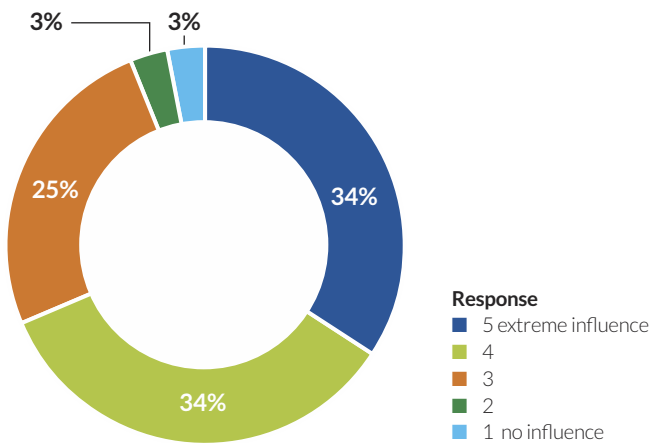


This survey invited travel trade buyers to indicate the likely impact on their business in Rome if the proposed coach access restrictions come into effect in 2019.

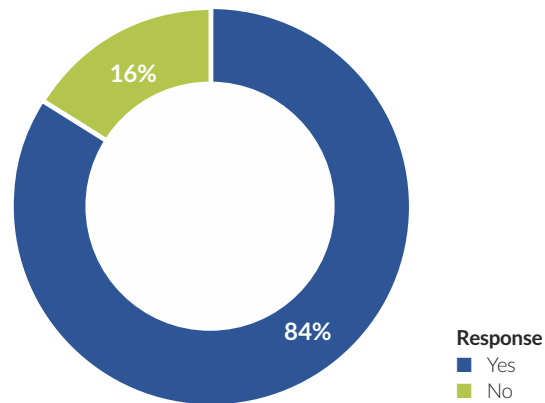
Would you consider reducing the number of overnights when reviewing tour design?

More than two thirds (68%) of respondents believed that introducing the regulation may have an “extremely” or “very” significant influence on the number of overnights in Rome included in tour programmes.



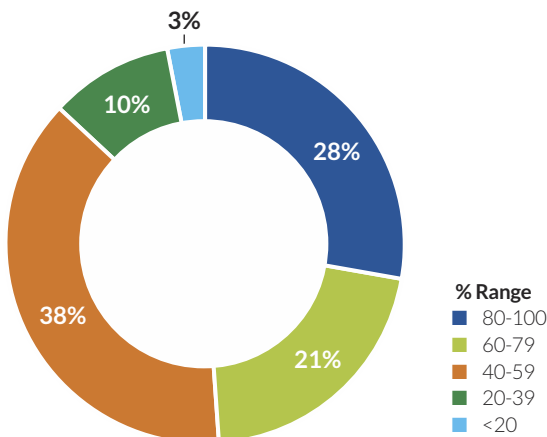
Would it affect where you place overnight accommodation in Rome?

84% of respondents said the restrictions would affect the location of the accommodation they plan to use.



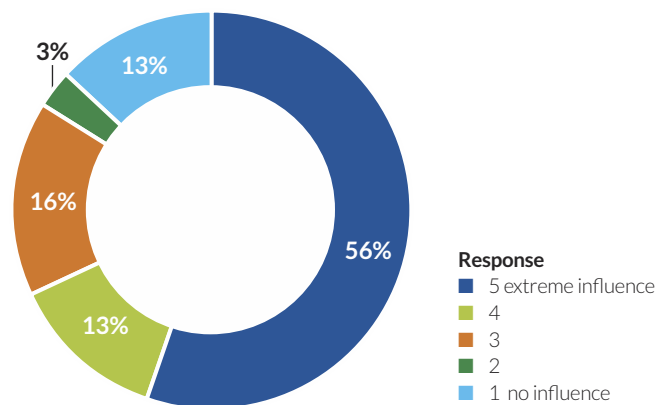
Of the volume you currently place within the restricted area, what percentage would you consider moving?

Half of respondents would consider moving more than 60% of the volume otherwise intended for the restricted area. Of the 28% who indicated 80% or more, over half of them would consider moving 100%.



