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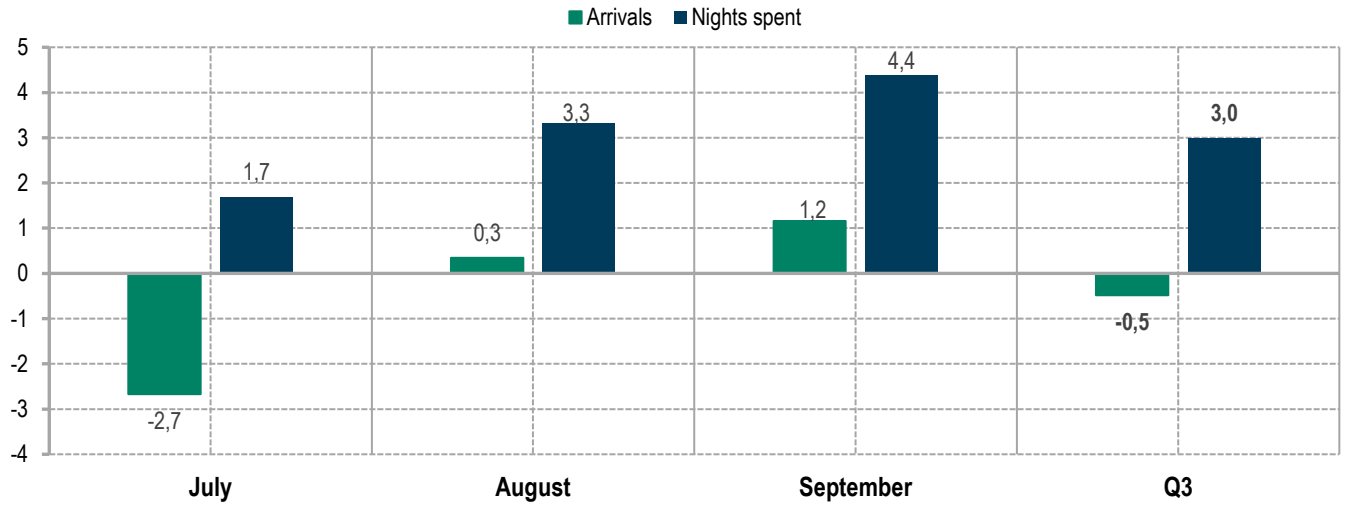
1926 | 2026 Istat

Q3 2026

# Tourist flows

- In Q3 2026, tourist accommodation establishments in Italy recorded just over 60 million arrivals and 249 million nights spent.
- Compared with the same quarter of 2025, arrivals decreased slightly (-0.5%), while nights spent increased by 3.0%.
- More than half of nights spent were accounted for by the foreign component, which represented 55.3% of the total. Compared with 2025, nights spent by foreign tourists in the third quarter increased by 6.4%, while those of Italian guests decreased by 1.0%.
- Compared with 2025, September was the month with the largest increase in nights spent (+4.4%), but August was the busiest tourist month, accounting for 39.7% of nights spent in the quarter.
- Hotels and similar establishments recorded 33.4 million arrivals and almost 118.5 million nights spent. Other accommodation establishments, also including houses and flats rented out for short periods for tourist purposes and managed on both a business and a non-business basis, contributed just under 27.1 million arrivals and over 130.5 million nights spent.
- The largest year-on-year increase concerned nights spent in other accommodation establishments (+4.2%), while those in hotels and similar establishments increased to a lesser extent (+1.7%).
- In other accommodation establishments, substantially stable nights spent by the Italian component (+0.1%) were accompanied by very strong growth in nights spent by foreign guests (+7.3%). In hotels and similar establishments, by contrast, the decrease in domestic demand (-2.0%) was offset by the significant growth in nights spent by foreign guests (+5.3%).
- In the third quarter, the average length of stay of guests in tourist accommodation establishments was 4.12 nights per arrival, higher for Italian guests (4.43 nights) than for foreign guests (3.89 nights).

**CHART 1. MONTHLY ARRIVALS AND NIGHTS SPENT IN TOURIST ACCOMMODATION ESTABLISHMENTS**
July-September 2026 (a). Year-on-year percentage changes 2025/2026.




(a) Provisional data.



