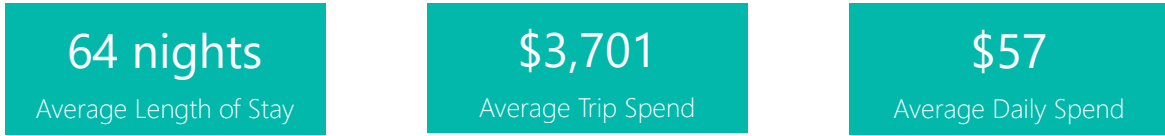


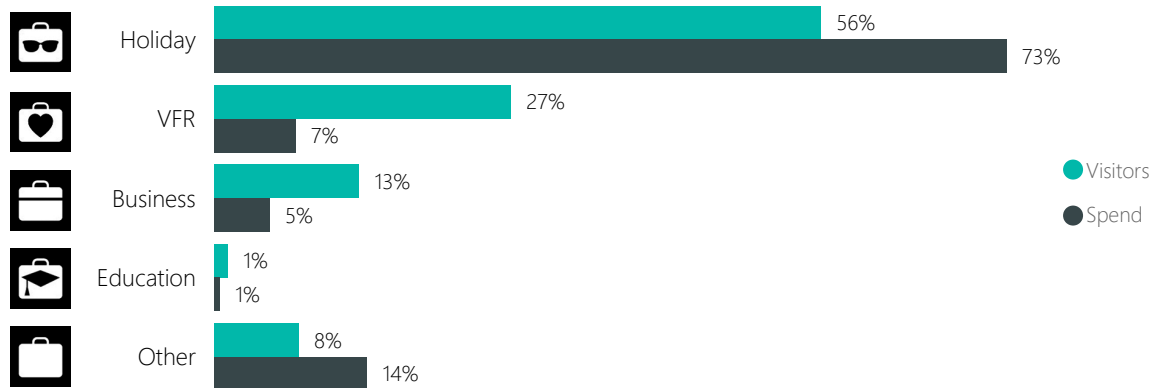
ITALY | MARKET PROFILE 2023

MARKET OVERVIEW

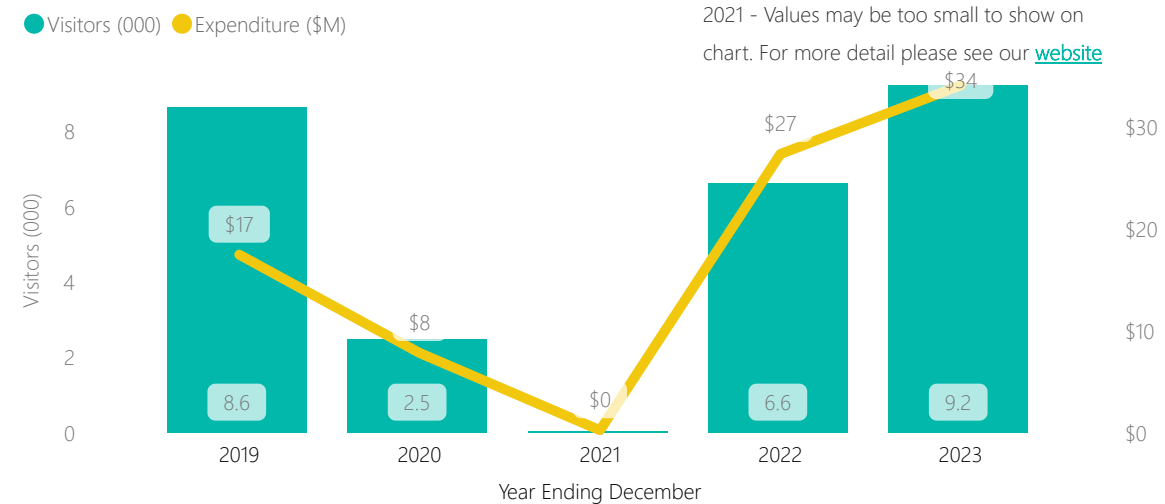
Leisure Visitation to WA¹



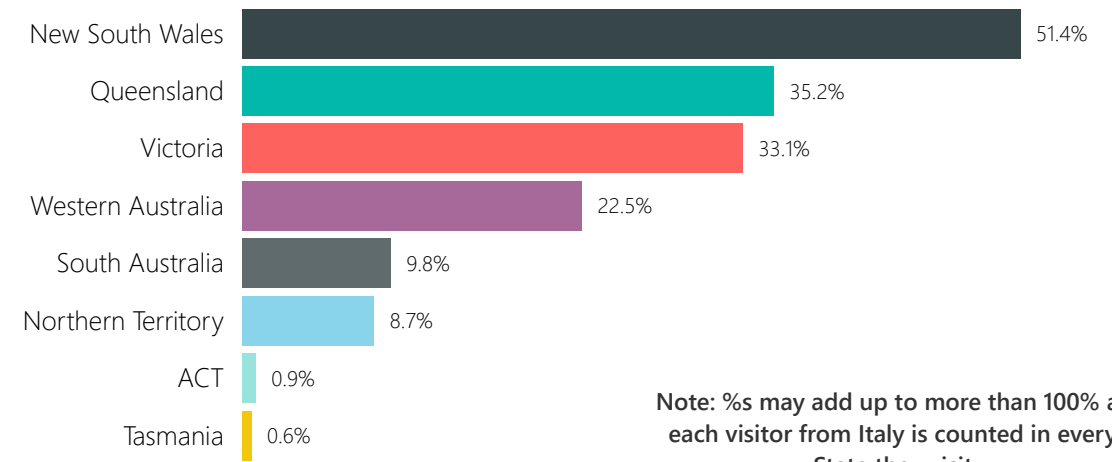
International Visitors and Spend by Purpose (WA)¹



