

# ITALY | MARKET PROFILE 2024

## MARKET OVERVIEW

### Leisure Visitation to WA <sup>1</sup>

56 nights

Average Length of Stay

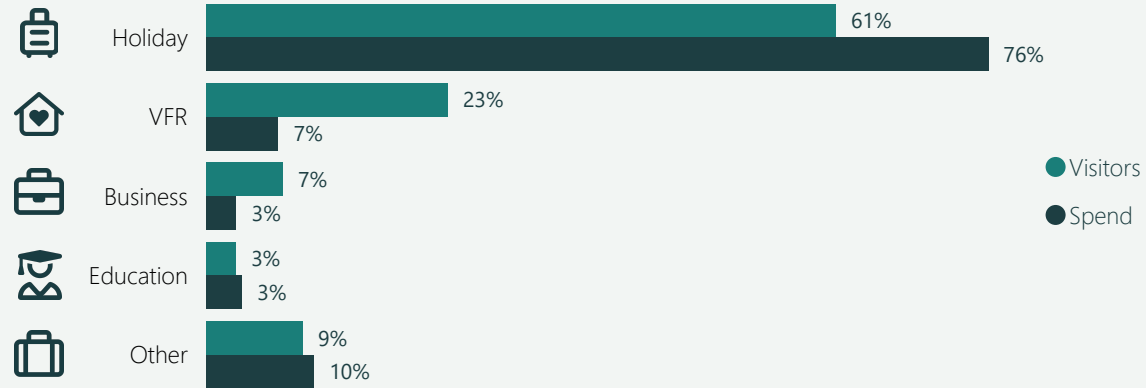
\$3,217

Average Trip Spend

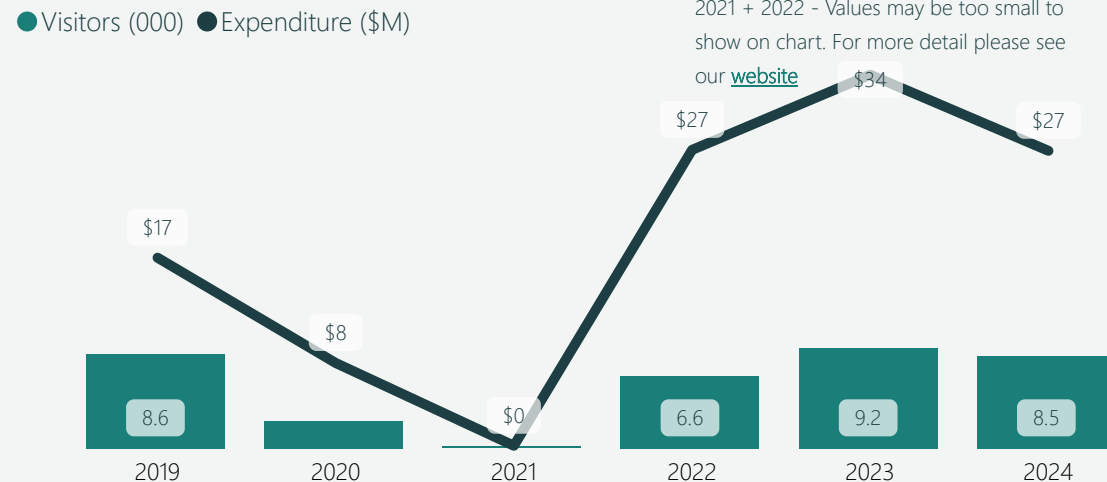
\$58

Average Daily Spend

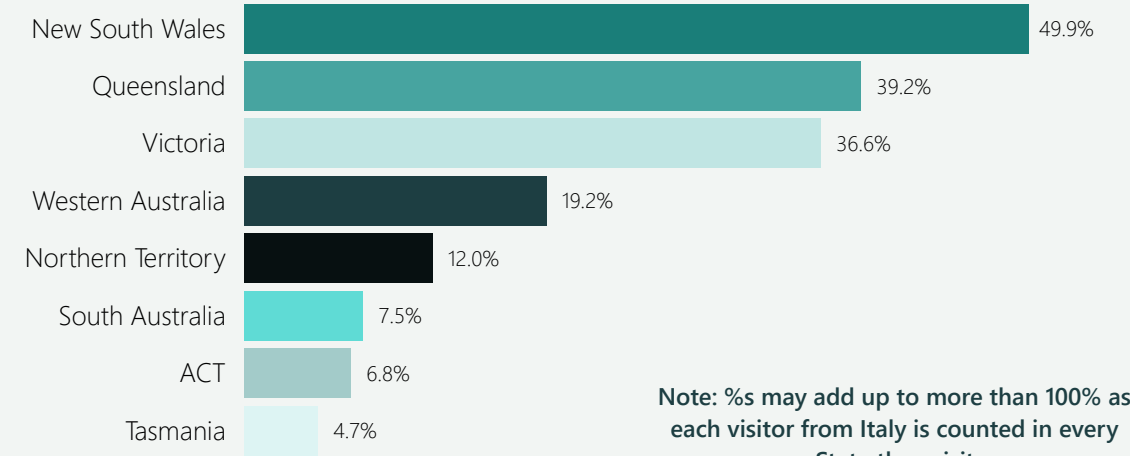
### International Visitors and Spend by Purpose (WA) <sup>3</sup>



### Leisure Visitation