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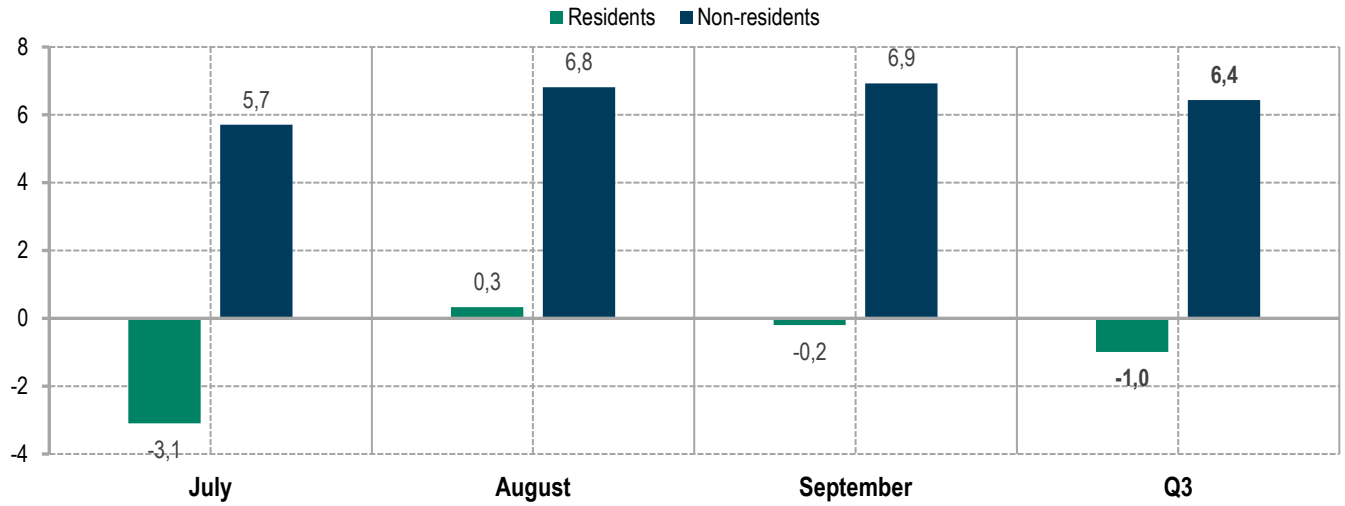
## CHART 2. MONTHLY NIGHTS SPENT IN TOURIST ACCOMMODATION ESTABLISHMENTS BY RESIDENCE OF GUESTS

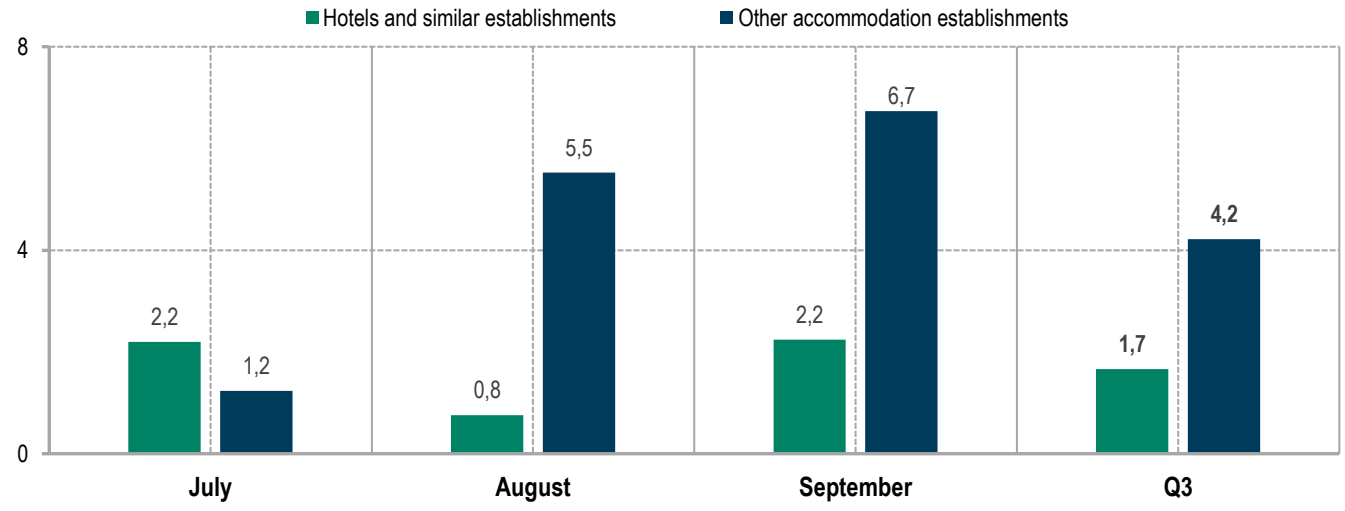
July-September 2026 (a). Year-on-year percentage changes 2025/2026.




