

# ITALIAN TOURISM NEEDS TO LIVE WITHOUT HALF OF FOREIGN VISITORS IN 2022



Italian tourism has been struggling significantly in the past two years due to the Covid-19 pandemic. The country is trying to find a way out, but it will clearly take some time to recover from the unprecedented health crisis.

What is certain is that the complete recovery will not take place this year, as the country continues to cope with the lack of foreign visitors. At the same time, the effects of Russia's invasion of Ukraine must also be considered.

## Growth Compared to 2021

According to estimates from Demoskopika, a market research company, **this year there will be about 92 million arrivals and 343 million overnight stays (including both Italians and foreign visitors) in Italy.** This represents a growth of 43 % and 35 %, respectively, compared to 2021.

While the growing trend is clear, the numbers are still far away from those registered in 2019. Overnight stays are still down by 21.4 %, while arrivals are by 29.6 %.

## Expenditure Grows Less than Flows

As per estimates, tourism expenditure will reach 26.4 billion euros in 2022. This represents an increase of 11.8 % compared to last year.

Regionally speaking, Veneto is in the lead with an expenditure of over 5 billion euros (+12.6 %), while Trentino Alto Adige in second place is quite far behind with 3.57 billion (+27.1 %). Emilia Romagna closes the top 3 with an expenditure of a little bit over 3 billion (+9.1 %).

With regards to tourism flows, all the regions will record a positive trend. Piedmont is estimated to register the highest growth of 56.7 % to 12.8 million overnight stays and 4.3 million arrivals (+66.3 %).

Trentino Alto Adige will grow by 53.5 % in terms of overnight stays (46.4 million) and 31.8 % in terms of arrivals (11.3 million), while Campania will have 11.3 million overnight stays (+38.6 %) and 3.4 million arrivals (+32 %).

## Where Will Italians Travel?

Demoskopika also conducted a survey which revealed that 30 million Italians (51 % of the total) have chosen to go on vacation in the next months.

Nine million (16 %) have already booked their holiday, especially in the age group between 18 and

35, while 35 % are thinking of planning a trip for the remainder of the current year. 18 % of those interested in travelling currently declare themselves “undecided”.

When it comes to destinations, 9 out of 10 Italians will travel domestically, while 10 % will go abroad. Of these, 7 % have planned a trip to a European destination, while the remaining 3 % will opt for an international holiday. It will thus be once again up to domestic tourists to “save” the industry in the absence of foreign visitors.

### **The Effects of the War**

As implied above, the war in Ukraine has also impacted the overall tourism environment in Italy. Of the 31 % of Italians who have given up on their vacation in the next months, 10 % did so due to fear of the effects of the conflict in Ukraine, while 8 % did so due to the persistence of Covid-19 variants.

At the same time, the war has also affected the choices of 13 % of Italians who have declared worsening family economic conditions as their reason to opt not travelling this year.

Finally, according to estimates, Italy will “miss” 300 thousand Ukrainian and Russian tourists in 2020. This represents a fall of 2.4 million overnight stays and a reduction in tourist expenditure of almost 180 million euros.

### **Cities of Art Awakening**

Seaside destinations remain the most popular ones, as indicated by as many as 57 % of Italians. **However, the cities of art, which have declined during the pandemic, are “awakening” (27.1 %).**

Furthermore, almost 1 in 4 Italians (23 %) opt for a holiday in nature. Specifically, 10 % want a holiday in the mountains, 9 % want to visit the countryside, while 4 % want to visit a lakeside destination during the next months.

At the bottom, in the ranking of destinations identified by Italians, are exotic destinations (3%) and spa holidays (2%).

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