

ITALIAN TOURISM IN 2023 - INTERNATIONAL TOURISM UP, DOMESTIC TOURISM DOWN



There is no official data from Istat to determine how tourism in Italy has performed in 2023. However, some indications provide preliminary results.

Between January and August, total visitors increased by 4% compared to 2022, but the trend varied significantly depending on whether the visitors were foreign or domestic. **International visitors increased by 10%, whereas domestic visitors decreased by 2%.**

Compared to the same period in 2019, there has yet to be a full recovery in total visitor numbers, with a decrease of 4%, primarily driven by a 6% decrease in domestic visitors compared to a 3% decrease in international visitors.

Although the recovery of the Italian tourism sector over 2022 is reassuring, it appears less so when viewed monthly. There was a 49% increase in January 2023 compared to January 2022, followed by a 31% increase in February, a 20% increase in March, a 14% increase in April, and a 12% increase in May. However, the trend changed in June with a decrease of 1%; in July, there was a significant drop of 13%. The growth then returned in August with a 2% increase.

The domestic goods trend worsened during the initial part of the summer season. The growth was -10% in May, -8% in June, and -14% in July. It then rose again in August, with a 2% increase.

Apart from the above data, confirmation from operators includes some qualitative factors like the promising performance of European incoming markets and the return of US tourists. As for domestic tourism, it faced some challenges in 2023 due to the rising cost of living and the increase in outgoing travel during the post-COVID period.

This situation presents an opportunity to restore a balance between domestic and incoming tourism. It allows us to compare foreign countries and Italian regions as tourism generators. By analyzing these two dimensions equally, **we can understand the relative importance of incoming and domestic markets in fueling tourism in Italy today.** This makes more precise assessments and determines these markets' role in the tourism industry.

Based on the available data, Germany is the most important source market for Italian tourism, with approximately 61 million overnight stays. The United States is the second-largest incoming market, with 15 million nights spent. France is the third-largest source market, with almost 13 million visitors.

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