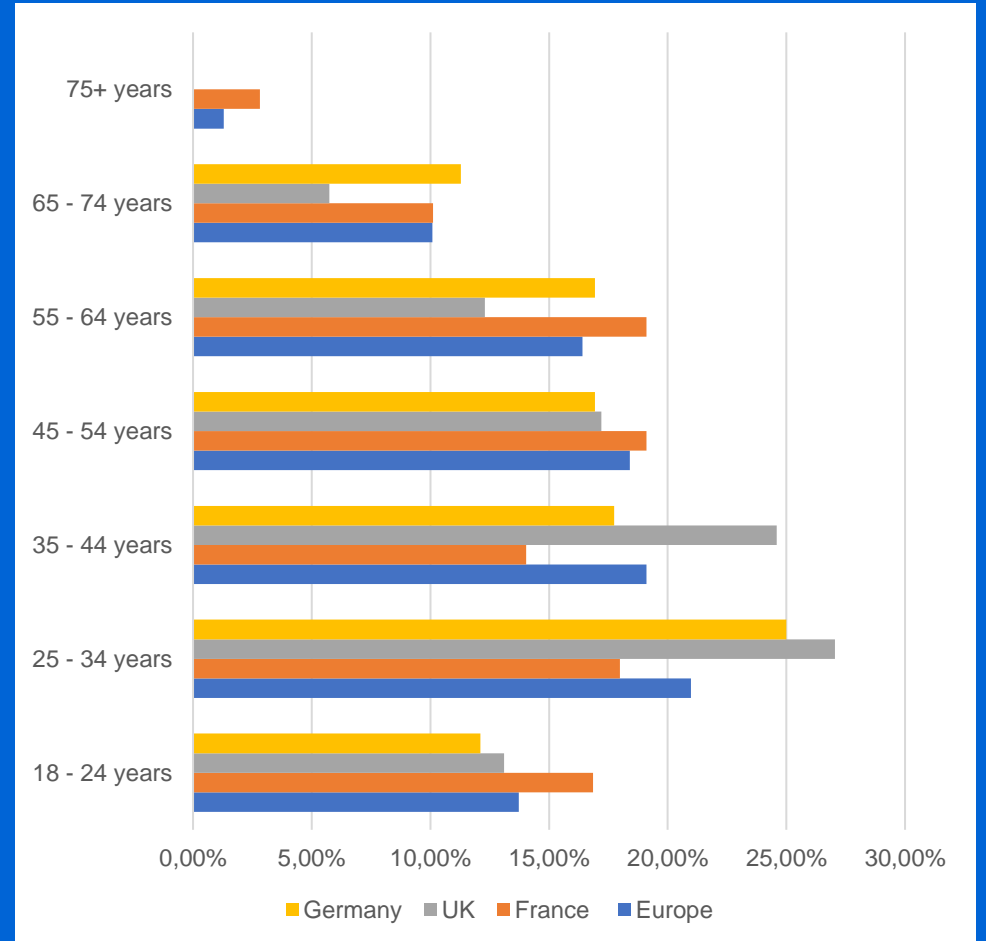
**French:**  
More female (56,03%) than male (43.97 %)  
Quite stable percentage (average 17 %) from 18 to 64 years old  
Peak education: bachelor degree (33,07 %) and, quite similar high school (32.68 %)

**English:**  
Quite same percentage of male and female  
Peak age: 25-44 years old (48,74%)  
Peak education: bachelor degree or similar (41,71 %)



**German:**  
More male (51,49%) than female (48,01%)  
Peak age: 34 years old (24,36%)  
Peak education: high school (54,46 %)