Leisure Visitation and Spend to WA²

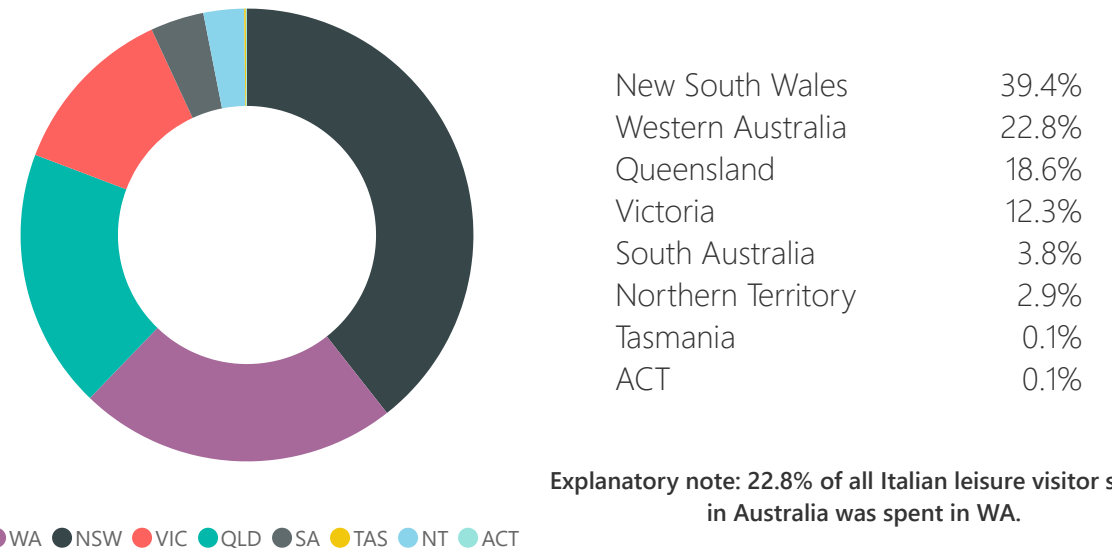


Market Share of International Leisure Visitors to Australia¹



Note: %s may add up to more than 100% as each visitor from Italy is counted in every State they visit.

