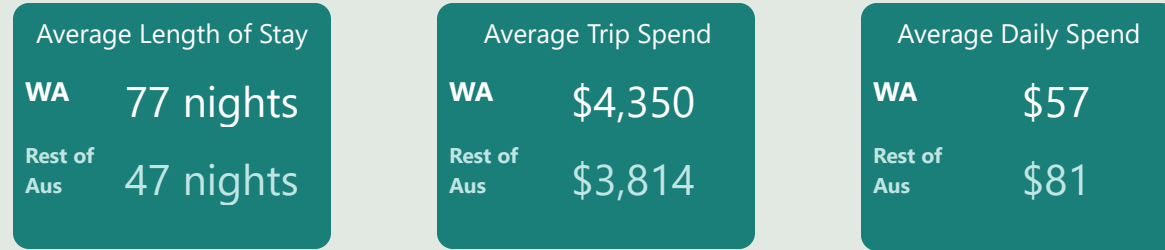


# ITALY | MARKET PROFILE 2025

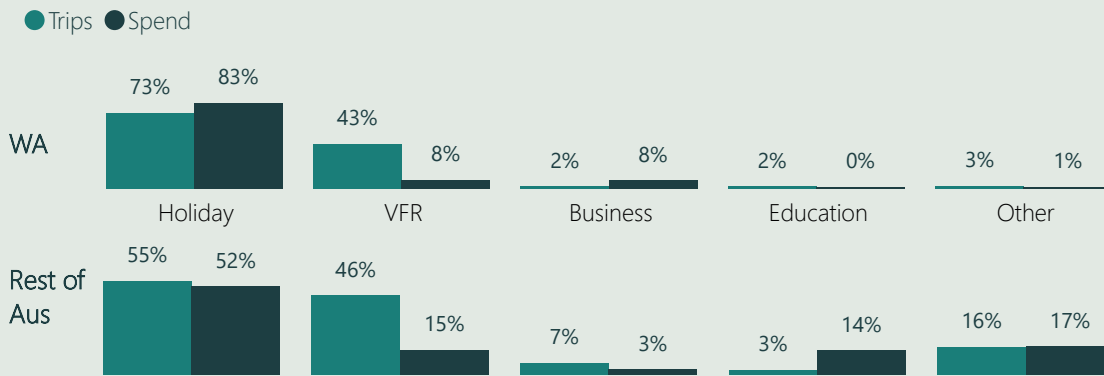
## MARKET OVERVIEW

### Leisure Visitation to WA (as compared to an average for other states/territories) <sup>1</sup>

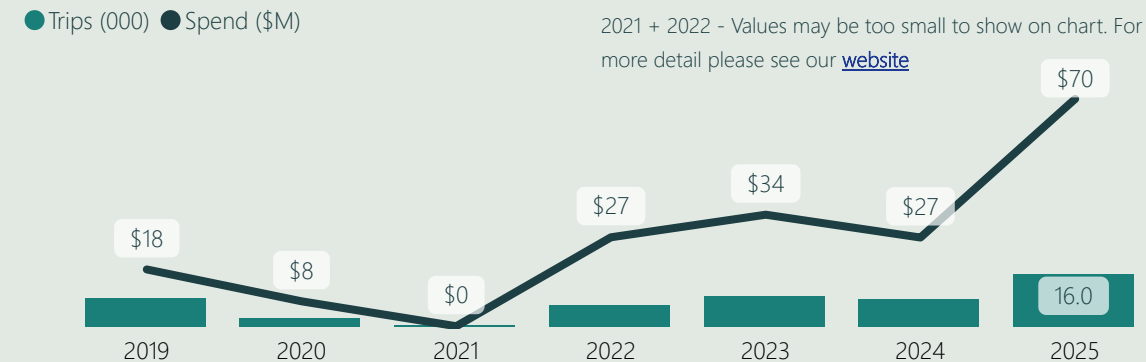
Rest of Aus is an average of all other states excluding WA



