Travellyze
TRAVELLERS ANALYZED

Lithuania Destination Report

ITALIAN MARKET 2024

Destination

Methodology

Travellyze employs a rigorous methodology by conducting detailed online consumer surveys annually in the months of August and January. Each survey wave utilises IP address and deduplication software to ensure that respondents are distinct individuals, while also ensuring that the collected data remains statistically relevant and precisely representative of the demographics in each national market.

The survey solicits responses from European adults aged 18 and older. The data collection process is both simple and random, yet stratified, to guarantee a sample that aligns closely with the population's composition. Factors such as gender, age, and geography are considered in this process. Each year, data from over 20,000 completed surveys undergoes qualification and verification by data analysts before being integrated into the Travellyze analytics platform.

The questionnaire is meticulously designed to provide an in-depth analysis of traveller perceptions regarding the tourism offerings of more than 150 destinations. An exclusive algorithm cross-references variables related to perception, image, travel intent, and consumer behaviour across different demographic and product segments for each destination.

About Travellyze Destination

Travellyze Destination simplifies destination management for Destination Marketing Organizations (DMOs). It offers insights that delve deep into the minds of travellers without complex maths and time-consuming data analysis.

Destination's objective is to empower DMOs to nurture flourishing destinations through precise insights and strategic guidance. Our comprehensive 360-degree strategy development, grounded in a Destination customers' perceptions, encompasses three key aspects that every DMO needs to address: Brand, Distribution, and Product Development. Additionally, it provides a fourth section to help you focus actions efficiently: the Current Traveller Persona.

Welcome to the future of destination management—welcome to Travellyze Destination.

Destination Reports work in many cases with the **TRAVELLER** to your specific destination. This Traveller is defined by those that have a positive perception of the destination but haven't been there, those that expressed interest in visiting your destination in the long term or in the next 3 years, those that visited and had a good experience and those that visited and want to revisit in the long term or in the next 3 years.

Each time a particular diagram, index or metric refers to it, the **TRAVELLER** label will be displayed.

Destination

Strategy

This section aids destinations to create their strategy and in allocating their resources efficiently. Utilising our rankings and algorithms, we provide an overview of the general status of a destination, as well as a foundational guide for decision-makers to prioritise actions and allocate budgets in brand, product development, and placement strategies. This section helps destinations understand who their current traveller persona is by providing a detailed profiling of these travellers based on their demographics and travel behaviours.

Brand Performance

The Brand Audit section illustrates a destination's position in Travellyze indexes. It provides a comparative analysis of how a destination measures up to its competition based on awareness, perception, and experience rankings. It also identifies the most relevant factors for travellers considering a visit to the destination.

Destination Positioning

The Destination positioning section provides insights into the channels that inspire travellers, along with a detailed overview of how users make bookings and the types of products they prefer, such as accommodations and transportation. Destinations can use this information to position themselves effectively.

Product Development

The Product Development section encompasses the insights a destination needs to enhance both product development and product adaptation to specific markets. It includes important Drivers, Essentials and Barriers, as well as an understanding of user flow in terms of quantities and seasonality.

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b. Essentials Audit

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d. Flow Audit

Strategy

01

This section aids destinations in creating their strategy and in allocating their resources efficiently. Utilising our rankings and algorithms, we provide an overview of the general status of a destination, as well as a foundational guide for decision-makers to prioritise actions and allocate budgets in brand, product development, and placement strategies.

Along with the Strategy, this section helps destinations understand who their current traveller persona is by providing a detailed profiling of these travellers based on their demographics and travel behaviours.

This section is divided into two main audits

- Strategic Focus Areas Audit
- Traveller Persona Audit

Strategic Focus Areas Audit

This audit plays a vital role in helping destinations optimise their resource allocation.

By utilising our proprietary rankings and algorithms, we not only provide a comprehensive evaluation of a destination's overall status but also offer an essential framework for decision-makers to determine the prioritisation of actions and budget allocation across brand, product development, and placement strategies.

To assess which strategies a destination should implement and prioritise, this report takes into consideration several areas that are transversal to the three major strategies defined earlier.

Traveller Persona Audit

This section summarises the most common responses in each section of the Travellyze survey to build a profile of the typical traveller from a given market to a specific destination.

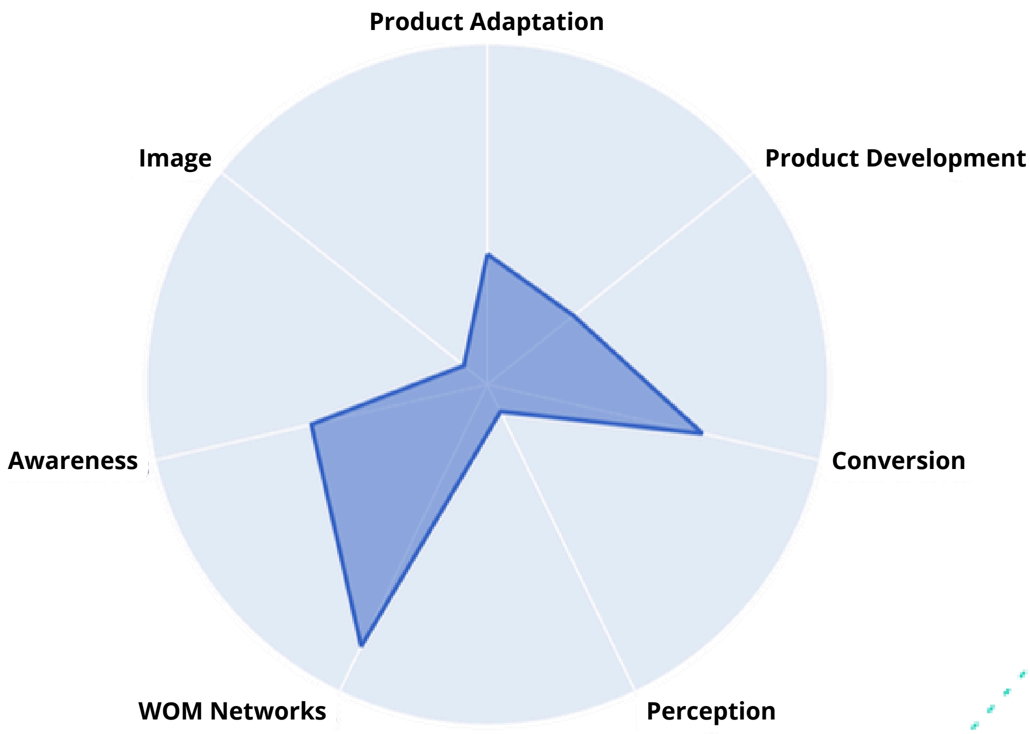
The system automatically identifies only the most common response in each section so after the description the actual percentages for each option are listed.

If, for example, 51% of respondents are women, the Current Traveller Persona will be female and the system will refer to "her" travel habits but this does not of course mean to say that the 49% of male travellers are not taken into account in all the other sections.

Strategic Focus Areas Audit

In this radial chart, we can visualise the current development status of the nine areas that require attention, along with the relative importance that the DMO should assign to each area. It's important to note that the size of the radius directly correlates with the level of significance attributed to a specific area. In practical terms, the larger the radius, the more pronounced the emphasis placed on that particular facet.

This chart illustrates that **Lithuania** should prioritise **WOM Networks** the most, while it should allocate fewer resources to **Image** and **Perception**.



AREAS UNDER ANALYSIS

In this analysis, Destination has developed algorithms aimed at thoroughly assessing the significance of each of the nine areas. Below, you will find a detailed description of each of these areas.

- **Image:** Refers to the overall impression and reputation of a specific travel location. It encompasses how travellers perceive and evaluate the destination based on factors such as natural beauty, culture, safety, amenities, and the experiences it offers.
- **Awareness:** It relates to the level of recognition and knowledge they have about a particular holiday destination. It includes their familiarity with the destination's name, attractions, and unique features.
- **Perception:** Refers to how individuals interpret and make judgments about a holiday destination. It includes their personal experiences, feelings, and opinions about the destination, which can influence their decision to visit or recommend it to others.
- **Product Adaptation:** Involves tailoring a holiday destination to cater to the preferences and needs of various types of travellers. It can include offering a range of activities, accommodations, and services to accommodate different travellers demographics.
- **Product Development:** Refers to the continuous efforts to improve and expand the offerings and infrastructure of a holiday destination. This may involve developing new attractions, improving transportation options, or upgrading accommodations and facilities.
- **Conversion:** Involves the process of turning potential travellers into actual visitors to the destination. It measures the success of marketing and promotional efforts in convincing travellers to choose the destination for their holiday.
- **WOM Networks:** "WOM" is an abbreviation for “word of mouth”. This refers to the interactions and discussions related to the destination that the tourist has with their social circles. Travellers share their experiences, reviews, and recommendations, influencing the perceptions of others.

From Strategic Areas to a comprehensive Strategy

Now we know what the areas for improvement are, but how can I create a strategy to enhance them? To address this, we've mapped each of the areas to the three major strategies you can pursue, namely Branding, Positioning and Product development.

Some of these areas are important for more than one strategy, so if you want to improve them, you should consider both strategies. In this chart, you can visualise the relationships between areas and strategies, as well as determine the priorities. The areas highlighted in red indicate those where the coefficients are higher, signifying the need for a more pronounced focus.

	Brand Performance	Destination Positioning	Product Development
Product Adaptation			😐
Product Development			😐
Conversion		☹️	
WOM Networks		☹️	
Image	🙂		
Perception	🙂		
Awareness	😐		

Traveller Persona Audit

Who is your Traveller Persona?

Destination works in many cases with the **TRAVELLER** to your specific destination. This Traveller is defined by those that have a positive perception of the destination but haven't been there, those that expressed interest in visiting your destination in the long term or in the next 3 years, those that visited and had a good experience and those that visited and want to revisit in the long term or in the next 3 years. Each time a particular diagram, index or metric refers to it, the **TRAVELLER** label will be displayed.

- She is a **55-64 year-old female** with a **Vocational education or Bachelor's degree or similar or above education**. She is **cohabiting/married** with **no children.**

- There are other special characteristics worth highlighting. Her most predominant social and environmental responsibility action is **choosing a train or bus over a plane ticket in the past**. It's important to note her apprehension level, meaning her willingness to travel to a destination after her country has issued a travel alert. In her case, if she receives an **interesting offer for a holiday to travel somewhere with a travel alert by the official government travel advisory**, she will not accept it.

- Her holiday budget will remain the **same as last year**, with an expected expenditure of **1000-2999€** on leisure travel over the next 12 months.

- This year, she looks forward to taking **short trips** within Europe in **September** **and long trips (5 days or more) in** **September**. Regarding trips outside Europe, she plans to do **short trips in** **May** **and long trips in** **September**. For domestic trips, she prefers short ones in **September** **and long ones in** **September**.

- When choosing a holiday destination or travel product, her main sources of online inspiration are **Search Engines (Google, Bing, etc), Online review sites (Tripadvisor), and Instagram.** Her primary offline sources of inspiration are **Friends and Family, Travel TV programmes and TV advertising.**

- For domestic trips she usually prefers to **book directly on provider's direct website.** In the case of trips within and outside Europe she prefers to **book trips online with a travel agency website - OTA (e.g. Expedia).**

- Her preferred accommodation options for domestic travel are **bed and breakfasts**. When talking about travel within and outside Europe, she prefers **3-4 * hotels.**

- Regarding transportation, for domestic trips she prefers using her **own vehicle**, and for trips within and outside Europe to **fly premium economy/economy**.

- She actively seeks destinations that have **nature/outdoor experiences, cultural & historical experiences** and the possibility of **going to the beach**. However, even if destinations offer these factors, they must also have **general cleanliness, safety standards/low crime levels**, and **health and hygiene standards associated with local / global outbreaks**. These three factors are essential requirements to consider a destination by this traveller persona. If the destination faces **local insecurity (i.e. terrorist attacks), international conflicts** or **global health concerns (COVID, monkey pox),** they would deter her from choosing that destination.

- In her mind, **Lithuania** is ranked **#99** out of **154 other destinations in terms of image**. In terms of awareness, **Lithuania** ranks **#107**.

Profiling - Insights

DEMOGRAPHICS

Destination Traveller Share

ITALY

Population	58.983.000
% Travellers	58.0%

Source: World Economic Outlook from International Monetary Fund

Gender

General

MEN 47.9% | WOMEN 51.9% | OTHER 0.1%

Source: Travellyze Data

Gender

Traveller

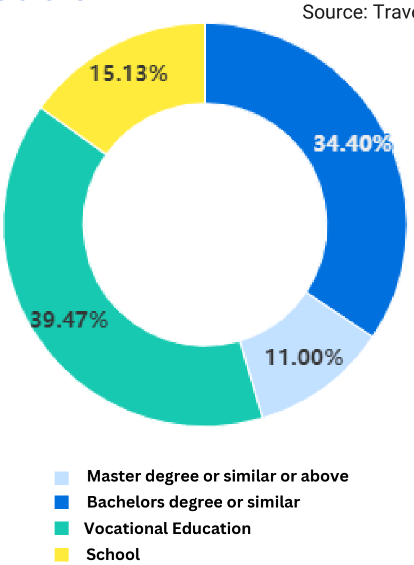
MEN 46.5% | WOMEN 53.3 | OTHER 0.2%

Source: Travellyze Data

Education

General

Source: Travellyze Data

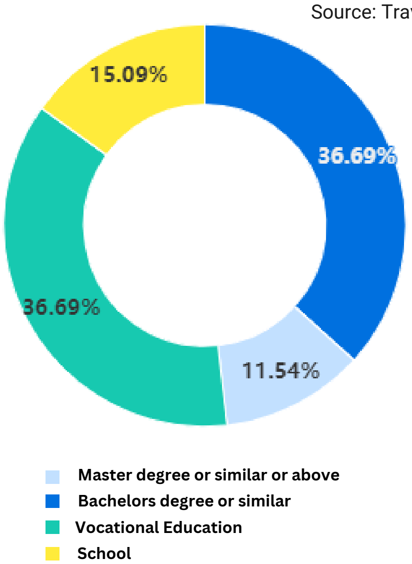


The most common level of education among the Italian General Population is Vocational education

Education

Traveller

Source: Travellyze Data

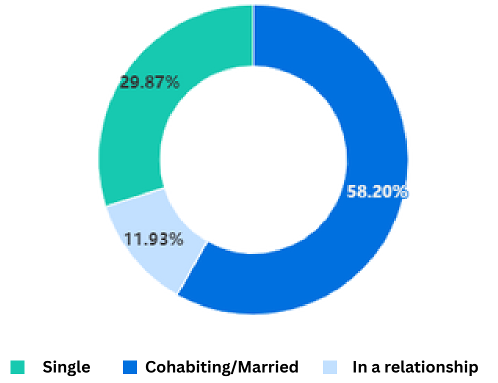


The most common level of education among Italian travellers is Vocational education.

Marital Status

General

Source: Travellyze Data

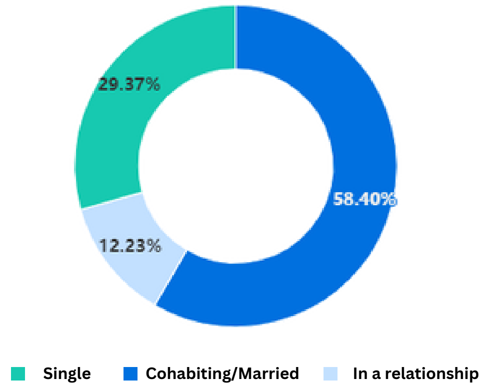


The most common household composition among **Italian General Population** is being **Cohabiting/Married**.

Marital Status

Traveller

Source: Travellyze Data

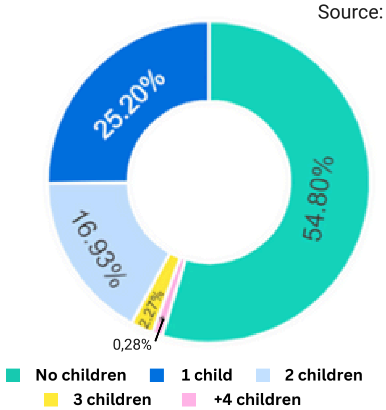


The most common household composition among **Italian Travellers** is being **Cohabiting/Married**.