and Spend to WA <sup>2</sup>

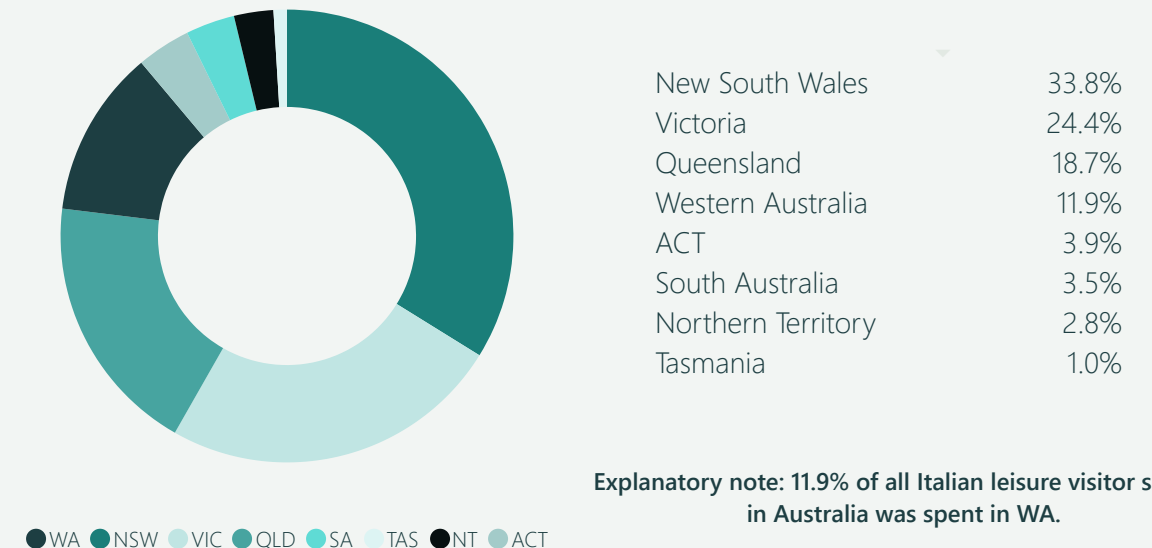


### Market Share of International Leisure Visitors to Australia <sup>1</sup>



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

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

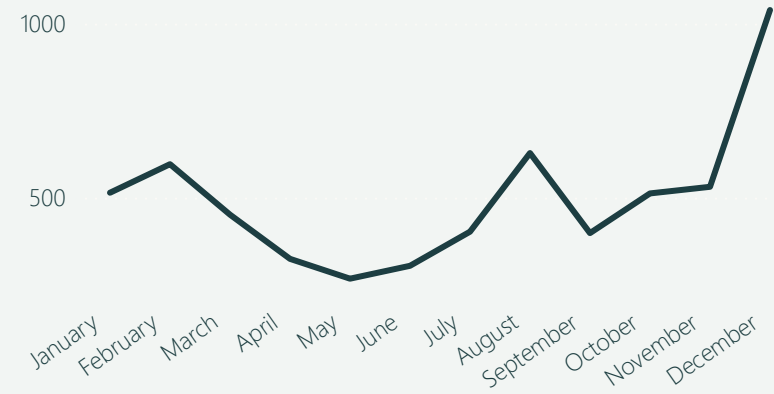


Explanatory note: 11.9% of all Italian leisure visitor spend in Australia was spent in WA.