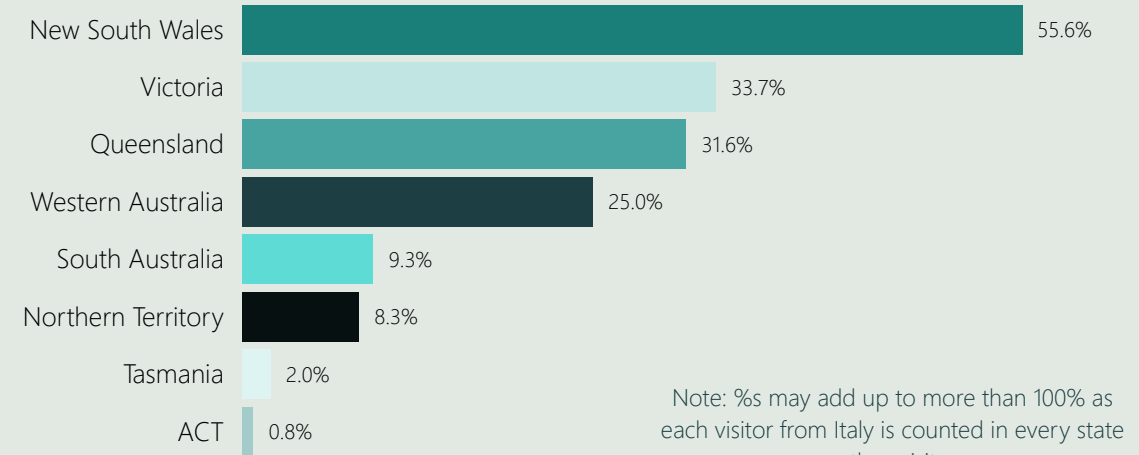
### Total Trips and Spend by Purpose <sup>1</sup>



