

This survey invited tour operators to report volume and overall spend related to their group travel business in Rome. The proposed introduction in January of new coach access regulations will affect a significant proportion of this activity. There is a high risk of serious disruption and reputational damage to both business and destination.

Summary **2.6mn visitors**
4.8mn overnights (average stay 2.67 nights),
of which 1.8mn in Zone C

€1.65bn spend
€653mn direct operator spend of which over €10mn
overnight taxes, plus over €1bn in-destination spend¹

Comment

Group travel remains a valuable and resilient part of the leisure travel industry. This survey illustrates only a part of Rome's group business.² Overnight group travel makes efficient use of existing resources. A coach takes up the space of about 3 cars; hotel beds do not displace domestic accommodation supply. Overnight visitors contribute to both the day-time and night-time economy.

City tourism in Rome is evolving but current logistic options are limited. In a previous ETOA survey, 43% of tour operators considered that there was no practical alternative to coach transport to access the central zone (Zone C). Public transport is a viable alternative for only 20% of operators. The availability of private mini-buses that are exempt from current regulatory proposals is insufficient to meet the requirements of groups business already scheduled for 2019.

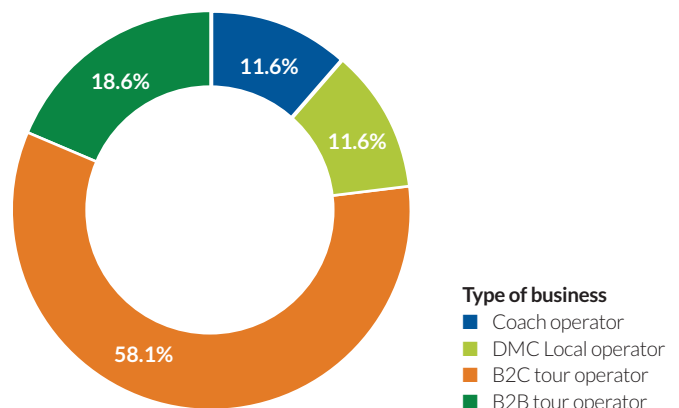
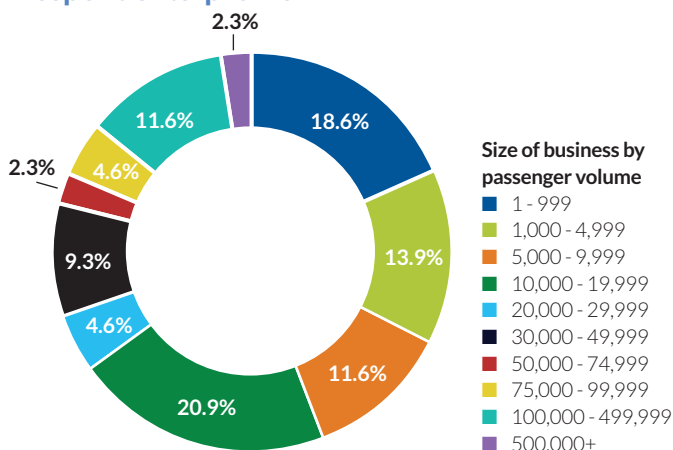
For 2020, some operators are already moving volume away from the city and cancelling included elements of their remaining programmes

due to practical difficulties presented by the new restrictions. Operators with group bookings in Zone C hotels do not know whether they will be able to transport their clients by coach. Transport providers contracted to carry groups into Zone C do not know if access will be permitted. Such uncertainty causes serious harm to business, and risks lasting damage to Rome's appeal and viability as a group tourism destination.

Enabling visitor access to tourist sites is a strategic requirement of ENIT's national plan for Italy.³ For the local population, the proportion of commuters and residents in Rome relying on private motor transport remains relatively high, with adverse environmental impact.

Requirements for urban mobility are: adequate infrastructure and public transport, competent management and enforcement, and the resources available for long-term strategic investment. While these are largely a matter of local and regional regulatory competence, the financial implications of necessary improvement are daunting.

Respondents' profile⁴



Notes on data

- Direct spend includes hotels, meals, attractions, guides etc. Average in-destination spend estimated at €150 per day per visitor.
- Responses are only a snapshot, and do not include the significant volume of Meetings, Incentives, Conferences and Events (MICE) business that currently use Rome as a destination, and either stay within or offer group access to Zone C as part of the event programme.
- http://www.turismo.beniculturali.it/wp-content/uploads/2017/07/Piano-Strategico-del-Turismo_2017_IT.pdf
- Responses provided by 43 travel trade buyers from ETOA's membership who book overnight group visits and private coaching in Rome. Their clients are predominantly long-haul, with a high proportion from Asian and North American markets.