# ITALY | MARKET PROFILE

TRIP PROFILE (TWO YEAR AVERAGE - 2023/24)

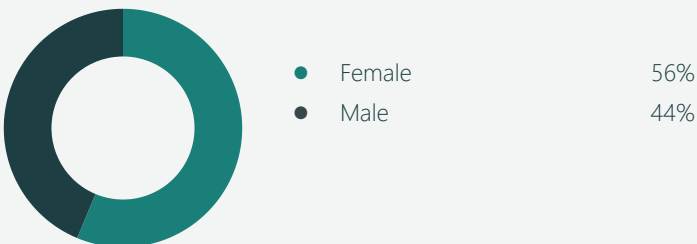
## Seasonality - Short-term Leisure Visitor Arrivals to WA <sup>4</sup>



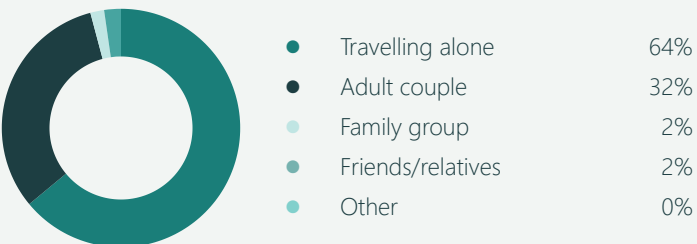
## Age <sup>3</sup>



## Gender <sup>3</sup>



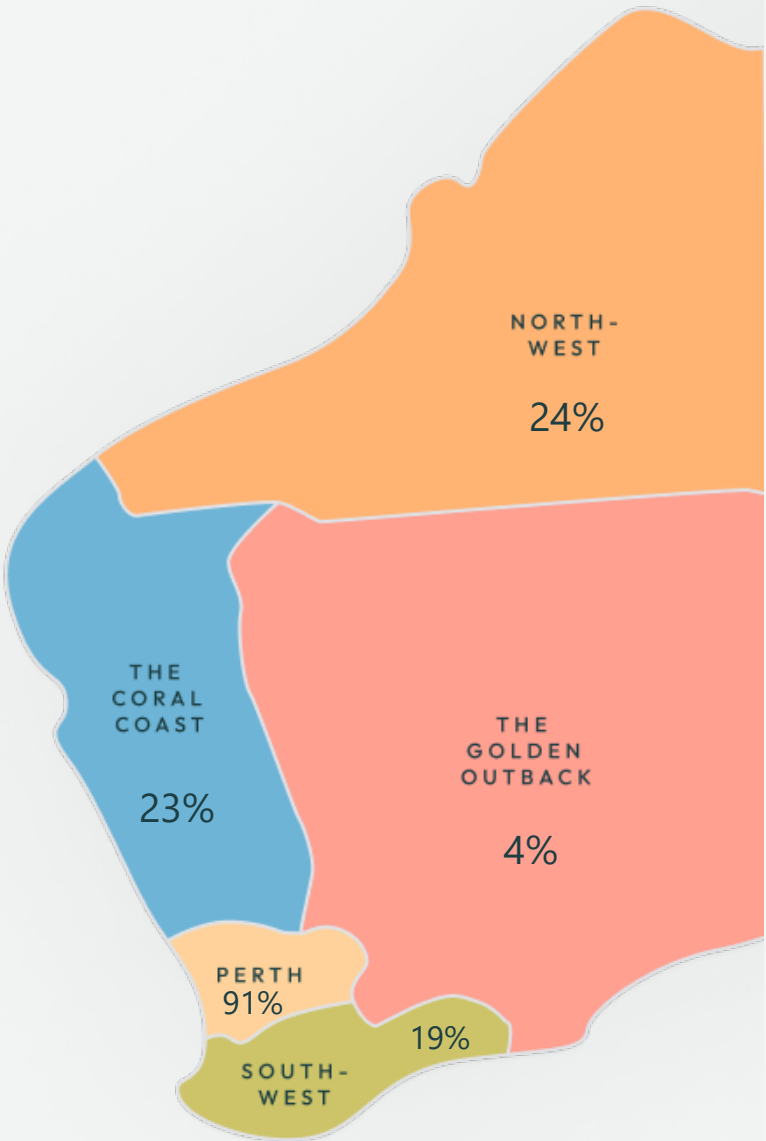
## Travel Party <sup>3</sup>



## Length of Trip <sup>3</sup>



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



# ITALY | MARKET PROFILE

TRIP PROFILE (TWO YEAR AVERAGE - 2023/24)

