



World Travel & Tourism Council

# GLOBAL SUMMIT

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DEL TURISMO  
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# THE VALUE OF ASSOCIATIONS, THE HEART AND DRIVING FORCE OF ITALIAN TOURISM



Vision, professionalism and passion: these are the defining characteristics of all the trade associations which, day after day, make a valuable contribution to shaping the travel experiences that make Italy's tourist offering unique and unforgettable.

The Italian system of tourism trade associations constitutes a dynamic driving force, to which we dedicate this catalogue, created as a real tool for showcasing and promoting these associations which are not merely players but genuine stars within our ecosystem.

The daily commitment of trade associations to supporting development of a high-quality, innovative and sustainable tourist offering is fundamentally important, stimulating the various elements of the industry, from promotion of local excellence to professional training and from protection of our heritage to the quest for increasingly cutting-edge solutions.

This catalogue is therefore intended to serve as a reference point for all operators and travellers wishing to explore the richness and diversity of Italian tourist services. It highlights our associations' skills and ability to represent and protect the interests of businesses and professionals, offer useful support and advisory services and promote the Italian tourist offering in Italy and abroad.

I trust that this tool will further strengthen the cooperation between Italy's Ministry of Tourism and associations, consolidating and optimising the synergy already in place with a view to building a public-private partnership, indispensable for shaping a highly competitive and winning offering.

We truly believe that only by working as a team

can we meet the challenges of the present and seize the opportunities of the future, thereby consolidating Italy's position as a leading global destination.

Together, we can build increasingly inclusive and responsible tourism that meets the expectations of those who choose our beloved nation.

***Daniela Santanchè***

Ministro del Turismo

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# TOURISM, A DRIVER FOR ITALY'S DEVELOPMENT, WITH TRADE ASSOCIATIONS PLAYING A KEY ROLE

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Tourism in Italy is experiencing a dynamic growth phase, surpassing pre-COVID levels. We are one of the world's most sought-after destinations, chosen by foreign tourists due to our rich and unique services. Each region offers singular, unforgettable experiences embodying the very essence of Italian-made products.

Tourism is one of our country's driving forces, and trade associations play a key role in this. Every single operator involved in this industry contributes to the growth of our country. We mustn't forget that we are on a trajectory of continual growth and are once again a leader in the ranking of this summer's most popular destinations, ahead even of France.

This is because associations and institutions regularly promote our country at major events attracting visitors from around the globe. It is no coincidence that we are recording a boom in food and wine tourism - a segment consolidated over the last decade and generating in 2024 a total expenditure of 396 million euros from 765,000 visitors and 2.4 million overnight stays - with an increase of +176%. We also have Italy's shopping and luxury tourism, another booming sector. In 2024 alone, we welcomed more than 2 million shopping tourists, an increase of 7% on the pre-COVID period, in a phenomenon that is growing at global level and making a direct contribution of over 2.5 billion euros to Italy's GDP. Another emerging phenomenon is that of sports tourism. The latest data tells us that nearly 600 thousand international travellers (up by about 5%) have chosen sports holidays in Italy, generating almost 2 million overnight stays (+8.7%) and making a strong impact on the economy, with 338 million euros generated by tourists mainly from Northern European countries

such as Germany, the Netherlands, the United Kingdom and Austria.

We are an industry that generates value, employment and socio-economic well-being for the entire nation. Every operator involved is pulling in the same direction, and the results confirm that we are on the right path. Public-private synergies still hold great potential for Italy, developing our GDP and local areas and enhancing our regional uniqueness and local communities.

***Ivana Jelinic***

Amministratore Delegato ENIT S.p.A.

