

ECONOMIA

Tourist nights spent increased in the fourth quarter, 2024 sets a new record year

FOURTH QUARTER SHOWS YEAR-ON-YEAR GROWTH COMPARED TO 2023

In the fourth quarter of 2024, tourism grew compared to the same period in 2023: arrivals increased by 1.2%, while nights spent rose by 11.1%.

NON-RESIDENTS DRIVE GROWTH IN THE FOURTH QUARTER

In the fourth quarter of 2024, compared to the same period in 2023, nights spent by residents in Italy increased by 5.9%, while those of non-residents more than doubled, rising by 15.6%.

PREVALENCE OF NON-RESIDENT TOURISTS IN THE FOURTH QUARTER

Even in the fourth quarter of 2024, nights spent by non-resident tourists exceeded those of residents in Italy. The inbound tourism segment accounted for 55.4% of total nights spent.

2024 SETS A NEW RECORD YEAR FOR TOURIST NIGHTS SPENT

The year 2024 closed with 458.4 million nights spent in tourist accommodation establishments, marking a further increase (+2.5%) compared to the previous record set in 2023.

OVER 250 MILLION NIGHTS SPENT BY NON-RESIDENTS IN 2024

In 2024, nights spent by non-resident in accommodation establishments exceeded 250 million, showing a 6.8% increase compared to 2023. They accounted for more than half (54.6%) of total nights spent.

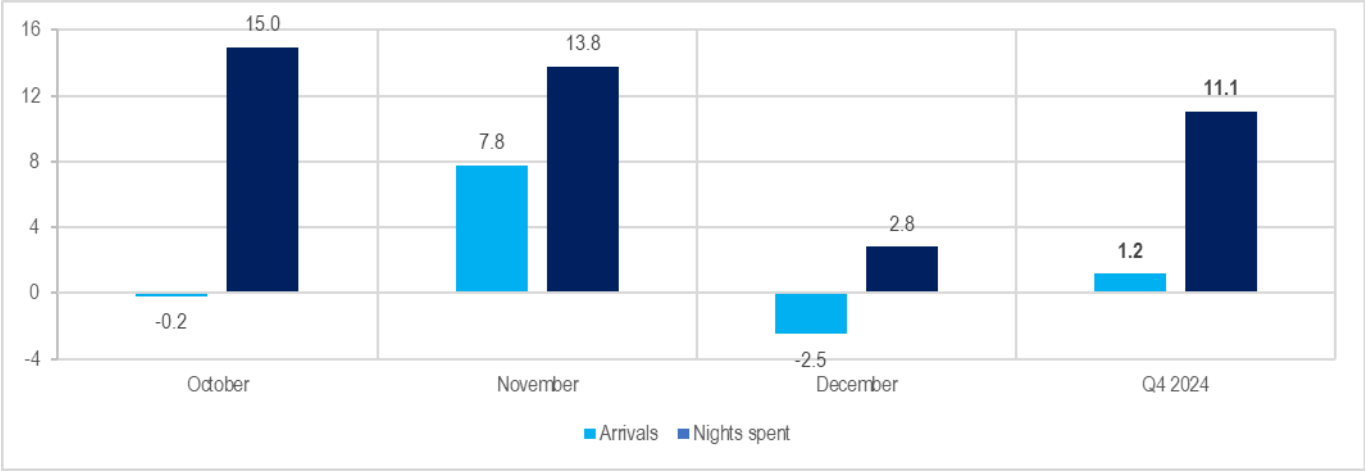
ITALY RANKS SECOND AMONG EU COUNTRIES FOR TOURIST NIGHTS SPENT IN 2024

Italy ranked second among EU countries in terms of tourist nights spent, surpassing France and trailing only Spain, which remains the leading country both in total nights spent and in nights spent by non-residents.

Tourism in the Fourth Quarter of 2024

According to provisional data from the survey “Occupancy of tourist accommodation establishments”, the fourth quarter of 2024 showed a very positive performance, particularly in terms of nights spent in accommodation establishments. Compared to the same period in 2023, nights spent increased by 11.1%, while arrivals grew by 1.2%.

FIGURE 1. ARRIVALS AND NIGHTS SPENT IN ACCOMMODATION ESTABLISHMENTS. October-December 2024 (a). Year-over-year percentage changes 2023-2024.



