

Italian Market Background



Italian Population

Population : 60.917.000

Area: 301.338 km²

Density: 198/km²

2012 Italian Gross Domestic Product

33,049 \$

Source: World Bank – United Nations



Target in Italy



Italian Target Entity:

- 20/70 y.o.
- middle-elevate social economic class
- living in medium/large cities (over 30k inhabitants)
- travelling abroad at least once in a year

Target in Italy

Main Target Audience

People living in the North - Center of Italy and other major regions/cities in the South of Italy (including Sicily and Sardinia). IGTO estimates, in accordance with research and current activity that there are several main target groups, composed of the tourism trade and the consumers.

Consumers - General market:

Females and males.

Ages: 20-64.

Socio-economic status – middle to high income, high education level.

People that frequently travel abroad, at least once a year for sight-seeing, culture, wellness and dynamic trip.

Trade: Wholesalers, Retailers (Tour Operators and Travel Agents):

Outbound destinations wholesalers, focusing on medium to longer haul travel outside of Italy

Retailers: retail chains that are owned or affiliated to the wholesalers, or retailers (chains and/or independent retailers) who sell multiple wholesaler originating packages, or arrange their customers with their own FIT travel arrangements.

Pilgrimage:

Denomination: Christian - Catholics

Gender: Female – Male

Age: 30-70.

Income: Medium and medium - high

People, who don't travel regularly out of Italy, but shall be planning a pilgrimage to visit the Holy Land, often as a once in a lifetime medium-long haul travel destination. Families

Press:

Most important trade magazines, all tourist/consumer magazines and news paper; TV , radio, Internet

Activities and Objectives

Activities of IGTO Italy

IGTO Milan has been implementing a diverse marketing program of advertising, above and below the line activities, PR operations (journalist hosting, direct consumer PR, special events and productions), Marketing activities with outgoing tourism vendors and suppliers, fairs and exhibitions throughout Italy, one-to-one formations dedicated to bookings and sales men, co-marketing operations. All those activities have the main goal to build and improve the perception of Israel, among Italian people, as a modern and dynamic destination, with different aspects such as cultural, historical, young; Israel as a perfect place for active and relaxing holidays.

Main Marketing and PR Objectives

Increase tourism and pilgrimage from Italy to Israel creating a demand for the whole year around
Promote travel of Italian outbound tourists to Israel, both in awareness and in sales (number of tourists).
Place Israel on the public agenda; Extend Advertising Campaign and deliver complex information
Expand and develop marketing channels of tourism trade to Israel.

Product Description

A vacation in Israel, with an emphasis on the following:

Jerusalem – history and culture, holy places.

Tel Aviv – young and dynamic city, beaches, nightlife, culinary center with many types of restaurants & cuisines, sport, design and architecture.

Holy Land – religion, holy places and spirituality

Acco – history and culture,

Galilee – spirituality, sight-seeing, active holidays

Dead Sea – Natural spa, relax, wellness

Negev – spirituality and active holidays

Eilat – sport and relax

Marketing and Communication

Marketing Strategy Emphasis

These are the most emphasized messages communicated through the different marketing (including advertising) and PR operations of IGTO Milan:

Israel is the Holy Land, birthplace of Jesus Christ, where everything happened and has begun.

Relatively close cultural touristic destination which has a good value for money.

Israel is a diverse country, which combines year round beaches with tours to historical sites, spa and wellness facilities, and of course holy places.

In Israel is possible to do different things even in the same day. A vacation in Israel is a deep experience for soul and body.

Communication Objectives

Increase visibility of Israel as a vacation and pilgrim destination

Define and update key messages for specific audiences

Emphasize Israel added values, ex.:

Variety of landscapes

Only 3½ hours flights

High standard tourism infrastructures

No visa for Italian tourists

International level of food

Many attractions in a short territory

Develop awareness of Israel as a all-year round tourist destination

Encourage pilgrims and pilgrimage organizers to add the “New Israel” into the Holy Land program.

2012 Information about the Italian tourists in Israel

General vs Pilgrimage

55%

45%

Source of information about Israel for a visit:

Internet 28% - Travel Agency 30% - Friends and Relatives 5% - Community organizations 24%

Time of booking

Up to 1 month 39% - Up to 3 months 43% - Up to 6 months 16%

Average cost of the trip

\$ 1860

Average expenditure in Israel

\$ 1286

Value for Money

Excellent 19% - Very Good 50 - Good 21% - Fair&Poor 10%

Average duration and cost of a package

- *Leisure:*

4 up to 10 days

Cost of the package one week 4 stars: from 1.700 to 2.100 euro half board
Must have Italian speaking guide

- *Religious:*

7 up to 14 days

Average cost of the package one week 3 stars FB 1,050; 4 stars from 1.210 FB.

