

INTERNATIONAL MARKET PROFILE

ITALY

MARKET OVERVIEW

- ▶ Approximately 20% of Italians travelling for leisure to Australia include South Australia in their itinerary.
- ▶ 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.

FAST FACTS & FIGURES

Data is based on a 3 year annual average for the years ending Dec 2016 – Dec 2018 for all purpose visitors.

ITALY	HOLIDAY	VFR	BUSINESS	OTHER	TOTAL
Visits (SA)	10,000	2,000	1,000	1,000	12,000
Visits (AUS)	44,000	24,000	11,000	18,000	74,000
Nights (SA)	89,000	32,000	2,000	48,000	171,000
Nights (AUS)	2,321,000	619,000	148,000	1,311,000	4,399,000
ALOS - Nights (SA)	9	16	2	48	14
ALOS - Nights (AUS)	53	26	13	73	59
EXPENDITURE					\$15,000,000

APPEALING EXPERIENCES

- ▶ Kangaroo Island's diverse and abundant nature and wildlife.
- ▶ Authentic outback and wilderness experiences of the Flinders Ranges & Outback often discovered via the Explorers Way touring route.
- ▶ 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).

TARGET MARKET PROFILE

- ▶ Adult couples from 20-35, covering the two major demographics of honeymooners (primary market) and the youth market on Working Holiday Visas (secondary market).

AIR ACCESS

- ▶ Airlines which provide direct access to Adelaide with one stopover include Emirates, Qatar Airways, Singapore Airlines, Cathay Pacific.

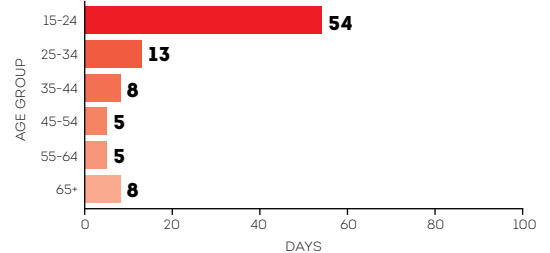
KEY THEMES

- ▶ Nature & wildlife
- ▶ Coastal
- ▶ Outback
- ▶ Self-drive
- ▶ Soft adventure
- ▶ Luxury

KEY SOUTH AUSTRALIAN OVERNIGHT DESTINATIONS

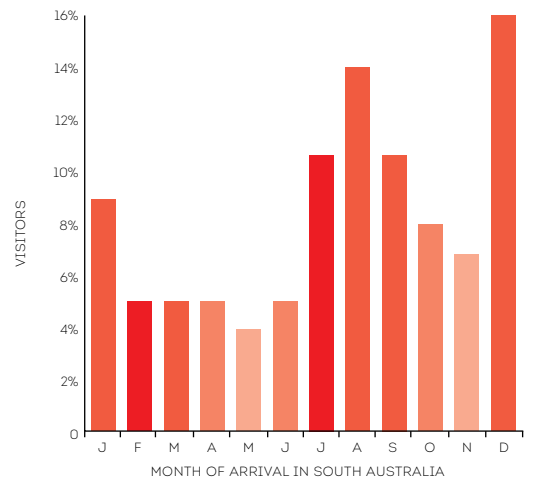


LENGTH OF STAY IN SOUTH AUSTRALIA BY AGE GROUP



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

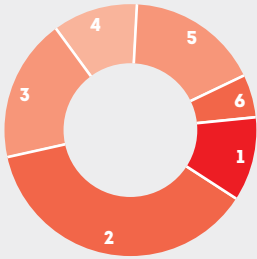
SEASONALITY



INTERNATIONAL MARKET PROFILE

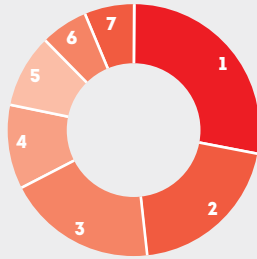
ITALY

VISITOR AGE PROFILE



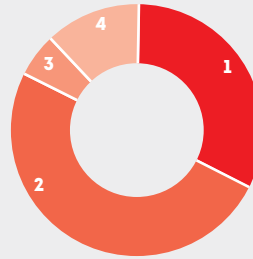
- 1 15-24 **11%**
- 2 25-34 **37%**
- 3 35-44 **19%**
- 4 45-54 **11%**
- 5 55-64 **17%**
- 6 65+ **5%**