(a) Provisional data.

## CHART 3. MONTHLY NIGHTS SPENT BY TYPE OF ACCOMMODATION

July-September 2026 (a). Year-on-year percentage changes 2025/2026.




(a) Provisional data.

**TABLE 1. MONTHLY ARRIVALS AND NIGHTS SPENT IN TOURIST ACCOMMODATION ESTABLISHMENTS BY RESIDENCE OF GUESTS AND TYPE OF ACCOMMODATION.** July-September 2026 (a). Absolute values and percentage changes 2025/2026.

| RESIDENCE OF GUESTS | | Absolute values | | | | % changes 2025/2026 | | | |
|---|---|---|---|---|---|---|---|---|---|
| | | July | August | September | Total Q3 | July | August | September | Total Q3 |
| **Hotels and similar establishments** | | | | | | | | | |
| Residents | Arrivals | 5,087,424 | 5,925,340 | 3,851,243 | 14,864,007 | -7.0 | -3.9 | -6.0 | -5.5 |
| | Nights spent | 20,414,871 | 24,760,864 | 11,798,526 | 56,974,261 | -2.5 | -1.9 | -1.5 | -2.0 |
| Non-residents | Arrivals | 6,340,060 | 5,986,010 | 6,242,142 | 18,568,212 | -3.2 | -1.3 | +1.5 | -1.1 |
| | Nights spent | 22,457,566 | 19,761,354 | 19,294,218 | 61,513,138 | +6.8 | +4.3 | +4.7 | +5.3 |
| Total | Arrivals | 11,427,484 | 11,911,350 | 10,093,385 | 33,432,219 | -4.9 | -2.6 | -1.5 | -3.1 |
| | Nights spent | 42,872,437 | 44,522,218 | 31,092,744 | 118,487,399 | +2.2 | +0.8 | +2.2 | +1.7 |
| **Other accommodation establishments** | | | | | | | | | |
| Residents | Arrivals | 3,384,257 | 4,699,544 | 2,156,977 | 10,240,778 | -2.4 | +2.5 | +0.7 | +0.4 |
| | Nights spent | 18,423,359 | 26,940,134 | 8,930,876 | 54,294,369 | -3.8 | +2.5 | +1.6 | +0.1 |
| Non-residents | Arrivals | 5,946,667 | 5,748,004 | 5,115,878 | 16,810,549 | +1.8 | +5.2 | +7.1 | +4.5 |
| | Nights spent | 28,075,285 | 27,343,794 | 20,799,939 | 76,219,018 | +4.8 | +8.7 | +9.1 | +7.3 |
| Total | Arrivals | 9,330,924 | 10,447,548 | 7,272,855 | 27,051,327 | +0.2 | +4.0 | +5.1 | +2.9 |
| | Nights spent | 46,498,644 | 54,283,928 | 29,730,815 | 130,513,387 | +1.2 | +5.5 | +6.7 | +4.2 |
| **Total tourist accommodation establishments** | | | | | | | | | |
| Residents | Arrivals | 8,471,681 | 10,624,884 | 6,008,220 | 25,104,785 | -5.2 | -1.2 | -3.7 | -3.2 |
| | Nights spent | 38,838,230 | 51,700,998 | 20,729,402 | 111,268,630 | -3.1 | +0.3 | -0.2 | -1.0 |
| Non-residents | Arrivals | 12,286,727 | 11,734,014 | 11,358,020 | 35,378,761 | -0.9 | +1.8 | +3.9 | +1.5 |
| | Nights spent | 50,532,851 | 47,105,148 | 40,094,157 | 137,732,156 | +5.7 | +6.8 | +6.9 | +6.4 |
| Total | Arrivals | 20,758,408 | 22,358,898 | 17,366,240 | 60,483,546 | -2.7 | +0.3 | +1.2 | -0.5 |
| | Nights spent | 89,371,081 | 98,806,146 | 60,823,559 | 249,000,786 | +1.7 | +3.3 | +4.4 | +3.0 |

(a) Provisional data.