Market Share of International Leisure Visitor Spend in Australia¹

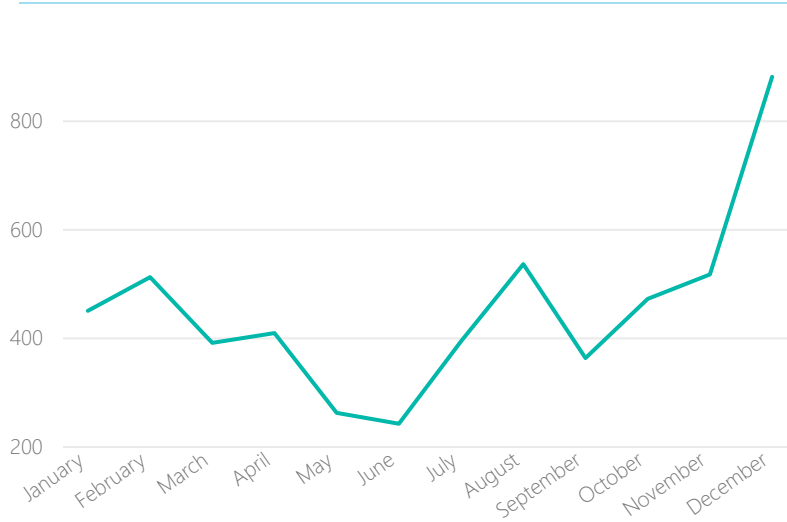


Explanatory note: 22.8% of all Italian leisure visitor spend in Australia was spent in WA.

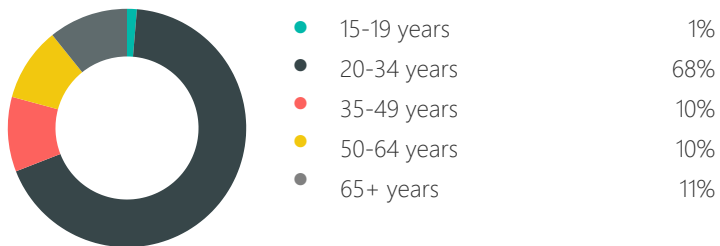
ITALY | MARKET PROFILE

TRIP PROFILE (TWO YEAR AVERAGE - 2019/23)

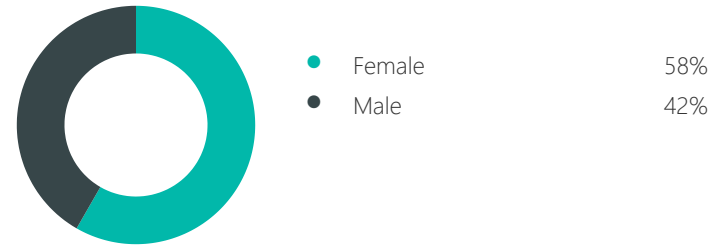
Seasonality - Short-term Leisure Visitor Arrivals to WA⁴