(a) Provisional data.
Source: Istat, Occupancy of tourist accommodation establishments

Monthly estimates indicate an increase in nights spent across all three months, while arrivals showed a fluctuating trend. October, the most touristic month of the fourth quarter, recorded 10.2 million arrivals and 33.4 million nights spent, with a significant increase in nights (+15.0% compared to 2023) and relatively stable arrivals (-0.2%). In November, with 6.5 million arrivals and 18 million nights spent, both indicators increased: nights spent by 13.8% and arrivals by 7.8%. In December, the trends diverged, with nights spent rising by 2.8% and arrivals declining by 2.5%.

Overall, compared to the fourth quarter of 2023, nights spent saw strong growth for both domestic and inbound tourists, though the increase was significantly higher for non-residents (+5.9% for residents and +15.6% for non-residents).

Nights spent of domestic tourists increased in October and November (+9.7% and +13.7%, respectively), while in December, they declined by 3.1%. In contrast, nights spent of non-resident tourists increased sharply across all three months, with growth exceeding 10%: +17.7% in October, +13.9% in November, and +11.9% in December.

TABLE 1. ARRIVALS, NIGHTS SPENT, AND AVERAGE STAY BY TYPE OF ACCOMMODATION AND RESIDENCE OF THE GUEST. October-December 2024 (a). Absolute values, year-over-year percentage changes 2023-2024, and absolute differences in average stay.

RESIDENCE OF THE GUEST	Absolute values				Year-over-year percentage changes 2023-2024 (absolute differences in average stay)			
	October	November	December	Q4 2024	October	November	December	Q4 2024
HOTEL ESTABLISHMENTS								
Residents								
Arrivals	2,930,396	2,951,426	3,250,208	9,132,030	-8.7	5.2	-8.8	-4.7
Nights spent	7,839,338	6,796,727	7,887,848	22,523,913	11.3	11.3	-3.0	5.9
Average stay	2.68	2.30	2.43	2.47	0.48	0.13	0.15	0.25
Non-residents								
Arrivals	4,403,545	2,002,999	1,954,967	8,361,511	2.4	3.2	5.7	3.3
Nights spent	14,837,248	5,813,339	6,020,290	26,670,877	18.7	10.8	10.1	14.9
Average stay	3.37	2.90	3.08	3.19	0.46	0.20	0.12	0.32
Totals								
Arrivals	7,333,941	4,954,425	5,205,175	17,493,541	-2.4	4.4	-3.9	-1.0
Nights spent	22,676,586	12,610,066	13,908,138	49,194,790	16.0	11.1	2.3	10.6
Average stay	3.09	2.55	2.67	2.81	0.49	0.15	0.16	0.29
OTHER ACCOMMODATIONS								
Residents								
Arrivals	879,717	863,958	990,499	2,734,174	-4.0	24.5	-6.1	2.6
Nights spent	3,019,871	2,820,362	3,212,406	9,052,639	5.7	19.7	-3.5	6.0
Average stay	3.43	3.26	3.24	3.31	0.31	-0.13	0.09	0.11
Non-residents								
Arrivals	1,983,952	662,734	643,425	3,290,111	11.1	15.9	18.2	13.4
Nights spent	7,704,206	2,477,010	2,362,258	12,543,474	15.8	22.1	16.7	17.2
Average stay	3.88	3.74	3.67	3.81	0.16	0.19	-0.05	0.12
Totals								
Arrivals	2,863,669	1,526,692	1,633,924	6,024,285	6.0	20.6	2.2	8.2
Nights spent	10,724,077	5,297,372	5,574,664	21,596,113	12.8	20.8	4.2	12.2
Average stay	3.74	3.47	3.41	3.58	0.23	0.01	0.07	0.13
TOTALS								
Residents								
Arrivals	3,810,113	3,815,384	4,240,707	11,866,204	-7.7	9.0	-8.2	-3.1
Nights spent	10,859,209	9,617,089	11,100,254	31,576,552	9.7	13.7	-3.1	5.9
Average stay	2.85	2.52	2.62	2.66	0.45	0.10	0.14	0.23
Non-residents								
Arrivals	6,387,497	2,665,733	2,598,392	11,651,622	4.9	6.1	8.5	6.0
Nights spent	22,541,454	8,290,349	8,382,548	39,214,351	17.7	13.9	11.9	15.6
Average stay	3.53	3.11	3.23	3.37	0.38	0.21	0.10	0.28
Totals								
Arrivals	10,197,610	6,481,117	6,839,099	23,517,826	-0.2	7.8	-2.5	1.2
Nights spent	33,400,663	17,907,438	19,482,802	70,790,903	15.0	13.8	2.8	11.1
Average stay	3.28	2.76	2.85	3.01	0.43	0.15	0.15	0.27