### Leisure Visitation and Spend in WA <sup>2 \*</sup>

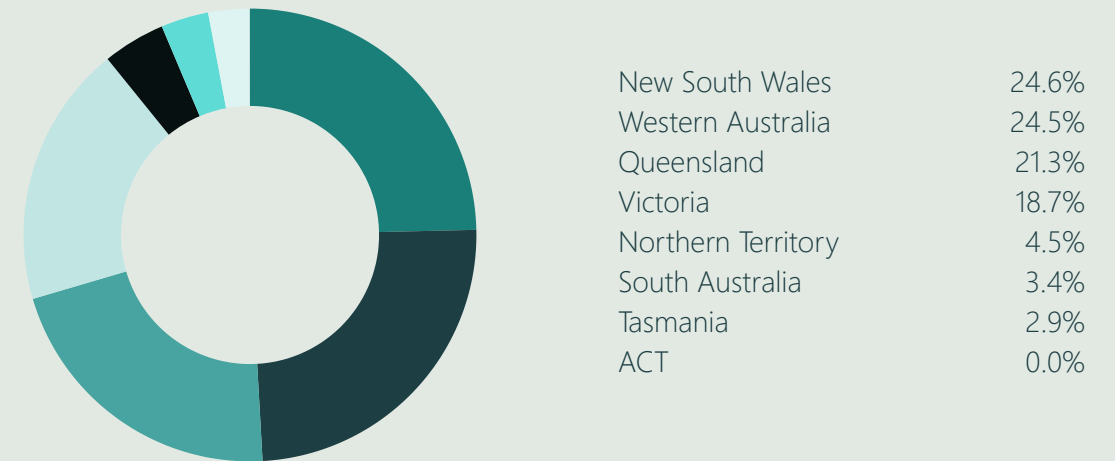


### Market Share of Leisure Trips to Australia <sup>1</sup>



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

### Market Share of Leisure Trip Spend in Australia <sup>1</sup>



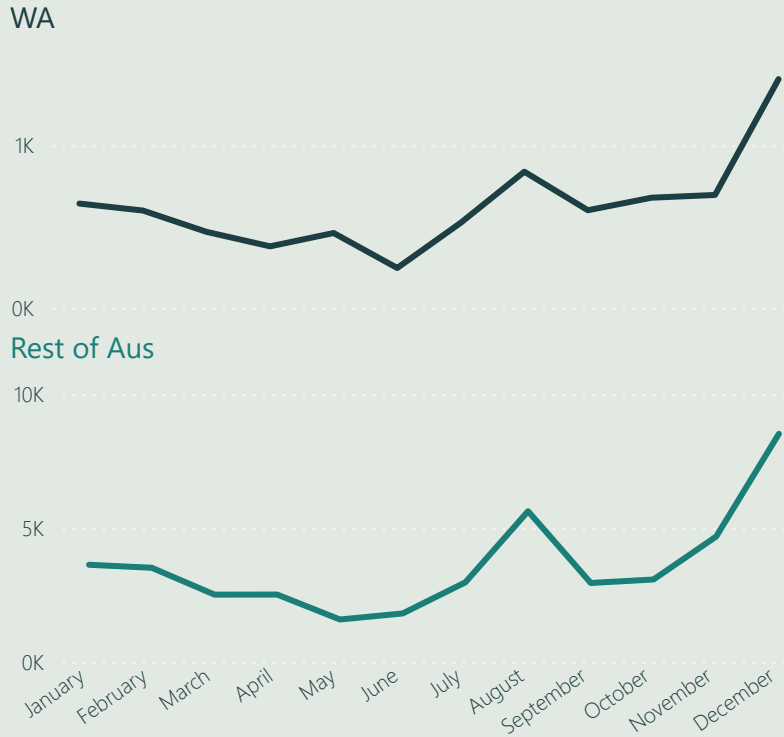
Explanatory note: 24.5% of all Italian leisure trip spend in Australia was spent in WA.

● WA ● NSW ● VIC ● QLD ● SA ● TAS ● NT ● ACT

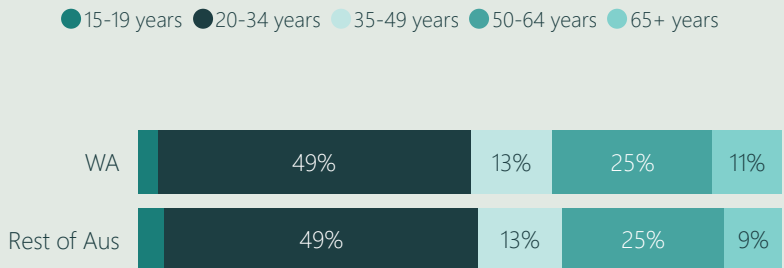
# ITALY | MARKET PROFILE

LEISURE TRIP PROFILE (TWO YEAR AVERAGE - 2024/25)

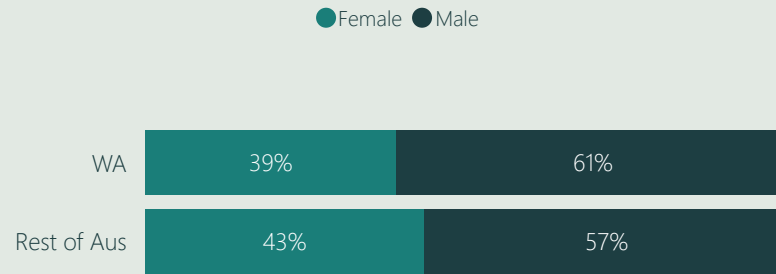
## Seasonality - Short-term Leisure Visitor Arrivals <sup>4</sup>