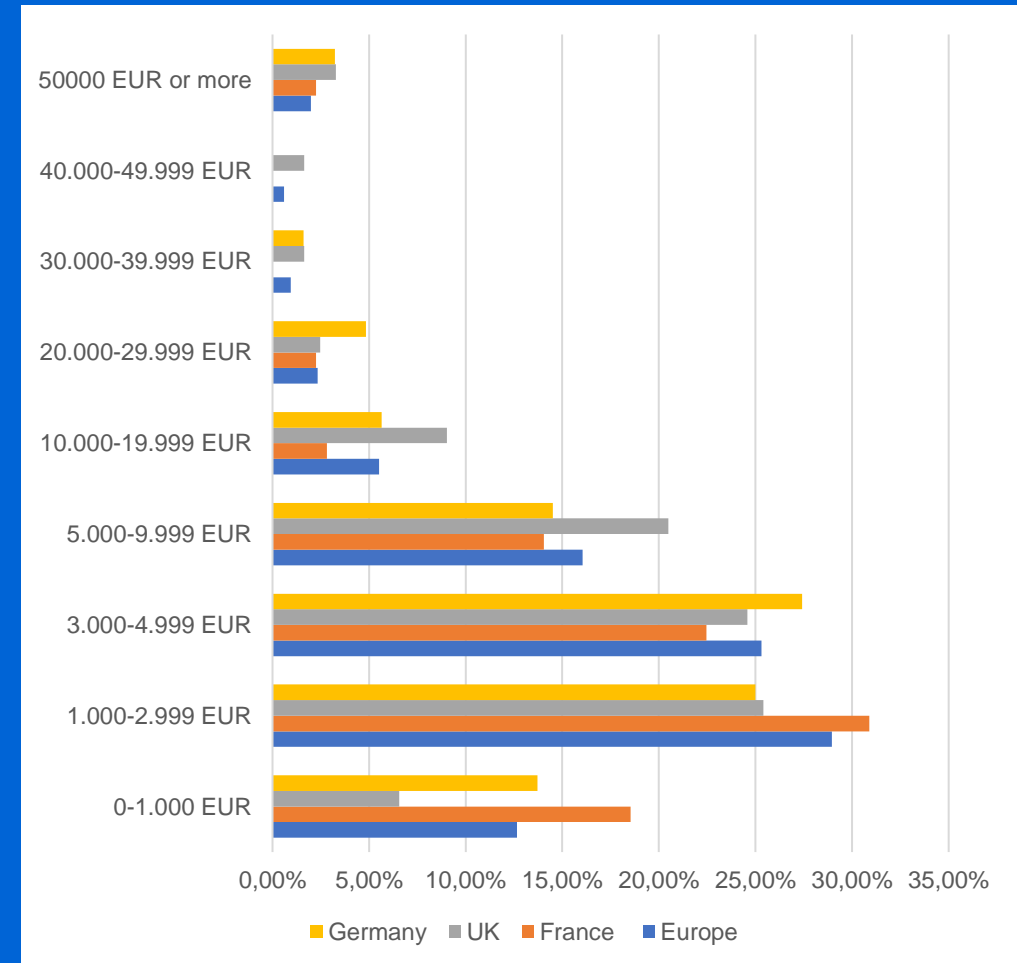
# European differences



## Travel budget

- Travel budget of active tourists is high compared to other targets; peak is still among € 1,000 and € 4,999, but with differences among nationality-
- German tourists budget is above the average for € 3,000-4,999, but also for budget higher than € 10,000 (even if with small percentage)
- UK tourists budget is above the average starting from € 5,000, as per all targets. Particularly high is also the percentage of who is available to spend € 10,000-19,999
- French tourists budget is still above the average of for budget under € 1,000 4,999, but percentage of people that are available to spend higher budget is superior compared to other targets.
- Even if budget are stable, it is important to notice that in this segment both French (15,18 % against 14,61 %), British (18,09 % against 16,39 %) and German (12,38 % against 9,68 %) declare to invest a higher budget compared to last year, while people declare to have an lower budget is always a lower percentage

## → European to Italy



## Travel inspiration



### **Friends & Relatives:**

First source of information for every nationality examine:

- 73,15 % French,
- 59,90 % German,
- 55,28% British



### **Online research:**

Direct research via Search engines are preferred by French (41,63 %) and German (51,98 %) while online review sites are British (42,71 %). German not mention Online Review Website in the top 5



### **Social media:**

YouTube is the only social media indicated in the top 5 by all the nationalities (45,54 % for German, 44,22 % or British, 33,07 % for French); Instagram is mentioned by French (40,08 %) as third source of information, and by British (47,24 %) as second source.

### **Other Sources:**

German confirm to have a different source structures, trusting in travel agencies (42,08 %) and TV programs (41,09 %).