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# ITALY AT A GLANCE: REGIONS AND STRATEGIC INFRASTRUCTURES

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# Map of Regional Capitals

## Italian Regions and Regional capitals





# Railway map

## Railway stations served by high-speed trains



Sorce: [Trenitalia](#)  
and [FS Italiane](#)

# Airport Map

Italy's main airports for international arrivals by region in 2024



Source: ENIT Research  
Department based on  
Assaeroporti data

# Map of Ports

Italy's main ports by number of arrivals by region (ferries and cruise ships) in 2024



Source: ENIT Research  
Department based on  
Assoporti data

# THE REASONS FOR THE HOLIDAY

In the coming years, tourism in Europe and Italy is set to grow to the point of exceeding the ratio of one visitor per resident. Against this backdrop, adopting sustainable practices is not only desirable but the only strategic way to manage an expansion that is already underway. By 2034, the tourist industry is expected to contribute an estimated \$16 trillion to the global economy, equivalent to 11.4% of the world's GDP. (Source: ENIT Research Department based on UNTourism data)

2024 confirmed the positive trend in Italy's tourism, with 139.6 million arrivals and 466.2 million overnight stays in accommodation establishments. More than 254 million of these were generated by foreign tourists accounting for 74 million arrivals. Compared to 2023, there was an increase of 4.5% in arrivals and 4.2% in overnight stays, with a significant boost from foreign markets (+8.9% and +8.4% respectively). (Source: ENIT Research Department based on ISTAT data)

Tourism is establishing itself as a pillar of Italy's economy, contributing 10.8% to the nation's GDP (240.1 billion USD), with a projected increase to 12.6% by 2034 (290.5 billion USD). (Source: ENIT Research Department based on WTTC data)

It is also an employment-intensive industry, with direct tourism activities employing 385,000 people in 2023 (+8.7% compared to 2022) and the entire broader industry employing in excess of 2 million workers. Including indirect and related jobs, tourism employs a total of no less than 3.07 million people. (Source: ENIT Research Department based on WTTC data)

Since the dawn of leisure travel, people have been setting out in search of new experiences. They want to meet friendly locals, taste new foods, walk through unfamiliar landscapes and witness (or perhaps even participate in) cultural traditions that remind them they are in a faraway place. The demand for immersive travel experiences like these has grown in recent years. Thanks to the Internet, immersive activities catering to the diverse interests of travellers around the world are easily accessible. Social media generates a flywheel effect: seeing friends' posts about their experiences prompts people to seek out experiences to have and share in turn, perhaps inspiring others to continue the cycle. Increasingly, experiences are becoming decisive factors in choosing a trip, because the chance to experience something life-changing motivates us to book. Finding the right kind of experience also affects the destinations we choose.

### Open-air tourism

Il turismo open air si conferma una delle componenti più dinamiche del panorama turistico italiano. Con oltre 2.600 campeggi e villaggi e una capacità di oltre 1,3 milioni di posti letto, il settore genera circa 5 miliardi di euro di fatturato diretto e oltre 3 miliardi di indotto. Nel 2024 si sono registrati 11,4 milioni di arrivi e 68,2 milioni di presenze. Questo tipo di turismo, sempre più scelto per la sua attenzione all'ambiente, coinvolge circa 100.000 lavoratori, anche in settori collegati come ristorazione e intrattenimento. L'interesse per campeggi, villaggi e glamping è alimentato dalla domanda di esperienze autentiche e sostenibili, rendendo il comparto una leva strategica per il rilancio del turismo italiano.

### Culture and entertainment

Cultural tourism was the top reason for travelling to Italy in 2024, with 110.5 million international overnight stays in art cities and a total expenditure of 19.1 billion euros. Cultural reasons account for over 29% of overnight stays by foreigners and 35.3% of tourist expenditure.

Compared to 2019, there was a significant increase, with fast-growing markets including Spain, the UK, Poland, Canada and the US. Today, cultural tourists seek authentic, sustainable and enriching experiences, with a growing interest in immersive technology (AR/VR) for showcasing heritage and maximising enjoyment.