Children per family

General

Source: Travellyze Data

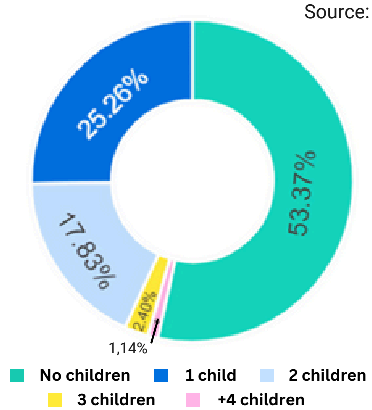


The most common family composition among **Italian General Population** is **no children**.

Children per family

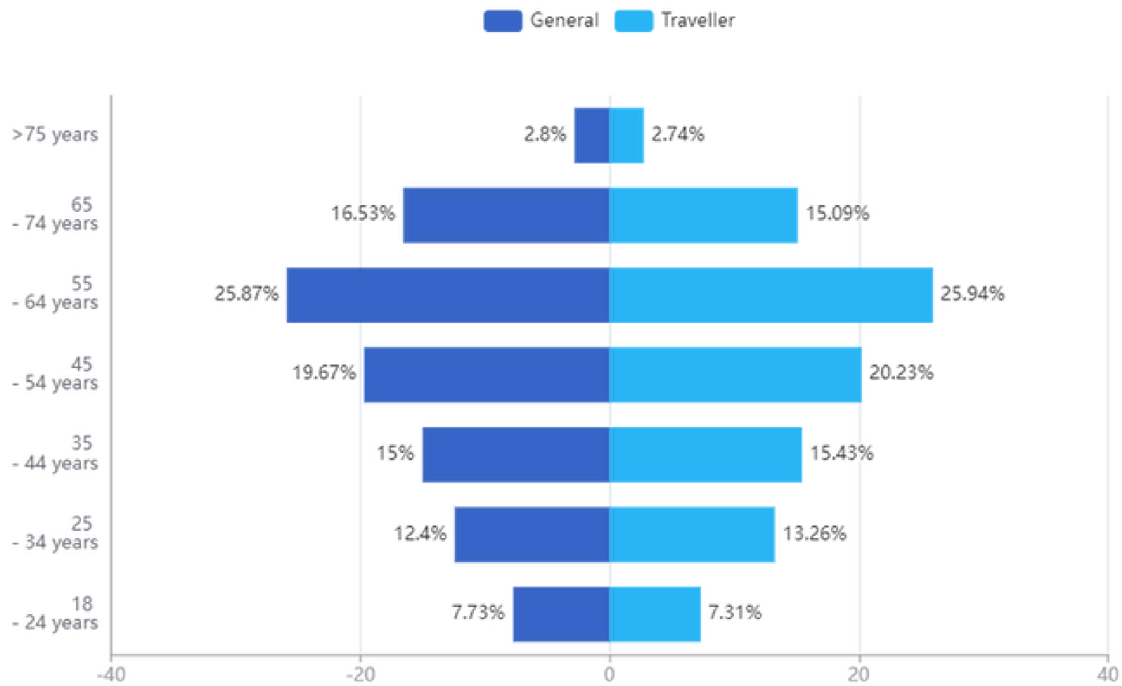
Traveller

Source: Travellyze Data



The most common family composition among **Italian Travellers** is **no children**.

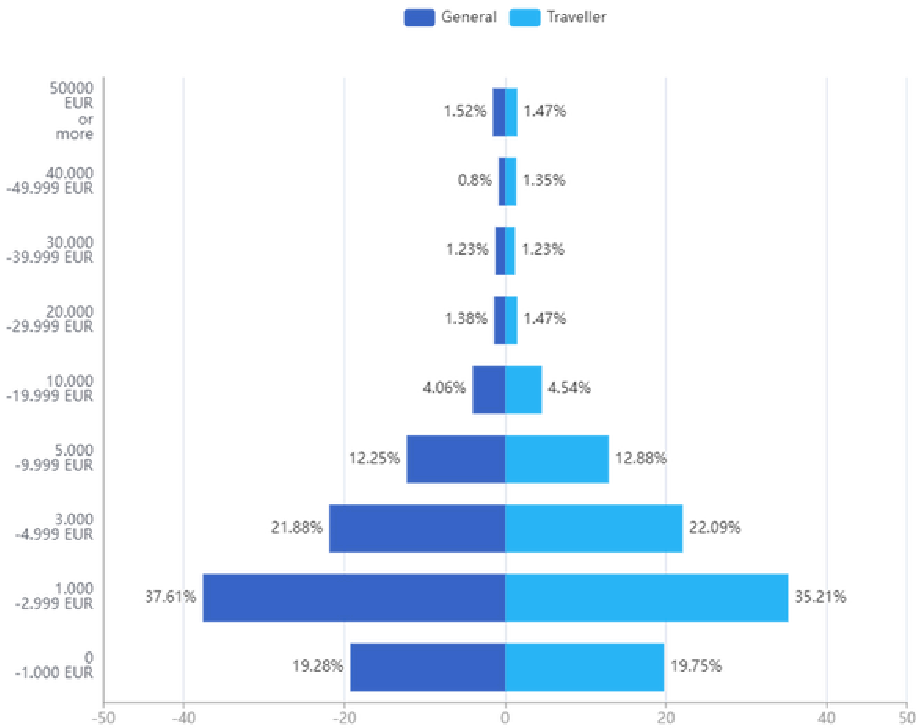
Age Distribution



Source: Travellyze Data

Travel Budget

35.2% of Italian Travellers have a yearly household holiday budget of 1.000 - 2.999€.

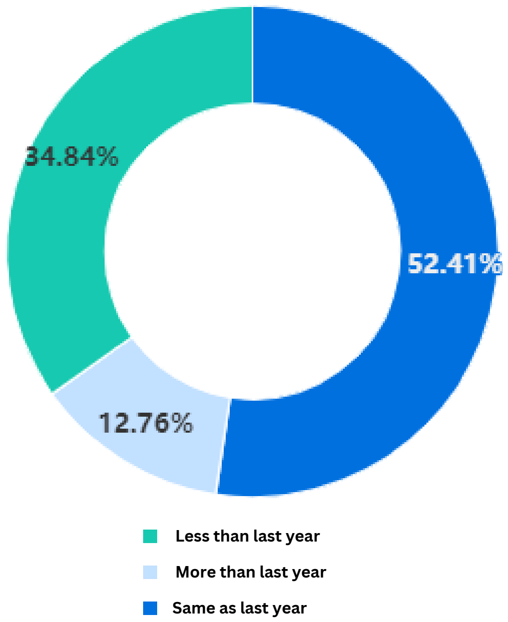


Source: Travellyze Data

Next Year Travel Budget

General

Source: Travellyze Data

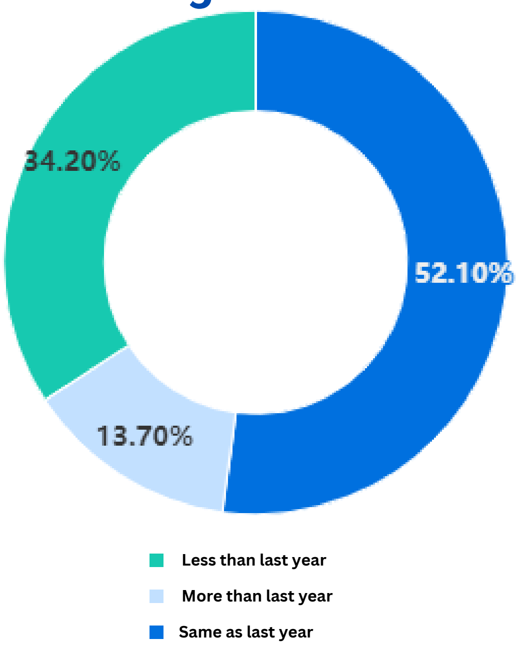


52.4% of Italian General Population expect to spend the same **on travel in the next year as they did last year**.

Next Year Travel Budget

Traveller

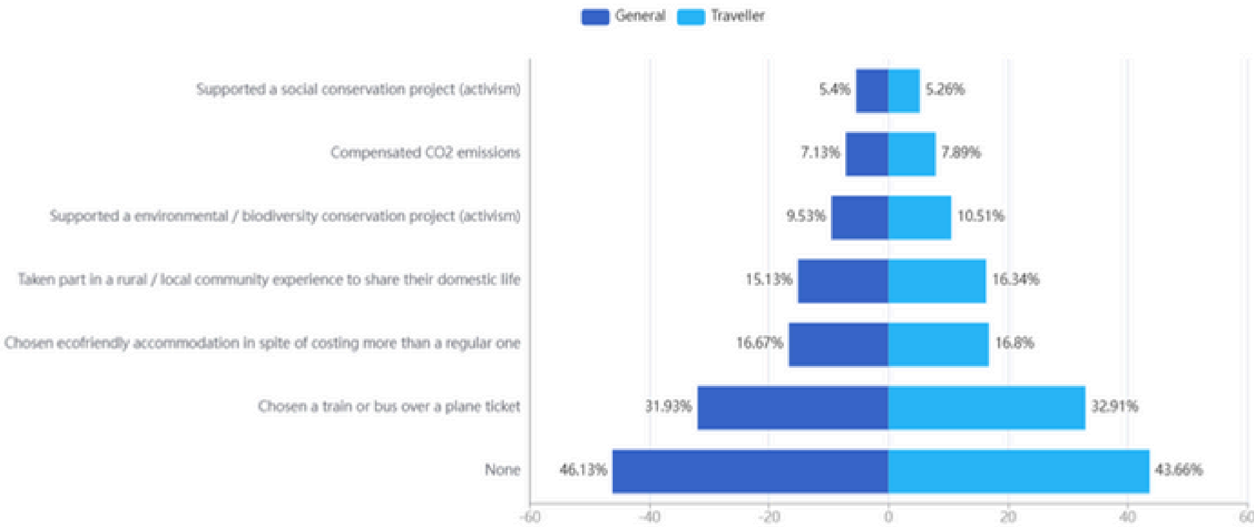
Source: Travellyze Data



52.1% of Italian Travellers expect to spend the same **on travel in the next year as they did last year**.

Sustainability Concerns

This chart displays the social and environmental responsibility actions the traveller has undertaken in the past. These actions pertain to past behaviour and do not indicate willingness to engage in future activities, thus providing a clear and more robust metric of sustainability behaviours.



Source: Travellyze Data

Apprehension Level

This chart illustrates the traveller's apprehension level. Apprehension level refers to the traveller's willingness to visit a destination after their home country has issued a travel alert for that specific destination.

Apprehension Level — General

9%
Yes, definitely

15.4%
Yes, if I myself feel that it is safe

20.1%
Maybe if it is a really good offer

55.5%
No

Apprehension Level — Traveller

9.5%
Yes, definitely

15.5%
Yes, if I myself feel that it is safe

20.7%
Maybe if it is a really good offer

54.3%
No

Brand Performance

02

This section is a valuable tool that provides a comprehensive assessment of a destination's performance in relation to Travellyze's carefully crafted indexes. It offers a holistic view of how a particular destination fares in branding and marketing terms compared to its competitive counterparts across several key dimensions. These dimensions encompass the critical elements of awareness, perception, and the actual experiences that travellers encounter.

This section is divided into three main audits

- Brand Position Audit
- Perception Audit
- Experience Audit

Brand Audit

This audit shows the destination's position in the Travellyze image and awareness indexes, two very important metrics to understand the performance of the destination's brand in the specific market. These two metrics are pivotal in assessing the Destination's standing and potential for growth within the tourism landscape.

The Image Index is a robust measurement tool, driven by a comprehensive algorithm, which compares and combines three other indexes measuring perception, experience and awareness. By amalgamating these dimensions, it derives a global score that encapsulates the overall image of the destination among travellers. This encompasses those who have already visited the destination and those who are yet to explore it.

On the other hand, the Awareness Index measures the percentage of residents within a specific country who are knowledgeable of the destination as a tourist hotspot. It essentially reflects whether the destination is on the radar of potential travellers in that market.

Perception Audit

This audit concentrates on the portion of the population that has not yet explored a particular destination. It aims to uncover their perception of the destination. Is it generally positive or negative? Are they inclined to visit in the future, and do they have plans to do so within the next three years?

These indexes are compared with the Destination’s competition and characteristics.

Experience Audit

This audit delves into the segment of individuals who have already visited the destination. It seeks to ascertain how many have visited it (essentially establishing the market share). What was their overall experience like? Was it primarily positive or negative? Are they interested in revisiting the destination in the future?

As in the Perception Audit, these indexes are then compared with the Destination’s competition and characteristics.

Brand Audit

The Brand Audit shows the destination's position in the Travellyze image and awareness indexes in the Italian market including **all the surveyed people**.

Brand Image Position

The brand image index is calculated using an algorithm based on perception, experience and awareness.

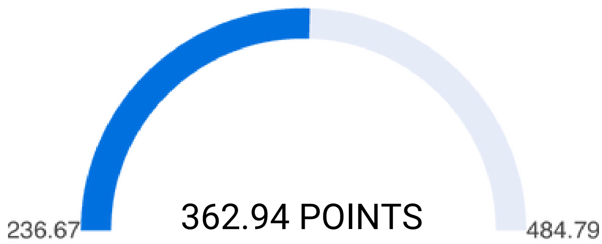
#99

OUT OF 154 DESTINATIONS

For the Italian, Lithuania is currently #99 in the global destination image index.

Source: Travellyze Data

Brand Image Index



Among the Italian, Lithuania has a brand image index scoring of 362.94 points. The lowest score is **236.67 (Los Cabos)** and the highest score is **484.79 (Spain)**.

Source: Travellyze Data

Brand Awareness Position

The destination brand awareness measures the extent to which travellers claim to be aware of the destination's tourism product.

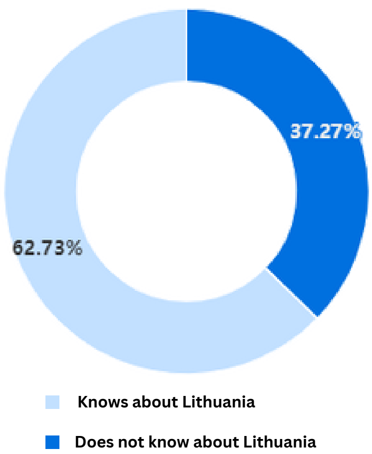
#107

OUT OF 154 DESTINATIONS

For the Italian, Lithuania is ranked #107 for awareness.

Source: Travellyze Data

Brand Awareness Ratio



62.73% of the Italian are aware of Lithuania as a travel destination.

Source: Travellyze Data

Perception Audit

The Perception Audit is determined by assessing how the destination is perceived by those who have indicated that they have **not visited it yet**.

Positive Perception Ranking

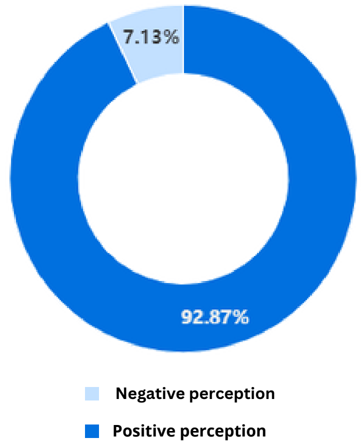
#81

OUT OF 154 DESTINATIONS

#81 is the position Lithuania in the Italian positive perception ranking.

Source: Travellyze Data

Positive Perception Rating



92.9% of the Italian have a positive perception of Lithuania as a travel destination.

Source: Travellyze Data

Destination Appeal Ranking & Rating

#105

OUT OF 154 DESTINATIONS

48.87% of the Italian would like to visit Lithuania at some point in the future.

Source: Travellyze Data

Short-Term Demand Ranking & Rating

#75

OUT OF 120 COUNTRIES

4.19% of the Italian intend to visit Lithuania within the next 3 years.

Source: Travellyze Data

Competitive Positioning

Lithuania

Lithuania ranks #81 in destination perception.

92.9% positive perception

48.9% appeal

4.2% short-term demand

92.87% of the Italian that didn't go to Lithuania have a positive perception of the destination.

Source: Travellyze Data

Remember!

The Competitive Positioning of the Perception Audit is determined by assessing how the destination is perceived by people who have indicated that they have **not visited it yet**.

Estonia

Estonia ranks #69 in destination perception.

