

2024 INTERNATIONAL MARKET UPDATE ITALY

MARKET OVERVIEW

Results based on year ending June 2024

- Italy is South Australia's twenty second largest inbound market, currently 71% down on pre-Covid visitation levels, and 55% down on expenditure levels. Pre-Covid, Italy was South Australia's 13th inbound market.
- South Australia is popular with the 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.
- Small groups of friends travelling together has increased, particularly choosing a self-drive holiday.
- 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.
- Key experiences which drive demand include nature and wildlife, outback, coastal, and soft adventure.
- 49% of Italian visitors to South Australia have been to Australia before.

SNAPSHOT OF CURRENT STATISTICS

Results based on year ending June 2024

VISITORS



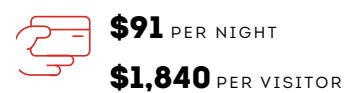
NIGHTS



EXPENDITURE



AVERAGE SPEND



AVERAGE LENGTH OF STAY



INTERNATIONAL RANKING IN SOUTH AUSTRALIA

#22 FOR VISITORS
#20 FOR NIGHTS
#22 FOR EXPENDITURE

AIR ACCESS

ITALY



Key Connecting Airlines

Qatar Airways (QR)
Qantas Airways (QF)
Singapore Airlines (SQ)
Malaysia Airlines (MH)
Emirates (EK)

Multiple airlines offering connections via other Australian Airports

FAST FACTS & FIGURES

Annual average of 2017-2019 figures - current year samples not yet sizeable enough

ITALY	HOLIDAY	VFR	BUSINESS	OTHER	TOTAL
Visits (SA)	11	2	1	1	13
Visits (AUS)	43	25	11	17	73
Nights (SA)	101	34	3	35	173
Nights (AUS)	2,308	583	152	1,205	4,248
ALOS - Nights (SA)	9	17	3	35	13
ALOS - Nights (AUS)	54	23	14	71	58

(,000)

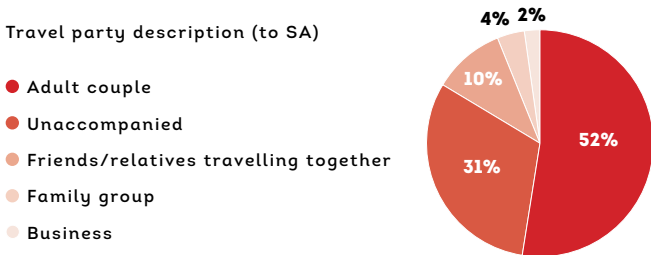
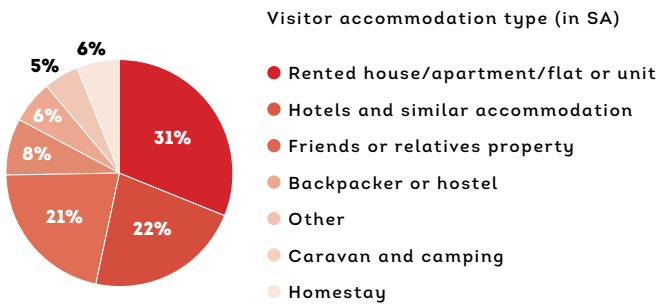
Expenditure

\$15M

ALOS = Average Length Of Stay, VFR = Visiting Friends and Relatives.

VISITOR ACCOMMODATION TYPE & TRAVEL PARTY DESCRIPTIONS

Annual average of 2017-2019 figures - current year samples not yet sizeable enough