## Top 5 Activities for Leisure Visitors to WA <sup>3</sup>

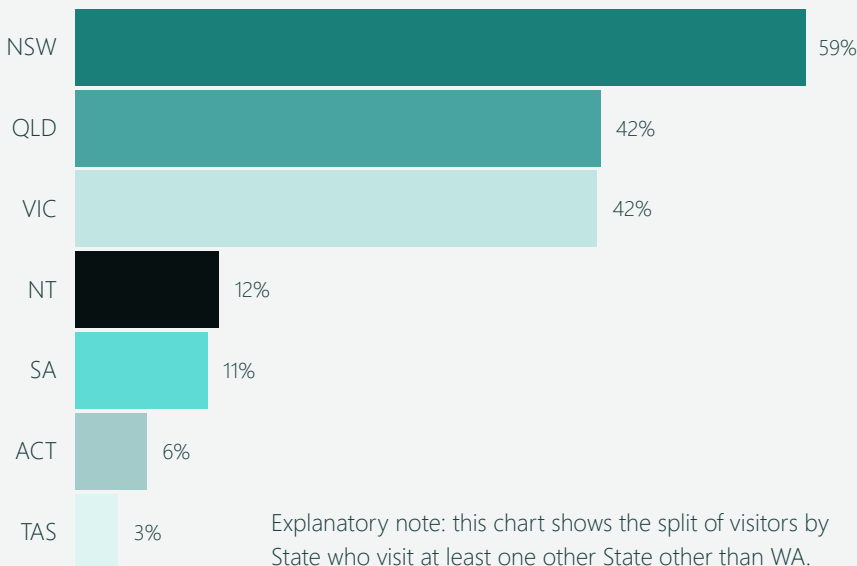
①	Eat out / dine at a restaurant and/or cafe	97%
②	Go to the beach	92%
③	Go shopping for pleasure	91%
④	Go to markets	79%
⑤	Sightseeing/looking around	78%

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

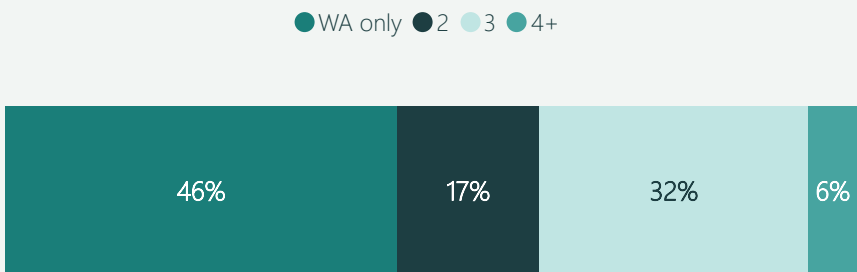
## Top 3 Accommodation Choices for Leisure Visitors to WA <sup>3</sup>

①	Other commercial accommodation	63%
②	Rented house/apartment/flat or unit	42%
③	Hotel/resort/motel or motor Inn	35%