93.7% positive perception

49.4% appeal

4.5% short-term demand

93.77% of the Italian that didn't go to Estonia have a positive perception of the destination.

Source: Travellyze Data

Latvia

Latvia ranks #105 in destination perception.

89.8% positive perception

43.3% appeal

3.2% short-term demand

89.81% of the Italian that didn't go to Latvia have a positive perception of the destination.

Source: Travellyze Data

Czech Republic

Czech Republic ranks #83 in destination perception.

92.6% positive perception

53.9% appeal

4.48% short-term demand

92.66% of the Italian that didn't go to the Czech Republic have a positive perception of the destination.

Source: Travellyze Data

Poland

Poland ranks #89 in destination perception.

92.2% positive perception

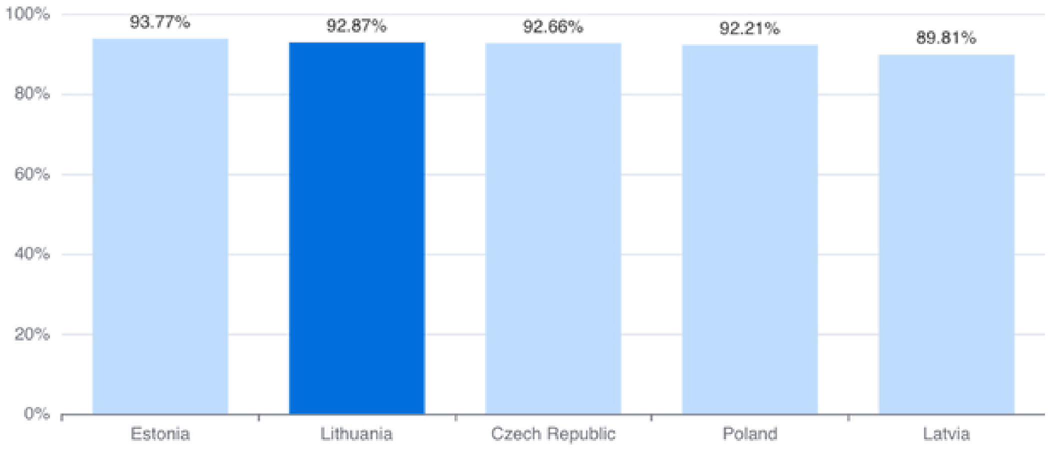
53.5% appeal

3.6% short-term demand

92.21% of the Italian that didn't go to Poland have a positive perception of the destination.

Source: Travellyze Data

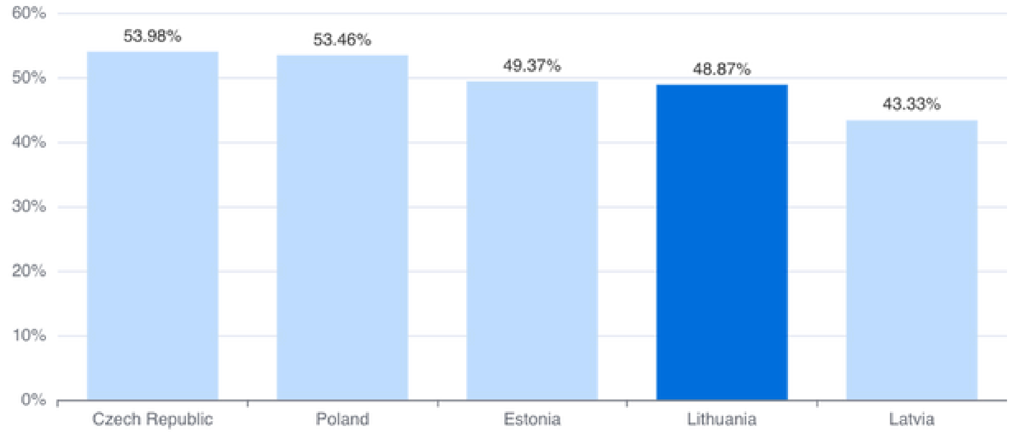
Positive Perception comparison



Of all the competitors, the destination with the **highest Positive Perception** among the **Italian** who haven't visited the destination yet is **Estonia**. **Lithuania** is ranked **2nd**.

Source: Travellyze Data

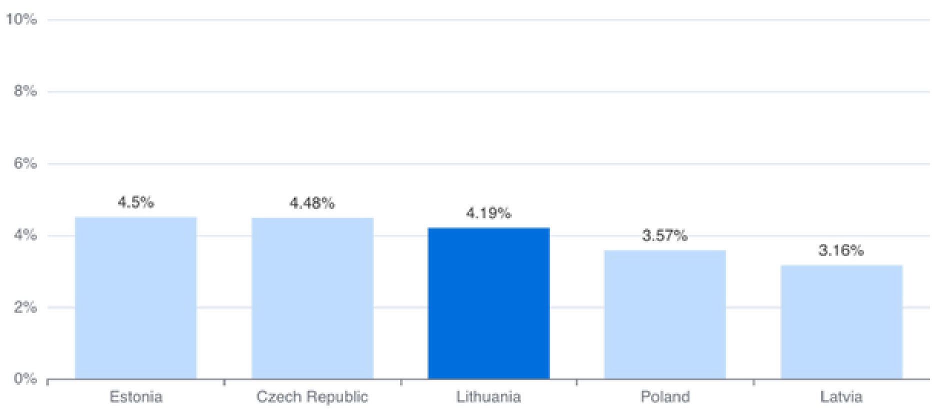
Appeal comparison



Of all the competitors, the destination with the **highest Appeal** among the **Italian** who haven't visited the destination yet is the **Czech Republic**. **Lithuania** is ranked **4th**.

Source: Travellyze Data

Short Term Demand comparison



Of all the competitors, the destination with the **highest Short-Term Demand** among the **Italian** who haven't visited the destination yet is **Estonia**. **Lithuania** is ranked **3rd** among its competitors.

Source: Travellyze Data

Experience Audit

The Experience Audit is determined by assessing how the destination is experienced by those who have **visited it**.

Positive Experience Ranking

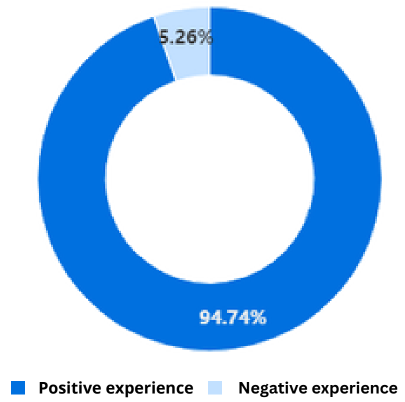
#121

OUT OF 154 DESTINATIONS

#121 is the position Lithuania has in the Italian positive experience ranking.

Source: Travellyze Data

Positive Experience Rating



94.7% of the Italian had a positive experience when visiting Lithuania in the past.

Source: Travellyze Data

Visitation Ranking & Rating

3.8%

OF THE ITALIAN HAVE VISITED.

Within the Italian, 3.8% of them have visited Lithuania in the past.

Source: Travellyze Data

Revisitors Ranking & Rating

71.9%

OF THE ITALIAN WANT TO REVISIT SOMEDAY

Within the Italian, out of the 3.8% who have visited Lithuania, 71.93% of them want to revisit.

Source: Travellyze Data

Competitive Positioning

Lithuania

Lithuania ranks #125 in destination positive experience.

94.7% positive experience

71.9% want to visit again

3.8% of the Italian indicated that they have visited Lithuania.

Of those, 94.74% indicated that they had a positive experience and 71.93% said that they want to visit again.

Source: Travellyze Data

Remember!

The Competitive Positioning of the Experience Audit is determined by assessing how the destination is experienced by people who have indicated that they have **visited** it.

Estonia

Estonia ranks #108 in destination perception.

96.4% positive experience

62.6% want to visit again

5.53% of the Italian indicated that they have visited Estonia.

Of those, 96.39% indicated that they had a positive experience and 62.65% said that they want to visit again.

Source: Travellyze Data

Latvia

8% have visited

Latvia ranks #78 in destination perception.

98% positive experience

58.8% want to visit again

3.4% of the Italian indicated that they have visited Latvia.

Of those, 98.04% indicated that they had a positive experience and 58.82% said that they want to visit again.

Source: Travellyze Data

Czech Republic

Czech Republic ranks #42 in destination perception.

99.4% positive perception

78.8% want to visit again

23% of the Italian indicated that they have visited the Czech Republic.

Of those, 99.42% indicated that they had a positive experience and 78.84% said that they want to visit again.

Source: Travellyze Data

Poland

Poland ranks #97 in destination perception.

97.3% positive perception

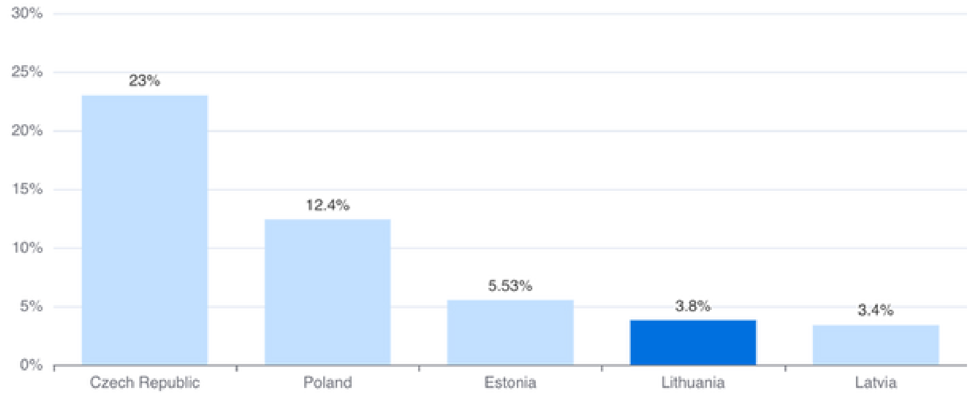
74.2% want to visit again

12.4% of the Italian indicated that they have visited Poland.

Of those, 97.31% indicated that they had a positive experience and 74.19% said that they want to visit again.

Source: Travellyze Data

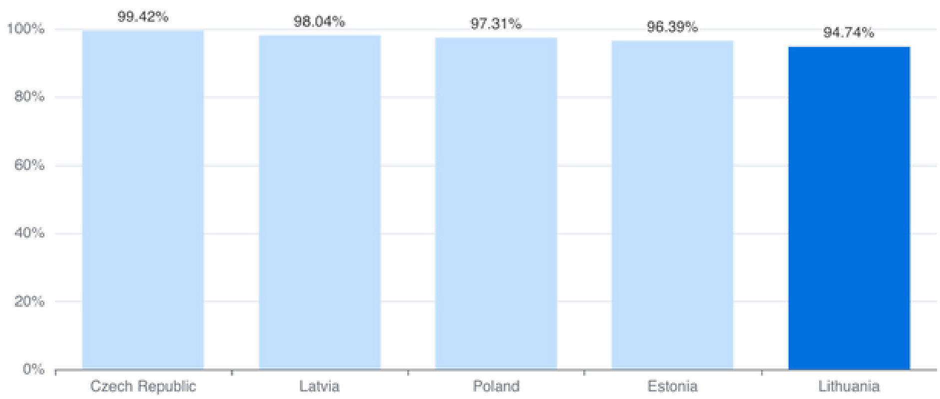
Visitors comparison



Of all the competitors, the destination with the **highest Visitation Rate** among the **Italian** is the **Czech Republic**. **Lithuania** is ranked **4th**.

Source: Travellyze Data

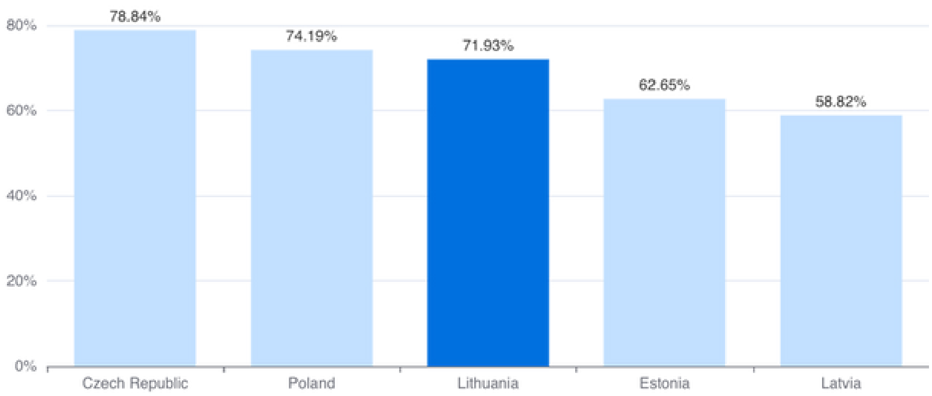
Positive experience comparison



Of all the competitors, the destination with the **highest Positive Experience Rate** among the **Italian** who have visited the destination is the **Czech Republic**. **Lithuania** is ranked **5th**.

Source: Travellyze Data

Revisitors comparison



Of all the competitors, the destination with the **highest Revisitation Rate** among the **Italian** who have visited the destination is the **Czech Republic**. **Lithuania** is ranked **3rd**.

Source: Travellyze Data

Destination Positioning

03

The Destination positioning section is a valuable resource for Destination Marketing Organizations (DMOs) looking to enhance their standing in the competitive tourism landscape. This section offers more than just insights; it provides a comprehensive view of how travellers are influenced and make decisions when choosing a destination and planning their trips, as well as how they book and what they book.

Effective positioning within channels of inspiration and distribution is crucial for DMOs for several reasons:

1. Targeted Marketing: Proper positioning enables DMOs to align their marketing efforts with the right channels of inspiration. By understanding the preferences and behaviours of their target audience, DMOs can select the most suitable platforms and content to inspire potential travellers. This ensures that their marketing messages reach the right people at the right time.

2. Efficient Resource Allocation: Strategic positioning helps DMOs optimise their distribution strategies by focusing on the channels most likely to yield positive results. This efficient allocation of resources can lead to a better return on investment and a more cost-effective approach to marketing and distribution.

3. Enhanced Visibility: When a destination is positioned effectively within channels of inspiration and distribution, it can gain greater visibility among potential travellers. Prominent placement on popular travel websites, social media platforms, and other influential channels can result in increased exposure and, ultimately, more bookings and visitors.

DMOs need to position their destinations within the tourism industry in the best way possible to effectively reach their target audience, allocate resources efficiently, and maximise their destination's visibility, ultimately driving tourism growth.

This section is divided into two main audits

- Inspiration Audit
- Distribution Audit

Inspiration Audit

The Inspiration Audit provides an understanding of the channels that serve as sources of inspiration for travellers. It dives deep into the touchpoints that captivate the imagination of potential visitors, influencing their destination choices.

These channels encompass a wide spectrum, from online platforms and social media to offline marketing efforts and word-of-mouth recommendations.

By examining these sources of inspiration, DMOs can strategically align their marketing efforts to effectively target and engage potential travellers.

Distribution Audit

The Distribution Audit offers an in-depth examination of the booking behaviours and preferences of travellers in domestic travel, travel within Europe and travel outside Europe.

It scrutinises how users make their travel arrangements, whether it be for accommodations or transportation. This level of detail is crucial in understanding the journey travellers undertake from the initial idea of a trip to the final booking phase.

DMOs can harness this knowledge to tailor their offerings and align them with the expectations of their target audience.

Inspiration Audit

Traveller

TOP OFFLINE INSPIRATION SOURCE

51.8%

OF **ITALIAN TRAVELLERS** FIND INSPIRATION IN **FAMILY AND FRIENDS**

This is a decrease of 0.57 points regarding the general Italian market.

