

INTERNATIONAL MARKET PROFILE

ITALY



Market Overview

Twenty five percent of Italians who holiday in Australia include South Australia in their itinerary. This is the highest share of any market.

South Australia is well served by the resilient honeymoon market. Honeymoons are most often paid for by family and friends and are booked via the travel trade.

The honeymoon period is generally from June through to October. However, December is also a peak month.

Youth travellers and those visiting on a Working Holiday Visa have a high length of stay and dispersal to the regions.

Kangaroo Island is the hero experience for South Australia. Consumers see it as one of the must-visit destinations in Australia and for most Italians it is their reason for visiting South Australia.

Air Access

Airlines that provide direct access to Adelaide via one stop over include Singapore Airlines, Cathay Pacific, Emirates and Malaysia Airlines.

Key Themes

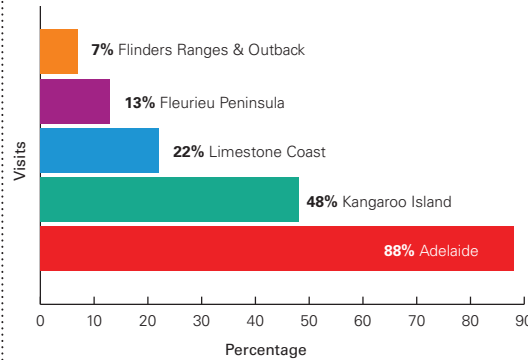
Coastal; nature and wildlife, outback, soft adventure; self-drive; luxury

Fast Facts and Figures

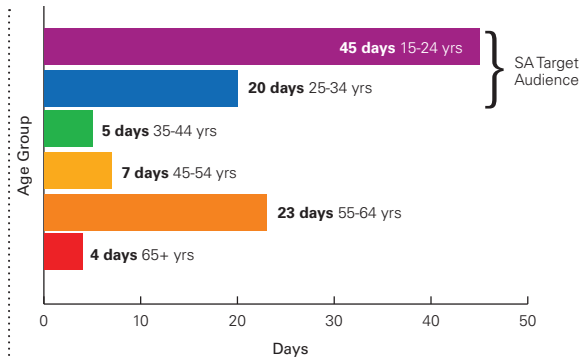
Data is based on a 3 year average for the years ending June 2012 to June 2014 for all purpose visitors.

ITALY					
South Australia	Holiday	VFR	Business	Other	Total
Visits	10,000	1,000	500	800	12,000
Nights	140,000	30,000	7,000	49,000	225,000
Average Length of Stay (nights)	14	30	14	61	19
Expenditure					\$14,000,000

Key South Australian Overnight Destinations



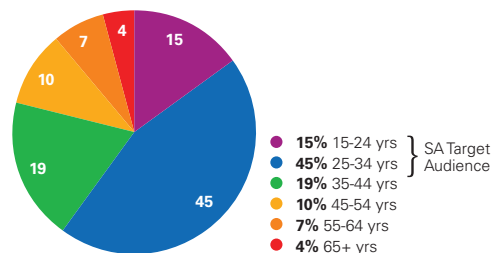
Length of stay in South Australia by age group



Appealing Experiences

- Kangaroo Island's diverse and abundant nature and wildlife.
- Authentic Outback and wilderness experiences of the Flinders Ranges, often discovered on self-drive journeys.
- South Australia is a perfect self-drive destination as indicated through visitation on the Limestone Coast as part of the Southern Ocean Drive (Melbourne to Adelaide).

Visitor Age Profile

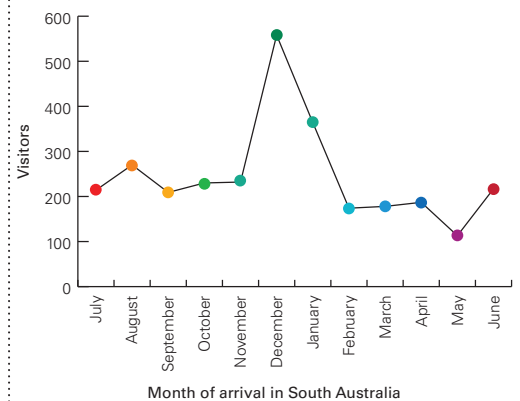


Target Market Profile

Adult couples from 20-35, covering the two major demographics being honeymooners and youth Working Holiday Visa market.

