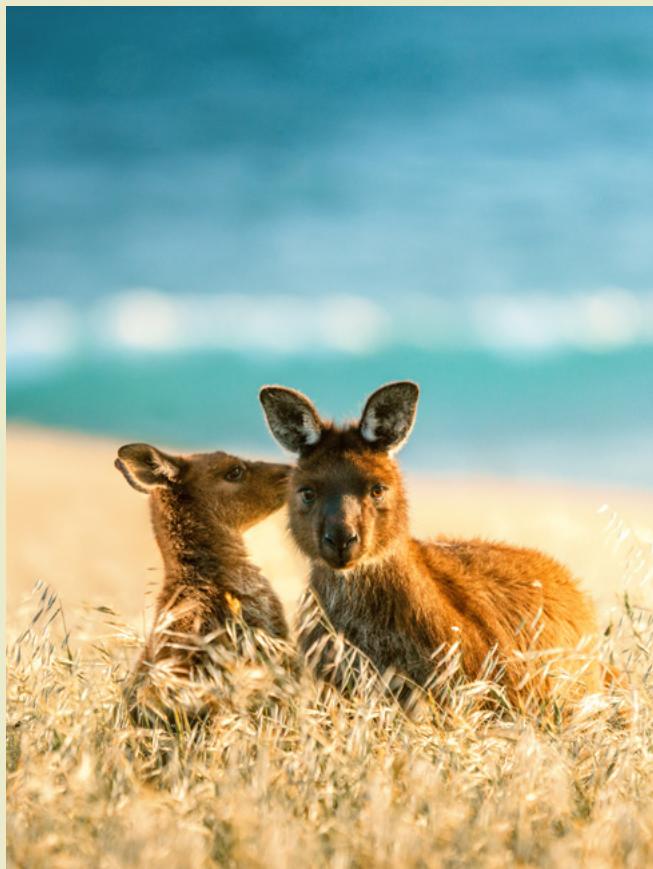


ITALY

INTERNATIONAL MARKET UPDATE 2025

MARKET OVERVIEW

- Italy is South Australia's 19th largest inbound market, and is also ranked 19th for expenditure as of June 2025.
- 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.
- 47% of Italian visitors to South Australia have been to Australia before.*
- 48% of visits are for the purpose of Holiday, 29% for Visiting Friends and Relatives (VFR).*



FAST FACTS & FIGURES

Data is an annual average over 2 years ending June 2024-June 2025

ITALY	HOLIDAY	VFR	BUSINESS	OTHER	TOTAL
VISITS (SA)	2,000	2,000	600	800	5,000
VISITS (AUS)	33,000	22,000	11,000	19,000	64,000
NIGHTS (SA)	19,000	50,000	4,000	57,000	130,000
NIGHTS (AUS)	2,610,000	599,000	156,000	1,115,000	4,480,000
ALOS - NIGHTS (SA)	10	30	7	69	26
ALOS - NIGHTS (AUS)	79	27	15	60	70
EXPENDITURE (SA)					\$12m

ALOS = AVERAGE LENGTH OF STAY. VFR = VISITING FRIENDS AND RELATIVES.

*DATA IS AN ANNUAL AVERAGE OVER 2 YEARS ENDING JUNE 2024-JUNE 2025.

SNAPSHOT OF CURRENT STATISTICS – JUNE 2025

VISITORS

👤 7k

NIGHTS

🌙 191k

AVERAGE LENGTH OF STAY

📅 29 nights

EXPENDITURE

💰 \$17m

AVERAGE SPEND

💳 \$92 per night \$2,613 per visitor

INTERNATIONAL RANKING IN SOUTH AUSTRALIA

🏆 #19 for visitors
#18 for nights
#19 for expenditure

AIR ACCESS

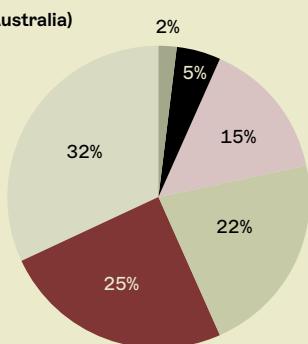
KEY CONNECTING AIRLINES

- 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*

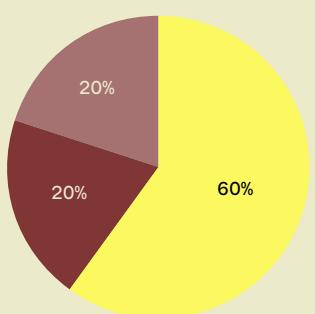
Visitor accommodation type (in South Australia)

