

ITALY

INTERNATIONAL MARKET UPDATE 2026

MARKET OVERVIEW

- Italy is South Australia's 19th largest inbound market, and is also ranked 18th for expenditure as of March 2026.
- South Australia is a sought-after destination for honeymooners. These trips are typically funded by family and friends and are commonly arranged through the traditional travel trade. The peak honeymoon season runs from June to October, with December also experiencing high demand due to Christmas Holidays.
- The Italian market has seen an increase in small group free independent travellers (FIT) who are choosing a self-drive holiday.
- Kangaroo Island is the hero experience for South Australia. Italians 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.
- 46% of Italian visitors to South Australia have been to Australia before.*
- 46% of visits are for the purpose of Holiday, 33% for Visiting Friends and Relatives (VFR).*



FAST FACTS & FIGURES

Data is an annual average over 2 years ending March 2025-March 2026

ITALY	HOLIDAY	VFR	BUSINESS	OTHER	TOTAL
VISITS (SA)	3,000	2,000	1,000	1,000	6,000
VISITS (AUS)	40,000	29,000	7,000	20,000	71,000
NIGHTS (SA)	30,000	61,000	22,000	77,000	190,000
NIGHTS (AUS)	3,083,000	671,000	150,000	1,109,000	5,013,000
ALOS - NIGHTS (SA)	11	30	26	99	31
ALOS - NIGHTS (AUS)	77	23	21	56	71
EXPENDITURE (SA)					\$21m

ALOS = AVERAGE LENGTH OF STAY. VFR = VISITING FRIENDS AND RELATIVES.
*DATA IS AN ANNUAL AVERAGE OVER 2 YEARS ENDING MARCH 2025-MARCH 2026.

SNAPSHOT OF CURRENT STATISTICS – MARCH 2026

VISITORS

 7k

NIGHTS

 194k

AVERAGE LENGTH OF STAY

 29 nights

EXPENDITURE

 \$24m

AVERAGE SPEND

 \$123 per night \$3,578 per visitor

INTERNATIONAL RANKING IN SOUTH AUSTRALIA

 #19 for visitors
#17 for nights
#18 for expenditure

AIR ACCESS

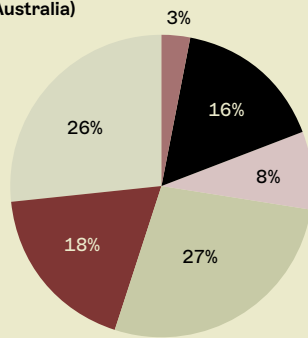
KEY CONNECTING AIRLINES

- Qatar Airways (QR)
- Emirates (EK)
- Singapore Airlines (SQ)
- Cathay Pacific (CX)
- Qantas Airways (QF)
- Multiple airlines offering connections via other Australian airports

VISITOR ACCOMMODATION TYPE AND TRAVEL PARTY DESCRIPTIONS*

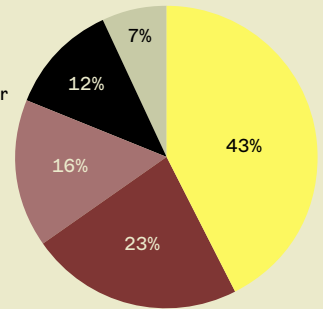
Visitor accommodation type (in South Australia)

- Other commercial accommodation
- Hotels and similar accommodation
- Caravan park or commercial camping ground
- Rented house/apartment/flat/unit
- Other private accommodation
- Friends or relatives' property



Travel party description (to South Australia)