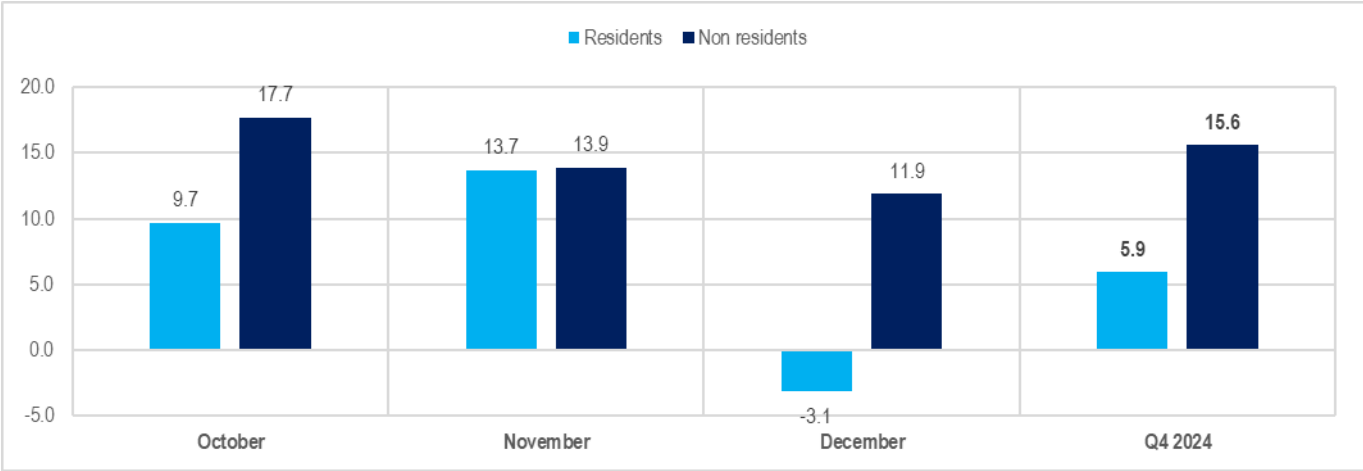
(a) Provisional data.

Source: Istat, Occupancy of tourist accommodation establishments

Considering the two components of demand, in October, more than two-thirds of nights spent (67.5%) were from non-resident tourists, while in November and December, prevailed residents. Specifically, Italian tourists accounted for 53.7% of nights spent in November and 57% in December.

Comparing the composition of nights spent in accommodation establishments for the entire quarter with the previous year, the share of non-resident tourists increased from 53.2% in 2023 to 55.4% in 2024.

FIGURE 2. NIGHTS SPENT IN ACCOMMODATION ESTABLISHMENTS BY RESIDENCE OF THE GUEST. October-December 2024 (a). Year-over-year percentage changes 2023-2024.