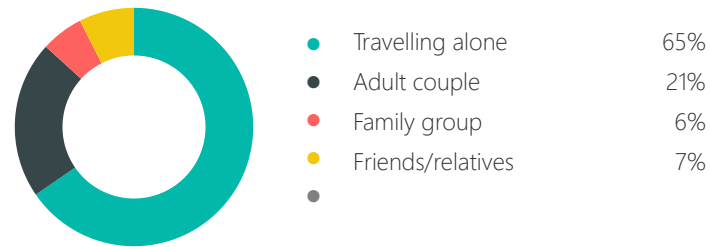
Age³



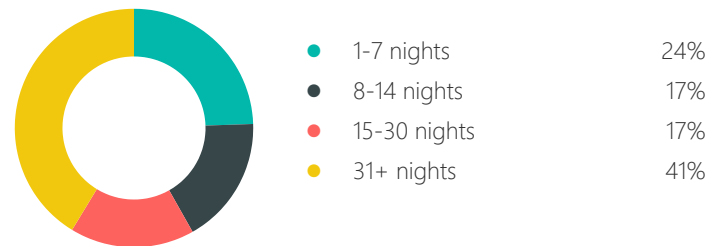
Gender³



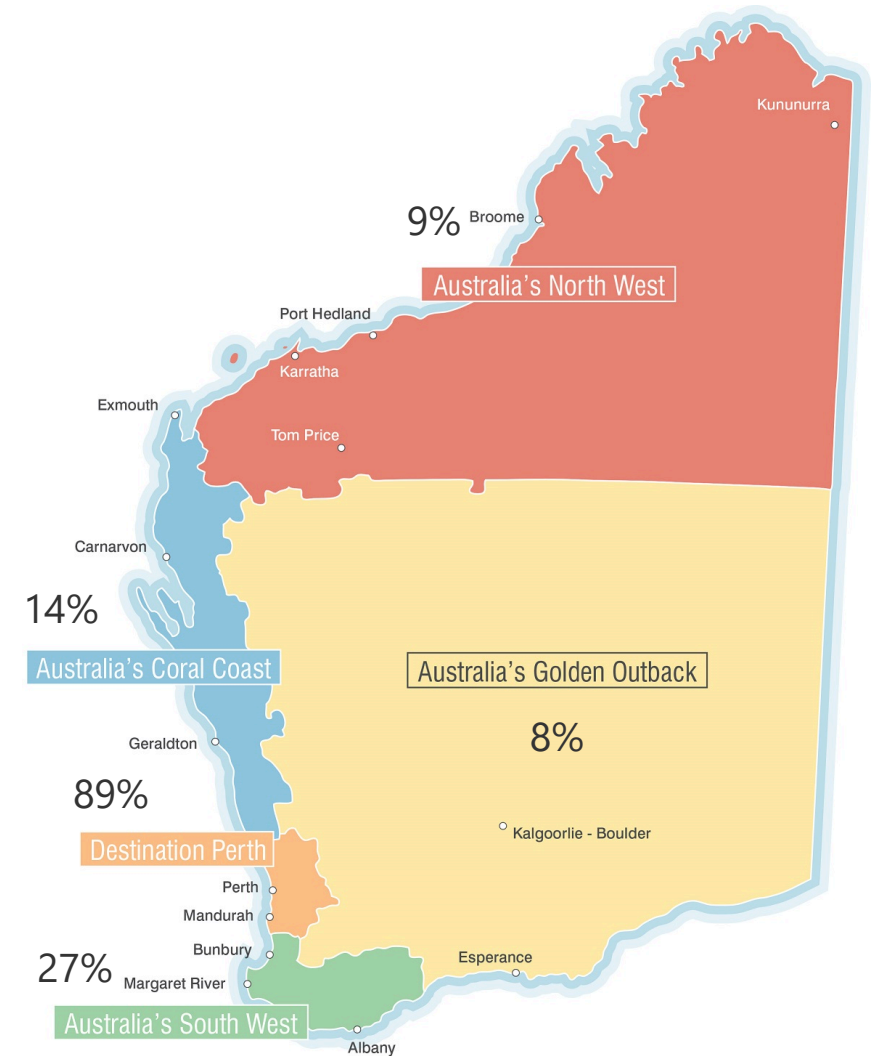
Travel Party³



Length of Trip³



Regional Dispersal³



ITALY | MARKET PROFILE

TRIP PROFILE (TWO YEAR AVERAGE - 2019/23)