Source: Travellyze Data

Traveller

TOP ONLINE INSPIRATION SOURCE

51.9%

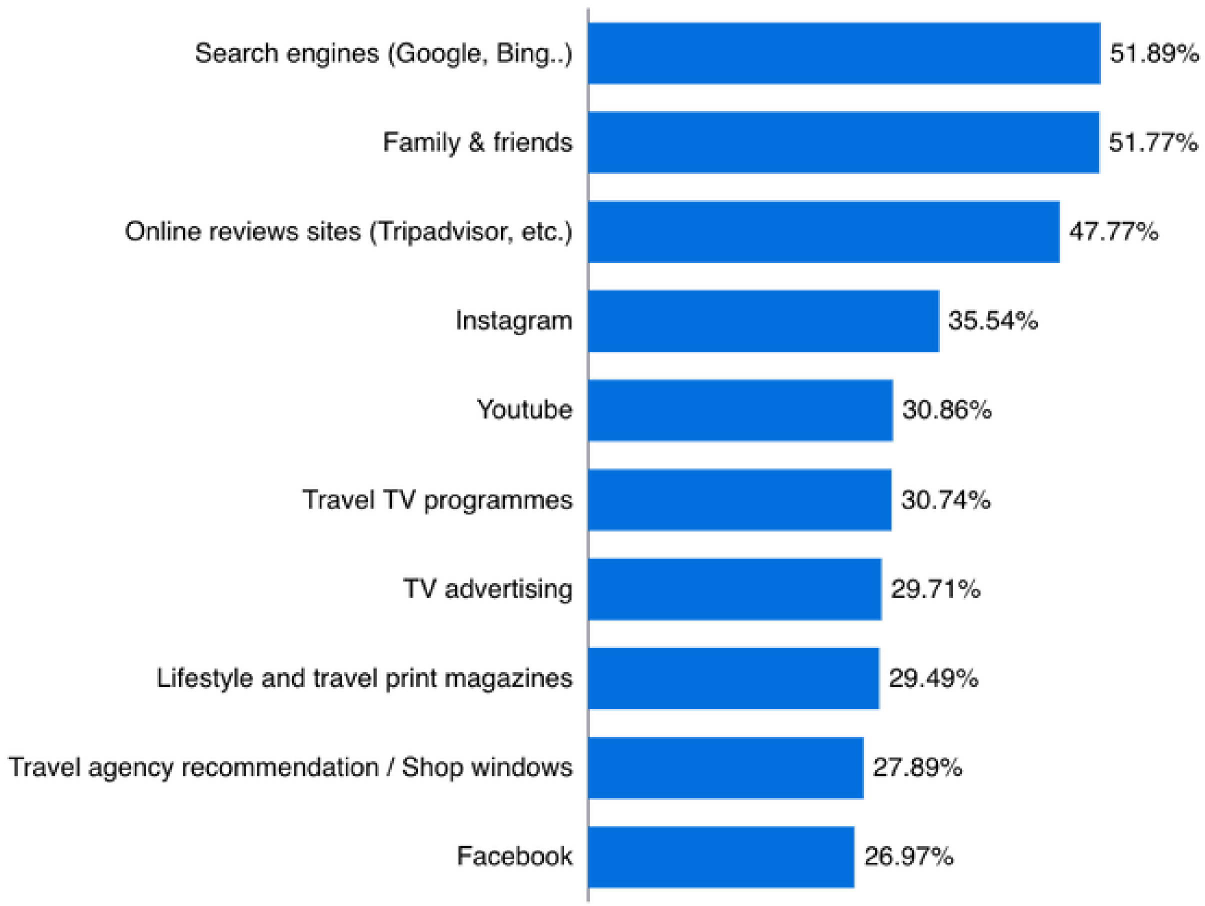
OF **ITALIAN TRAVELLERS** FIND INSPIRATION IN **SEARCH ENGINES (Google, Bing...)**

This is an increase of 1.31 points regarding the general Italian market.

Source: Travellyze Data

TOP 10 Inspiration Sources

Traveller



Source: Travellyze Data

Inspiration growth & share Matrix

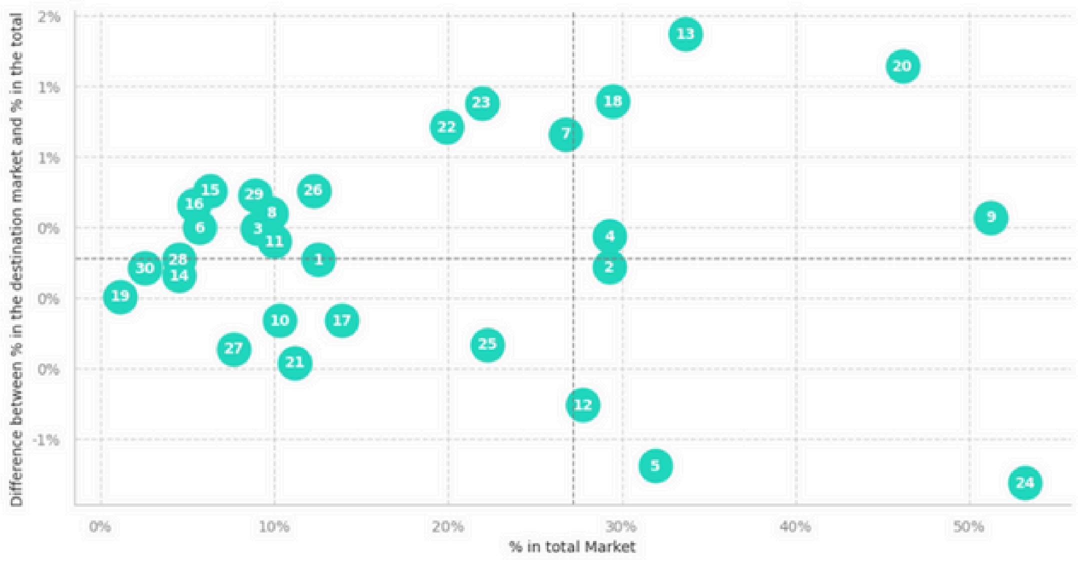
The Inspiration growth and share Matrix allows analysing which inspiration sources are most attractive to use for a Destination and thus defining the most appropriate marketing strategy to achieve a goal.

Its purpose is to evaluate the attractiveness of a destination's set of inspiration sources. This set consists of the various sources of inspiration that a destination uses to channelize its marketing strategies, and the matrix proposes analysing them from two perspectives:

- The market share of each Inspiration Source in the overall market (X-axis).
- The market growth rate of each inspiration source when comparing the traveller market with the overall market.

The matrix thus generates two perpendicular axes that define four quadrants:

- Star Inspiration (top right): High market share in the overall market and high growth rate of the traveller segment relative to the overall market.
- Cash Cow Inspiration (bottom right): High market share in the overall market and low growth rate of the traveller segment relative to the overall market.
- Unknown Inspiration (top left): Low market share in the overall market and high growth rate of the traveller segment relative to the overall market.
- Dog Inspiration (bottom left): Low market share in the overall market and low growth rate of the traveller segment relative to the overall market.



The quadrant lines on both the y-axis and x-axis indicate the average percentages.

Only channels with sufficient sample support are displayed.

In the following list, you can find the Inspiration channels used in the matrix. Star Inspiration channels are indicated in bold and capital letters, Cash Cow Inspiration channels are indicated in bold letters, and Unknown Inspiration channels are highlighted in italics.

1 - Newspapers and Supplements
2 - **Lifestyle and travel print magazines**
3 - *Cinema/movies*
4 - **TV ADVERTISING**
5 - **Travel TV programmes**
6 - *Radio*
7 - **TRAVEL AGENCY RECOMMENDATION / SHOP WINDOWS**
8 - *Outdoor Advertising*
9 - FAMILY AND FRIENDS
10 - Promotional Events
11 - *TV series live*
12 - **Facebook**
13 - **INSTAGRAM**
14 - Twitter
15 - *Blogs*
16 - *Podcasts*
17 - TikTok
18 - **YOUTUBE**
19 - Twitch
20 - **ONLINE REVIEWS SITES (TRIPADVISOR, ETC.)**
21- Online Media
22 - Online Travel Agencies
23 - Online lifestyle and travel magazines
24- **Search Engines (Google, Bing..)**
25 - Official Tourism Board / Office Website
26 - *Travel company websites (airline, hotels, etc.)*
27 - Whatsapp
28 - Pinterest
29 - *TV series on demand (Netflix, HBO, Disney+, Amazon Prime, etc)*
30 - Artificial Intelligence for planning my trip

Social Media

Top Social Media

Traveller

35.5%

OF **ITALIAN TRAVELLERS** FIND INSPIRATION ON **INSTAGRAM**

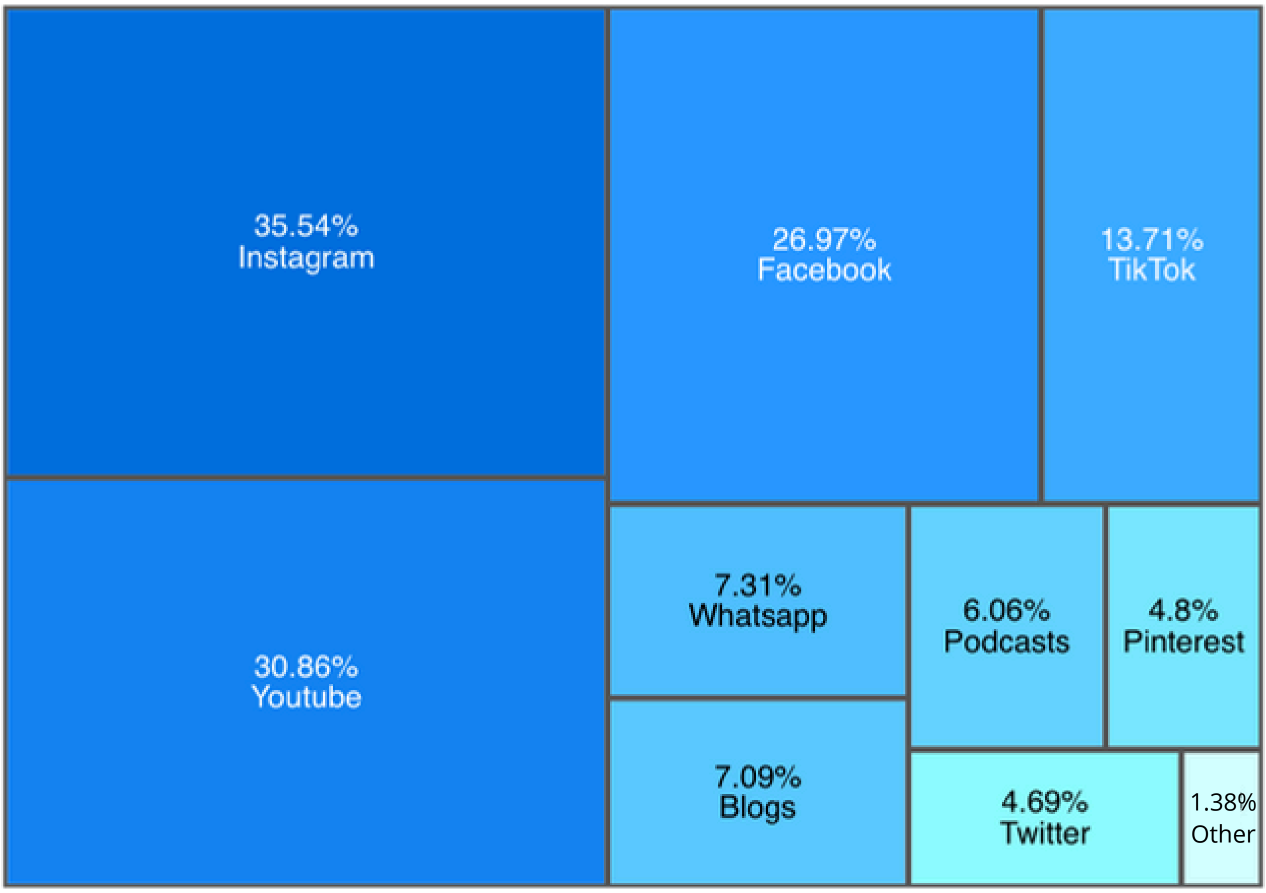
This is a decrease of **1.87** points regarding the general **Italian** market

Source: Travellyze Data

Social Media Resource allocation overview

The Social Media Resource Allocation Overview chart illustrates the strategic distribution of resources among various social media inspiration sources. The chart serves as a discerning guide for optimising resource allocation within the dynamic landscape of social media marketing, aiding DMOs in comprehending the primary social media platforms to prioritise, and efficiently allocating resources such as time and budget. The size of each rectangle corresponds to the magnitude of resources that DMOs should allocate to the respective social media platform.

Traveller



Search Online

Traveller

Top Online Source

51.9%

OF **ITALIAN TRAVELLERS** FIND INSPIRATION IN **SEARCH ENGINES (GOOGLE, BING...)**

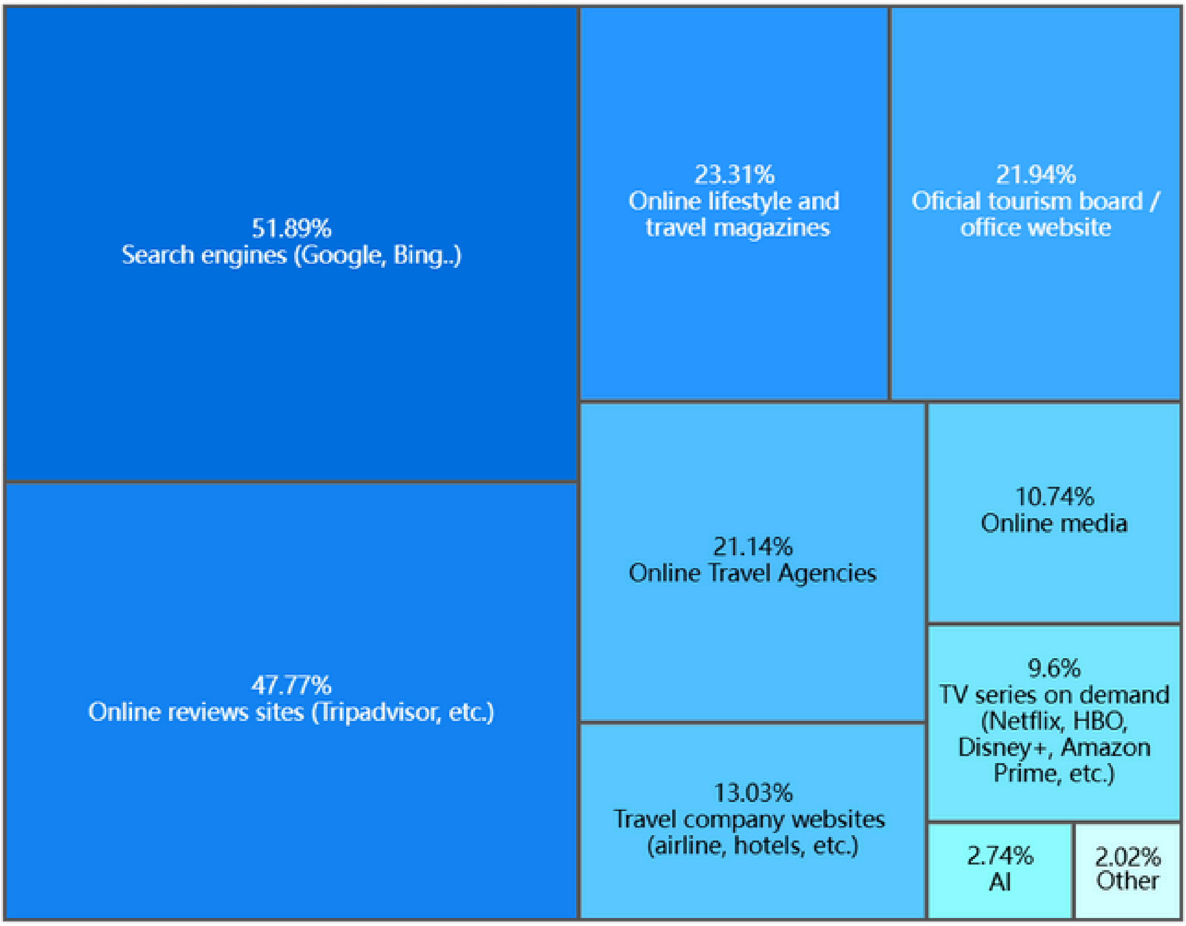
This is an increase of 1.31 points regarding the general Italian market.

Source: Travellyze Data

Online Source Resource allocation overview

The Online Search Resource Allocation Overview chart illustrates the strategic distribution of resources among various online search inspiration sources. The chart serves as a discerning guide for optimising resource allocation within the dynamic landscape of online search marketing, aiding DMOs in comprehending the primary online search channels to prioritise, and efficiently allocating resources such as time and budget. The size of each rectangle corresponds to the magnitude of resources that DMOs should allocate to the respective online search channel.