- Backpacker or hostel
- 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



MARKET INSIGHTS

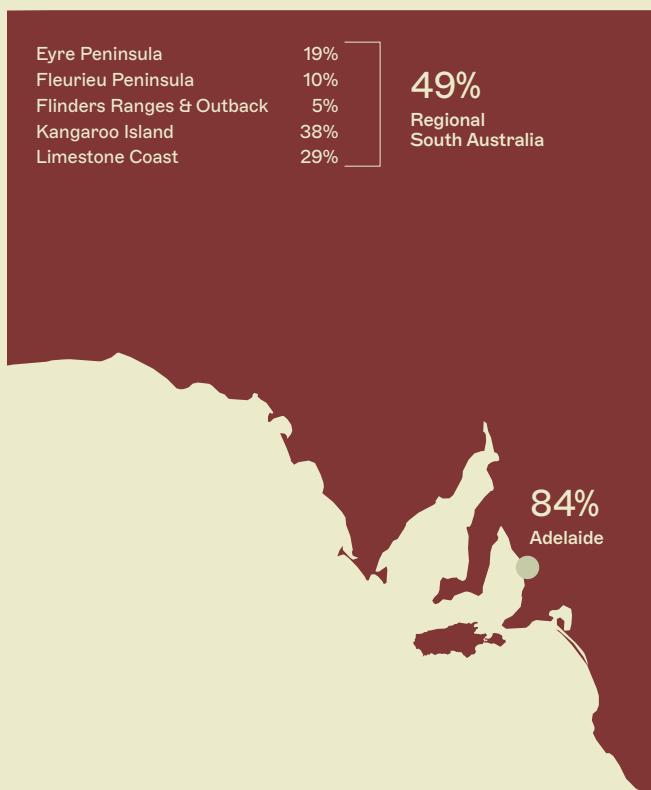
- The South Australian Tourism Commission (SATC) services the Italian market from the SATC London office and has relationships with key destination partners to ensure South Australia stays top of mind.
- The SATC works closely with Tourism Australia on their visiting media strategy to drive demand and 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 had 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.

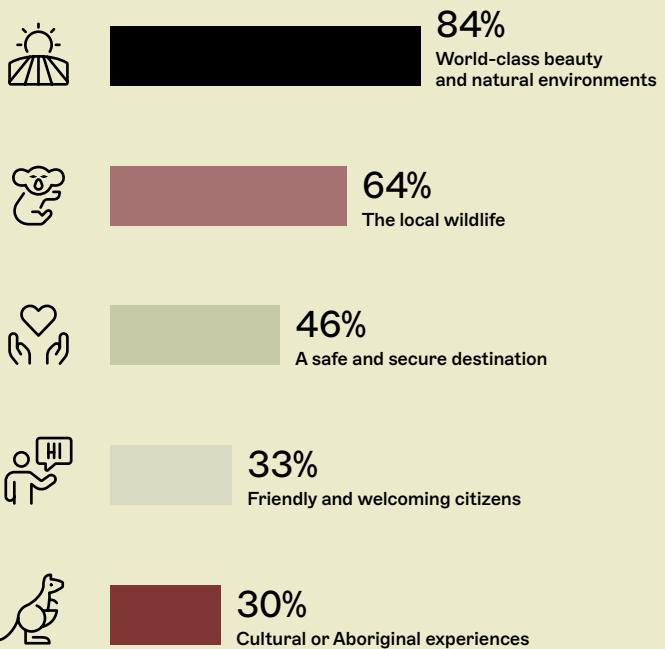
- Italians want to have a memorable holiday and tend to spend their money on experiences over accommodation. For accommodation they look for something comfortable and rely on reviews.

- 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*



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 where they can get the best value for money. Strong honeymoon market.



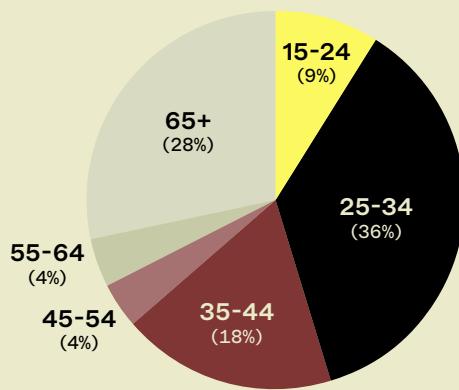
SECONDARY

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
Volonline	Across Australia
	AOT
Gattioni	ATS
	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

*DATA IS AN ANNUAL AVERAGE OVER 2 YEARS ENDING JUNE 2024-JUNE 2025.

DISCLAIMER: SOURCE: INTERNATIONAL VISITOR SURVEY JUNE 2024 AND JUNE 2025 CONDUCTED BY TOURISM RESEARCH AUSTRALIA, CONSUMER DEMAND PROJECT (CDP) 2024. TOTALS MAY NOT ADD TO 100% DUE TO ROUNDING. 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 DECEMBER 2025.