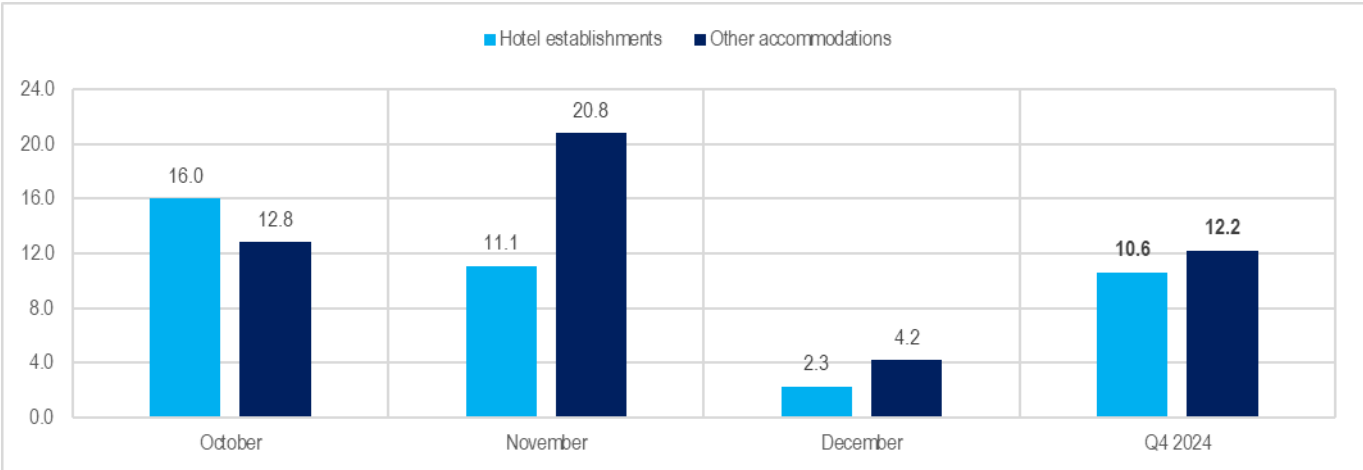


(a) Provisional data.
Source: Istat, Occupancy of tourist accommodation establishments

Compared to the same period in the previous year, both hotel and other accommodations¹ recorded a significant increase in nights spent during the quarter: hotel nights grew by 10.6%, while other accommodations saw a 12.2% increase. The highest growth in hotel nights occurred in October (+16%), while other accommodations saw the largest increase in November (+20.8%). In December, non-resident tourists’ nights spent increased by 10.1% in hotels and 16.7% in other accommodations, while domestic tourists’ nights spent declined in both sectors (-3% in hotels and -3.5% in non-hotel accommodations).

The average stay in accommodation establishments was 3.01 nights, showing a slight increase for both domestic tourists (2.66 nights, +0.23 compared to 2023) and non-resident tourists (3.37 nights, +0.28).

FIGURE 3. NIGHTS SPENT IN ACCOMMODATION ESTABLISHMENTS BY TYPE OF ACCOMMODATION. October-December 2024 (a). Year-over-year percentage changes 2023-2024.



(a) Provisional data.
Source: Istat, Occupancy of tourist accommodation establishments

¹ Other accommodations include open-air accommodations (such as campsites and areas equipped for campers and trailers, tourist villages, mixed forms of campsites and tourist villages) and holiday accommodations and other short-stay accommodations (such as rental accommodations managed as businesses, farmhouses, holiday homes, youth hostels, mountain refugees, other accommodation facilities not classified elsewhere, and bed and breakfasts).

Tourism Flow Estimates for 2024

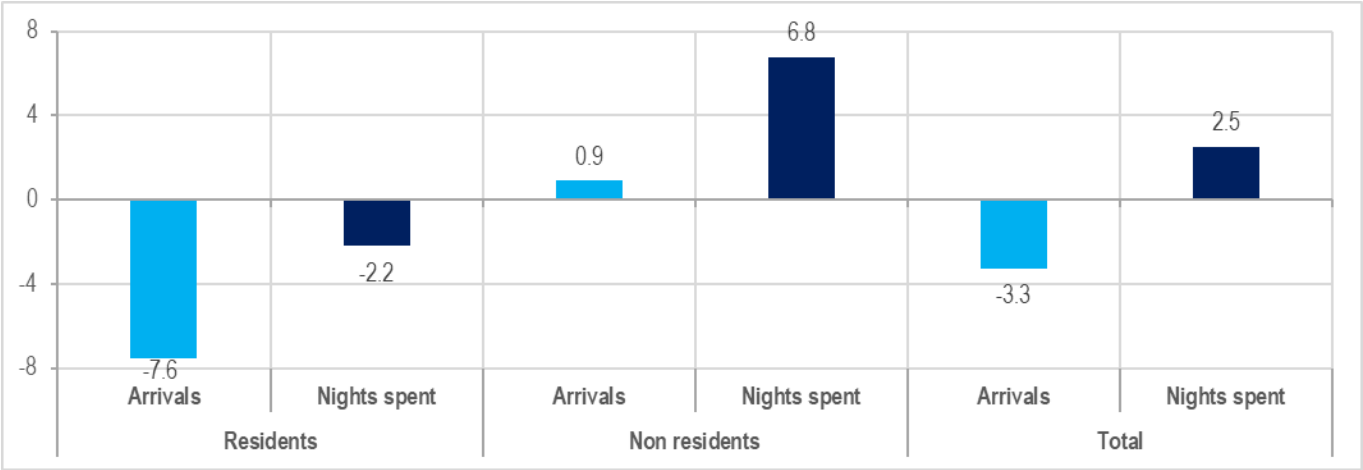
According to early estimates for 2024, the annual balance shows a divergent trend between arrivals and nights spent. While nights spent, totaling 458.4 million, continued to grow compared to the record levels of 2023 (+2.5%), arrivals reached 129.3 million, 4.4 million fewer than in 2023 (-3.3%).

