

Italy

Tourism in the economy and outlook for recovery

Tourism is a key sector of the Italian economy. In 2019, tourism directly accounted for 6.2% of total GVA, or EUR 99.9 billion. Tourism directly employed 2.1 million people, contributing 8.8% of total employment and supported over 218 000 enterprises in 2019. The impacts of COVID-19 saw the direct contribution of tourism to Italy's GVA fall to 4.5% in 2020.

In 2020, international arrivals decreased by 61.0% to 25.2 million, while domestic tourism decreased by 37.1% to 34.1 million. An estimated EUR 27.0 billion was lost in tourism expenditure from international visitors. In 2021, international arrivals remained 58.3% below 2019 levels, totalling 26.9 million tourists. The top source markets in 2021 were Germany (17.1%), France (14.5%) and Austria (9.3%). Tourism expenditure from international tourism was EUR 21.2 billion in 2021, 52% below 2019.

Domestic tourism is an important part of the Italian tourism sector, accounting for 56.4% of total tourism expenditure in 2019. Domestic tourism has rebounded more strongly recording, 37.2 million tourists in 2021, 31.5% below pre-pandemic levels.

Tourism governance and funding

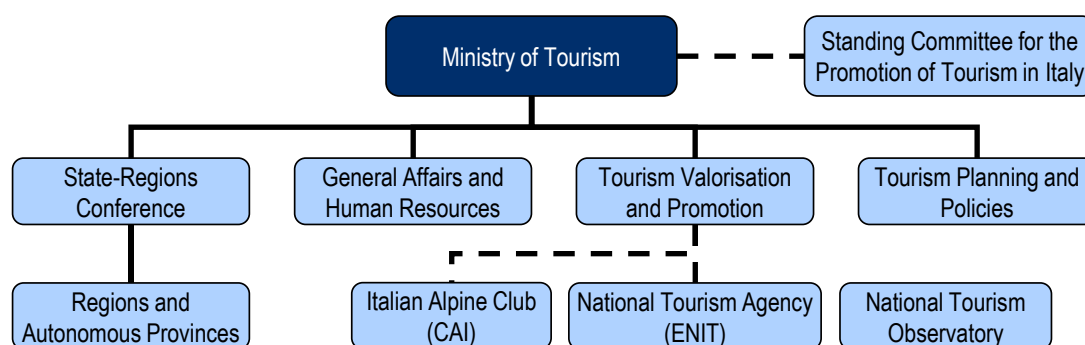
A new Ministry dedicated to tourism was created in 2021. The Ministry of Tourism is responsible for national strategic co-ordination, implementation of development plans, promotion of initiatives to enhance the tourism offer, planning assistance mechanisms for tourists, and playing a leading role in innovation. The Ministry supports and supervises the National Agency for Tourism (ENIT, which oversees the promotion and marketing of the national image and brand) and Club Alpino Italiano (responsible for promoting knowledge of the mountains and safeguarding their natural environment).

Each Italian region has legislative powers and adopts triennial plans. These are organised around annual programmes that define responsibilities, objectives and guidelines for tourism management. Regions and autonomous provinces gather in the “Unified Conference”, a public body which ensures strategic and united collaboration between central authorities and local institutions. The main responsibilities of regions include:

- Organisation and distribution of functions between the region, provinces, and municipalities.
- Regulation of tour operators and accommodation facilities, including their standardisation at the regional level.
- Promotion of the image of the region at national and international levels.
- Promotion of projects of regional interest directed at different levels of the supply chain.
- Collection and management of regional tourism statistics and visitor satisfaction surveys.

The Italian Budget Law for 2022 created the Unique National Tourism Fund (FUNT), with a budget of EUR 120 million for 2022-23 and EUR 40 million for 2024 (see Box 1.7).

Italy: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of Tourism, 2022.

Tourism policies and programmes

The Ministry of Tourism has implemented various measures to respond to the COVID-19 crisis. Short-term measures focused on public health issues and initiatives to mitigate the economic and social impact of the crisis on businesses and workers (over EUR 2.3 billion). These included economic stimulus packages to provide financial liquidity, fiscal and tax relief measures to companies along the tourism supply chain and income continuity for tourism workers.

Italy's National Recovery and Resilience Plan (NRRP) was developed in line with the Strategic Tourism Plan 2017-22 and presents a strategic framework to face the structural challenges of the sector while adapting national tourism strategies to the policy context emerging after the COVID-19 crisis. In this context, the NRRP is the main medium to long-term strategic document guiding the development of the tourism sector during the period 2021-26.

The Strategic Tourism Plan 2017-22 is receiving an update in 2022. While digital transformation was included in the 2017-22 plan, the COVID-19 crisis highlighted that low levels of digitalisation are a key limiting factor for the competitiveness and resilience of operators.

The crisis also highlighted the necessity to address the fragmentation of the Italian tourism ecosystem, particularly the regional differences, including the gap between large and small attractions and operators of the supply chain. There is a need to invest in training programmes directed at SMEs, support them in the digitalisation of their offer, increase competitiveness and productivity, and provide tools that address inclusion and sustainability in the provision of services.

