

# 2023 INTERNATIONAL MARKET UPDATE ITALY

## MARKET OVERVIEW

Results based on year ending June 2023

- Italy is South Australia's eighteenth largest inbound market, currently 68% down on pre-Covid visitation levels, and 37% down on expenditure levels. Pre-Covid, Italy was South Australia's thirteenth 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.
- 73% of Italian visitors to South Australia have been to Australia before.

## SNAPSHOT OF CURRENT STATISTICS

Results based on year ending June 2023

### VISITORS



### NIGHTS



### EXPENDITURE



### AVERAGE SPEND



### AVERAGE LENGTH OF STAY

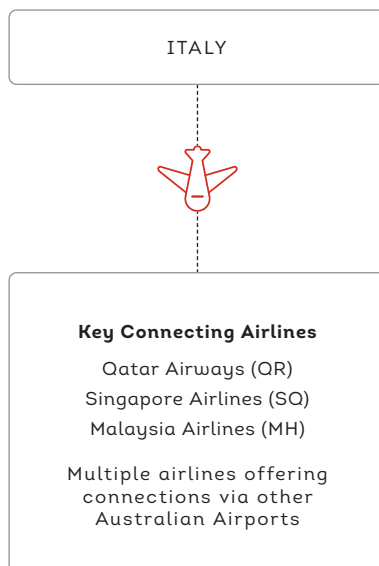


### INTERNATIONAL RANKING IN SOUTH AUSTRALIA

#18 FOR VISITORS  
#14 FOR NIGHTS  
#18 FOR EXPENDITURE

#A high average due to VFR.

## AIR ACCESS



## FAST FACTS & FIGURES

Annual average of 2017-2019 figures

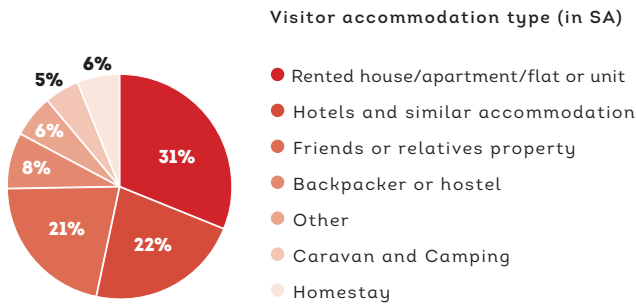
ITALY	HOLIDAY	VFR <sup>^</sup>	BUSINESS	OTHER	TOTAL
<b>Visits (SA)</b>	11	2	1	1	13
<b>Visits (AUS)</b>	43	25	11	17	73
<b>Nights (SA)</b>	101	34	3	35	173
<b>Nights (AUS)</b>	2,308	583	152	1,205	4,248
<b>ALOS<sup>^</sup> - Nights (SA)</b>	9	17	3	35	13
<b>ALOS<sup>^</sup> - Nights (AUS)</b>	54	23	14	71	58
<b>Expenditure</b>					<b>\$15M</b>

(\$,000)

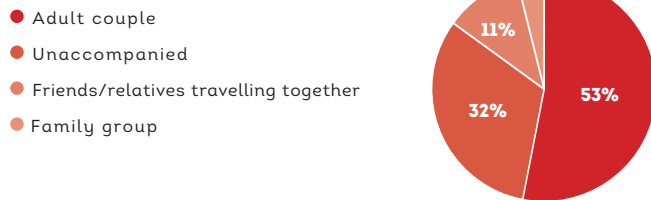
<sup>^</sup> ALOS = Average Length Of Stay, VFR = Visiting Friends and Relatives.

## VISITOR ACCOMMODATION TYPE & TRAVEL PARTY DESCRIPTIONS

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



### Travel party description (to SA)

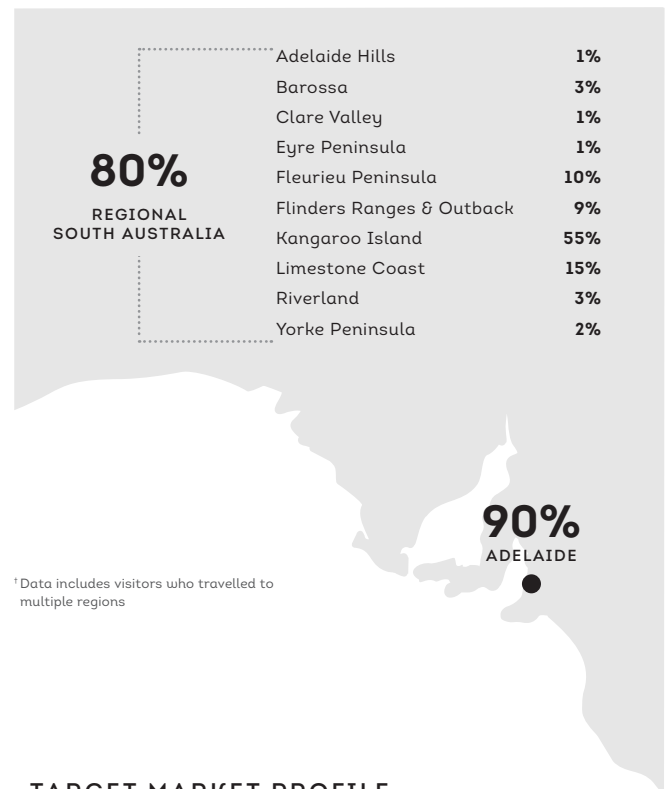


## MARKET INSIGHTS

- 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<sup>†</sup>

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.

## INFORMATION SOURCES

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



69%

Internet



32%

Travel book  
or guide



31%

Travel agent



25%

Friend/relative in  
Australia or visited



17%

Other



10%

Previous  
visit(s)



6%

Did not get any  
information

## 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

## 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

Gattinoni

• ATS  
• Goway  
• Pan Pacific

Kia Ora Viaggi

• ATS

Aliviaggi Tour Operator

• AOT

Idee per Viaggiare

• Goway

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Source: International Visitor Survey Dec 17, Dec 18, Dec 19 and June 23 conducted by Tourism Research Australia, Consumer Demand Project (CDP) Aug 23. Unless otherwise stated, all data refers to the Annual Average results for the 3 years from Dec 2017 to Dec 2019. Totals may not add to 100% due to rounding. VFR = Visiting Friends and Relatives. ALOS = Average Length of Stay (Nights).

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