Average length of stay is influenced by longer staying education and VFR sectors.

Seasonality



Market Insights

- Traditional trade partners are still the main driver for bookings in the Italian market due to the strong honeymoon sector and first time visitor focus.
- The majority of honeymooners will book through a specialist Australian tour operator so engaging and working with these partners is a high priority in Italy.
- The South Australian Tourism Commission runs a very successful public relations strategy including social media engagement to drive demand and support the industry simultaneously.
- Consumer laws are very strict in Europe, so please remember this when you prepare product descriptions for wholesalers. What you deliver has to match what was offered. If you make changes to product that has already been brochured, let the wholesaler and their inbound tour operator know as soon as possible.
- Italians like to eat late and like to spend time at the dinner table.

Social Media

Facebook: www.facebook.com/southaustraliaitalia

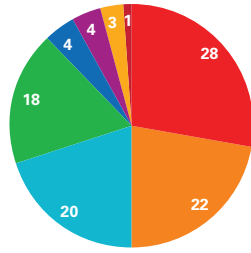
Contacts

Marketing

Martin Kaesler,
Business Manager International Marketing, Adelaide
martin.kaesler@sa.gov.au

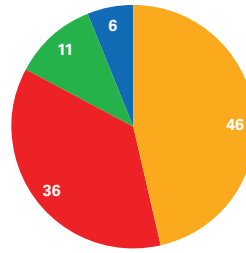
Inbound Distribution

Marc Leopold, Business Manager Inbound Distribution
marc.leopold@sa.gov.au



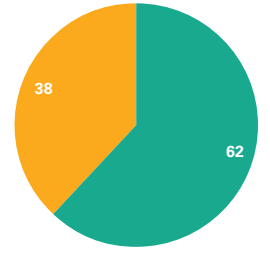
Accommodation used (visitor nights)

- 28% Home of friend/relative
- 22% Backpacker/hostel
- 20% Hotel/resort/motel/motor inn
- 18% Rented house/apartment/unit/flat
- 4% Caravan
- 4% Educational Institution
- 3% Homestay
- 1% Other



Travel party description

- 46% Adult couple
- 36% Unaccompanied
- 11% With Friends/relatives
- 6% Family Group



Package Tours

- 62% Non Package Tour
- 38% Package Tour

This data includes Education and VFR purpose sectors.

Key Distribution Partners

Key Wholesale Partners	Inbound Representative Company in Australia
Viaggidea	AOT
Hotelplan	AOT
Kuoni/Best Tours	AOT
Alidays	ATS
Naar	AOT
Discover Australia	AOT
Go Australia	PAN PACIFIC
Amo il Mondo	AOT
Australian Travel / Spicchi di Mondo	AOT
I Viaggi del Delfino	FINESSE

Top Travel Websites		
Odigeo (owns eDreams)	Ryanair	Skyscanner Sites
TripAdvisor	Alitalia	NTV Spa
Priceline.com Network	EASYJET.COM	HomeAway
Gruppo Ferrovie dello Stato	Trivago	Paesionline
Expedia.com	TUI	FLYAIRONE.COM
Viaggiare Group	Zingarate Sites	Travelocity
VIAGGIAMO.ORG	Virgilio Viaggi	

Source: International Visitor Survey, Tourism Research Australia, Canberra | Department of Immigration and Citizenship (DIAC) | VFR = Visiting Friends and Relatives
Definition of Package Tour: Where the international airfares plus some other travel component (transport, accommodation, tour) are paid for before arrival in Australia.

Disclaimer: This summary has been prepared by the South Australian Tourism Commission (SATC) in good faith. While every care has been taken in preparing the information, the SATC does not represent or warrant that it is correct, complete or suitable for the purposes for which you wish to use it. By using this information you acknowledge that it is provided by SATC without any responsibility on behalf of the SATC and agree to release and indemnify the SATC for any loss or damage that you or any third party may suffer as a result of your reliance on this information.