For these reasons, a revision and updating of strategies became necessary. Priority pillars for the New Strategic Plan 2023-27 are:

- **A shared governance and monitoring model:** as tourism is constitutionally a subject of residual competence for regions, there is a need for an increased focus on a shared model of governance and monitoring. This aims to create and consolidate a participatory and effective decision-making process, ensuring continuity of action even in emergencies due to outside factors.
- **Digital tourism:** this pillar concerns the digitalisation and innovation of the tourism ecosystem and the implementation of projects such as the Tourism Digital Hub. Digitalisation affects the entire supply and value chains of the tourism product. It must arise through a process of sharing better transition experiences from a 'classic' type of tourism to an 'innovative' tourism. This is also made available through SME incubation tools at the community level.
- **A sustainable and integrated tourism system:** this pillar involves promoting culturally and environmentally sustainable growth. The tourism model should incorporate circularity, protection

of biodiversity, and access to sustainable transport and contribute to the Green Deal's decarbonisation objectives and a more sustainable global economy.

This pillar includes 'proximity tourism', the promotion of sustainable tourist transportation, intermodality and facilitating local public transport access for tourists, the exchange of experiences between different localities and territories on sustainable tourism models and support for the adoption of circular economy models and sustainable waste management systems in tourist destinations.

- **Tourism for all, in terms of safety, accessibility and quality:** this pillar requires encouraging the recovery and growth of the individual and the community. Tourism is a powerful tool for developing communities and enhancing heritage and territorial specificities. It is an important driving force for retaining and attracting jobs and businesses.

Quality must be sought in the product offered at any level, with a particular focus on the high-end range, to enhance - from a tourist perspective - manufacturing excellence and the traditions of making. The main tourist products (e.g. MICE tourism, wellness tourism, health tourism, ecotourism, school tourism, cultural and religious tourism, and tourism for shopping) are covered in this strategic category.

- **Offering a high-level education:** offering training through an in-depth study of existing courses and new thematic specialisation schools (e.g. mountain, marine and cultural offers). This includes training in the fields of hospitality, attraction and tourism organisation at a high level. Training paths from vocational schools to technical high schools, universities and postgraduate programmes must be clearly traced.

To draft the new Strategic Plan, thematic working tables involving different stakeholders will be established to examine each of the five strategic lines of the Plan.

Statistical Profile

Italy: Domestic, inbound and outbound tourism

| | 2017 | 2018 | 2019 | 2020 | 2021 |
|--|---------|---------|---------|---------|---------|
| TOURISM FLOWS, THOUSAND | | | | | |
| Domestic tourism¹ | | | | | |
| Total domestic trips | 121 851 | 145 307 | 132 858 | 74 654 | 73 000 |
| Overnight visitors (tourists) | 53 647 | 62 861 | 54 253 | 34 130 | 37 183 |
| Same-day visitors (excursionists) | 68 203 | 82 446 | 78 604 | 40 524 | 35 817 |
| Nights in all types of accommodation | 209 970 | 212 334 | 216 077 | 143 003 | 183 055 |
| Hotels and similar establishments | 176 666 | 179 432 | 188 592 | 122 346 | 158 150 |
| Other collective establishments | 33 305 | 32 903 | 27 485 | 20 658 | 24 905 |
| Private accommodation | .. | .. | .. | .. | .. |
| Inbound tourism | | | | | |
| Total international arrivals | 89 931 | 93 229 | 95 399 | 38 419 | 40 186 |
| Overnight visitors (tourists) | 58 253 | 61 567 | 64 513 | 25 190 | 26 888 |
| Same-day visitors (excursionists) | 31 678 | 31 661 | 30 886 | 13 229 | 13 298 |
| Top markets | | | | | |
| Germany | 12 451 | 13 518 | 13 951 | 5 161 | 4 604 |
| France | 7 202 | 7 641 | 7 978 | 3 687 | 3 910 |
| Austria | 3 690 | 4 020 | 4 309 | 2 034 | 2 488 |
| Switzerland | 3 309 | 3 216 | .. | 1 561 | 1 415 |
| United Kingdom | 4 932 | 5 659 | 6 006 | 1 756 | 909 |
| Nights in all types of accommodation | 365 939 | 384 426 | 398 963 | 182 214 | 208 525 |
| Hotels and similar establishments | 170 412 | 177 738 | 175 649 | 54 228 | 53 537 |
| Other collective establishments | 56 659 | 66 547 | 73 335 | 25 543 | 32 700 |
| Private accommodation | 138 868 | 140 141 | 149 980 | 102 444 | 122 288 |
| Outbound tourism | | | | | |
| Total international departures | 60 042 | 61 195 | 62 207 | 21 448 | 17 588 |
| Overnight visitors (tourists) | 31 805 | 33 347 | 34 703 | 11 960 | 12 354 |
| Same-day visitors (excursionists) | 28 237 | 27 848 | 27 505 | 9 489 | 5 234 |
| Top destinations | | | | | |
| France | 5 525 | 5 787 | 5 631 | 2 522 | 2 667 |
| Spain | 3 120 | 3 567 | 3 694 | 943 | 1 648 |
| Germany | 2 769 | 3 048 | 3 517 | 1 396 | 1 155 |
| Austria | 2 219 | 2 191 | 2 327 | 1 025 | 709 |
| Switzerland | 1 565 | 1 182 | 1 193 | 596 | 526 |
| TOURISM RECEIPTS AND EXPENDITURE, MILLION EUR | | | | | |
| Inbound tourism | | | | | |
| Total international receipts | 41 038 | 43 860 | 46 440 | 17 708 | .. |
| International travel receipts | 39 155 | 41 712 | 44 302 | 17 332 | .. |
| International passenger transport receipts | 1 884 | 2 148 | 2 138 | 376 | .. |
| Outbound tourism | | | | | |
| Total international expenditure | 30 649 | 31 972 | 33 896 | 11 455 | .. |
| International travel expenditure | 24 557 | 25 485 | 27 100 | 9 577 | .. |
| International passenger transport expenditure | 6 091 | 6 487 | 6 796 | 1 878 | .. |