Traveller



Offline Sources

Traveller

Top Offline Source

51.8%

OF **ITALIAN TRAVELLERS** FIND INSPIRATION IN **FAMILY AND FRIENDS**

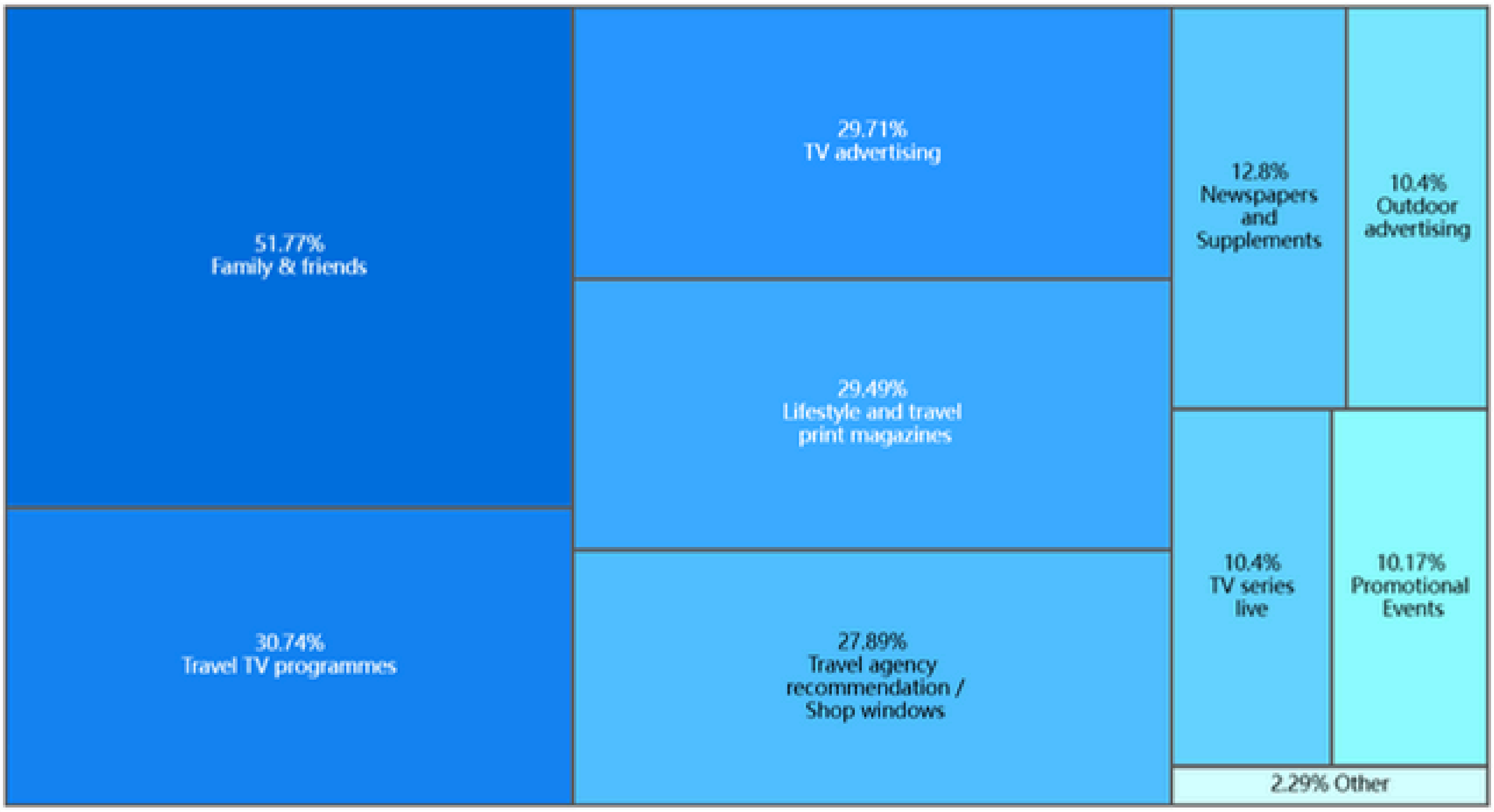
This is a decrease of 0.57 points regarding the general Italian market.

Source: Travellyze Data

Offline Sources Resource allocation overview

The Offline Sources Resource Allocation Overview chart illustrates the strategic distribution of resources among various Offline inspiration Sources. The chart serves as a discerning guide for optimising resource allocation within the landscape of Offline Sources marketing, aiding DMOs in comprehending the primary Offline Sources to prioritise, and efficiently allocating resources such as time and budget. The size of each rectangle corresponds to the magnitude of resources that DMOs should allocate to the respective Offline Source.

Traveller



Distribution Audit

Top Booking Type - By Channels

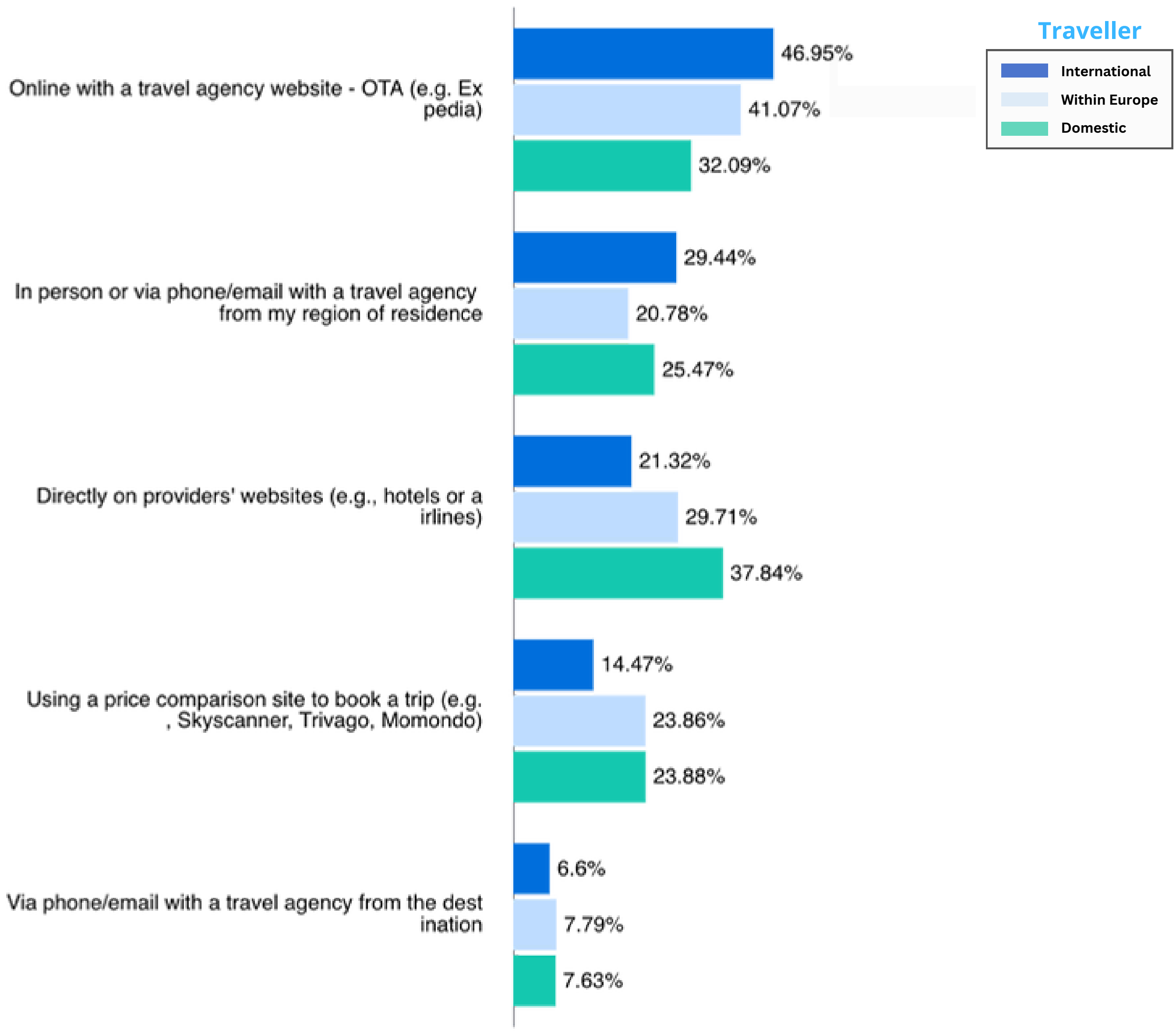
Traveller

41.1%

TOP BOOKING TYPE FOR **ITALIAN TRAVELLERS** IN TRIPS **WITHIN EUROPE** IS **BOOK ONLINE WITH A TRAVEL AGENCY WEBSITE - OTA (E.G., EXPEDIA)**

This is an increase of 1.68 points regarding the general Italian market.

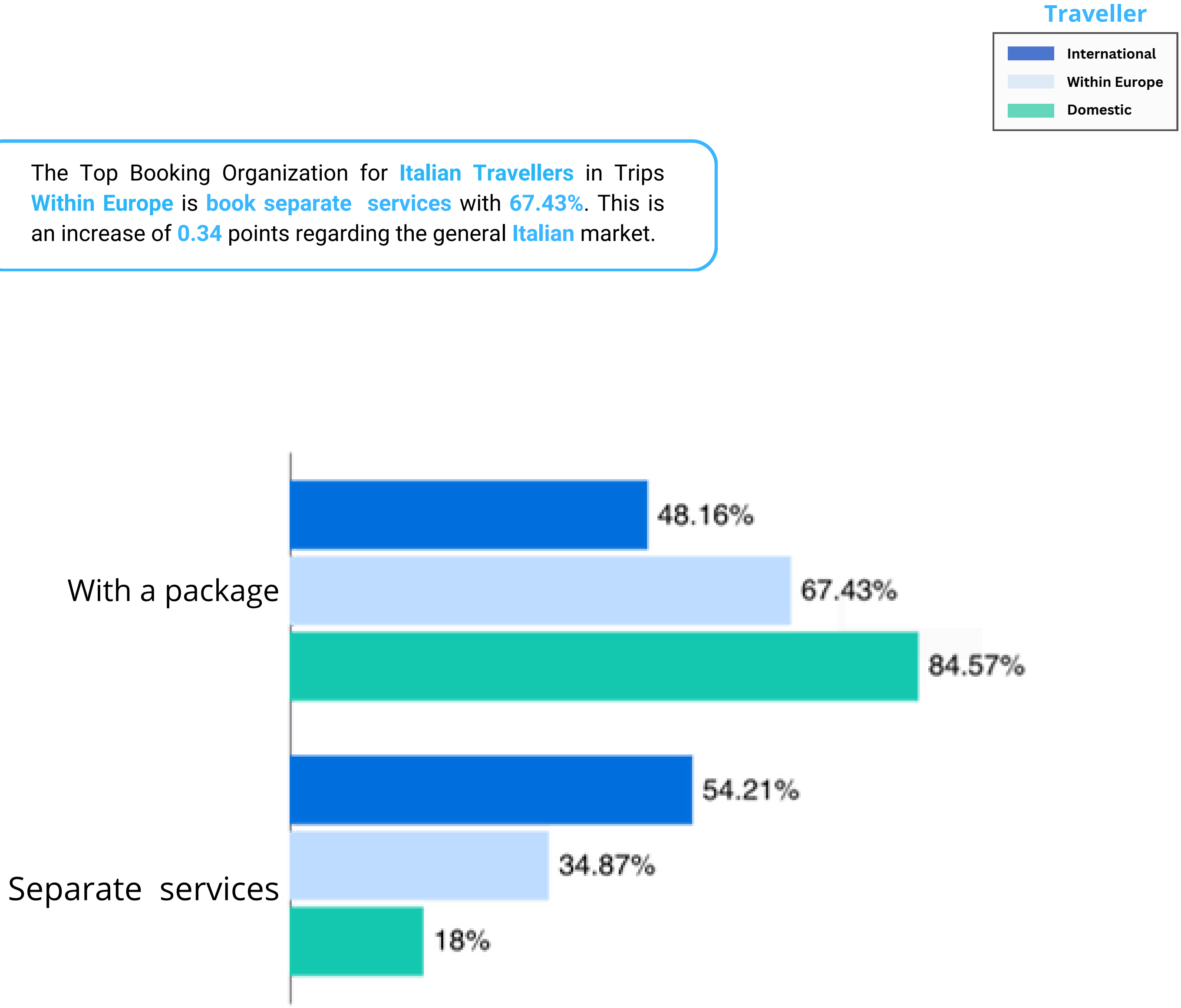
Source: Travellyze Data



Source: Travellyze Data

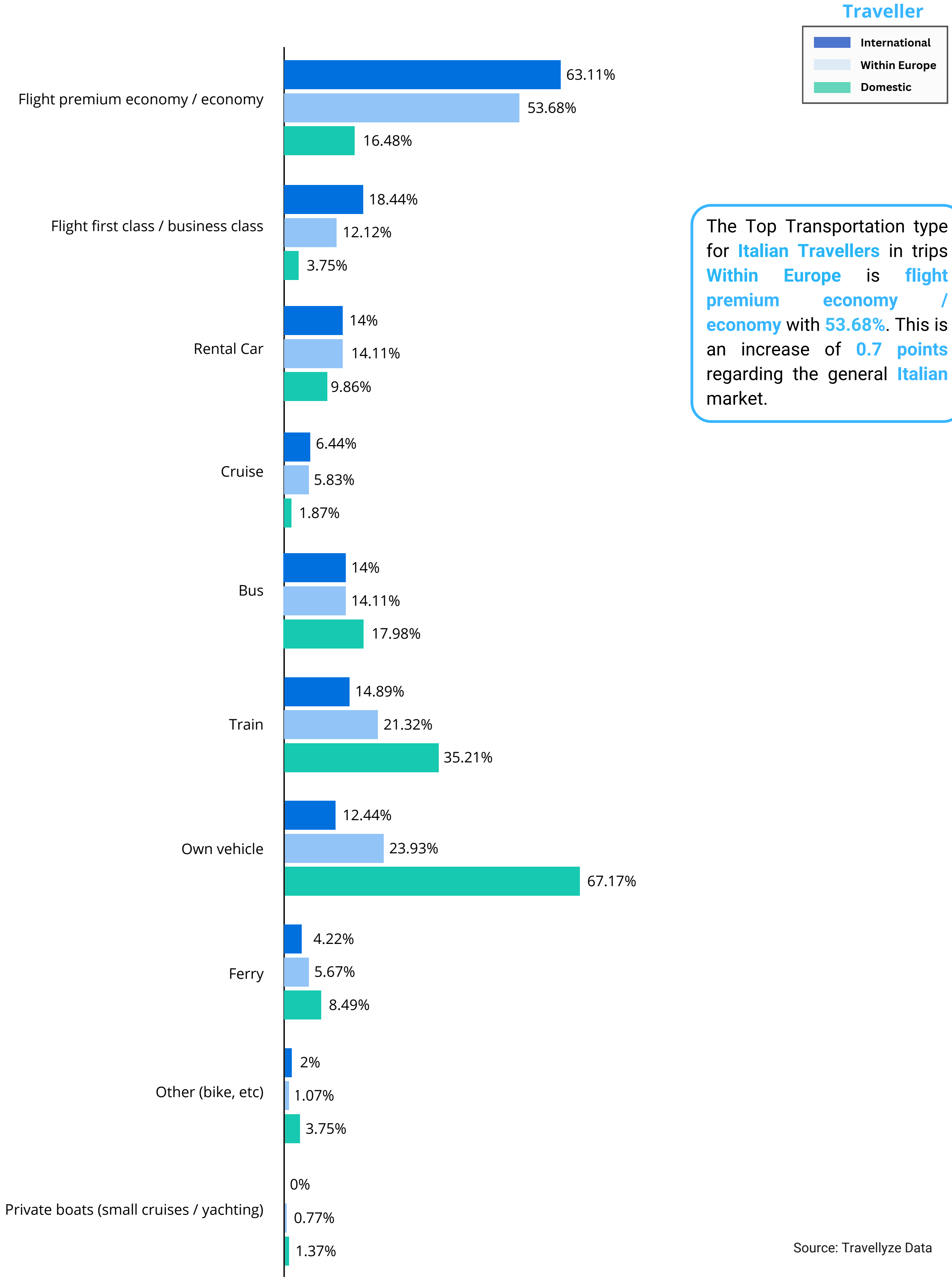
Booking Types - By Organization

The Top Booking Organization for **Italian Travellers** in Trips **Within Europe** is **book separate services** with **67.43%**. This is an increase of **0.34** points regarding the general **Italian** market.