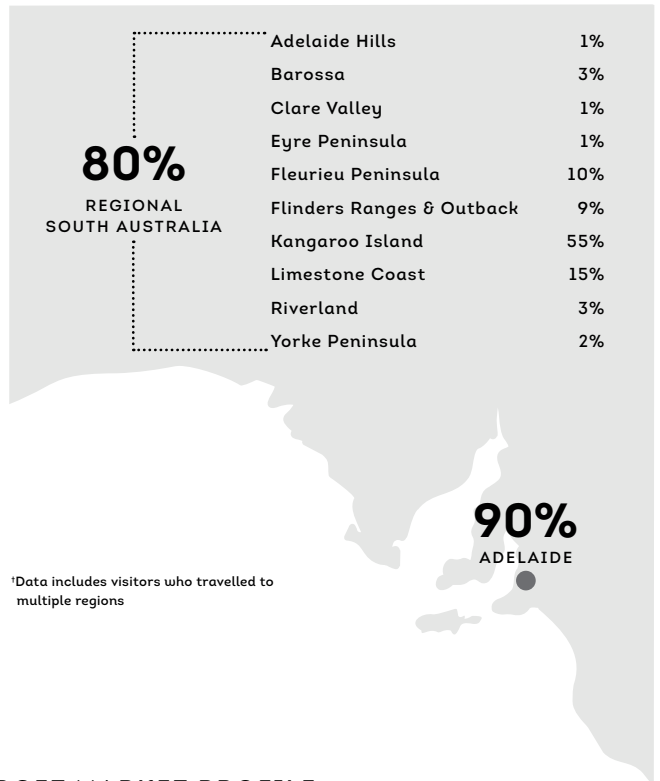


MARKET INSIGHTS

- The SATC services the Italian market from the SATC London based office and has relationships with key destination partners to ensure South Australia stays top of mind.
- Italians are provided extra annual leave for first time marriages. They generally spend three to four weeks on a honeymoon. 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 SATC works closely with Tourism Australia on their visiting media strategy to drive demand and widen audience reach.
- Key themes for the Italian market include nature, wildlife, coastal, outback, self-drive, soft adventure, and luxury.
- Italians like to eat late and like to spend time at the dinner table.
- Traditional trade partners are still the main driver for bookings in the Italian market (particularly the honeymoon sector and first-time visitor markets) as Australia is perceived as a complex destination to book and requires specialist knowledge for those who haven't visited before.
- European travel law is very strict, and operators have to provide exactly what is described in any brochures. Changes to product offerings must be advised to the travel partner as soon as possible.
- When looking at accommodation, previous travellers' reviews are deemed extremely important.

VISITOR DISPERSAL[†]

Annual average of 2017-2019 figures - current year samples not yet sizeable enough



TARGET MARKET PROFILE



Primary

Adult couples aged 20-35, covering the two major demographics of honeymooners with additional time to spend in destination and looking for luxurious and exclusive experiences.



Secondary

Youth market on Working Holiday Visas.

BOOKING PREFERENCES

Data from Consumer Demand Project (CDP) report - March 2024



33%

Direct with
Airline



32%

Online Travel Agent
(e.g. Expedia)



32%

Retail Travel Agent/
Tour Operator



19%

Direct with
Accommodation



7%

Direct with
Experienced Provider



3%

Other

CONTRACTING & BROCHURE TIMES

Brochure contracting and production takes place from July to October for release in November/December. Brochure validity is 1 April - 31 March. Most companies include product on websites.

ITALY CHECKLIST

Consider the following points when targeting travellers from Italy:

- ✓ **Highlight accessibility from Adelaide.**
For example, Kangaroo Island is a short 30-minute flight from Adelaide or Flinders Ranges is an easy 5-hour drive from Adelaide via the wineries of the Clare Valley or Barossa.
- ✓ **Ensure website and training includes any Italian language tours** that are available or if you have **Italian speaking staff.**
- ✓ **Showcase wildlife in the wild experiences** (land and sea) and the great South Australian outdoors.
- ✓ **Highlight if owner operated or using local guides** - it's a key unique selling point in South Australia and provides guests with an authentic experience.

TOP TRAVEL WEBSITES & APPS

Booking.com

Tripadvisor

Expedia

paesi line

lonely planet

eDreams



Disclaimer: Source: International Visitor Survey Dec 2017, Dec 2018, Dec 2019, and June 2024 conducted by Tourism Research Australia, Consumer Demand Project (CDP) Aug 2023 and 2024. Totals may not add to 100% due to rounding. VFR = Visiting Friends and Relatives. ALOS = Average Length of Stay (Nights).

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KEY TRADE PARTNERS

KEY WHOLESALE PARTNERS

INBOUND REPRESENTATIVE COMPANY IN AUSTRALIA

Go Australia

Pan Pacific

Discover Australia

AOT

Alpitour

Pan Pacific

Alidays

Pan Pacific

NAAR

AOT
Goway

Kel 12/Viaggi di Maurizio Levi

Goway
AOT

Cat Viaggi

ATS
Goway

Gattioni

ATS
Goway
Pan Pacific

Kia Ora Viaggi

ATS

Aliviaggi Tour Operator

AOT

Idee per Viaggiare

Goway

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