

# Italy International Market Factsheet

## Marketing Overview

The Italian visitor market is an established, stable visitor market for the Northern Territory. The *Northern Territory's Tourism Industry Strategy 2030* sets out high level targets based on the International Visitor Survey results and the 2030 target for the Italian market is 20,000 holiday visitors. This equates to a 4.4% compound average annual growth rate.

In 2019 the Northern Territory held a 16.8% share of the Italian inbound visitor market to Australia. According to Tourism Australia, there are 600,000 Italian High Value Travellers considering to visit Australia (11% of long haul market); this target normally spends 2-3 times more than the average traveller; 69% of these travellers are independent travellers.

The Italian market is strategically important to the Northern Territory due to the high dispersal rate of visitors and their relatively high spend per trip, particularly from the honeymoon segment.

Online plays a key role in Italy for destination selection and planning. Consumers are increasingly using online channels for booking. However, traditional operators remain an important booking channel for the leisure market and probably the main one for special interest travel such as the honeymoon segment.

## Target Market Profile

1. The primary target market for Italy are premium high value travellers, including honeymooners.
2. Independent travellers, including Italian youth aged 18-29.

ALL PURPOSE	ITALY	
	2019	YOY CHANGE
VISITORS	12,000	-5.7%
NIGHTS	53,000	-20%
EXPENDITURE	\$11.7M	-29%
ALOS* (nights)	4.3	-0.8
ASPT (average spend per trip)	\$963	-\$316
VISITOR MARKET SHARE	16.8%	-0.4pp

\*average length of stay

## Strategic Opportunities

Cooperative programs with trade partners to increase market share of AU holidays

Digital marketing campaigns to increase contact frequency and enhance conversion (OTA\*\* partnerships)

Travel agents training to increase NT product knowledge

Public relation programs to highlight regional diversity and increase dispersal

Brand partnerships

\*\*Online Travel Agent

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## Market Profile

### ANNUAL LEAVE



**4-5 WEEKS**

### TARGET REGIONS



- Lombardy
- Lazio
- Veneto

### SPECIAL INTERESTS



- Nature and wildlife
- Aboriginal culture
- Adventure and outback experiences
- Experiential luxury
- Icons

### SEASONALITY



## TRAVEL PARTY

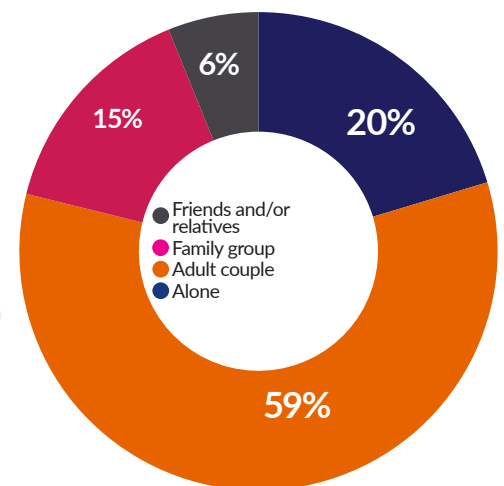
**48%**

of Italian all-purpose visitors were Free Independent Travellers (FIT)

**79%**  
**55%**

of Italian visitors were travelling alone or as an adult couple

of the visitor nights were in hotel/ motel style accommodation while **16%** were in caravan parks and campgrounds



## AVIATION



## INTERNATIONAL AIRLINE ACCESS



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## CHEAPEST RETURN AIRFARES\*

MILAN - DARWIN (2 STOPS)

**\$1,988**

\* Expedia - depart 1/12/19 and return 1/01/20

MILAN - DARWIN (2 STOPS)

**\$1,398**

\* Expedia - depart 1/05/20 and return 1/06/20

## Distribution

- Viaggidea
- Naar
- Go Australia
- Australian Travel
- Alidays Pm
- Amo il Mondo
- Alidays
- Amo il Mondo