### Boating and coastal tourism

With its 7,700 kilometres of coastline and numerous lakes, Italy is a popular destination

for maritime tourism and yachting. The Italian boating industry is internationally renowned, with production reaching €3.6 billion in 2021, largely driven by exports. Italy ranks as the world's second largest manufacturer in the yachting industry, with a global market share of 12%, specialising primarily in construction of large vessels with inboard engines.

The country also has a very extensive port network, with 156,465 moorings in locations spread along its coasts, 46.1% of which are in Southern Italy and on the islands. There are more than 84,000 registered recreational craft, distributed evenly across Northern, Central and Southern Italy.

### MICE and conference tourism

Italy is an established world leader in the meetings industry, second only to the United States for number of international meetings hosted in 2024 (635 events) and first in Europe.

The MICE (Meetings, Incentives, Conferences and Exhibitions) industry has an economic value of approximately 11.7 billion euros and involves more than 27 million participants each year.

According to an ENIT-Federcongressi&eventi study, each participant spends an average of 281 euro per day while in Italy.

The nation has over 5,600 event venues, with Rome, Milan, Florence, Naples and Turin among the cities with the highest-capacity facilities. 39.7% of spending is concentrated in the North-West of Italy, followed by the Centre (27.7%), the North-East (23.6%) and the South and Islands (9%).

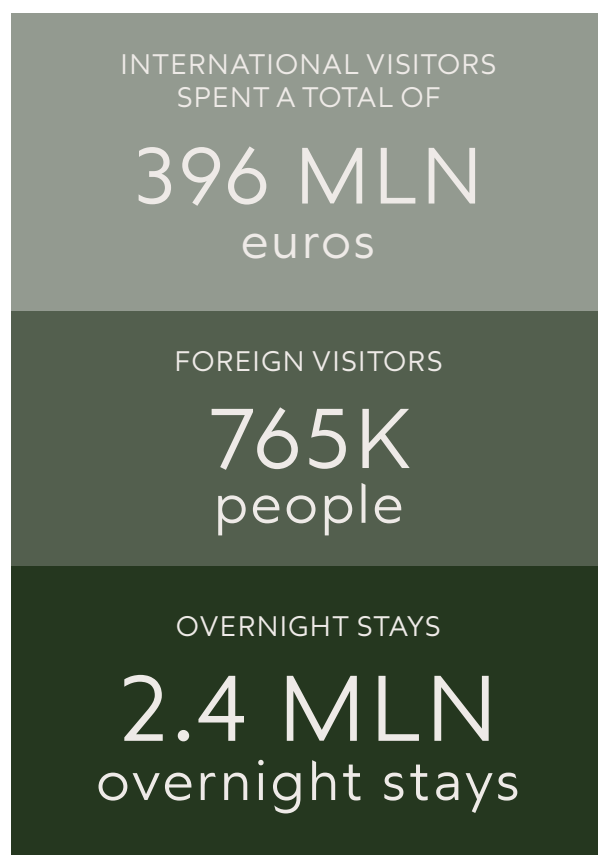
### Food & wine as a holiday motivation

Italian cuisine is no longer a niche market but one of the top reasons for visiting the country. Spending on cultural tourism, reaching 19 billion euros, accounts for 35.3% of total expenditure by international visitors to Italy, with an increase of +52.7% between 2014 and 2024. (Source: ENIT Research Department based on Bank of Italy data)

Food and wine tourism has grown by +176% in the last decade, transforming from a niche interest into a major travel motivation. International visitors spent a total of 396 billion euros on food & wine tourism experiences, boosting tourism the most iconic and lesser-known rural areas preserving Italy's authentic cultural heritage. Around 765,000 foreign visitors opted for food & wine-themed trips, totalling 2.4 million overnight stays. (fig.12)