# European to Italy

# Travel catalysts and enablers

Travel enablers change in terms of percentage compared to other targets. British tend to be more attentive to hygiene, safety, affordability and air connections, while for French access to medical facilities is important as other safety factors, and Germany give particularly attention to the type of experience as well as general safety standard and affordability

Apart from being active, sport European travellers in Italy look for:



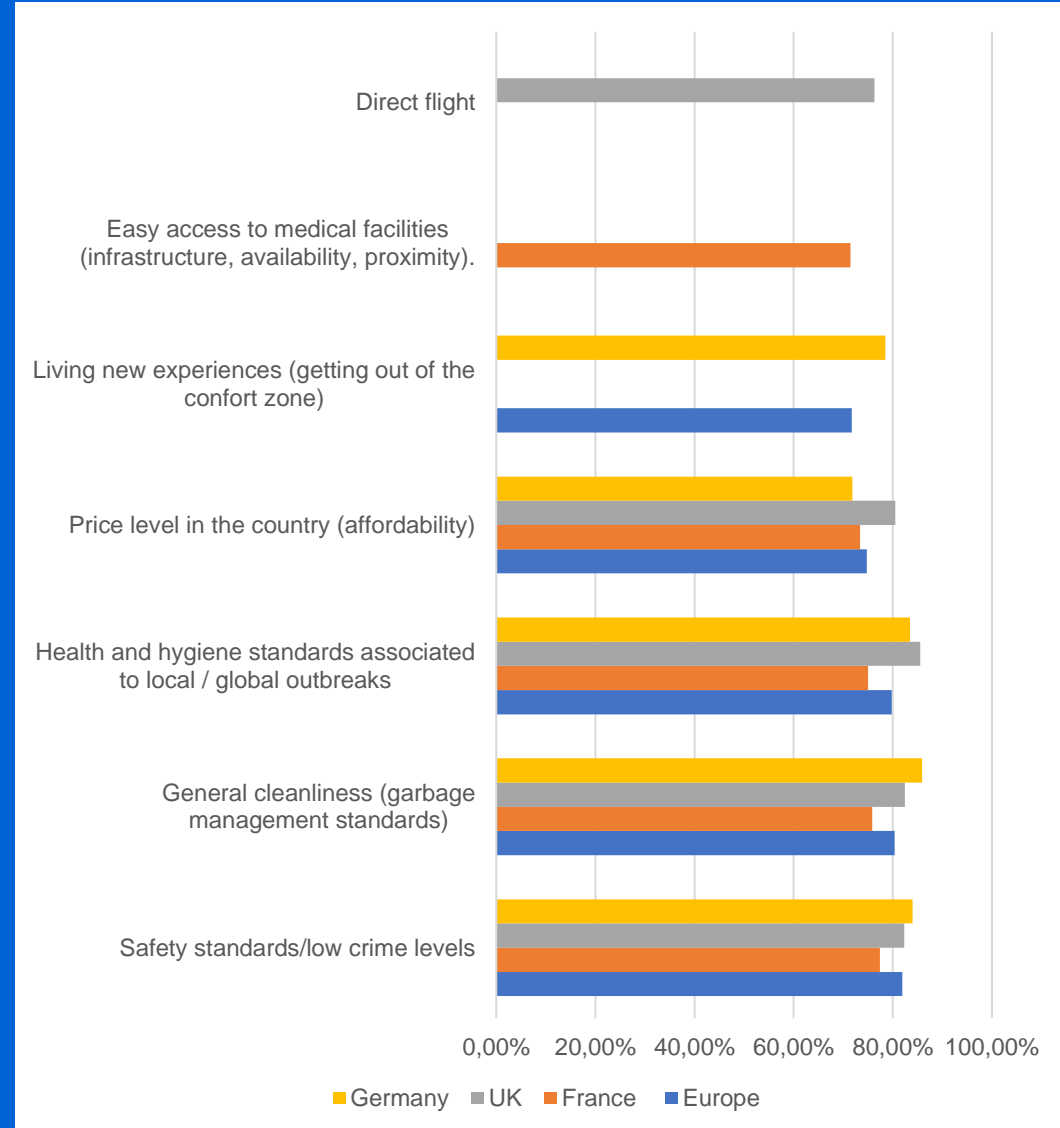
**French:**  
 Big cities (81,64 %)  
 Small towns (80,71 %)  
 Mountains (80,76 %)  
 Beach (76,19 %)



**English:**  
 Nature (84,92 %)  
 Food & Wine (82,74 %)  
 Small Towns (73,23 %)  
 Mountains (69,70 %)



**German:**  
 Nature (84,50 %)  
 Beach (75,50 %)  
 Small Town (74 %)  
 Mountains (68 %)





# Type of holidays and accommodation

If the previous ones are the factors to be included in a vacation, also top 5 type of holidays change per nationality, maintaining more or less the same structure than for other target