.. Not available

1. Trips from demand side surveys; Nights from supply side surveys.

Source: OECD Tourism Statistics (Database).

StatLink  <https://stat.link/9qda6y>

Italy: Enterprises and employment in tourism

| | Number of establishments | Number of persons employed | | | | |
|---|--------------------------|----------------------------|------|------------------|------|------|
| | 2021 | 2017 | 2018 | 2019 | 2020 | 2021 |
| Total | .. | .. | .. | .. | .. | .. |
| Tourism industries | .. | 2 099 565 | .. | 2 136 578 | .. | .. |
| Accommodation services for visitors | 220 457 | 504 030 | .. | 524 528 | .. | .. |
| Hotels and similar establishments | 217 889 | 302 488 | .. | 315 698 | .. | .. |
| Food and beverage serving industry | .. | 1 075 932 | .. | 1 080 934 | .. | .. |
| Passenger transport | .. | 182 534 | .. | 184 591 | .. | .. |
| Air passenger transport | .. | 14 033 | .. | 15 172 | .. | .. |
| Railways passenger transport | .. | 31 194 | .. | 31 001 | .. | .. |
| Road passenger transport | .. | 99 196 | .. | 96 887 | .. | .. |
| Water passenger transport | .. | 38 111 | .. | 41 531 | .. | .. |
| Passenger transport supporting services | .. | .. | .. | .. | .. | .. |
| Transport equipment rental | .. | 10 931 | .. | 12 948 | .. | .. |
| Travel agencies and other reservation services industry | .. | 48 607 | .. | 52 051 | .. | .. |
| Cultural industry | .. | 128 322 | .. | 135 758 | .. | .. |
| Sports and recreation industry | .. | 149 209 | .. | 145 768 | .. | .. |
| Retail trade of country-specific tourism characteristic goods | .. | .. | .. | .. | .. | .. |
| Other country-specific tourism industries | .. | .. | .. | .. | .. | .. |
| Other industries | .. | .. | .. | .. | .. | .. |

.. Not available

Source: OECD Tourism Statistics (Database).

StatLink  <https://stat.link/omei6s>

Italy: Internal tourism consumption

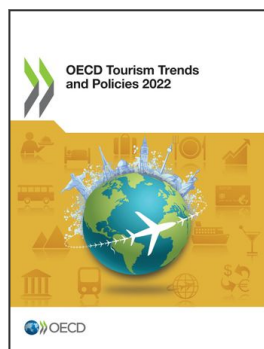
Million EUR

| | 2019 | | |
|---|------------------------------|-----------------------------|------------------------------|
| | Domestic tourism expenditure | Inbound tourism expenditure | Internal tourism consumption |
| Total | .. | .. | .. |
| Consumption products | 71 589 | 55 437 | 164 012 |
| Tourism characteristic products | 55 313 | 42 195 | 134 328 |
| Accommodation services for visitors | 16 438 | 16 951 | 59 863 |
| Food and beverage serving services | 12 169 | 10 683 | 23 913 |
| Passenger transport services | 9 665 | 3 404 | 17 440 |
| Air passenger transport services | 3 543 | 1 810 | 8 381 |
| Railways passenger transport services | 2 038 | 360 | 3 295 |
| Road passenger transport services | 2 020 | 790 | 3 256 |
| Water passenger transport services | 2 064 | 444 | 2 508 |
| Passenger transport supporting services | .. | .. | .. |
| Transport equipment rental services | 432 | 616 | 1 455 |
| Travel agencies and other reservation services industry | 3 528 | 515 | 6 673 |
| Cultural services | 411 | 585 | 1 744 |
| Sports and recreation services | 1 319 | 1 878 | 4 325 |
| Country-specific tourism characteristic goods | 11 351 | 7 564 | 18 915 |
| Country-specific tourism characteristic services | .. | .. | .. |
| Other consumption products | 16 277 | 13 242 | 29 684 |
| Tourism connected products | .. | .. | .. |
| Non-tourism related consumption products | .. | .. | .. |
| Non-consumption products | .. | .. | .. |

.. Not available

Source: OECD Tourism Statistics (Database).

StatLink  <https://stat.link/jgdr5k>



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