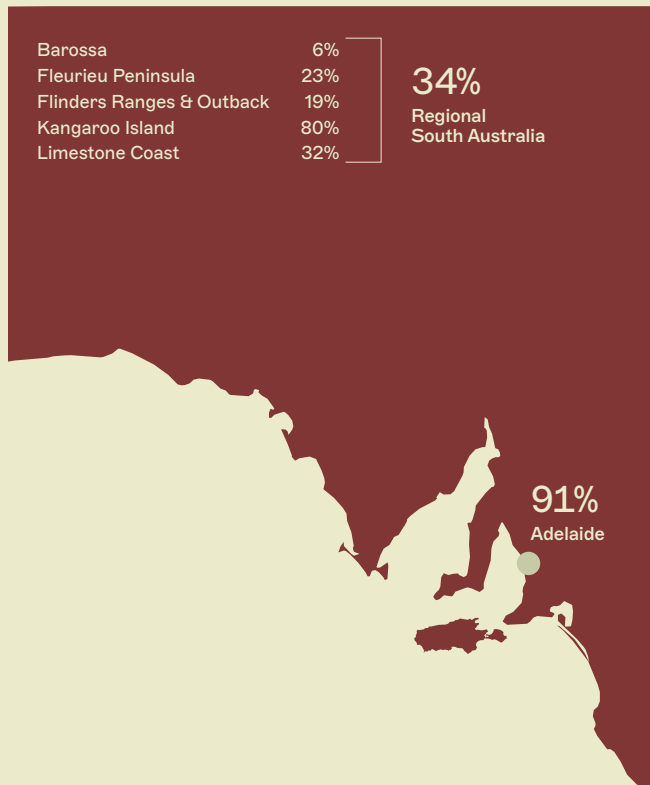
- Travelling alone
- Adult couple
- Friends or relatives travelling together
- Family group - parents and children
- Other travel party



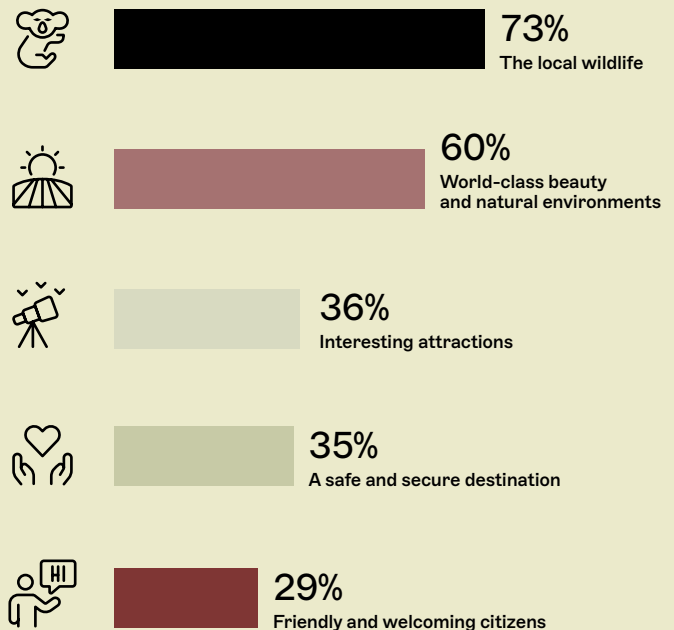
MARKET INSIGHTS

- The South Australian Tourism Commission (SATC) services the Italian market from the SATC London office and has relationships with key destination partners to ensure South Australia stays top of mind.
- The SATC works closely with Tourism Australia on their visiting media strategy to drive demand and widen audience reach.
- Italians are provided an extra two weeks annual leave for first time marriages to go on a honeymoon, which are typically three to four weeks long. 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. However, a decline in marriages has led to a corresponding downturn in the honeymoon sector.
- Italians like to eat late, usually around 8pm, and like to spend time at the dinner table. For breakfast, they prefer a quick small meal. Fresh, local produce is important to these travellers.
- 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. Changes to product offerings must be advised to the travel partner as soon as possible. Printed brochures remain highly valued by this market, with consumers expecting to collect them at fairs and consumer events. Trade partners also continue to request significant quantities of brochures and branded merchandise.
- Italians want to have a memorable holiday and tend to spend their money on experiences over accommodation. For accommodation they look for something comfortable and rely on reviews.
- Escorted group tours are an emerging trend in Italy, catering to solo travellers seeking the ease and reassurance of long-haul travel with a dedicated escort to assist with language and logistics. Several Italian trade partners have begun organising their own group tours, often accompanied by a staff member. While Australia is not yet a primary destination for these tours, it is gradually gaining interest.