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



## Number of 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>

52% of Italian leisure visitors to WA are on a return visit to Australia

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

3% of Italian leisure visitors to WA arrived on a travel package

# ITALY | MARKET PROFILE

## IMPORTANCE FACTORS, DESTINATION CONSIDERATIONS AND ASSOCIATIONS

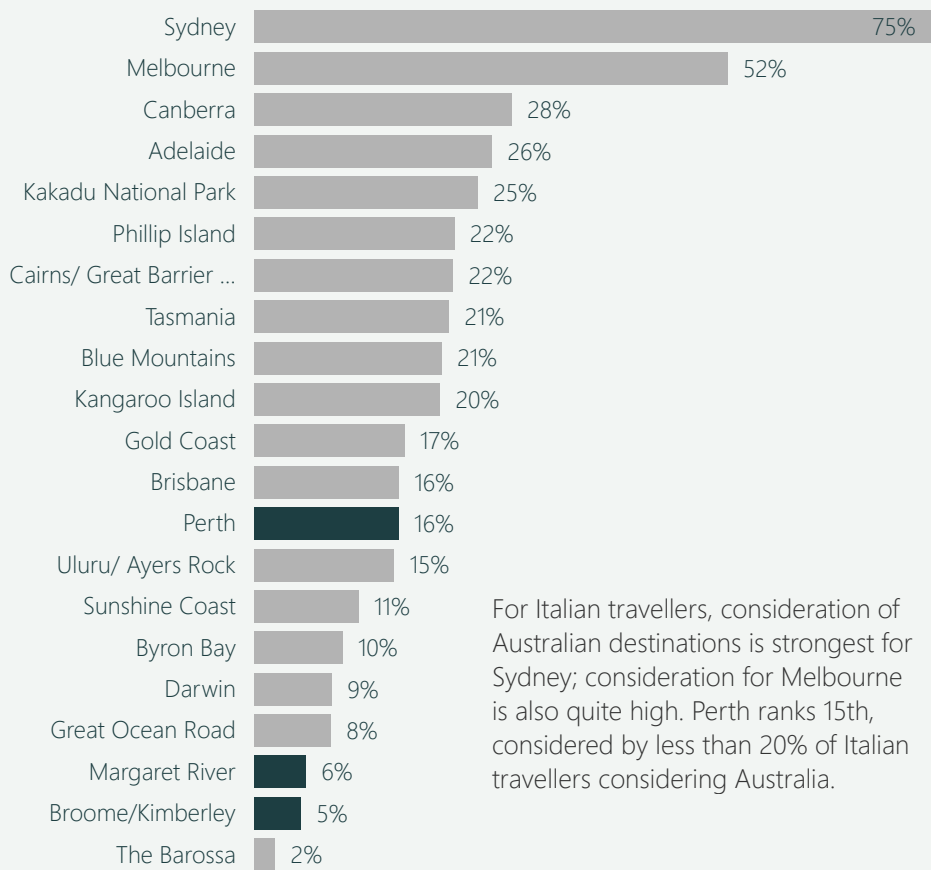
### Out of region (OOR) travellers



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 <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; consideration for Melbourne is also quite high. Perth ranks 15th, considered by less than 20% 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 A family friendly destination
- 3 Value for money
- 4 Appealing climate or weather
- 5 A safe and secure destination
- 6 Natural wonders to explore e.g. world heritage sites

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

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

	Sydney	Melbourne	Brisbane	Perth	Margaret River	Broome/Kimberley region
A family friendly destination	47%	32%	11%	15%	4%	5%
A vibrant city lifestyle	57%	36%	12%	15%	3%	4%
Beautiful natural environments, including mountains, rivers, forests, beaches, and coastlines	15%	13%	6%	9%	14%	8%
Different and interesting local wildlife	15%	10%	6%	9%	7%	9%
Good food, wine/beverages, local cuisine and produce	39%	28%	11%	13%	4%	4%
Interesting events and festivals	47%	29%	10%	10%	3%	4%
Value for money	23%	20%	7%	8%	3%	4%

Italian travellers have strong perceptions of Sydney and Melbourne, but very few associations with Perth. Margaret River region performs on par with Sydney and Melbourne for beautiful natural environments.

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## 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 24
2. Tourism Research Australia – International Visitor Survey, YE Dec 19/20/21/22/23/24
3. Tourism Research Australia – International Visitor Survey, 2 yr average, YE Dec 23/24
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 24
5. Tourism Australia – Consumer Demand Project, October - December 2024.

Published by Tourism WA, April 2025

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