

Market Demographics

- Italy population is **58,749,234**
- The Italian economy is the 8th largest in the world and the 3rd largest in EU The budget deficit dropped compared to the previous year. Italian GDP is expected to grow by 0.8% in 2025
- Italian travelers abroad in 2024 increased by 9% compared to previous year
- **Popular travel season:** summer, from mid-June (school closures) to mid-September. 36 Mil Italians go on holiday between June and September
- Average of **26 days (4 weeks) of paid annual leave**
- **Italian arrivals to USA in 2024: 1 Mil 124,000, +15% change 2023/24**
- A steady growth of arrivals from Italy of 6% annually until 2027 is expected



Market Trends



- **Increase direct seasonal flights from Italy to USA** helps the market diversify travel offer:
 - ✓ Rome - Denver by United Airlines as of May 2, 2025
 - ✓ Rome - Minneapolis by Delta Air Lines as of May 23, 2025
- + 127% in air capacity on non-stop flights between Italy and the United States (from 2019 to 2024)

Market Trends



- **Digital media** and **Artificial Intelligence-AI** are emerging as a strategic tool to personalize the travel experience = great opportunity for companies in innovation, growth and satisfaction of travelers.
- The use of AI technology improves various aspects of the tourism industry, including customer service, travel planning, pricing and marketing.
- The use of AI technology in tourism is changing the way we experience travel, creating personalized, efficient, and enjoyable journeys.

Who travels to GAW region



- **Repeaters travelers**
- **Average traveler age:** 40-65 years old
- **Average party size:** 2-4
- **Travel preference:** Fly&Drive - mini groups: increase of small groups escorted by small/medium size TOs
- **Average length of stay:** 10-15 days
- **"Modern traveler"**, able to get the right information, use new technologies, take advantage of specialized travel consultants for creating THE TRIP but still want to leave a free space for personal exploration.
- **Italians are curious and love different cultures;** they have the myth of the Old West and are fascinated by the culture of the Native Americans
- **Sources of Travel Inspiration:** Italians are inspired by family & friends advices, social media, online media, including travel sites and blogs/digital travel magazines, TV/movies
- Book via travel agency for a complex trip and for assistance, support and safety Average daily spend: 550\$ (including transportation, lodging, food, attractions)
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Which are the main interests for a Gaw trip?

- The Frontier history & Old West culture
- Unique and true western experience: ranch stay, rodeo, horseback riding etc.
- Historic small towns
- Native American heritage and culture
- Iconic National Parks and state parks
- Region with valuable biodiversity hotspots appealing ecotourism
- Love to travel by car/motorcycles
- Exploring the wild opens spaces - GAW: no Overtourism destination



Fun Facts about Italians

- Italians prefer landscape and relax more than action. We love "La Dolce Vita," or, "The Sweet Life."
- Italians are shy. They don't dare speak English and are intimidated by the language barrier. Anyway, Italians can communicate perfectly with gestures and hands!
- Italians are food lovers. Dinner from 7.30/8 pm onwards!
- Italians do not like Italian food abroad. In the USA we prefer an authentic American meal. Hamburger, steak and a good local beer.
We don't eat pineapple on pizza!
- We hate water with ice, the lack of bread during meal and the cold AC
- We prefer to have breakfast and WIFI included in the room rate
- The concept of tipping in Italy is totally different: tipping is not expected or required unless you receive exceptional service. For this reason, tipping in USA is often misunderstood.

