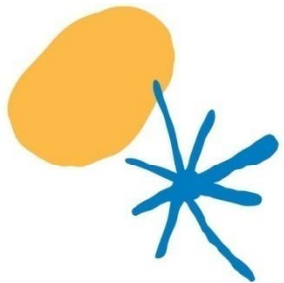


*Low Cost Airlines and
Capturing the British Market:
The Opportunities for
Bergamo*

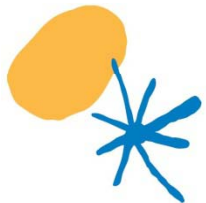


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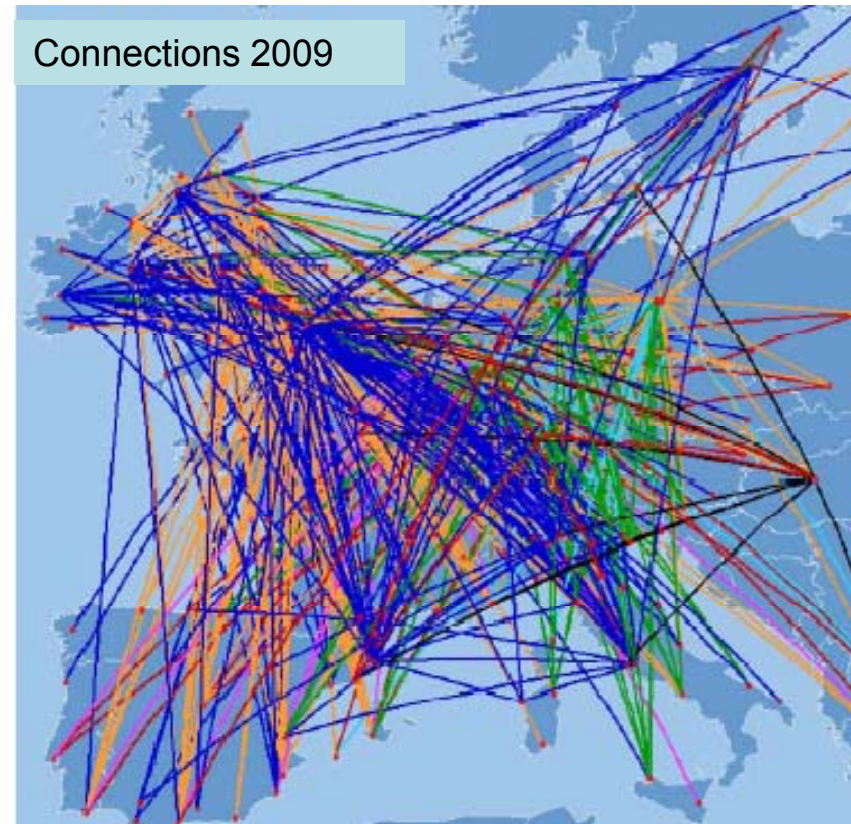
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Key Market Trends = need to
find new ways to deliver
tourism in destinations



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Expansion of Low Cost Carrier Networks 2001 - 2009



Market Trends

- Destination experiences essential
- More discerning, seeking quality
- Aesthetics strong driver of demand: views, art, design and architecture
- Well-being
- Short-break, year round
- Distinctive and differentiated

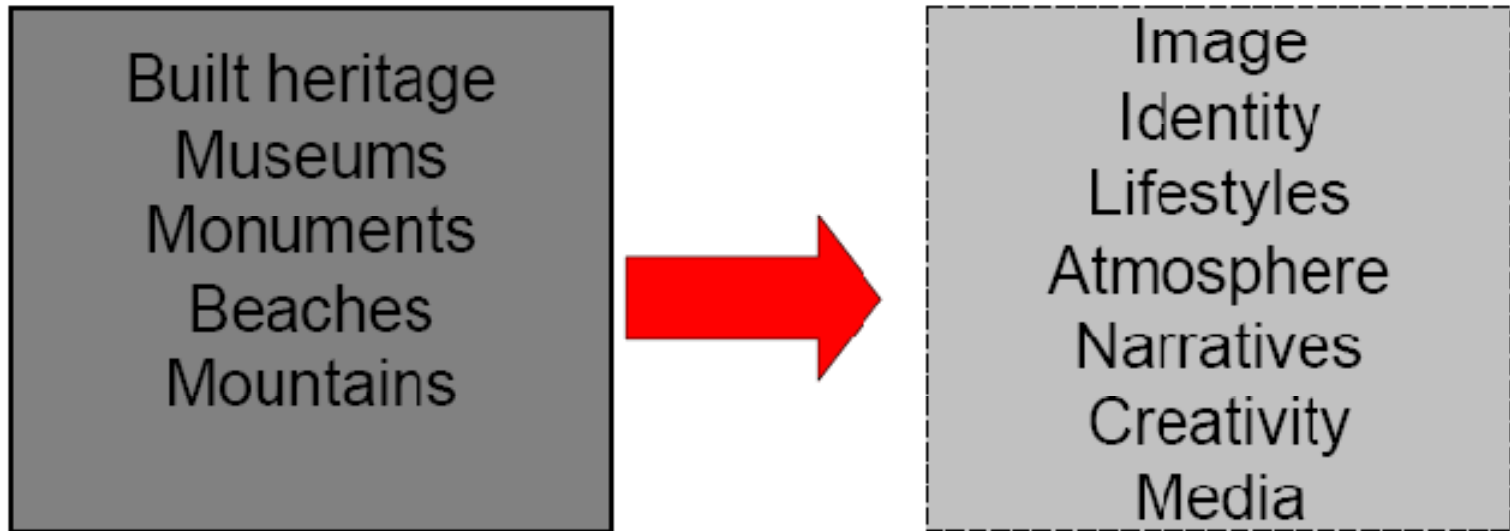
Emerging Trends

Growth in specialised travel ...