- Must have catholic religious tour guide

2012 Summing - Up

- The year 2012 ended with 170.033 Italian tourists to Israel +12% vs 2011
- Jan – Aug 2013 107.187 Italian (the same of 2012); the difficult political situation in Syria and Egypt has been troubling the Italian's perception of a trip to Israel
- The economic crisis has affected the tourism business, especially the medium haul and low cost destination.
- The rockets launch from Gaza in November 2012 disturbed the performance affecting the total number of Italian tourists in the last part of the year, and the beginning of 2013.
- Igto continued concentrating its efforts on the general market on the history/archaeology/trendy/sightseeing/Spa/night-life/glbts segments.
- Trade and public keep improving their perception of Israel as a modern, dynamic, cultural, leisure destination.

Highlights of 2012 – general market

- New potential Tour Operators have been approached:
- One to One Travel agents formation in cooperation with Top Tour Operators
- 9 tour operators (7 in 2011) have been promoting the City Break Tel Aviv creating packages and special offers
- Approaching low cost airlines (Ryanair and Easy Jet)
- Penetrating the incentive market with a dedicated fam trip
- Massive promotion with T.O. to promote the week end in Jerusalem (advertising, pr, mktg and 2 fam trips)

Highlights of 2012 – religious market

- New potential Tour Operators have been approached:

New trend by Religious T.O.: Discovering Israel for “secular” people following the “Year’s faith indications”: Opera Romana, Duomo Viaggi, Fratesole, ODPT. Special packages on the Mary’s footstep and on the Gospel Trail

- Seminars in cooperation with Top Tour Operators

Highlights of 2012 - PR

P.R. exposure in the trade and general media:

- 98 Press Releases on the Trade
- 29 Press Releases on the Consumer
- 80 Articles/Reportages on the Trade
- 170 Articles/Reportages on the Consume

Hostings: 68 journalists hosted in Israel in 2012 + 5 blogger

Segments covered:

spiritual; art/architecture; nature/sea/desert/sea/wellness/archaeology

TV Reportages: on RAI TV; (3 Issue Alle Falde del Kilimangiaro; 2 A Sua Immagine);
1 on 105 Network “Madonna concert”; 1 DJ TV, Tel Aviv; 6 radio Issues, Telenova,
Telepace, Voyager on Rai 2 TV; La 7, Effetti Personali

Highlights of 2012

Special Pr Activity

1. Igto Milano won the II prize given by the Tourist's Office Association for the "Jerusalem Marathon" program: Correndo per il Mondo



2. Igto Milano won the Prize by the Italian Touris Journalist Association for the «Best Communication Campaign»



3. Igto Milano, in occasion of the Family Day Meeting, gave to the Milano's Archibishop S.E. Scola a small olive tree arriving from Nazareth