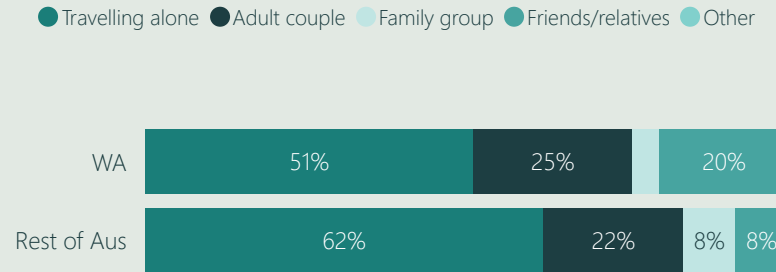
## Age <sup>3</sup>



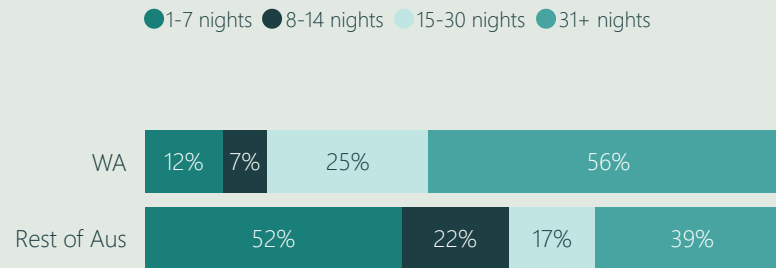
## Gender <sup>3</sup>



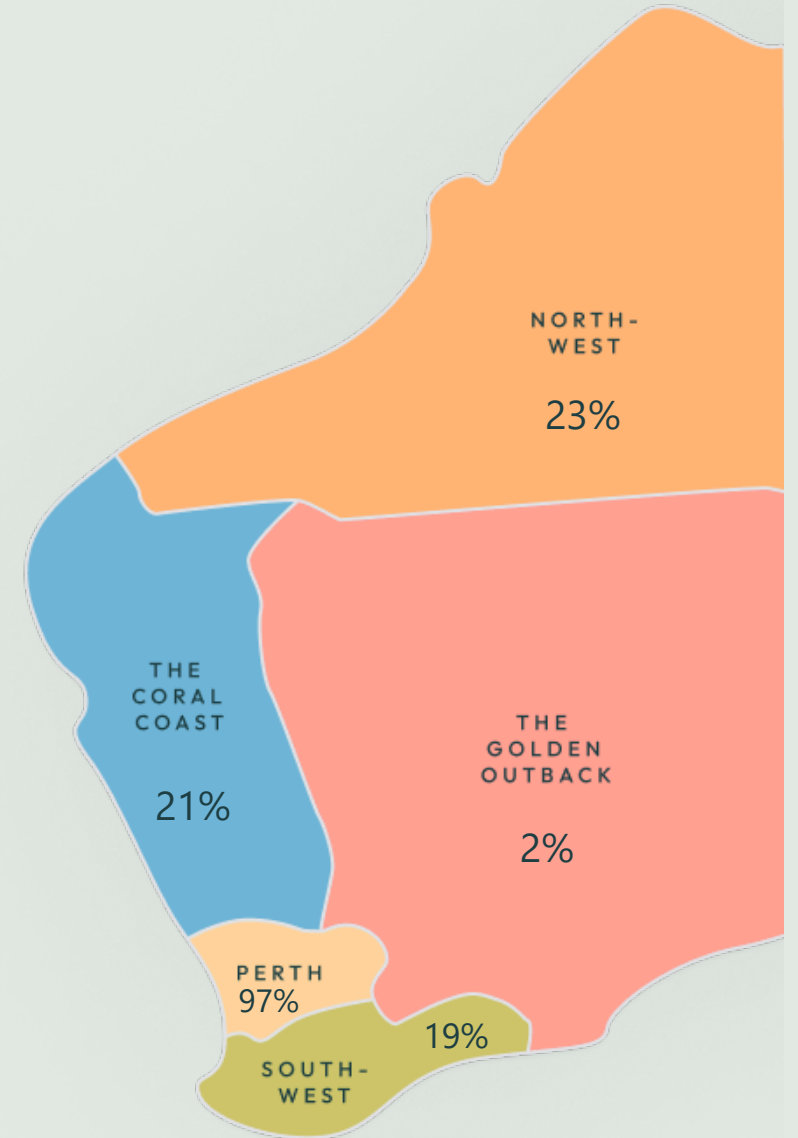
## Travel Party <sup>3</sup>



## Average Length of Stay in State <sup>3</sup>



## Regional Dispersal <sup>3</sup>



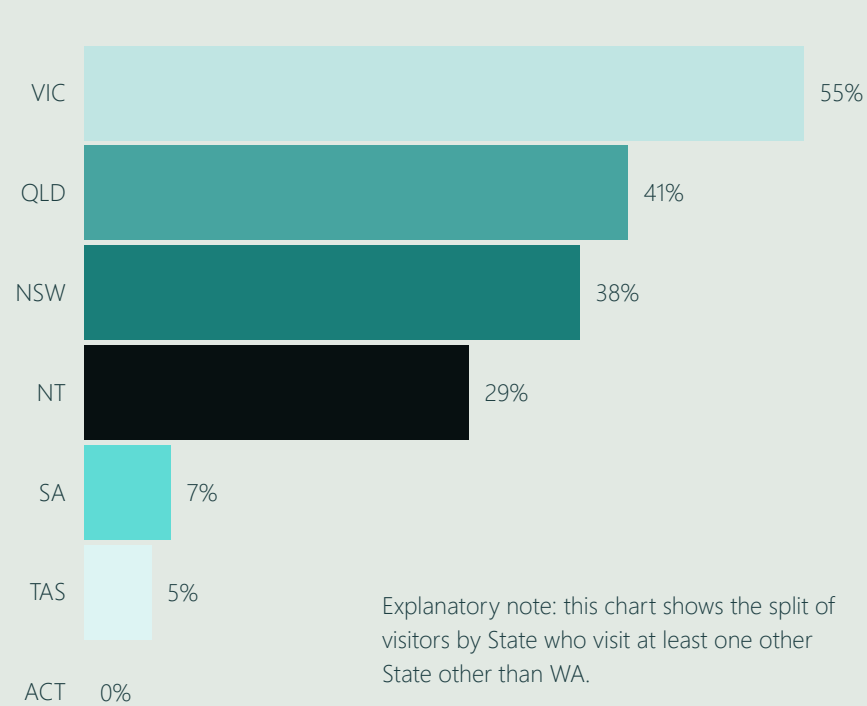
# ITALY | MARKET PROFILE

LEISURE TRIP PROFILE (TWO YEAR AVERAGE - 2024/25)

## Top 10 Activities for Leisure Visitors to WA <sup>3</sup>\*

	WA	Rest of Aus
	%	%
① Eat out / dine at a restaurant and/or cafe	97%	92%
② Go shopping for pleasure	86%	74%
③ Sightseeing/looking around	82%	85%
④ Go to the beach	81%	76%
⑤ Pubs, clubs, discos etc	76%	61%
⑥ Go to markets	68%	71%
⑦ Visit botanical or other public gardens	67%	61%
⑧ Visit national parks / state parks	66%	59%
⑨ Bushwalking / rainforest walks	54%	46%
⑩ Visit museums or art galleries	50%	46%