## Major Online Travel Agents

 Booking.com

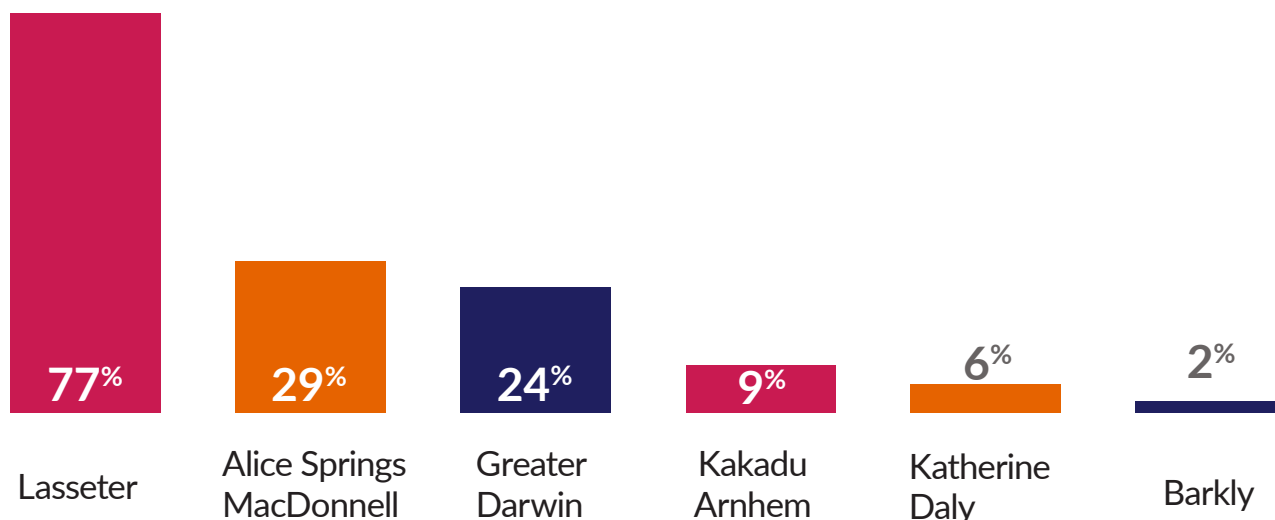
 eDreams

 Expedia<sup>®</sup>

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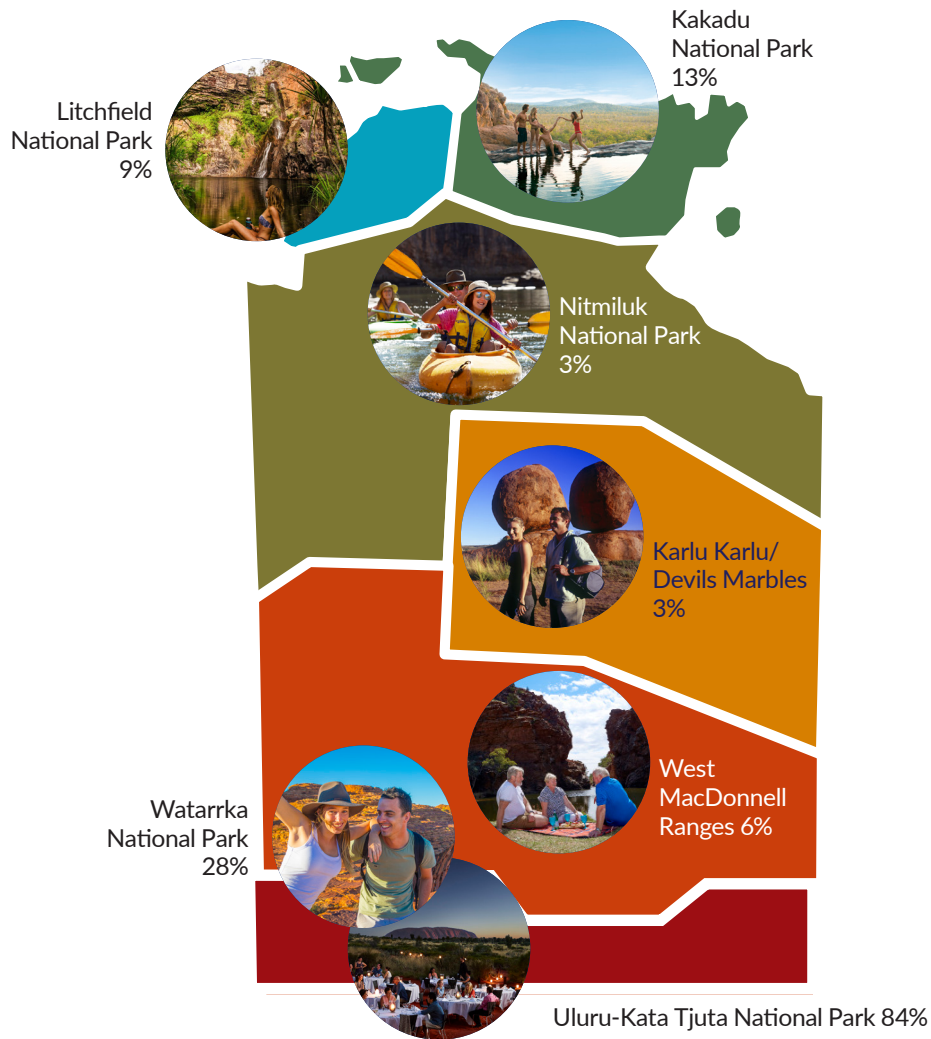
 tripadvisor<sup>®</sup>

## Overnight visitors to NT regions



# Italy International Market Factsheet

## Visitors to NT destinations - overnight and day trips



Publication Date: November 2020

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