<http://www.youtube.com/watch?v=NfWASXHd4ZM&feature=endscreen>

Digital Pr

Social Media Management



«Visitate Israele» From 3 October 2012, 168 posts and 5789 likers



Twitter: From 15 February 2012, 299 followers and 399 tweets



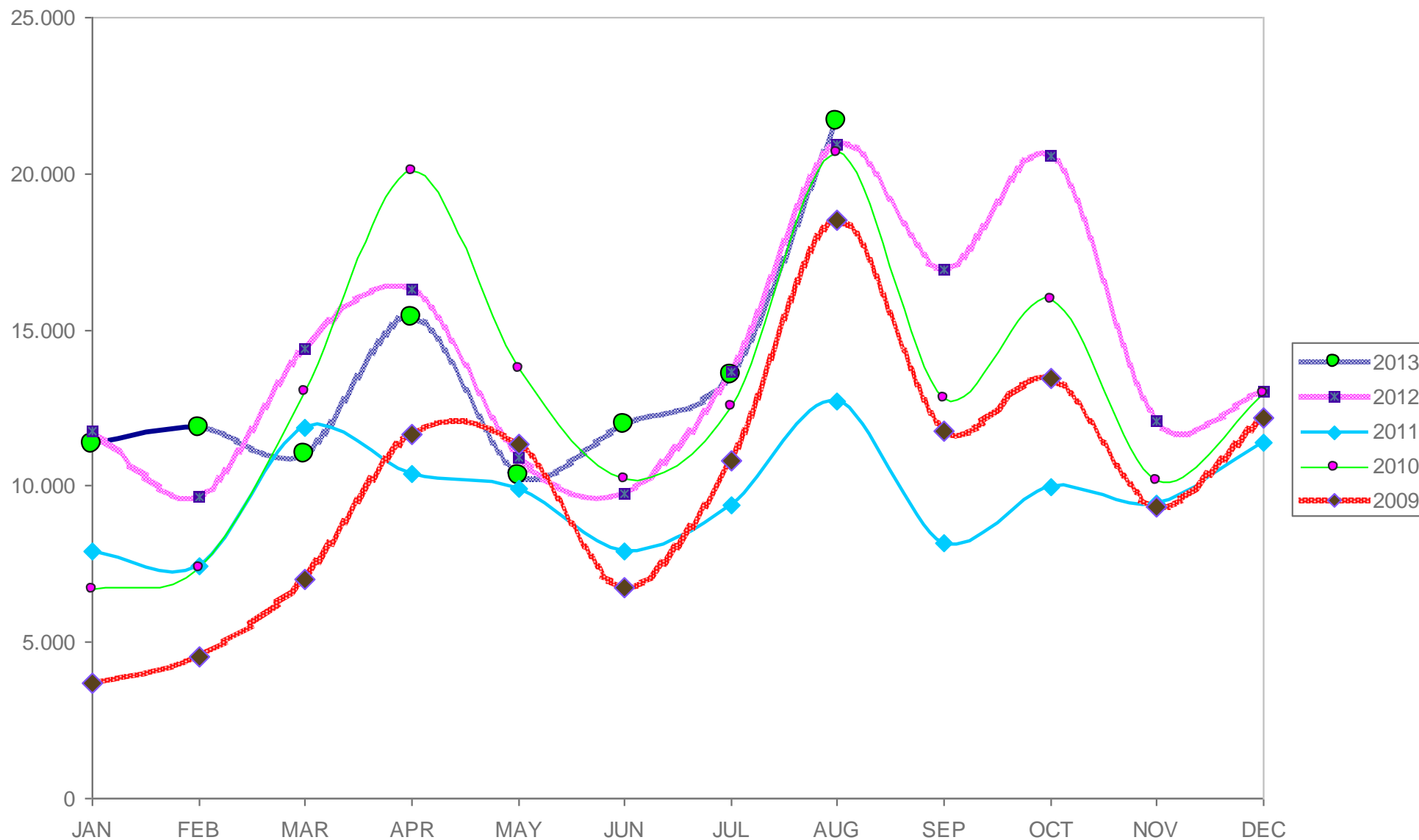
Blog: 348 Posts since 1 January 2013

2012 geographic distribution of the marketing support given on the Italian market with seminars, events and one-to-one formations to adv, tour operators, opinion and tour leaders, GLBT final consumers



Events attendants:
339 Religious Market
1572 Leisure Trade
8100 GLBT final Consumers