Source: Travellyze Data

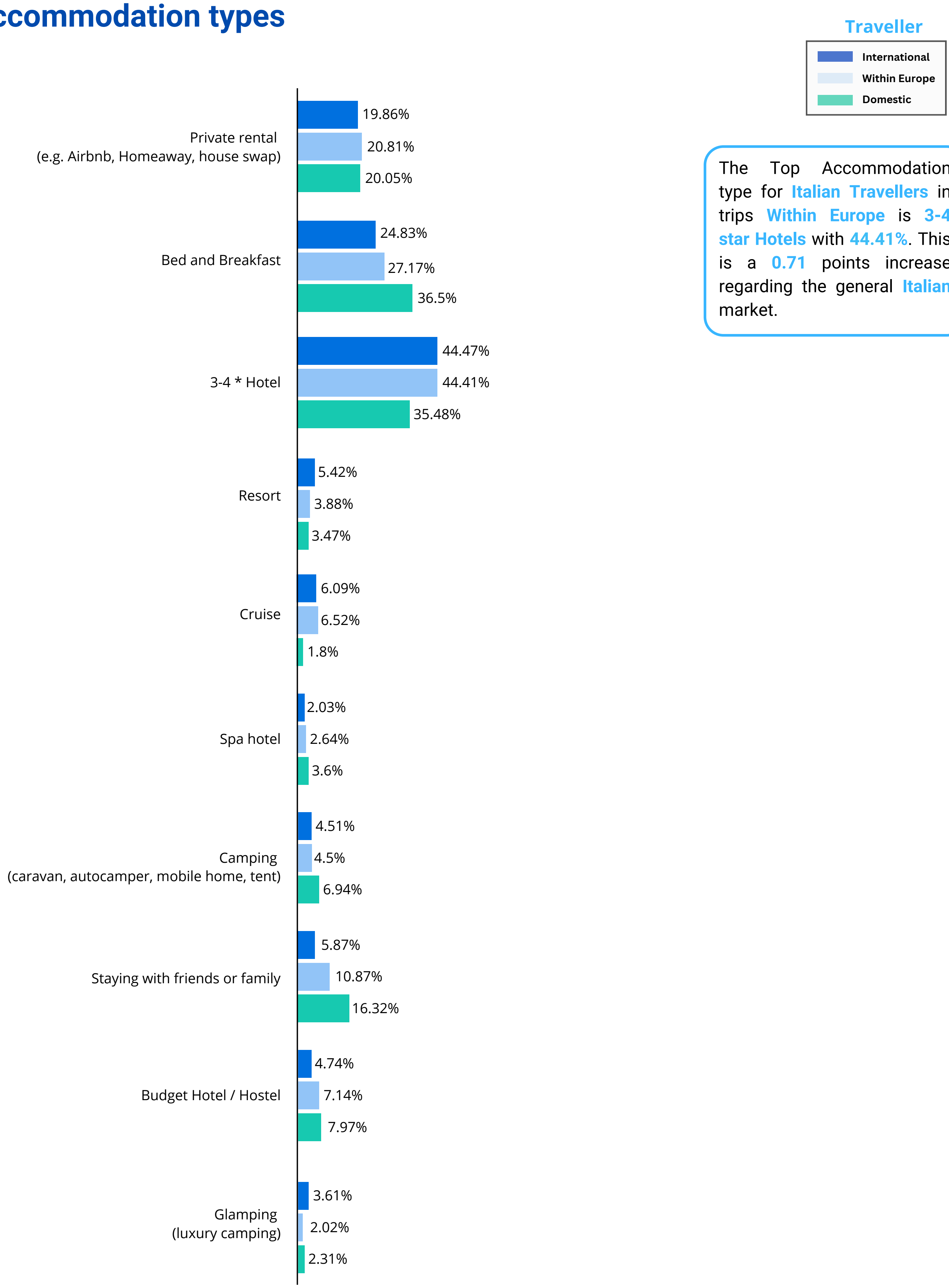
Transportation types



The Top Transportation type for **Italian Travellers** in trips **Within Europe** is **flight premium / economy / economy** with **53.68%**. This is an increase of **0.7 points** regarding the general **Italian** market.

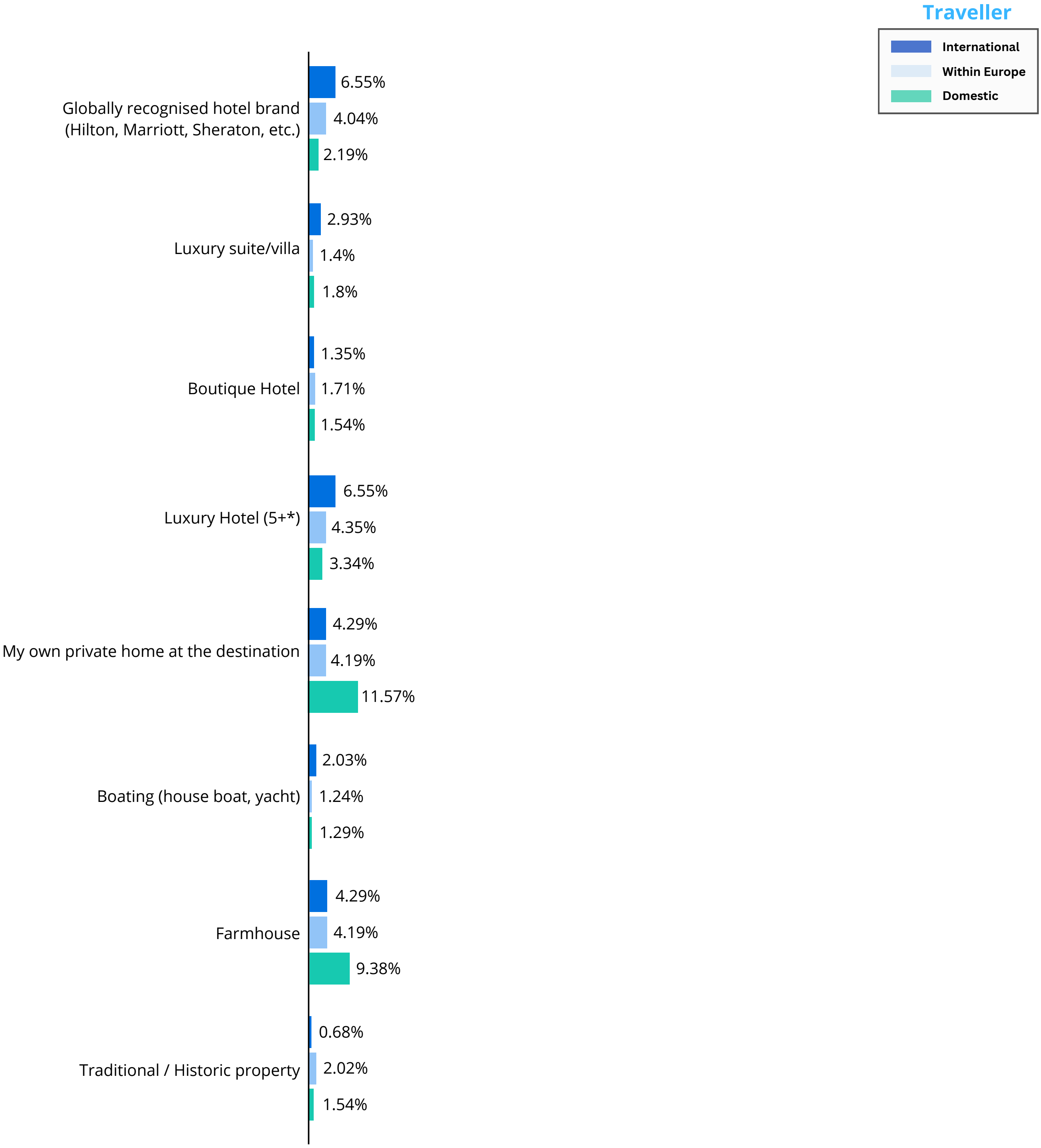
Source: Travellyze Data

Accommodation types



The Top Accommodation type for **Italian Travellers** in trips **Within Europe** is **3-4 star Hotels** with **44.41%**. This is a **0.71** points increase regarding the general **Italian** market.

Source: Travellyze Data



Source: Travellyze Data

Product Development

04

The Product Development section includes valuable information that helps a destination to refine its product enhancement and product adaptation strategies. This section serves as a compass, guiding destinations through the intricate process of refining their offerings to meet the dynamic needs and preferences of travellers. Several key reasons underscore the importance of the Product Development section:

1. **Tailored Offerings:** Product Development aligns products with audience needs, enhancing destination appeal for travellers.
2. **Competitive Edge:** Continuous innovation from Product Development ensures destinations surpass competitors in a dynamic market.
3. **Enhanced Visitor Experience:** Identifying Drivers and Essentials in Product Development enriches visitor experiences and encourages repeat visits.
4. **Strategic Planning:** User flow analysis in Product Development supports strategic alignment with seasonal demands for optimal resource utilisation.
5. **Sustainable Growth:** Informed product development in Product Development fosters long-term success, navigating challenges for sustainable growth.

This section is divided into four main audits

- Drivers Audit
- Essentials Audit
- Barriers Audit
- Flow Audit

Drivers Audit

A Driver represents the desired expectations that travellers have when selecting a particular destination. In simpler terms, these are the factors that tourists actively seek when deciding on their next holiday destination.

This audit serves as a strategic tool, shedding light on the key Drivers that can elevate a destination's attractiveness.

Essentials Audit

Essentials represent the essential requirements that travellers consider when choosing a particular destination. In simpler terms, these are the factors that tourists may passively seek when deciding on their next holiday destination. For instance, in many cases, if a destination does not meet their cleanliness standards, they might choose to avoid it.

This audit helps in understanding the key Essentials that can either elevate or reduce a destination's attractiveness.

Barriers Audit

Barriers are factors that make people think twice before deciding to visit a certain destination. Most of these aspects are beyond the destination's control. They go from particular events like flight cancelations to global crises like COVID-19 or Monkey Pox.

These indexes are compared with the Destination’s competition and characteristics.

This audit helps in understanding the key barriers that can either impede a traveller from going to a destination.

Flow Audit

This audit offers a nuanced understanding of user behaviour, considering factors such as quantities and seasonality to facilitate informed decision-making in the development process. How many trips are travellers planning in the next year? In which months do they plan to travel?

This audit is invaluable for strategic planning, providing insights into the frequency and timing of travellers' planned trips. It serves as a valuable resource for understanding the rationale behind your actions and making informed planning decisions.

Drivers Audit

Traveller

Top Driver

55.4%

OF **ITALIAN TRAVELLERS** SAY THAT **NATURE/OUTDOOR EXPERIENCES** IS THE MOST IMPORTANT DRIVER

This is an **increase** of **2.17** points regarding the general **Italian** market.

Source: Travellyze Data

Traveller

Ranking

#1 Nature/outdoor experiences

#2 Cultural & Historical Experiences

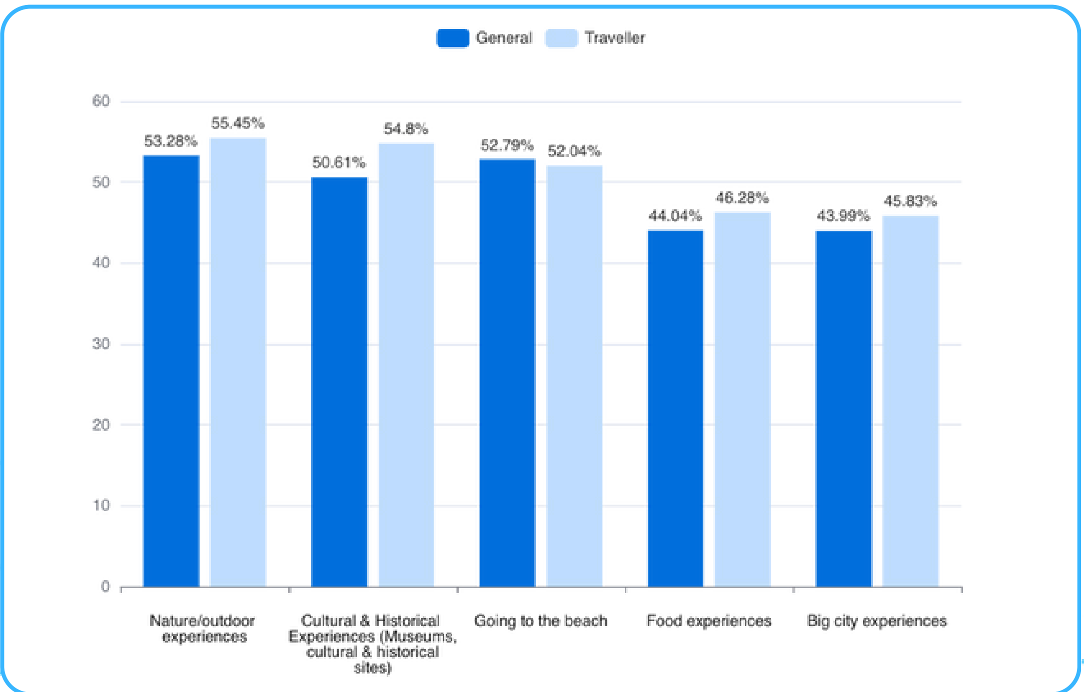
#3 Going to the beach

#4 Food experiences

#5 Big city experiences

Source: Travellyze Data

Top 5 Drivers



Source: Travellyze Data

Drivers growth & share Matrix

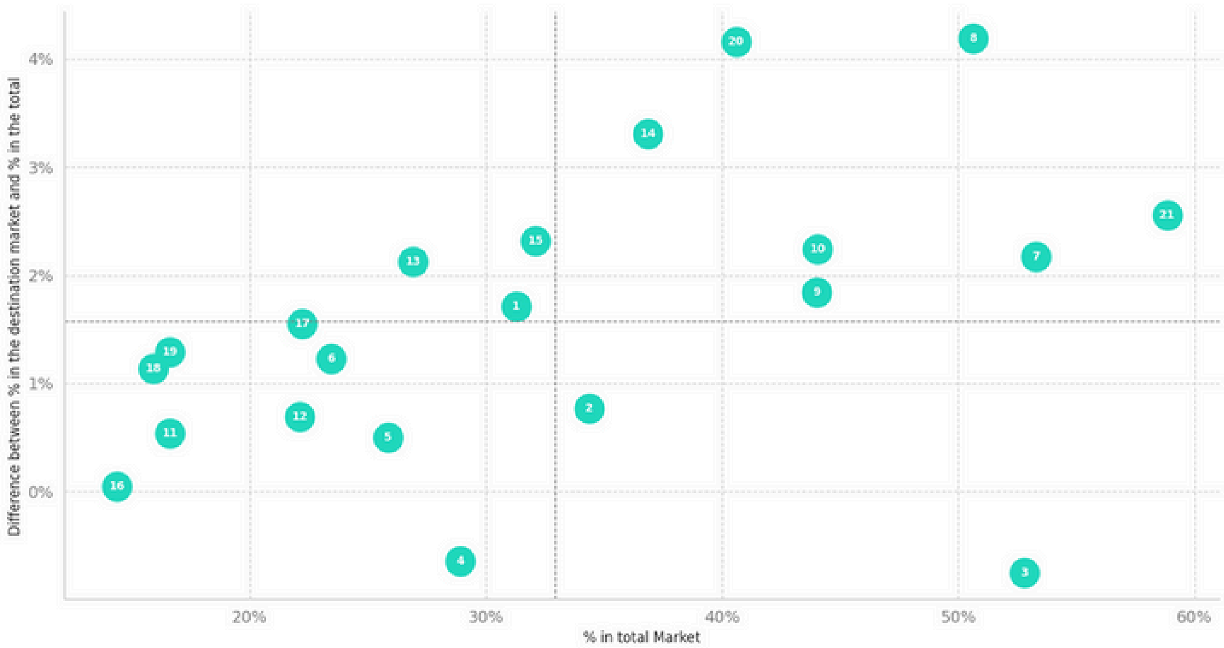
The Drivers growth and share Matrix allows analysing which Drivers are most attractive to use for a destination and thus defining the most appropriate marketing strategy to achieve a goal.