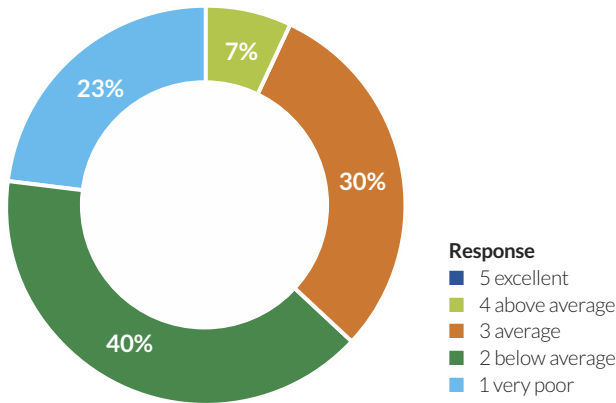
How much would it affect your restaurant bookings within the restricted area?

More than two thirds (69%) of respondents believed the introduction of the regulation would lead to an “extremely” or “very” significant reduction in restaurant bookings within the restricted area.



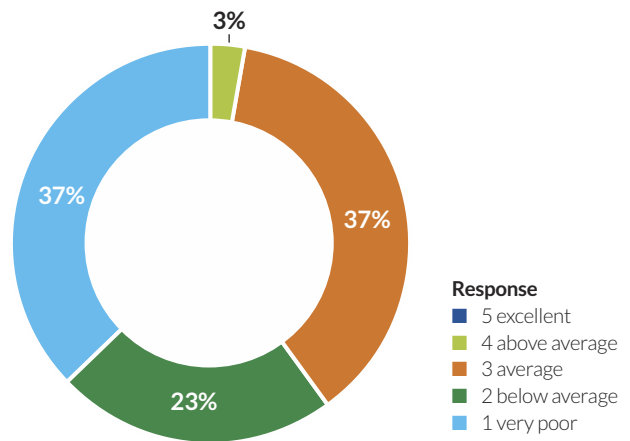
Compared to other major tourism cities in Europe (e.g. Amsterdam, Barcelona, London, Paris) and given the external constraints, how would you judge accessibility for group visitors to Rome?

Almost two thirds (63%) of respondents judged accessibility to Rome for group visitors as “below average” or “very poor”.



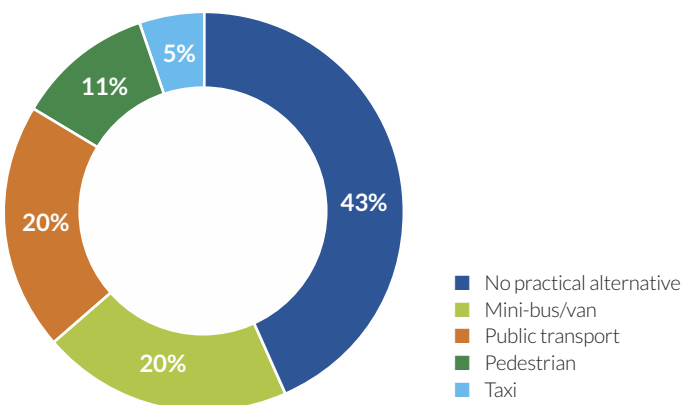
How would you judge infrastructure for group tourism in Rome?

Three fifths (60%) of respondents considered infrastructure for group tourism in Rome to be “poor” or “very poor”.



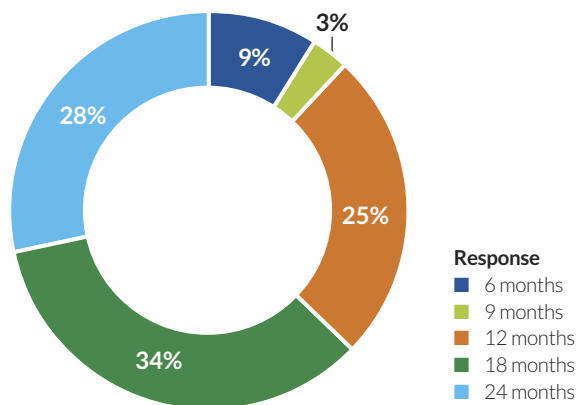
What alternatives to coach transport would you expect to use to access the restricted zone?

More than two fifths (43.2%) of respondents do not see any practical alternative to coach transport to access the restricted access zone. A fifth (20.5%) will consider using public transport instead, while another 20.5% will opt for mini bus and vans. Only 11.4% would consider walking as an alternative method. 11.4% would consider walking as an alternative method.



How much notice do you need to account for changes?

88% of respondents said they needed 12 months' notice or more to take changes into account properly, with 62% saying 18 months' notice or more was required.



Note on data

Responses were provided by B2C and B2B travel trade buyers drawn from ETOA's membership whose business includes group travel to Rome, which typically includes coach services. Almost three fifths (59%) of respondents are based in Europe, of which 9% are in Italy, 41% are based outside Europe. For more information please email: policy@etoa.org