## French:

- Sun & Beach (78,21%)
- Events / Festival (71,60 %)
- Small towns (47,08 %)
- Group vacations (42,80 %)
- Relax (36,19 %)



## English:

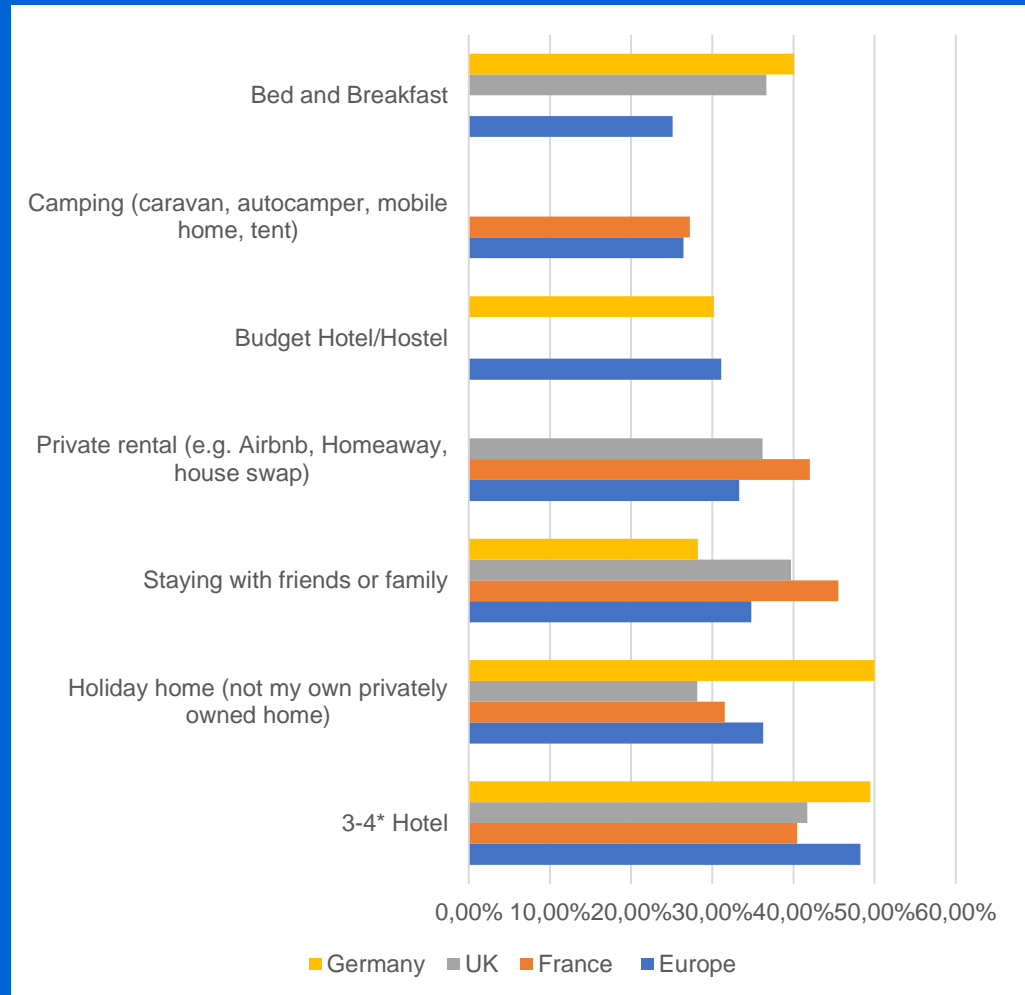
- Sun & Beach(72,86 %)
- Events / Festival (61,81 %)
- Group vacations (48,24 %)
- Small towns (44,72 %)
- Relax (38,19%)



## German:

- Relax (69,80%)
- Sun & Beach(67,33 %)
- Big cities (54,46 %)
- Friends & relatives (53,47%)
- Culture (51,58 %)

In terms of accommodation Germans confirm to prefer structured proprieties, while France and British are more attracted also from camping and private rental



## To recap....

Italy is among the first choice for active tourists in terms of short term demand, but not always the first one: British prefer Ireland and Iceland, German prefer Austria.

The travel budget is generally higher, even if the general national tendencies are confirmed (higher budget for British, conservative approach for German, lower budget for French).

Mountains is more indicated from this target than beaches as something to be part to the trip.



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