

ITALY

KEY CONTACTS

South Australian Tourism Commission

Name Giancarlo Truffa
Title Marketing Manager Italy
Address 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
Address Via Girolamo Boccoardo 27, Rome, Italy
Telephone +39 06 3340086
Mobile +39 3358274781
Email daniela@quattropiu.it

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

Tourism Australia Contacts

Name Matteo Prato
Title Country manager
Address c/o Adam, via Marconi,33. 10125 Torino
Telephone +39 011 6687550
Email matteo.p@adam.it

GENERAL MARKET OVERVIEW

- Population – 58,153,000
- Annual Leave Entitlement – Normally 25 working days
- Internet access – 66.6%
- Visitors to Australia - 56,600 in the 12 months to June 2009. This represents a 12% increase on the 12 months to June 2008. (Source: ABS, Overseas Arrivals and Departures , 3401.0, TRA)
- Visitors to SA – 12,100 in the 12 months to June 2009. This represents a 20% increase on the 12 months to June 2008. (Source: International Visitor Survey (SA estimates, persons 15+ years))

MARKET PROFILE

The main target segment is “Experience Seekers” with Honeymooners being the most important and largest market sub-segment by far. The youth market (not necessarily backpackers or WHV) is still not predominant but growing slowly. A large percentage of holiday visitors are FIT’s, however 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 should 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 12% (about 57,000 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 5,500 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 its 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 Italy and the rest of Europe, thus there would be no need to visit Australia. Kangaroo Island is definitely one of Australia's biggest icons and increasingly popular with consumer and media. Kangaroo Island is also easy to sell by trade as a result of its great access and the variety of product. KI also has the “best” name, marketing-wise for an Australian destination.

MARKET INTELLIGENCE

The results of the GFC have been felt quite severely for the past six months with many big companies reducing working hours (it's virtually impossible to lay off anyone in Italy) and taking actions against slow bookings, specially for the US (down some 15%) and the Caribbean (-10%). Australia has not shown much of a downturn (marginally 2-3%) thanks to the very resilient honeymoon market.

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

Inbounders: AOT (Kuoni and Hotelplan), and Finesse (virtually everybody else) are the top ones; then ATS (Dimensione Triade), Pan Pacific, Australia One, QF Holidays

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

KEY HIGHLIGHTS OF MARKETING ACTIVITIES IN 2008/09

- "Australia" the movie activity included
 - Print ad in Gente Viaggi, a leading travel magazine with call to action to sa.com featuring "Australia" related offers
 - Consumer event with Cividin Tour Operator in Trieste and subsequent on-line competition to win a trip to SA
 - Southside flyer highlighting the outback and the Flinders Ranges
- Participation at consumer (Honeymoon) shows and at BIT (trade show)
- Road show with SA leading operators to Milan and Rome
- Presence at Fiera del Levante in Bari (through DTED)
- Ongoing media and trade famils to SA

MAJOR PLANS FOR 2009/10

- 24-page print supplement on KI to be distributed with Plein Air Magazine (ideal for independent travellers and experience seekers) in February 2010
- Focus on upmarket SA products at trade and PR level
- Participation at Honeymoon Consumer Show as a DAP activity

ACTIVE INBOUND COMPANIES IN THE REGION

- Finesse
- AOT
- ATS Pacific
- Australia One

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 come in via Melbourne or Perth.

USEFUL TIPS FOR WORKING IN THE ITALIAN MARKET

Marketing and Selling Your Product

Best time to come across 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, as 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 market for packages (eg. 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. 8:30 pm) 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.