Its purpose is to evaluate the attractiveness of a destination's set of Drivers. This set consists of the various Drivers that a destination has and the matrix proposes analysing them from two perspectives:

- The market share of each Driver in the overall market (X-axis).
- The market growth rate of each Driver when comparing the traveller market with the overall market.

The matrix thus generates two perpendicular axes that define four quadrants:

- Star Drivers (top right): High market share in the overall market and high growth rate of the traveller segment relative to the overall market.
- Cash Cow Drivers (bottom right): High market share in the overall market and low growth rate of the traveller segment relative to the overall market.
- Unknown Drivers (top left): Low market share in the overall market and high growth rate of the traveller segment relative to the overall market.
- Dog Drivers (bottom left): Low market share in the overall market and low growth rate of the traveller segment relative to the overall market.



Source: Travellyze Data

The quadrant lines on both the y-axis and x-axis indicate the average percentages.
Only factors with sufficient sample support are displayed.

In the following list, you can find the Drivers used in the matrix. Star Drivers are indicated in bold and capital letters, Cash Cow Drivers are indicated in bold letters, and Unknown Drivers are highlighted in italics.

1. *Opportunities for going to theme parks*
2. **All inclusive accommodation options**
3. **Going to the beach**
4. Shopping
5. Being active (Sport, adventure)
6. Wellness/Spa
7. **NATURE/OUTDOOR EXPERIENCES**
8. **CULTURAL & HISTORICAL EXPERIENCES**
9. **BIG CITY EXPERIENCES**
10. **FOOD EXPERIENCES**
11. Fine Dining

12. Nightlife
13. *Gaining a new skill/developing skill*
14. **INTERACTING WITH LOCALS**
15. *Opportunity to pursue travel / artistic photography*
16. Agenda of Sport Events (Football World
17. cup/Rugby)
18. Agenda of Festivals, Concerts & Events
19. Possibility of a spiritual experience, pilgrimage
20. The possibility to practise a specific activity
21. **GOING TO THE MOUNTAIN AND WILDERNESS**
VISITING SMALL AND UNIQUE TOWNS

Essentials Audit

Top Essential

Traveller

70.3%

OF **ITALIAN TRAVELLERS** SAY THAT **GENERAL CLEANLINESS** IS THE MOST IMPORTANT ESSENTIAL.

This is an **increase** of **1.38** points regarding the general **Italian** market.

Source: Travellyze Data

Ranking

Traveller

#1 General Cleanliness

#2 Safety standards/low crime levels

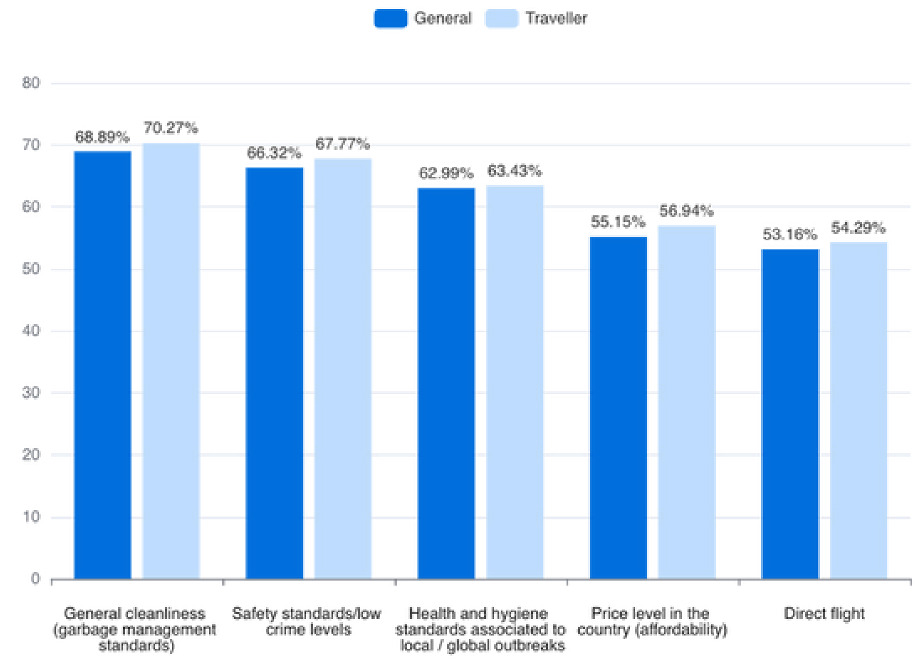
#3 Health and hygiene standards

#4 Price level in the country (affordability)

#5 Direct flight

Source: Travellyze Data

Top 5 Essentials



Source: Travellyze Data

Essentials growth & share Matrix

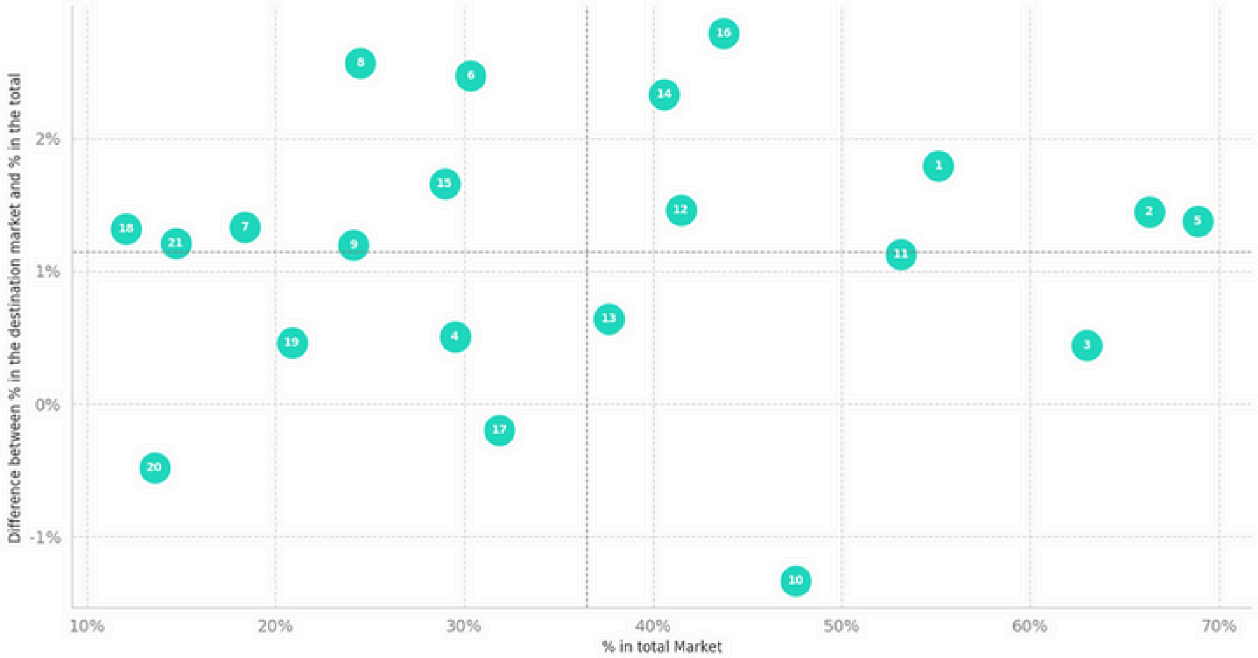
The Essentials growth and share Matrix allows analysing which Essentials are most attractive to use for a destination and thus defining the most appropriate marketing strategy to achieve a goal.

Its purpose is to evaluate the attractiveness of a destination's set of Essentials. This set consists of the various Essentials that a destination has and the matrix proposes analysing them from two perspectives:

- The market share of each Essentials in the overall market (X-axis).
- The market growth rate of each Essentials when comparing the traveller market with the overall market.

The matrix thus generates two perpendicular axes that define four quadrants:

- Star Essentials (top right): High market share in the overall market and high growth rate of the traveller segment relative to the overall market.
- Cash Cow Essentials (bottom right): High market share in the overall market and low growth rate of the traveller segment relative to the overall market.
- Unknown Essentials (top left): Low market share in the overall market and high growth rate of the traveller segment relative to the overall market.
- Dog Essentials (bottom left): Low market share in the overall market and low growth rate of the traveller segment relative to the overall market.



Source: Travellyze Data

The quadrant lines on both the y-axis and x-axis indicate the average percentages.

Only factors with sufficient sample support are displayed.

In the following list, you can find the Essentials used in the matrix. Star Essentials are indicated in bold and capital letters, Cash Cow Essentials are indicated in bold letters, and Unknown Essentials are highlighted in italics.

1. **PRICE LEVEL IN THE COUNTRY (AFFORDABILITY)**
2. **SAFETY STANDARDS / LOW CRIME LEVEL**
3. **Health and hygiene standards**
4. Pet friendliness
5. **GENERAL CLEANLINESS**
6. *The destination has few tourists*
7. *LGBTQ+- friendliness*
8. *Accessibility for travellers with less mobility*
9. *Child friendliness*
10. **Easy access to medical facilities**
11. **Direct flight**
12. **FLIGHTS FROM MY LOCAL AIRPORT**
13. **Being able to drive to the destination**
14. **ENVIRONMENTAL CONCERNS AND SUSTAINABILITY**
15. *Discovering the destination through a guided or arranged tour*
16. **LIVING NEW EXPERIENCES (GETTING OUT OF THE COMFORT ZONE)**
17. Opportunity for meeting new people
18. *Availability of luxury and VIP exclusive personal service*
19. Backpacker friendliness
20. Opportunities to make social media content
21. *Premium/luxury accommodation options*

Barriers Audit

Top Barrier

Traveller

83.8%

OF **ITALIAN TRAVELLERS** SAY THAT **THREAT OF TERRORIST ATTACK OR GENERAL LOCAL INSECURITY** IS THE MOST IMPORTANT BARRIER.

This is an **increase** of **0.34** points regarding the general **Italian** market.

Source: Travellyze Data

Ranking

Traveller

#1 Local security i.e. Terrorist Attack

#2 International conflicts

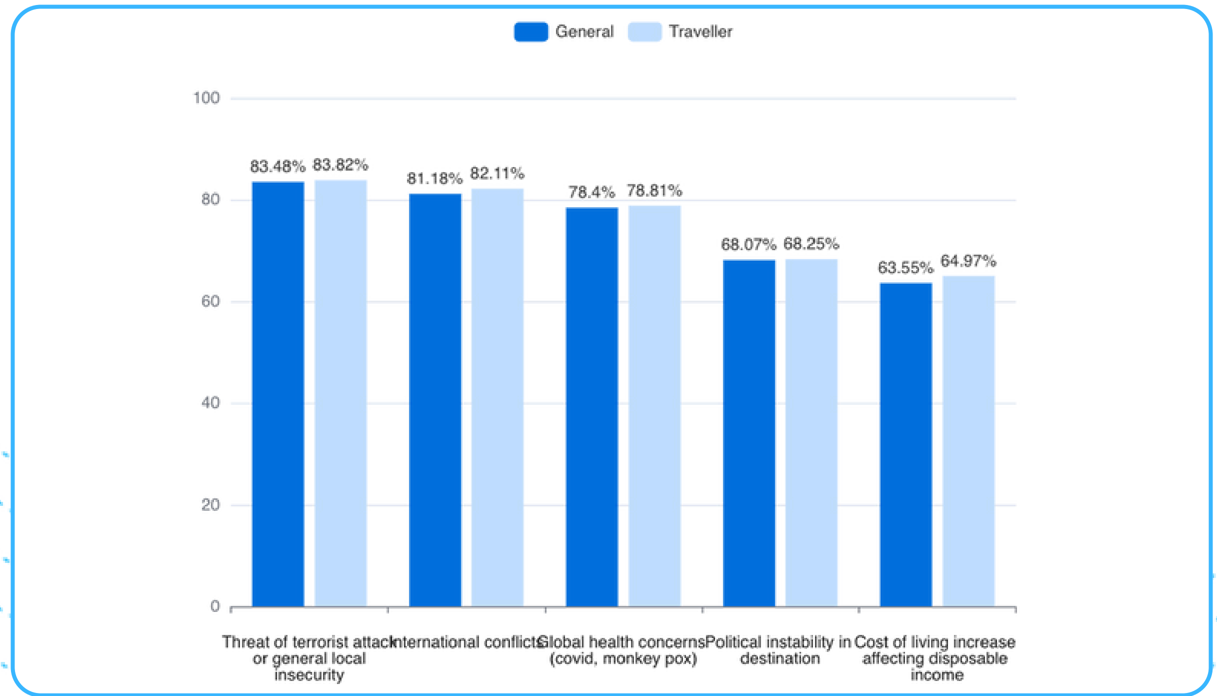
#3 Global health concerns

#4 Political instability in destination

#5 Cost of living increase affecting disposable income

Source: Travellyze Data

Top 5 Barriers



Source: Travellyze Data

Barriers growth & share Matrix

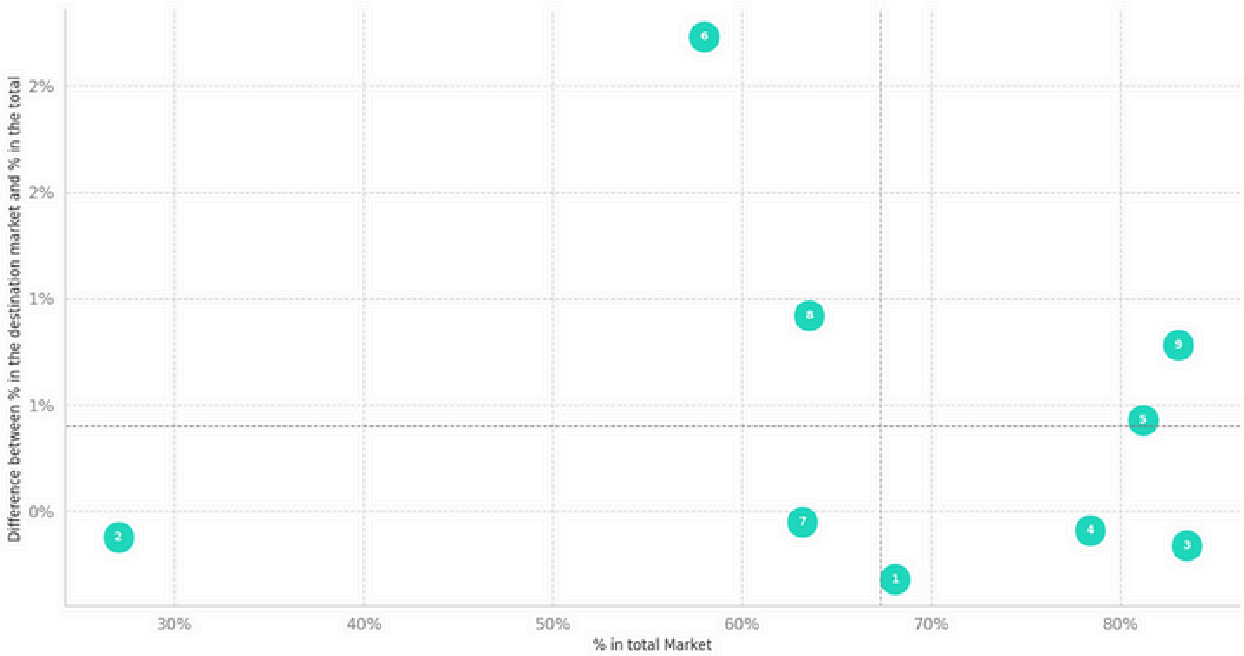
The Barriers growth and share Matrix allows analysing which Barriers are most unattractive for a destination and thus plan ahead of potential impacts.

Its purpose is to evaluate the importance the travellers assign to specific Barriers. The matrix proposes analysing them from two perspectives:

- The market share of each Barriers in the overall market (X-axis).
- The market growth rate of each Barriers when comparing the traveller market with the overall market.

The matrix thus generates two perpendicular axes that define four quadrants:

- Star Barriers (top right): High market share in the overall market and high growth rate of the traveller segment relative to the overall market.
- Cash Cow Barriers (bottom right): High market share in the overall market and low growth rate of the traveller segment relative to the overall market.
- Unknown Barriers (top left): Low market share in the overall market and high growth rate of the traveller segment relative to the overall market.
- Dog Barriers (bottom left): Low market share in the overall market and low growth rate of the traveller segment relative to the overall market.