The two guest segments behaved differently: non-resident tourists recorded an increase in tourism flows compared to 2023 (+0.9% in arrivals and +6.8% in nights spent), whereas domestic tourists saw a decline (-7.6% in arrivals and -2.2% in nights spent).

Non-resident tourists remained the dominant segment over domestic visitors. In 2023, foreign tourists recorded 234.2 million nights spent, accounting for 52.4% of the total. In 2024, this number exceeded 250 million, representing 54.6% of total nights spent.

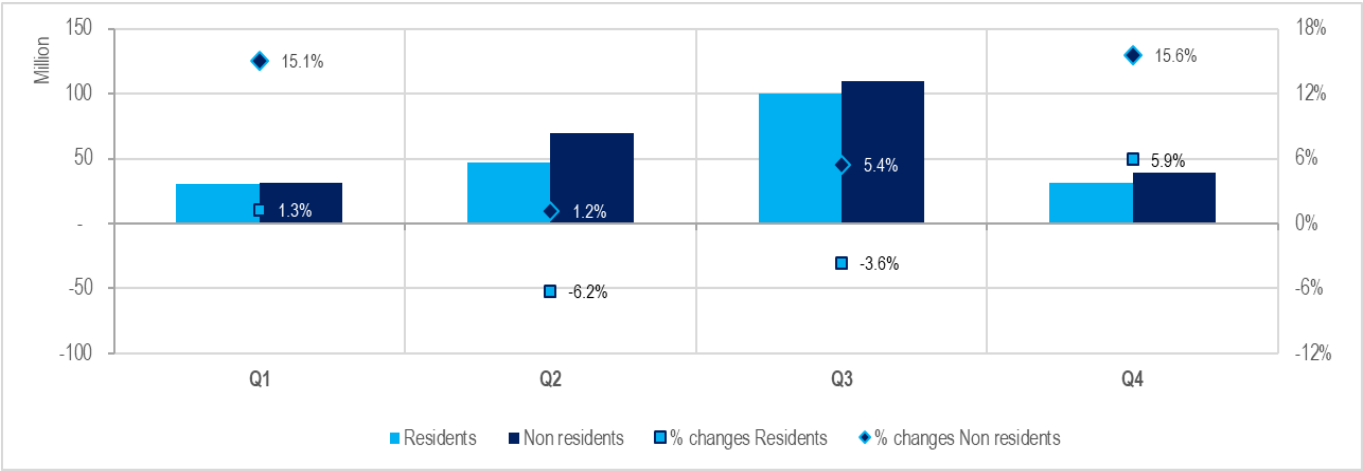
In 2024, nights spent in hotel accommodations increased by 3% compared to the previous year, almost double the growth rate of the other accommodations sector (+1.7%). This trend reinforced the dominance of the hotel sector over other accommodations in terms of nights spent (61.9% vs. 38.1% of the total).

FIGURE 4. ARRIVALS AND NIGHTS SPENT IN ACCOMMODATION ESTABLISHMENTS BY RESIDENCE OF THE GUEST. Year 2024 (a). Year-over-year percentage changes 2023-2024.



(a) Provisional data.
Source: Istat, Occupancy of tourist accommodation establishments

FIGURE 5. NIGHTS SPENT IN ACCOMMODATION ESTABLISHMENTS BY RESIDENCE OF THE GUEST. Year 2024 (a). Absolute values (primary axis) and year-over-year percentage changes 2023-2024 (secondary axis).



(a) Provisional data.
Source: Istat, Occupancy of tourist accommodation establishments

Italy's growth (+2.5%), in line with the EU average, positioned the country as the second-largest European destination in terms of total nights spent, surpassing France (450.1 million) and trailing only Spain (501.1 million). Considering only inbound tourists, Italy, with 250.1 million nights spent, ranked second after Spain, which recorded 320.7 million nights spent from non-resident tourists.

The decline in domestic tourism was observed across the top three European countries in terms of nights, with Italy experiencing the steepest decline (-2.2%) compared to Spain (-1.4%) and France (-1.7%). In contrast, the growth in non-resident tourists was seen across all EU-27 countries. Among the leading tourism destinations, Spain, Italy, and Germany each recorded an increase of over six percentage points, exceeding the EU average growth rate (+4.7%).

