

ITALY

Key Contacts

South Australian Tourism Commission

Name Giancarlo Truffa
Title Marketing Manager Italy
Location Via Filangieri, 14. 10128 Torino, Italy
Telephone +39 011 5681 816
Fax +39 011 59 18 70
Mobile +39 335 66 10 685
Email travelpromotion@tin.it

Name Daniela di Monaco
Title Press Office & PR, Italy
Location Via Girolamo Boccoardo 27, Rome, Italy
Telephone +39 06 3340086
Mobile +39 3358274781
Email daniela@quattropiu.it

Name Susanne Regenberg-Drew
Title Marketing Executive, France & Italy
Location Level 3, 121-125 King William St, Adelaide SA 5000
Email susanne.regenberg-drew@tourism.sa.com

Tourism Australia Contacts

Name Matteo Prato
Title Manager

Name Margherita Costa
Title PR Manager

Name Nicoletta Corradin
Title Training

Location Adam Integrated, Corso Marconi, 33. 10125 Torino, Italy
Telephone +39 011 6687550
Email teamaustralia@adam.it

General Market Overview

- Population – 58,153,000.
- Annual Leave Entitlement – Normally 25 working days
- Internet access – 55.6%
- GDP growth rate 2005 – 1.8 %
- Visitors to Australia - 50,700 in the 12 months to June 2008 – this represents a 1% decrease on the 12 months to June 2007. Source: ABS, Overseas Arrivals and Departures, 3401.0, TRA
- Visitors to SA – 10,100 in the 12 months to June 2008 - this represents a 9% decrease on the 12 months to June 2007. Source: International Visitor Survey (SA estimates, persons 15+ years)

Market Profile

The main target segment is “experience seekers” with honeymooners (by far the most important and largest market sub-segment) leading the show. The youth market (not necessarily backpackers or WHV) is still not predominant but growing slowly.

A large percentage of holiday visitors are FIT’s. Group touring (escorted and regular) is making a slow comeback, mainly originating in the south of Italy.

The Italian market is inbound-driven and all new product efforts need to be directed not only to in-market wholesalers but also to inbound tour operators in Australia.

Market Trends

Arrivals figures show that Italians visiting Australia have grown by approximately 8% (about 55,000 visitors) and Australia remains one of the most (if not *the* most) desirable holiday destination for Italian consumers. It is also a high revenue destination due to the average pro capita expenditure when buying a tour package (approximately 5,000 Euro per person).

Some wholesalers are looking at promoting their product through their website and won’t print a brochure, however this trend remains very niche as the major players put together glossy brochures every year (some of them twice a year). Desire to go consumer direct is on every big player’s agenda though.

There is an interesting increase in requests for students wishing to study in Australia.

Key Themes / Experiences Promoted in the Market

SA is promoted as part of a unique, truly Australian experience with big drawcards such as wildlife, beaches, nature and the great outdoors. Indigenous culture is also quite important. It should be noted that we cannot promote history, art, food, wine and shopping as these experiences can be better accessed in Europe / Italy, thus there is no need to visit Australia.

Market Intelligence

A traditional and fierce competitor, Tahiti is not faring as well as in the past but it could still erode market share to Australia. South America has made a formidable comeback, and a number of charter flights to Brazil’s north east coast cater to the “beach only” market, which seems to have “moved south” of the traditional all-time favourites such as the Latin

Caribbean Islands. The USA is the “success story” of the year due to the weak dollar.

Market leaders still are Kuoni, Hotelplan, Viaggidea, Dimensione Triade (Australia For You), Ventaglio I Viaggi, Southside, GoAustralia, and Australia World.

AOT (Kuoni and Hotelplan) and Finesse are the top inbounders, with ATS (Dimensione Triade), Pan Pacific, AU One and QF Holidays following.

Brochure inclusion of new product needs to be leveraged both with inbound and wholesalers.

Key Highlights in 2008

- Explorer's Way multimedia campaign (print, outdoor and online) with Tourism NT targeting the experience seeker (Plein Air media partner).
- An online competition with Singapore Airlines on Virgilio and a 6-page article in AirOne in-flight magazine. Distribution of joint SATC/SIA flyer to promote the online competition.
- Distribution of Plein Air magazine's supplement dedicated to Explorer's Way.
- For the honeymoon segment, advertorial in Conde Nast Traveller magazine with wholesalers packages and participation at a honeymoon consumer show, a Spanish honeymoon brochure, presence at Bari Fiera del Levante (through DTED), and promotion of AIS.com Australian Team in Italy in printed and online media.

Major Activites in 2008/09

- Leveraging “Australia” the movie: working with wholesaler partners to highlight the Outback romance element including a possible competition in 3 Italian cities.
- Multimedia (print, online, trade tactical) campaign on Explorer's Way with TNT.
- Focus on upmarket SA at trade and PR level.
- Participation at a honeymoon consumer show and in Conde Nast publication's multi-state campaign (DAP Activity).
- New media plan focusing on “Australia” the movie itineraries, and upmarket resorts (including Southern Ocean Lodge and Rawnsley Park).

Active Inbound Companies in the Region

- Finesse
- AOT
- ATS Pacific

Airlines Flying to South Australia

Singapore Airlines, Malaysia and Cathay Pacific (code sharing with QF) all have direct flights out of Rome (SQ daily also ex Milan). Qantas is off line as it flies via Frankfurt or London. The QF connections to Adelaide are poor out of Singapore with only a few direct flights. Most Qantas travellers have to travel via Melbourne or Perth.

Useful Tips – Working in the Italian Market

Marketing and Selling Your Product

- Best time to visit Italy for sales calls would be from late September to late November to introduce new products, and March or April for training.
- Attend ATE as this is your best chance of making an initial contact.
- Don't forget the media, they can play a very important role in promoting your product.
- When speaking to your contact/client keep in mind that you are speaking a foreign language – so speak slowly and don't use jargon.

Getting Your Product Into Brochures

- Think of special honeymoon offers. This is a booming area for packages (e.g. ten percent discount on the tour for the bride, an offer of a free spa treatment in a hotel for the bride, free breakfasts etc).
- Do call on the relevant inbound tour operator to supply them with your product information.
- Consumer laws are very strict in Europe so please remember this when you prepare product descriptions for wholesalers. What you deliver has to match what was offered. If you make changes to product that has already been brochured, let the wholesaler and their inbound tour operator know as soon as possible.

Cultural Differences

- Italians like to dine late (e.g. 8:30pm) so do take this into account. They like to spend time at the dinner table and will probably spend more than other nationalities on food and wine.
- Don't be concerned if an Italian is late for a meeting. They are not being rude as this is what they would do at home. Remember that they come from crowded cities where it is difficult to be on time due to the traffic.