# glossary

**Arrivals:** persons who checked in at a tourist accommodation establishment in the reference period.

**Average length of stay:** ratio of the number of nights spent to the number of arrivals in tourist accommodation establishments in the reference period, i.e. the average number of nights spent by guests per arrival.

**Hotels and similar establishments:** include 1- to 5-star hotels, *villaggi albergo* (hotel villages), hotel resorts, *alberghi diffusi* (scattered hotels), hotel-tourism residences, *pensioni*, motels, *alberghi meublé* or *garni*, as well as *residenze d'epoca* and *dimore storiche* (historic residences), beauty farms, congress and conference centres providing accommodation services for short stays (less than one year) and all other types of accommodation that are similar to hotels under regional regulations.

**Nights spent:** nights spent by guests in tourist accommodation establishments in the reference period.

**Non-resident guests:** guests of tourist accommodation establishments who are resident abroad (inbound component of tourism demand). In the text they are also referred to as foreigners or the foreign component.

**Other accommodation establishments:** establishments providing accommodation services for short stays (less than one year), but generally without daily cleaning and bed-making services and/or on-site guest assistance. They include open-air accommodation (i.e. tourist camp-sites and areas equipped for campers and caravans, holiday villages, mixed forms of tourist camp-sites and holiday villages) and holiday and other short-stay accommodation (i.e. private rented accommodation managed on both a business and a non-business basis, farmhouses, holiday homes, youth hostels, mountain refuges, bed and breakfasts and other accommodation n.e.c.).

**Resident guests:** guests of tourist accommodation establishments who are resident in Italy (domestic component of tourism demand). In the text they are also referred to as Italians or the Italian component.

**Tourist accommodation establishments:** hotels and similar establishments and other accommodation establishments taken together.

**Year-on-year change:** percentage change compared with the same month or period of the previous year.

# Occupancy of tourist accommodation establishments

## Information objectives and regulatory framework

Statistics on the occupancy of tourist accommodation establishments have been produced regularly by Istat since 1956 and are the main source of official information on internal tourism available in Italy.

The survey on the occupancy of tourist accommodation establishments is a census survey carried out monthly at all hotels and similar establishments and other accommodation establishments in Italy. For each month and each municipality, it quantifies arrivals and nights spent by guests by category and type of accommodation establishment, distinguishing the foreign country or Italian region of residence of guests.

Istat carries out the survey in compliance with the technical and operational guidelines of the European Union and with the conceptual and methodological framework defined by the *International Recommendations for Tourism Statistics 2008* (IRTS 2008). The data collected are therefore internationally comparable.

The survey is conducted on the basis of Regulation (EU) No 692/2011 of the European Parliament and of the Council concerning European statistics on tourism, as amended by Commission Delegated Regulation (EU) 2019/1681 of 1 August 2019.

For further information: https://www.istat.it/informazioni-sulla-rilevazione/movimento-dei-clienti-negli-esercizi-ricettivi/ (available in Italian only).

## Data source, scope, units of analysis and reporting units

The scope of the survey covers all accommodation establishments in the national territory that provide accommodation services for short tourist stays (less than one year) and were open to the public during the reference year, regardless of the length of the opening period. Establishments that also operated on a seasonal basis are therefore included, while establishments that remained closed for the entire reference year are excluded.

The territorial reference unit of the data is the municipality with accommodation establishments (*comune ricettivo*), i.e. a municipality in whose territory at least one accommodation establishment is present in the reference year, even if it recorded no guest flows.

The reporting units, i.e. the responding units to which the information refers, are the individual accommodation establishments active in the reference year, as identified and transmitted to Istat for the survey on the Capacity of tourist accommodation establishments for the same year.

According to national and regional regulations, the reporting units are classified into:

- "Hotels and similar establishments": hotels, classified into five categories represented by the corresponding number of stars, and hotel-tourism residences;
- "Other accommodation establishments": tourist camp-sites and areas equipped for campers and caravans, holiday villages, mixed forms of tourist camp-sites and holiday villages, private rented accommodation (managed on both a business and a non-business basis), farmhouses, youth hostels, holiday homes, mountain refuges, bed and breakfasts and other accommodation n.e.c.

The other accommodation establishments to which the Statistics Flash data refer also include category C.2 "*Other private accommodation*" (ATECO 55.20.42) (see "Classifications"), and year-on-year changes are calculated on a like-for-like basis, considering this category for both years compared.