TABLE 2. NIGHTS SPENT IN ACCOMMODATION ESTABLISHMENTS IN EU COUNTRIES BY RESIDENCE OF THE GUEST.

Year 2024 (a). Absolute values in millions, year-on-year percentage changes 2023-2024

UE COUNTRY OF DESTINATION	Absolute values in millions Year 2024 (a)				Percentage changes 2023-2024		
	Residents	Non-residents	Totals	% Share Non-residents	Residents	Non-residents	Totals
Spain	180.4	320.7	501.1	64.0	-1.4	6.2	3.3
Italy	208.3	250.1	458.4	54.6	-2.2	6.8	2.5
France	312.1	138.0	450.1	30.7	-1.7	1.2	-0.8
Germany	355.6	85.3	440.9	19.4	1.3	6.1	2.2
Greece	24.6	127.7	152.3	83.8	2.1	3.7	3.5
Netherlands	84.4	61.5	145.9	42.2	1.4	4.1	2.5
Austria	37.2	93.2	130.3	71.5	1.1	2.4	2.0
Poland	79.1	18.3	97.3	18.8	4.4	7.3	4.9
Croatia	8.7	84.9	93.6	90.7	7.6	0.8	1.4
Portugal	28.5	59.6	88.1	67.6	1.9	4.6	3.7
Sweden	46.8	17.0	63.8	26.6	-3.0	9.0	-0.1
Czech Republic	31.6	25.4	56.9	44.6	-2.7	8.7	1.9
Belgium	22.6	22.1	44.7	49.4	-2.2	2.3	0.0
Ireland	17.1	24.9	42.0	59.2	5.0	2.0	3.3
Denmark	24.1	15.7	39.7	39.5	-1.2	7.2	1.9
Hungary	16.6	15.0	31.6	47.5	1.9	6.0	3.8
Romania	25.2	4.9	30.2	16.3	2.2	10.4	3.4
Bulgaria	11.9	14.8	26.6	55.4	-3.5	1.2	-0.9
Finland	16.6	6.3	22.8	27.6	-3.0	9.7	0.0
Slovenia	4.5	12.3	16.8	73.3	-1.6	6.9	4.6
Cyprus	1.2	15.2	16.4	92.7	-1.7	5.2	4.7
Slovakia	9.7	4.9	14.6	33.3	0.9	3.1	1.7
Malta	0.7	10.6	11.3	93.7	3.5	15.0	14.3
Lithuania	5.5	3.1	8.6	36.0	0.5	3.0	1.4
Estonia	3.0	3.7	6.8	54.8	0.1	10.2	6.8
Latvia	1.8	2.8	4.7	60.5	3.0	9.6	6.9
Luxembourg	0.4	3.0	3.4	87.3	14.6	23.1	21.9
EU	1,558.2	1,440.9	2,999.1	48.0	-0.5	4.7	1.9

(a) Provisional data for January-November, December estimated.

Source: Processing based on Eurostat data.

Glossary

Accommodation establishments: The sum of hotel and other accommodation establishments.

Arrivals: Number of guests who checked in at accommodation establishments during the reference period.

Average stay: The ratio between the number of nights spent in accommodation establishments and the number of guests registered (arrivals) during the reference period.

Eurostat: The Statistical Office of the European Union, established in 1953 and based in Luxembourg.

EU27: The 27 countries of the European Union: Italy, Austria, Belgium, Bulgaria, Croatia, Cyprus, Denmark, Estonia, Finland, France, Germany, Greece, Ireland, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Poland, Portugal, Czech Republic, Romania, Slovakia, Slovenia, Spain, Sweden, and Hungary.

Hotel establishments: Includes hotels from 1 to 5 stars, resort hotels, tourist residences, guesthouses, motels, historical hotels, “*meubl  *” or “*garni*” hotels, historic residences, scattered hotels, wellness centers (beauty farms), conference and convention centers, and all other accommodation types classified as hotels according to regional regulations.

Nights spent: Number of nights spent (overnight stays) by guests in accommodation establishments during the reference period.