ACCOMMODATION USED



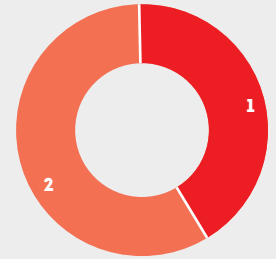
- 1 Rented house/apartment/unit/flat **28%**
- 2 Home of friend/relative **20%**
- 3 Hotels and similar accommodation **19%**
- 4 Other **11%**
- 5 Backpacker/hostel **9%**
- 6 Caravan/camping **6%**
- 7 Homestay **6%**

TRAVEL PARTY DESCRIPTIONS



- 1 Unaccompanied **32%**
- 2 Adult couple **49%**
- 3 Family group **6%**
- 4 With friends/relatives travelling together **12%**

PACKAGE TOURS



- 1 Package tour **41%**
- 2 Non-package tour **59%**

MARKET INSIGHTS

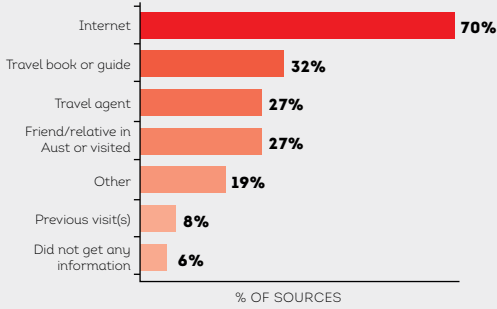
- ▶ Traditional trade partners are still the main driver for bookings in the Italian market due to the strong honeymoon sector and first time visitor focus.
- ▶ The majority of honeymooners will book through a specialist Australian tour operator so engaging and working with these partners is a high priority in Italy.
- ▶ The South Australian Tourism Commission runs a public relations strategy to drive demand and support the industry simultaneously.

- ▶ European consumer travel law is very strict, and you must provide exactly what is described in any brochures. If there are any changes to your product you must advise the wholesaler as soon as possible.
- ▶ Italians like to eat late and like to spend time at the dinner table.
- ▶ Italians are provided extra annual leave for first time marriages. They generally spend three to four weeks on a honeymoon to Australia but usually a week of this is at a beach resort either in Queensland or the South Pacific.

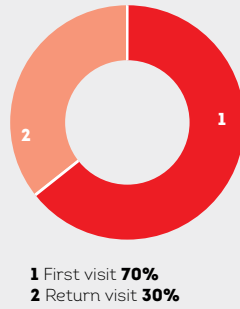
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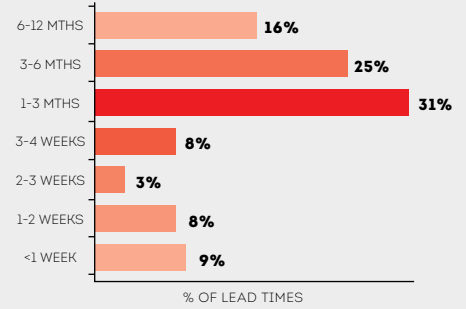
INFORMATION SOURCES



FIRST OR RETURN VISIT



BOOKING LEAD TIMES



KEY DISTRIBUTION PARTNERS

KEY WHOLESALE PARTNERS	INBOUND REPRESENTATIVE COMPANY IN AUSTRALIA
DISCOVER AUSTRALIA	AOT
VIAGGIDEA	AOT
GO AUSTRALIA	PAN PACIFIC
NAAR	AOT
AMO IL MONDO	AOT
ALIDAYS	ATS PACIFIC
CIVIDIN VIAGGI	FINESSE
AUSTRALIAN TRAVEL	AOT
HOTELPLAN	AOT
GASTALDI HOLIDAYS	AOT

TOP TRAVEL WEBSITES

BOOKING	EXPEDIA
EDREAMS	TRIPADVISOR
EASYJET	RYANAIR
PAESIONLINE	LONELYPLANET

SOCIAL MEDIA

Find our Facebook page at [SeeSouthAustralia](#)

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Source: International Visitor Survey Dec 16, Dec 17 & Dec 18 conducted by Tourism Research Australia. Unless otherwise stated, all data refers to the Annual Average results for the 3 years from Dec 2016 to Dec 2018. Totals may not add to 100% due to rounding. np = not published due to small sample size. VFR = Visiting Friends and Relatives. ALOS = Average Length Of Stay (Nights). 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. Produced by the South Australian Tourism Commission April 2019.