Italian tourists in Israel/month 2009 – 2010 – 2011 – 2012 – 2013

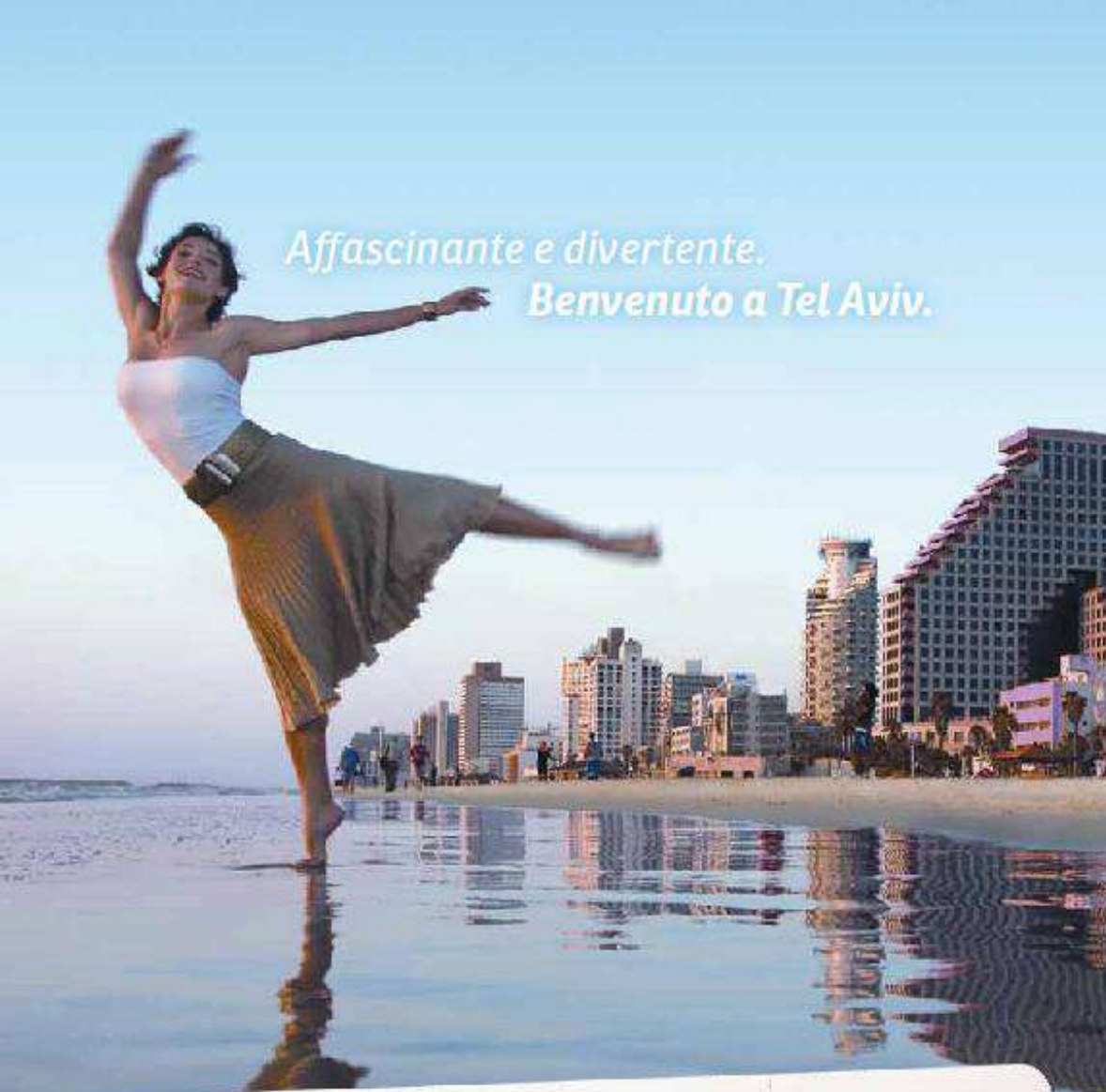


Advertising Campaign

New creativity – Fun & Food



Club Israele 2013 dedicated to the promotion of Tel Aviv City Break



Ti aspetta un **City Break** di 4 giorni.
A partire da 499€.



Per maggiori informazioni vai su
www.goisrael.it

2013 Italian Tourism Fairs

IGTO Milano participates to the most important Italian tourism fairs



BMT
Napoli 2013



TTG Fair - operators boots at IGTO stand



2013

- Approaching and hopefully starting marketing activities with new Tour Operators (Leisure and Pilgrimage): Grandi Viaggi, Veratour, Swan Tour, Settemari, Albatravel, Azalai, Inviaggi, i Viaggi del Delfino, Cortes T.O., Zerotrenta, Amerigo Viaggi, Turisalfa, Si Viaggiare
- Pushing on program for students: (Bastiani, Lakinion, Brevivet, Opera Romana, Vivalingue)
- Promotion of Tel Aviv and Jerusalem City Break
- Increase the length of charter seasons for pilgrims
- Starting cooperation with low cost airlines (EasyJet – Ryanair) - Easy Jet will start flying from Rome on September 24 2013
- Promotion among historical/cultural/sightseeing/young/glbtfun segments
- Promotion among travel agencies networks
- Promotion of Jerusalem and Tel Aviv Marathons
- Promotion of some cultural event such as Light Festival in Jerusalem, With Night and Gay Parade in Tel Aviv
- Workshop Israele in Rome dedicated to travel agencies, tour operators and associations
- Special project “The Apprentice” Italia (international reality television series) in Israel – 3 days shooting in Jerusalem
- Year of Faith

2013 Flights situation

Alitalia

3 daily flights from Rome

Total - 21 per week – capacity 180 seats per flight (total of 3780 seats weekly)

EI AI

2 daily flights from Milan 12 per week (one flight on Saturday night and one on Friday)

2 daily flights from Rome 11 per week (not included Shabat; just one flight on Friday)

Total - 23 per week – capacity 140 seats per flight (total of 3080 seats weekly)

Meridiana

3 flights weekly from Milan

Total - 3 per week - capacity 180 seats per flight (total of 540 seats weekly)

Easy Jet (from September 2013)

2 flights weekly from Rome

Total - 2 per week - capacity 180 seats per flight (total of 360 seats weekly)

2013 Charters operators

BREVIVET

Bergamo

ETERIA

Bergamo / Bologna

IOT

Verona

OBY WHAN

Catania

OPERA DIOCESANA

Torino

OPERA ROMANA

Roma

SITI

Napoli

EVES

Bari

LAKINION

Lamezia Terme