Top 5 Activities for Leisure Visitors to WA³

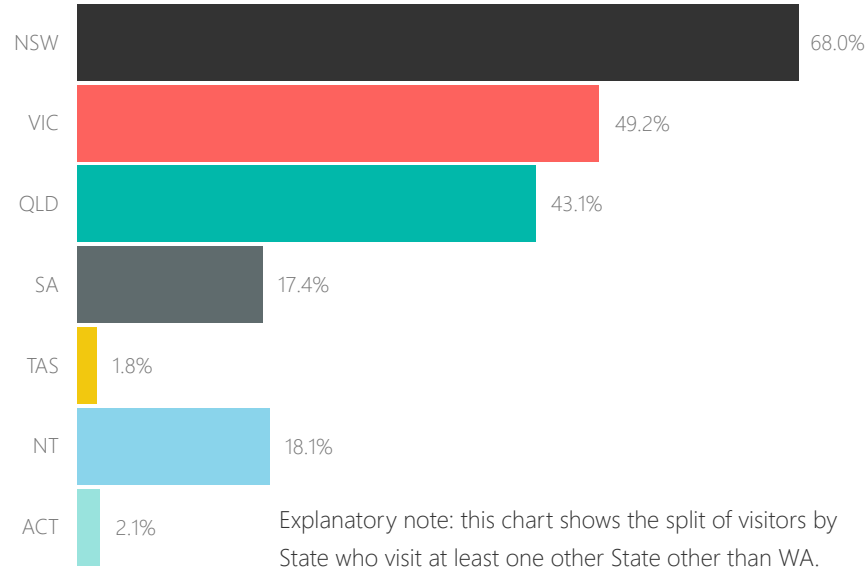
- | | | |
|---|--|-----|
| ① | Eat out / dine at a restaurant and/or cafe | 99% |
| ② | Go shopping for pleasure | 82% |
| ③ | Go to the beach | 96% |
| ④ | Sightseeing/looking around | 84% |
| ⑤ | Visit national parks / state parks | 83% |

NOTE: Activity may have taken in place in WA or elsewhere in Australia during the trip.

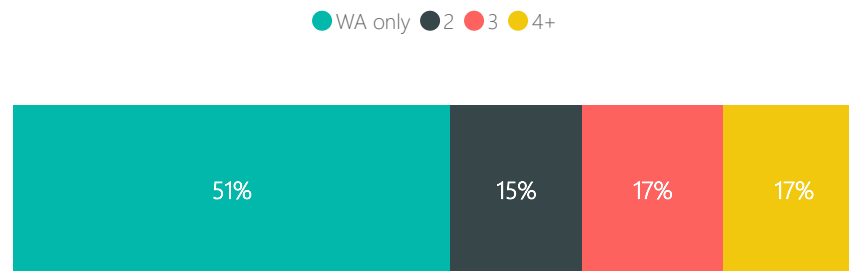
Top 3 Accommodation Choices for Leisure Visitors to WA³

- | | | |
|---|--------------------------------|-----|
| ① | Other commercial accommodation | 54% |
| ② | Other Private Accommodation | 49% |
| ③ | Friends or relatives property | 39% |

Other States Visited³



Number of States Visited³



Group Tour v Free Independent Travellers (FIT)³

97% of Italian leisure visitors to WA are free independent travellers. Equally, 96% of Italian leisure visitors to the rest of Australia are free independent travellers, so only a small proportion are likely to be on a group tour.