- Rise of Women
- Grandchild on Board
- Spontaneous Travel
- Religious / Spiritual Tourism
- Gastronomy Tourism
- Niche market activity



Shift from tangible to intangible tourism resources



The new demands



Adventure



Sports



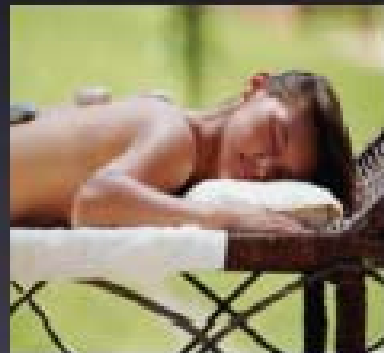
Nature



Who I am



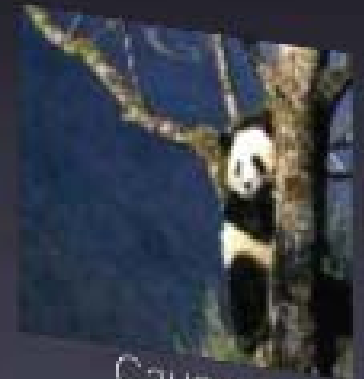
Good life



Wellness



Peace of mind



Causes

Future Brand Philosophy

I want ...

Essence

Attractions

Authenticity

Culture

Ethos

I need ...

Essentials

Geography

Infrastructure

Governance

Economy



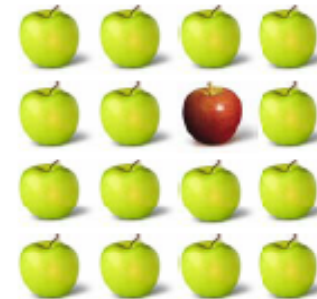
Two Alternatives for Customer Perception



Cheap



Differentiated





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Key Drivers of Short-Break Tourism

- Culture
- Food and drink
- Shopping
- Easy to get to (total = 2-3 hrs)
- Easy to understand
 - Physical
 - Brand
 - Message
 - Experience
- Friendly
- Welcoming
- Social
- Safe
- Value





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Bergamo - Strengths

- Italian!!
- Matches our perceptions
- Historic city shopping : dining
- Heritage and culture
- Unique experiences
- Charming
- Compact : small
- Special interest appeal
- Repeat appeal
 - Bergamo Province
 - Mountain lakes
 - Base to explore
 - Gateway to N Italy



Bergamo - Weaknesses

- Low awareness of place
- Sold as 'Milan (BGY)'
- Absence of strong ...
 - Positioning
 - Branding
 - Marketing
- No 'sell'
- Customer relationship
- Taxis!!
- Hotel base - limited range
- Absence of guides
- Absence of packages



The Stereotype v The Polymath Tourist



The Stereotype v The Polymath Tourist



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What Do We Say About Bergamo? ...

“A beautiful, cultured and friendly City”

“This was my first ever visit to Italy. This is an ideal weekend or short leisure break. Impressive buildings and excellent restaurants”

“Bergamo offers two towns in one and reflected Italy’s best assets: style”

“A lovely relaxing environment with wonderful old town atmosphere and outstanding food and drink”

What Do We Say About Bergamo? ...

“The old City was inspiring ... Cathedral, squares, exhibitions, culture and atmosphere ... a wonderful destination for a weekend break”

“An excellent range of quality shops, great food and drink ... the true taste of a nation ... style and quietly classy. The atmosphere in the evening was relaxed, charming and welcoming”

“A rewarding, relaxing and truly Italian experience”

“The staff at the tourist information were very helpful and the proximity of the airport to the City is a real positive”



Low Cost - The Benefits

Economic:

- Average spend per day: Leisure €95
- Average spend per day: Business €200
- Average spend in destination all inbound: €12.5m - €15m
- Support c1,000 new jobs

Markets

- New audiences
- Ryanair - loyalty
- Partnership marketing
- In-flight magazines
- Very large exposure
- Business and Leisure
- Good for VFR

Low Cost - The Issues

- New Opportunities
- Aggressive business model



Low Cost Travellers

- Young professionals
- 50 yrs + couples
- Social groups
- Diaspora - Family links

- Year round
- Mid week
- Short break

- Multi-interest
- Impulsive
- Internet



Tourism in Lombardia

- OECD ‘Territorial Review - Bergamo’
= “*significant tourism potential*”
- Travel and Tourism Intelligence
= “*shopping and culture are key drivers of tourism*”
- La Galleria Market Assessment
= “*Italian food, drink and fashion is a major draw for British tourists*”
- Over 20m international tourists to 11 Provinces around Bergamo
- UK approximately 10%



Vision and Strategy = Essential



A Marketing Strategy

- Strong brand and position
- Clear imagery and narrative
- Focused “sell”
 - = originating airports
 - = special interest
 - = short break
 - = repeat
- Working with partners
- PR activity - UK Agency?
- Programmes and packages



UK Population: Key Airports

	Population within 30 mins of Airport	Population with 60 mins of Airport
Liverpool	2.0m	10m
Bristol	0.45m	4m
East Midlands	1.7m	6m
Luton	3.5m	15m
Stansted	0.5m	6m



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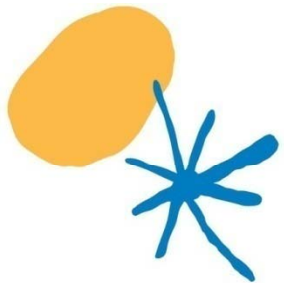
Product Requirements

- Hotels - range/boutique style
- Guides/Special interest
- Well-being programmes
- Creative tourism/discovery
- Taxis and support services



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