VISITOR DISPERSAL**



FACTORS FOR CHOOSING TO VISIT SOUTH AUSTRALIA*



*DATA IS AN ANNUAL AVERAGE OVER 2 YEARS ENDING MARCH 2025-MARCH 2026.
+DATA INCLUDES VISITORS WHO TRAVELLED TO MULTIPLE REGIONS FOR ALL PURPOSES.

TARGET MARKET PROFILE



PRIMARY

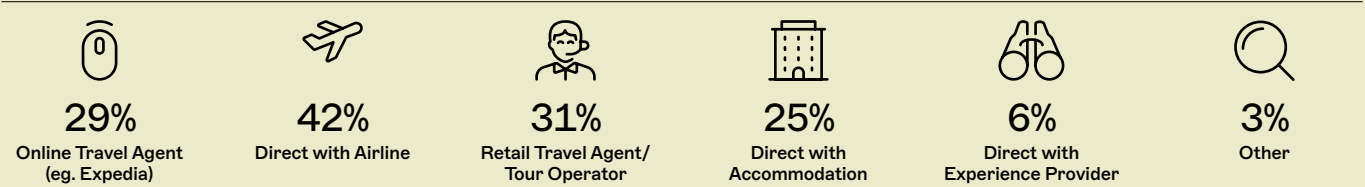
High yielding travellers, in different life stages. Likely to travel with a partner and travel around different places on the one holiday. When choosing a destination, Italian travellers base their decision on what time of year to travel and where they can get the best value for money. Strong honeymoon market.



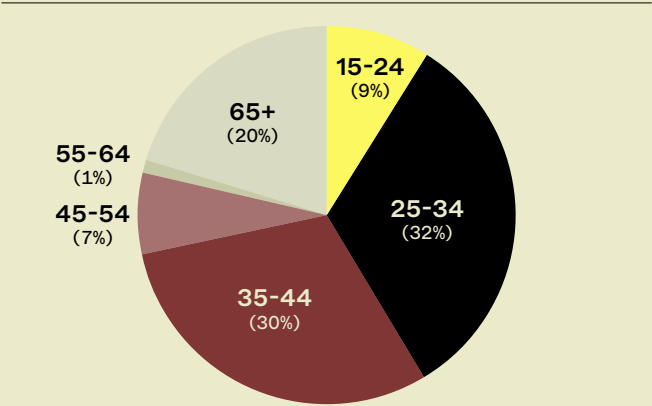
SECONDARY

The youth market travelling Australia on Working Holiday Visas (WHVs).

BOOKING PREFERENCES



ITALIAN VISITORS TO SOUTH AUSTRALIA BY AGE GROUP*



ITALY CHECKLIST

Consider the following points when targeting travellers from Italy:

- ✓ Ensure website and training includes any Italian language tours that are available or if you have Italian speaking staff. Trade partners are always looking for this.
- ✓ Showcase wildlife in the wild experiences (land and sea) and the great South Australian outdoors. Authentic experiences in small groups are highly appealing to this market.
- ✓ 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.
- ✓ 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.

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Government of South Australia
South Australian Tourism Commission

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
Going	Across Australia
	Pan Pacific
Vonline	Across Australia
	AOT
	ATS
Gattioni	Goway
	Pan Pacific
Kia Ora Viaggi	ATS
Creo	Across Australia
	Pan Pacific
Idee per Viaggiare	Goway

TOP TRAVEL WEBSITE & APPS

Booking.com

Tripadvisor

Expedia

lonely planet

paesi line

eDreams

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