Source: Travellyze Data

The quadrant lines on both the y-axis and x-axis indicate the average percentages.
Only factors with sufficient sample support are displayed.

In the following list, you can find the Barriers used in the matrix. Star Barriers are indicated in bold and capital letters, Cash Cow Barriers are indicated in bold letters, and Unknown Barriers are highlighted in italics.

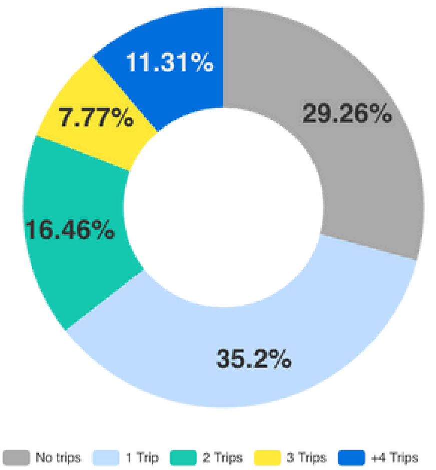
1. **Political instability in destination**
2. Political instability in my country
3. **Local insecurity (i.e. terrorist attacks)**
4. **Global Health Concerns**
5. **INTERNATIONAL CONFLICTS**
6. *Inconvenience in airports*
7. Increase in cost of holidays
8. *Cost of living increase affecting*
9. **NATURAL DISASTERS OR EXTREME WEATHER**

Flow Audit

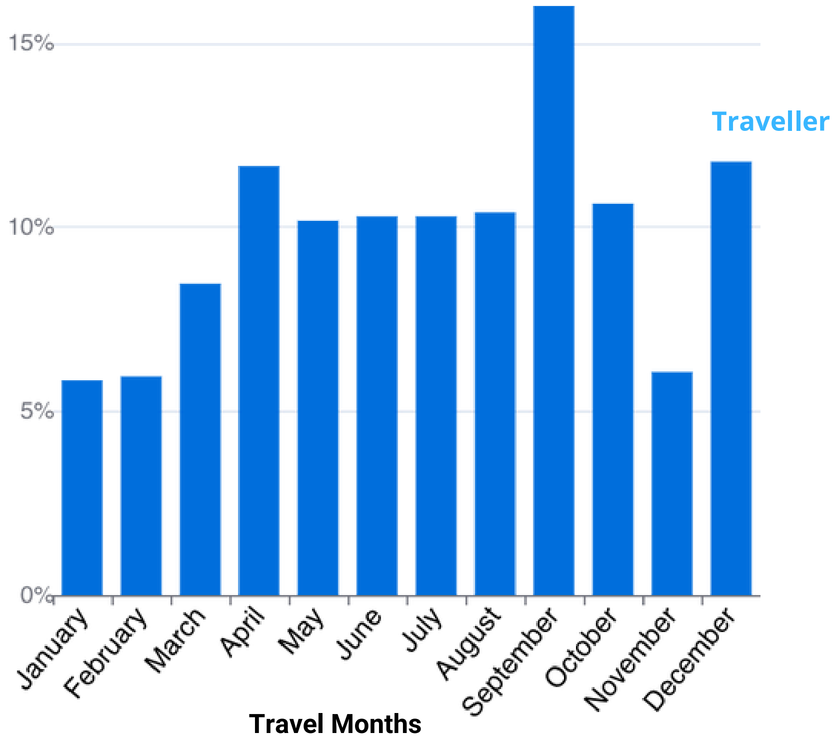
Domestic Flow Forecast

Short Trips

Up to 4 days (included) are considered short trips.



Quantity per year

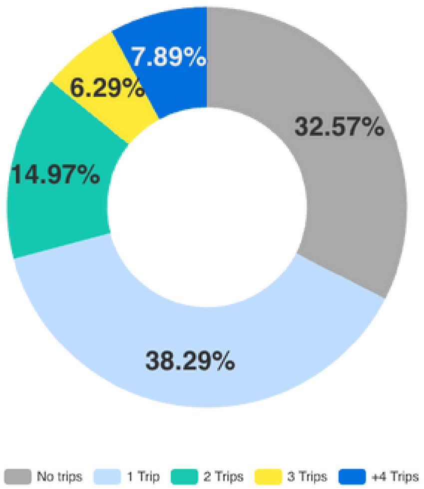


Travel Months

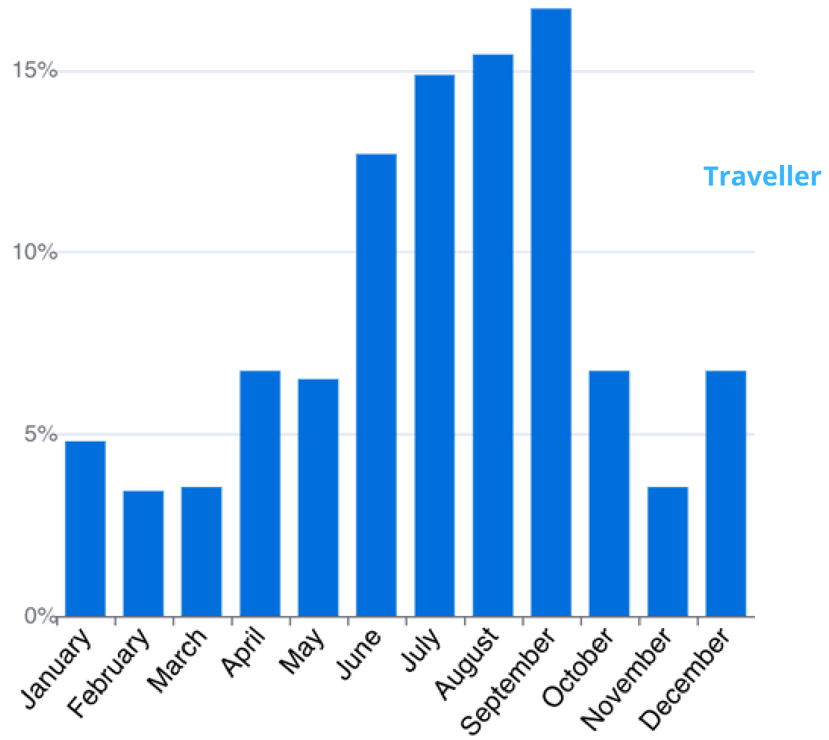
Source: Travellyze Data

Long Trips

5 days or more are considered long trips.



Quantity per year



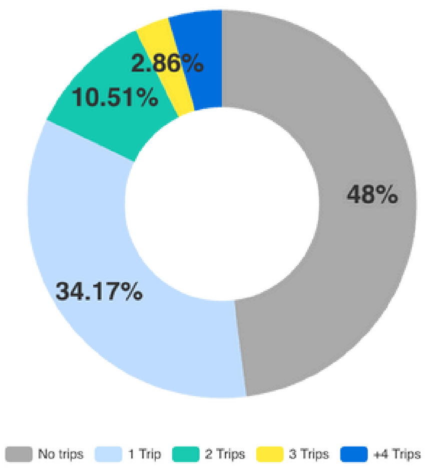
Travel Months

Source: Travellyze Data

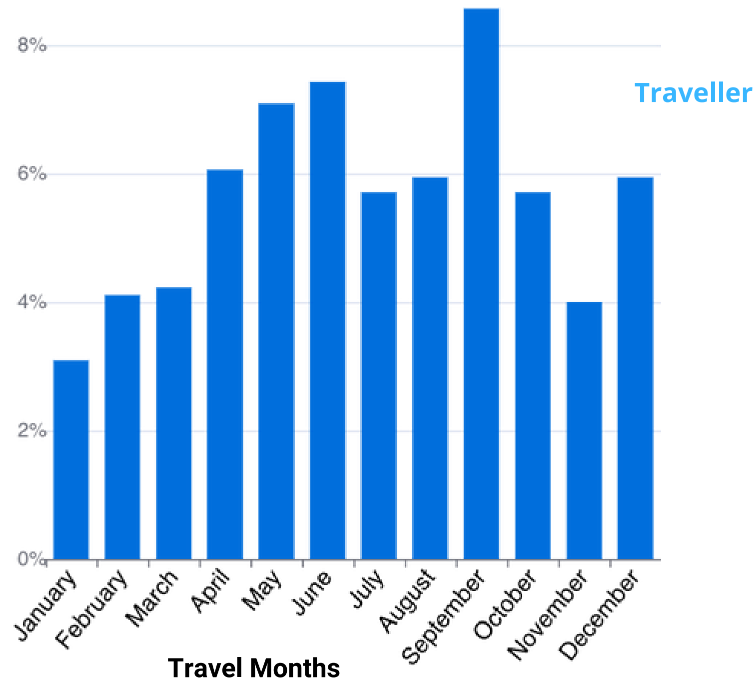
International Within Europe

Short Trips

Up to 4 days (included) are considered short trips.



Quantity per year

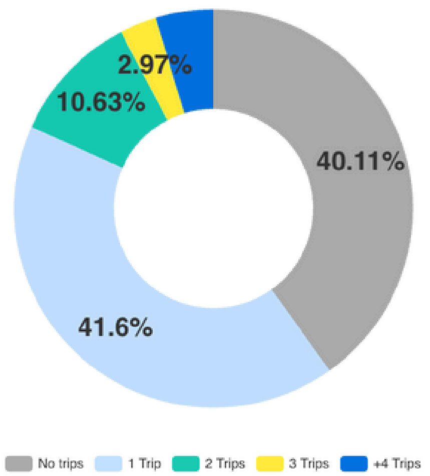


Travel Months

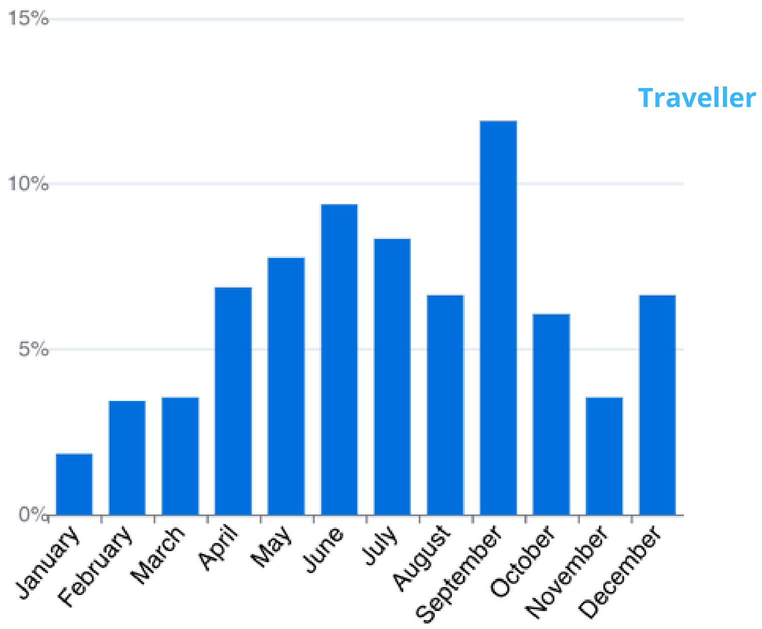
Source: Travellyze Data

Long Trips

5 days or more are considered long trips.



Quantity per year



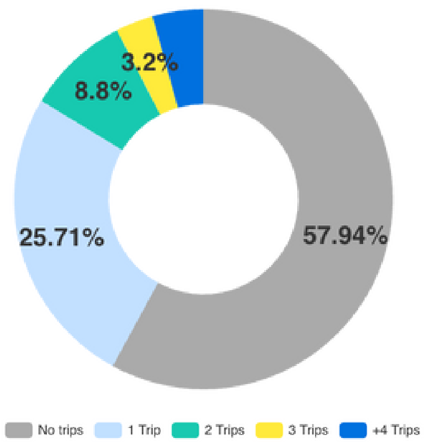
Travel Months

Source: Travellyze Data

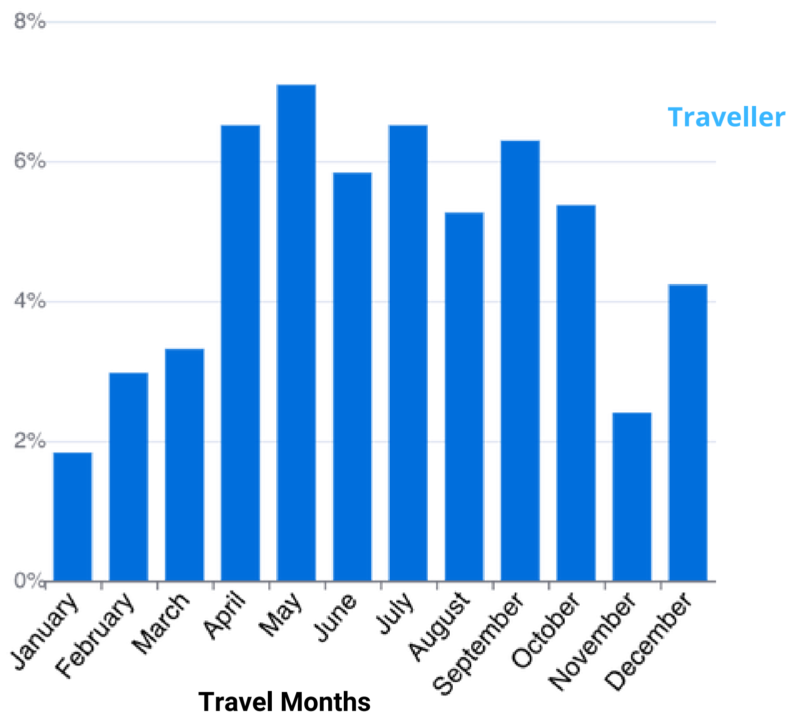
International Outside Europe

Short Trips

Up to 4 days (included) are considered short trips.



Quantity per year

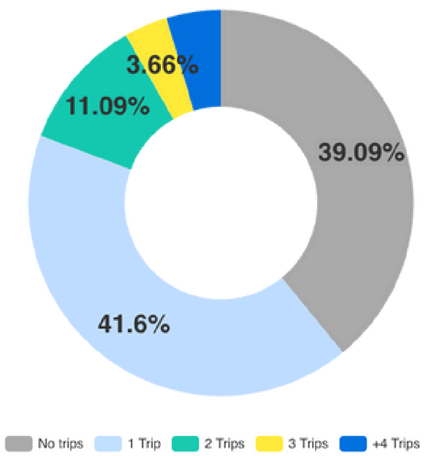


Travel Months

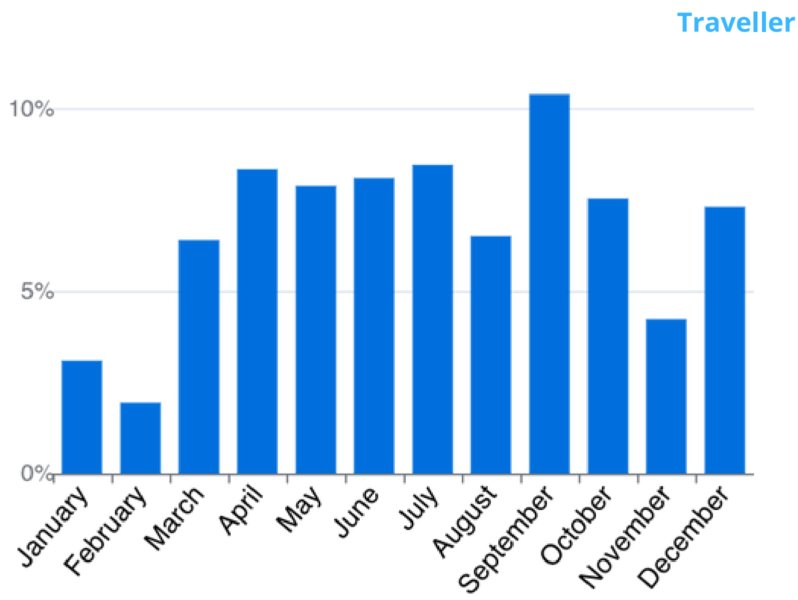
Source: Travellyze Data

Long Trips

5 days or more are considered long trips.



Quantity per year



Travel Months

Source: Travellyze Data

Thank you!