## Classifications

The survey uses:

- ✓ the Istat territorial classifications of Municipalities, Provinces and Regions;
- ✓ the international classification "*Nomenclature of Territorial Units for Statistics*" (NUTS);
- ✓ the Eurostat classification of foreign countries "*Standard Code List*";
- ✓ the classification of accommodation establishments, as defined below (with reference to the classification of economic activities ATECO 2025; https://www.istat.it/classificazione/classificazione-delle-attivita-economiche-ateco/, available in Italian only):

*A) Hotels and similar establishments* (ATECO 55.10.00): these include 1- to 5-star hotels, *villaggi albergo* (hotel villages), hotel resorts, *alberghi diffusi* (scattered hotels), hotel-tourism residences, *pensioni*, motels, *alberghi*

*meublé* or *garni*, as well as *residenze d'epoca* and *dimore storiche* (historic residences), beauty farms, congress and conference centres providing accommodation services for short stays (less than one year) and all other types of accommodation that are similar to hotels under regional regulations.

*B) Other accommodation establishments:* establishments providing accommodation services for short stays (less than one year), but generally without daily cleaning and bed-making services and/or on-site guest assistance. They include:

*B.1 Tourist camp-sites and areas equipped for campers and caravans* (ATECO 55.30.01 and 55.30.03): establishments providing space and services for the stopover and stay of guests who normally have their own mobile means of overnight accommodation, such as tents, campers, caravans, mobile homes and other recreational vehicles (excluding pleasure boats). Camp-sites, specifically, are accommodation establishments providing guests with free and/or equipped pitches in fenced areas. They take the additional designation "A" (annual) when they are authorised to operate for the whole year. Camp-sites may be allowed to close temporarily for a period of three months a year. Camping villages and glamping accommodation (included in Holiday villages) and marina resorts are excluded.

*B.2 Holiday villages* (ATECO 55.30.02): establishments equipped in fenced areas offering accommodation services (in tents, caravans, mobile homes, bungalows, etc.) for the stopover and stay of guests who do not normally have their own means of overnight accommodation. They take the additional designation "A" (annual) when they are authorised to operate for the whole year. Camping villages and glamping accommodation are included, while marina resorts are excluded.

*B.3 Tourist camp-sites and holiday villages (mixed form)* (ATECO 55.30.00): establishments which, under regional/provincial regulations, cannot be unambiguously assigned to either of the previous categories B.1 and B.2.

*B.4 Holiday dwellings managed on a business basis* (ATECO 55.20.42): establishments offering accommodation services in rooms, houses and/or flats managed by a single commercial management and rented for tourist use for a period of less than one year. Under regional regulations, some similar forms of accommodation are included, such as accommodation in catering establishments, residences, accommodation provided by room renters (*affittacamere*), furnished housing units for tourist use, holiday houses and flats.

*B.5 Farmhouses* (ATECO 55.20.51): exclusively rural accommodation establishments, as specifically defined under Law no. 96 of 20 February 2006, where individual or associated farmers provide accommodation services in connection with their main activity of crop cultivation and/or animal husbandry. Specifically, country houses and all types of accommodation provided for by regional laws that fall under "rural tourism" are excluded from this category and are included, according to the regional laws in force, in the type of accommodation of which they are a specification or, where a further type of complementary accommodation is provided for, in "Other accommodation n.e.c." (code B.9).

*B.6 Youth hostels* (ATECO 55.20.10): accommodation establishments specifically equipped for the stay and overnight accommodation of young people.

*B.7 Holiday homes* (ATECO 55.20.3): religious and social hospitality houses offering accommodation to individuals and/or groups, managed outside normal commercial channels by religious or public bodies, by non-profit associations pursuing religious, social, cultural, welfare or sports purposes, or by bodies or companies for the stay of their employees and their families. Under regional regulations, this category may include holiday centres for children and young people, holiday camps (*colonie*), youth houses, guest quarters (*foresterie*), facilities for retreats and spiritual exercises, social holiday centres, etc.

*B.8 Mountain refuges* (ATECO 55.20.20): establishments offering accommodation and hospitality in high-altitude mountain areas, outside urban centres. Under regional laws, this category may include high-mountain social refuges, hiking refuges, hotel refuges, bivouacs, etc.