Repeat Visitors³

39% of Italian leisure visitors to WA are on a return visit to Australia

Travel Packages³

5% of Italian leisure visitors to WA arrived on a travel package

ITALY | MARKET PROFILE

IMPORTANCE FACTORS, DESTINATION CONSIDERATIONS AND ASSOCIATIONS

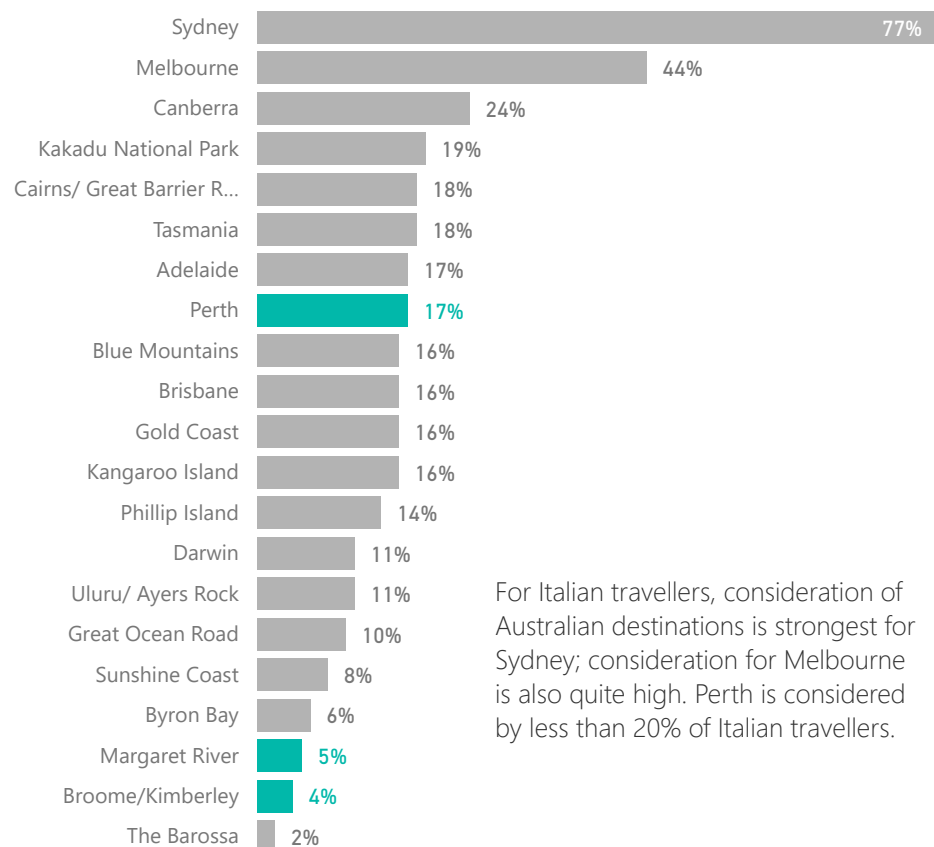
Out of region (OOR) travellers



Travelled outside of their region within the last 5 years for leisure and/or intend to travel outside of their region for leisure within the next 2 years

Consideration of Australian Destinations ⁵

(those considering a trip to Australia in the next 4 years)



For Italian travellers, consideration of Australian destinations is strongest for Sydney; consideration for Melbourne is also quite high. Perth is considered by less than 20% of Italian travellers.

Which factors are most important when choosing a destination ⁵

- ① Value for money 49%
- ② Natural wonders to explore e.g. world heritage sites 36%
- ③ Beautiful natural environments e.g. mountains, rivers, forests 35%
- ④ A safe and secure destination 30%
- ⑤ World class beaches, coastlines, and marine wildlife 30%
- ⑥ Appealing climate or weather 28%

Italian travellers state that they are looking for value for money and beautiful natural environments to explore, with safety and security lower down the list than the global average.

What OOR travellers associate with destinations ⁵

	Sydney	Melbourne	Brisbane	Perth	Margaret River	Broome/Kimberley region
A family friendly destination	47%	34%	10%	13%	7%	4%
A vibrant city lifestyle	57%	41%	9%	12%	3%	3%
Beautiful natural environments	15%	14%	7%	10%	12%	8%
Different and interesting local wildlife	17%	13%	7%	7%	8%	7%
Good food, wine/beverages	35%	29%	8%	10%	4%	3%
Interesting events and festivals	44%	32%	8%	9%	5%	3%
Value for money	23%	19%	8%	10%	5%	4%

Italian travellers strongly associate Sydney with a vibrant city lifestyle and a family friendly destination, as well as interesting events/festivals. WA destinations do not have any strong associations due to low consideration by Italian travellers.

ITALY | MARKET PROFILE

NOTES & REFERENCES

Notes

'Leisure' comprises both holiday visitors and those visiting friends and relatives (VFR).

References

1. Tourism Research Australia – International Visitor Survey, YE Dec 23
2. Tourism Research Australia – International Visitor Survey, YE Dec 19/20/21/22/23
3. Tourism Research Australia – International Visitor Survey, 2 yr average, YE Dec 19/23 (2020-2022 cannot be used)
4. Australian Bureau of Statistics via Tourism Research Australia – Visitor Arrivals and Departures (State of Stay: WA, Category of Traveller: Short Term Visitor Arrival, Main purpose of trip: Leisure, Country (TRA benchmarks)), YE Dec 23
5. Tourism Australia – Consumer Demand Project, July - December 2023.

Published by Tourism WA, April 2024

For more information, please contact: research@westernaustralia.com