## Other States Visited <sup>3</sup>



## Group Tour v Free Independent Travellers (FIT) <sup>3</sup>

99% of Italian leisure visitors to WA are free independent travellers. 97% 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.

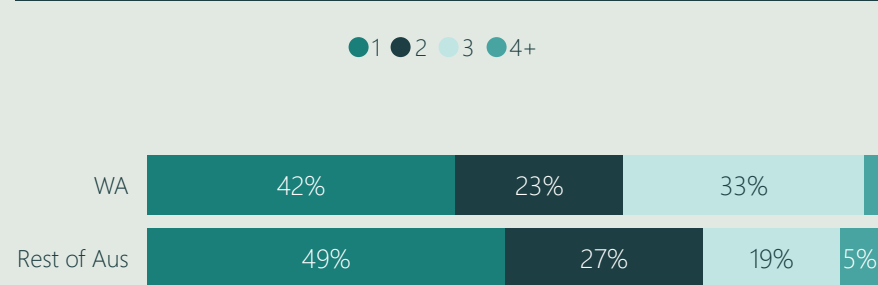
## Repeat Visitors <sup>3</sup>

68% of Italian leisure visitors to WA are on a return visit to Australia whilst the proportion for the rest of Australia is 51%.

## Top 3 Accommodation Choices for Leisure Visitors to WA <sup>3</sup>

	WA	Rest of Aus
	%	%
① Other commercial accommodation	53%	46%
② Hotel/resort/motel or motor Inn	46%	40%
③ Rented house/apartment/flat or unit	36%	24%

## Number of States Visited <sup>3</sup>



## Travel Packages <sup>3</sup>

8% of Italian leisure visitors to WA arrived on a travel package and the percentage this type of visitor makes up in the rest of Australia is 4%.

\*Note: Activity may have taken in place in WA or elsewhere in Australia during the trip.