*B.9 Other accommodation n.e.c.* (ATECO 55.20): all types of establishments providing short-stay accommodation services provided for by the various regional laws that cannot be assigned to the other categories of the classification. Marina resorts and houseboats are excluded.

*C.1 Bed and breakfast* (ATECO 55.20.41): establishments offering accommodation with overnight stay and breakfast, with a limited number of rooms and/or bed places set by regional laws.

*C.2 Other private accommodation* (ATECO 55.20.42): all types of private accommodation in houses and flats rented for short periods, managed on a non-business basis, provided for by the various regional and national laws, such as properties intended for short-term rentals or for tourist purposes, etc. This category also includes rented accommodation for which the type of management cannot be identified in any way.

## Process and methodologies

For the purposes of the survey, pursuant to Legislative Decree no. 322/1989, Istat relies on the Statistical offices of the Regions and Autonomous Provinces acting as intermediate bodies. Where necessary, these may in turn rely on other offices of the same administration and/or other bodies competent for tourism at territorial level.

The possible participation of other territorial bodies (offices and/or external structures) in data collection depends on the organisational set-up of the survey at territorial level, defined in accordance with specific regional regulations. In this case (as provided for by art. 2 of Agreement no. 104/CSR of 6 July 2017 between Istat and the Regions and the Autonomous Provinces of Trento and Bolzano/Bozen on statistical activities, adopted by the Permanent Conference for relations between the State, the Regions and the Autonomous Provinces pursuant to art. 4 of Legislative Decree no. 281 of 28 August 1997), the Statistical offices of the Regions or Autonomous Provinces give the necessary instructions directly to the above offices and/or external structures and carry out appropriate checks to verify the methodological correctness, reliability, completeness and consistency of the data, as well as strict compliance by such offices and/or external structures with the provisions on statistical confidentiality and personal data protection.

In any case, the Statistical offices of the Regions or Autonomous Provinces are the sole counterpart of the National Statistical System (Sistan) for matters within their competence and are responsible for the data acquired, for the timeliness of the required tasks and for the accuracy of the results.

The intermediate bodies are entrusted with the following tasks:

a) identifying the most efficient organisational arrangements for collecting data from accommodation establishments in their territory;
b) sending all accommodation establishments the information notice signed by the President of Istat and the survey presentation letter, specifying to respondents the purposes of the survey and the operational procedures for transmitting the requested data;
c) monitoring the progress of the survey, ensuring that any territorial offices and/or bodies involved meet the data transmission deadlines and ensuring the smooth running of the survey in their territory;
d) sending reminders to any non-responding units, using the most effective communication channels;
e) coordinating the information collection procedures and the activities of the offices of the same administration and/or of any territorial bodies involved;
f) transmitting the requested data to Istat by the established deadlines.

Specifically, the intermediate bodies must collect and transmit to Istat:

a) monthly data on the number of arrivals and nights spent by guests for each municipality;
b) the summary of final annual data, aggregated by province.

After a checking and validation process, Istat transmits to Eurostat the monthly data on arrivals, nights spent and net occupancy rates of bed places and bedrooms, broken down as provided for by Regulation (EU) No 692/2011 as amended, within six weeks of the end of the reference period. Final data are transmitted to Eurostat by 30 June of the year following the reference year.

For the release of provisional data, an estimation procedure is adopted to handle non-responses and late responses. For the dissemination of final data, missing data are replaced with those of the latest available year.

## Dissemination

Data on the Occupancy of tourist accommodation establishments are available at the following web addresses:

- ✓ IstatData (https://esploradati.istat.it/databrowser/#/ Categories “Services”, topic “Tourism”), where municipal-level data are also available;
- ✓ Istat institutional website (www.istat.it "Data tables" from 2003 to 2008, available in Italian only);
- ✓ Eurostat website (https://ec.europa.eu/eurostat/data/database selecting “*Industry, trade and services*”);
- ✓ Press releases with quarterly data (https://www.istat.it/documenti/comunicato-stampa/);
- ✓ Serie storiche (https://seriestoriche.istat.it/#turismo);
- ✓ Atlante Statistico del Territorio (ASTer) (https://aster.istat.it/#/it/ast; Tourism category).

Annual summary data are disseminated in the Italian Statistical Yearbook and in Noi Italia, and the main macro-aggregates feed into the publications and databases of international organisations such as the OECD and UNWTO.

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