

ITALY

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GENERAL MARKET OVERVIEW

- **Population:** 58,153,000
- **Annual Leave Entitlement:** Normally 25 working days
- **Internet access:** 79.2%
- **Visitors to Australia:** 54,000 in the 12 months ending June 2010. This represents a 5% decrease on the 12 months to June 2009.
- **Visitors to SA:** 111,400 in the 12 months to June 2010. This represents a 6% decrease on the 12 months to June 2009. (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

Despite a small decrease in visitor numbers, 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 consumers 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

Australia as a tourist destination has not shown much weakness during the GFC and has remained pretty resilient. Most wholesalers are happy with the results for 2010 and the "per file" value has increased approximately 6% due to a) the strengthening of the AUD b) the fact that anybody buying a "package" to Australia (thus going through the traditional distribution system) is keen to buy as much land content as possible. Again, this last cause is due to the fact that Australia is perceived as a dream destination so "the more in it the better".

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

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

ACTIVITIES IN 2009-2010

- Consumer and Trade shows (Honeymoon Shows, Fiera del Levante, BIT)
- ASP Famil, pre-ATE Famils, Media Famils including Cattle Drive
- DAP (Tourism Australia and other STO Partners) Activity: Training Roadshow and printing of a motivational booklet ("Love") highlighting romantic spots/experiences in Australia, aimed at the Honeymoon Market Segment, distributed at Honeymoon Consumer Shows and through retail stores
- KI Print Supplement. Print of 32 page motivational brochure to highlight the quintessential icon of Australia. Circulated in 90,000 copies through Magazine Plein Air, aimed at independent travellers in January 2010. Other copies distributed through trade partners, and at honeymoon and trade shows.

KEY HIGHLIGHTS OF MARKETING ACTIVITIES IN 2010/11

- Participation in consumer Honeymoon shows and at TTG Incontri and BIT (trade show)
- Presence at Fiera del Levante in Bari in conjunction with DTED
- Ongoing media and trade (ASP and Product Managers) famils to SA
- Latitudes on-line campaign: Media Partner activity including ongoing articles, product updates, videos and "news" about SA in a specially dedicated section of their website
- Leveraging off TA's "there's nothing like..." campaign by placing Kangaroo Island again in the spotlight by using "there's nothing like KI etc..."
- SQ campaign: consumer activity aimed at increasing awareness of SQ daily flights from Italy into SA and unique experiences available in SA.
- Southside campaign including an SA micro-site on their Australia website, with specific packages, flyer featuring SA self drive itineraries, honeymoon consumer show attendance, on-line banners advertising Southside SA programme on trade media
- Plein Air reprint of the 32-page motivational brochure and advertising and advertorial in Plein Air Magazine focus on up-market SA products at trade and PR level

ACTIVE INBOUND COMPANIES IN THE REGION

- AOT (Kuoni and Hotelplan)
- Finesse
- ATS (Dimensione Triade)
- Pan Pacific
- Australia One
- QF Holidays

AIRLINES FLYING TO SOUTH AUSTRALIA

Singapore Airlines, Malaysia and Cathay Pacific (code sharing with QF) all have direct flights out of Italy's major hubs, Milan and Rome. 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. 10% 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.