# ITALY | MARKET PROFILE

## IMPORTANCE FACTORS, DESTINATION CONSIDERATIONS AND ASSOCIATIONS

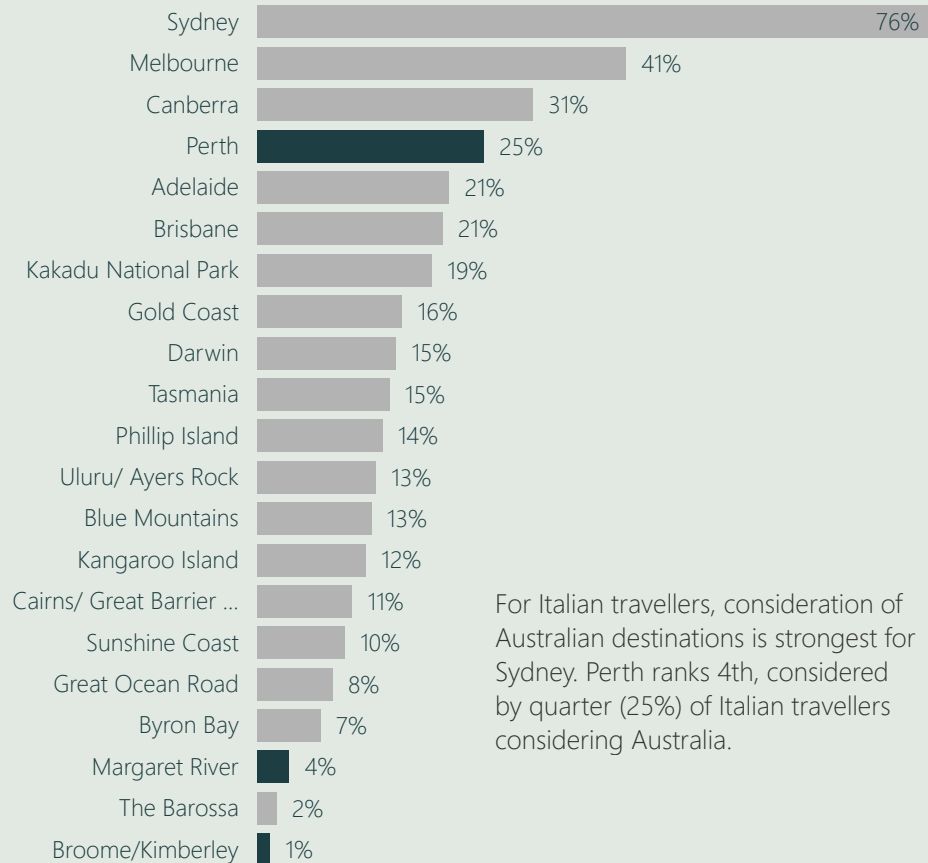
### Out of region (OOR) travellers



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 <sup>5</sup>

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



For Italian travellers, consideration of Australian destinations is strongest for Sydney. Perth ranks 4th, considered by quarter (25%) of Italian travellers considering Australia.

### Which factors are most important when choosing a destination <sup>5</sup>

- ① Easy to get to (time & effort)
- ② Appealing climate or weather
- ③ Value for money
- ④ Good accommodation options
- ⑤ A safe and secure destination
- ⑥ Natural wonders to explore

Italian travellers seek destinations that are easy to get to (time and effort) and have appealing weather/climate. They are more likely than other travellers to seek destinations that offer 'natural wonders', such as world heritage listed sites.

### What OOR travellers associate with destinations <sup>5</sup>

	Sydney	Melbourne	Brisbane	Perth	Margaret River	Broome/Kimberley region
A family friendly destination	45%	31%	10%	14%	6%	5%
A vibrant city lifestyle	55%	40%	11%	15%	4%	4%
Beautiful natural environments	19%	16%	8%	11%	13%	11%
Different and interesting local wildlife	18%	14%	8%	10%	8%	8%
Good food, wine/beverages, local cuisine and produce	36%	27%	11%	13%	5%	6%
Interesting events and festivals	45%	29%	7%	14%	5%	4%
Value for money	26%	20%	7%	12%	7%	7%

Italian travellers have strong perceptions of Sydney and Melbourne, but very few associations with Perth.

# ITALY | MARKET PROFILE

## DEFINITIONS & SOURCES

### Definitions

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

### Sources

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1. Tourism Research Australia – International Visitor Survey, YE Dec 25
2. Tourism Research Australia – International Visitor Survey, YE Dec 19/20/21/22/23/24/25. \* Note: 2023 & 24 have a low sample size and should be used with caution.
3. Tourism Research Australia – International Visitor Survey, 2 yr average, YE Dec 24/25
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 25
5. Tourism Australia – Consumer Demand Project, October - December 2025.

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