Other accommodations: Includes open-air accommodations (such as campsites and areas equipped for campers and trailers, tourist villages, mixed forms of campsites and tourist villages) and holiday accommodations and other short-stay accommodations (such as rental accommodations managed as businesses, farmhouses, holiday homes, youth hostels, mountain refugees, other accommodation facilities not classified elsewhere, and bed and breakfasts).

Residence of the guest: Guests in accommodation establishments are classified as either residents of Italy (domestic component) or non-residents in Italy (inbound component).

Year-on-year change: Percentage change compared to the same month or period of the previous year.

Methodological Note

Survey on “Tourist Arrivals and Overnight Stays in Accommodation Establishments”

Regulatory framework

The survey is part of the [National Statistical Program](#), which collects the statistical surveys necessary for the country. It is also carried out in accordance with the conceptual and methodological definitions established by the [Tourism Statistics Regulation \(EU\) No. 692/2011](#) and its following amendments.

Objectives and reference framework

Tourism statistics on occupancy of accommodation establishments have been regularly compiled by Istat since 1956 and represent the primary official source of internal tourism information available in Italy.

This is a total survey conducted monthly, quantifying arrivals and nights spent of guests (both residents and non-residents) for each month and municipality, broken down by category/type of accommodation establishment. It also considers the country of residence for non-resident guests or the Italian region of residence for domestic guests. The key value of this data is the ability to analyze tourism flows through various combinations of the collected variables, enabling an in-depth understanding of their relationships. Additionally, Istat calculates occupancy rates for hotel-type establishments, measuring the utilization of beds and rooms.

The survey is conducted within the framework of EU methodology and of the conceptual framework of the International Recommendations for Tourism Statistics 2008 (IRTS 2008).

For further details: <https://www.istat.it/informazioni-sulla-rilevazione/movimento-dei-clienti-negli-esercizi-ricettivi/>

Data Sources

The survey units are accommodation establishments in Italy, categorized as follows:

- Hotel establishments: Hotels classified into five categories based on the number of stars and hotel-tourism residences.
- Other accommodations: Camp-sites, holiday villages, mixed forms of camp-sites and holiday villages, rental accommodations managed as businesses, farmhouses, youth hostels, holiday homes, mountain refugees, bed and breakfasts and other accommodation establishments not elsewhere classified.

Process and Methodologies

The survey is carried out according to the rules outlined in Istat’s annual circular letters.

In accordance with the Legislative Decree No. 322/1989, for the purposes of the survey Istat relies on the Statistical Offices of Regions and Autonomous Provinces as intermediate bodies. When necessary, these offices may collaborate with other relevant administrative bodies competent in the field of tourism, such as regional tourism departments or provincial tourism promotion agencies, etc.. The Statistical Offices remain, in any case, the sole point of contact for the National Statistical System regarding matters within their respective Regions, and are responsible for the data collected, the timeliness of the required tasks and the accuracy of the results.

Intermediate bodies are responsible for:

- Organizing efficient data collection methods from accommodation establishments.
- Distributing official survey communications to accommodation establishments, explaining the survey objectives and data submission requirements.
- Coordinating the data collection process and any involved local administrative offices.
- Monitoring survey progress, ensuring data is submitted on time and maintaining data accuracy.
- Transmitting data files to Istat by the 20th of the month following the reference period, using the ISTAT MOV/C model.

Istat performs data validation and submits monthly data on arrivals, nights spent and occupancy rates to Eurostat within six weeks from the reference period. An additional and final data transmission by the intermediate bodies, including any corrections or updates, is allowed by February of the following year.

For provisional data, an estimation program handles missing and late responses. Final data dissemination typically uses the last available year's data when necessary.

Classifications

The survey uses:

- Istat's territorial classifications for municipalities, provinces, and regions.
- Nomenclature of Territorial Units for Statistics (NUTS).
- Ateco 2007 (Nace Rev.2) economic activity classification.
- Eurostat's "Standard Code List" for country classification (available via "RAMON, Eurostat's metadata server").

Data Dissemination

Tourism data on accommodation establishments is available at the following websites:

- IstatData Warehouse (<https://esploradati.istat.it/databrowser/#/>).
- Istat's institutional website (www.istat.it).
- Eurostat database (<https://ec.europa.eu/eurostat/data/database>).

Annual summary data is also published in:

- The Italian Statistical Yearbook and "Noi Italia" report.
- International publications and databases from OECD and UNWTO.

Territorial Detail

Tourism statistics are published at regional, provincial and municipal levels, in compliance with statistical confidentiality regulations.

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