**fig.12 Food & wine tourism in Italy**

Source: ENIT Research Department based on Bank of Italy data



+176%  
growth in the last decade

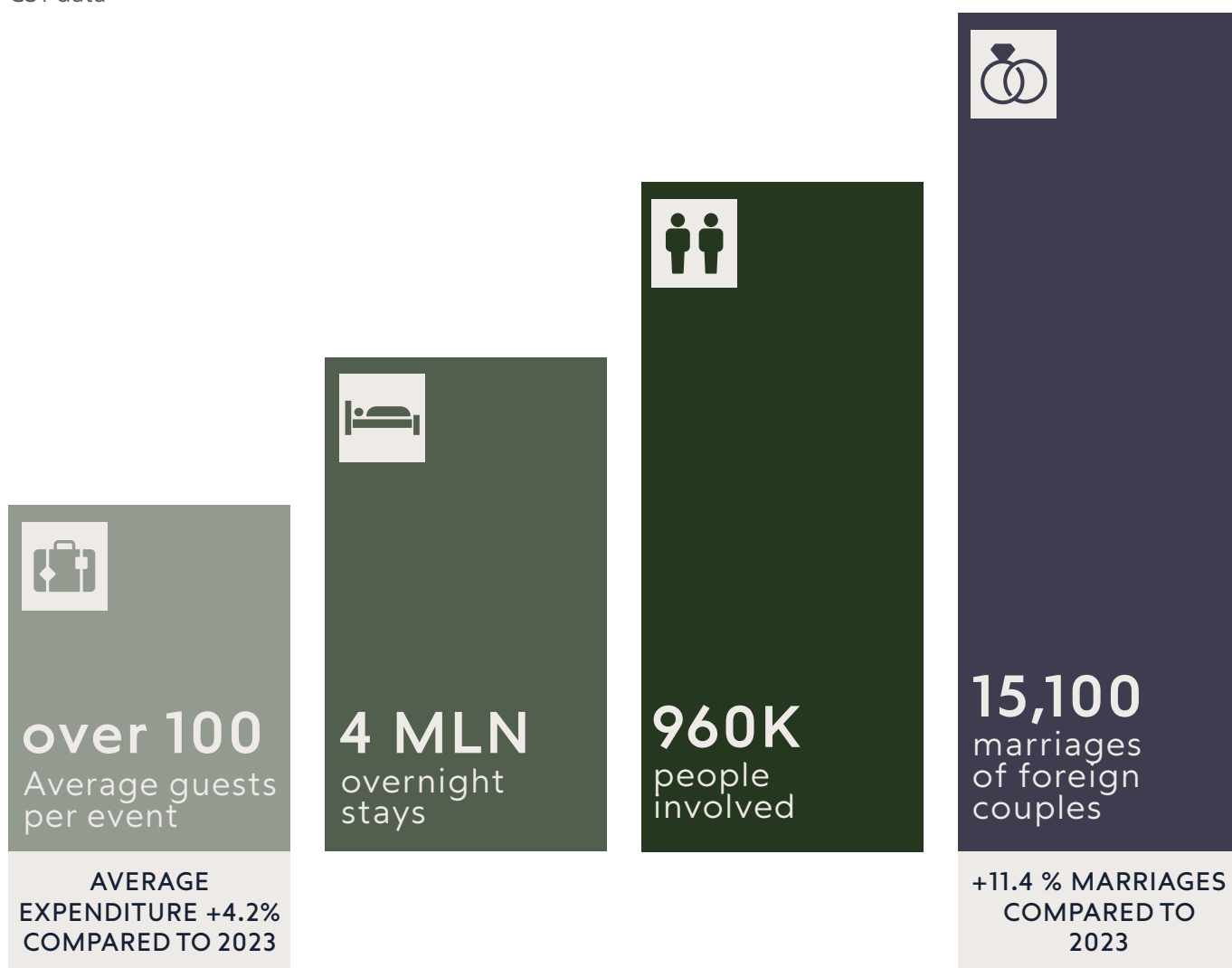
## II Wedding Tourism

More than 15,100 foreign couples chose to get married in Italy in 2024, up by +11.4% compared to 2023, involving 960,000 people and generating 4 million overnight stays and an increase

in the number of guests, exceeding 100. With inflation, this will push the average expenditure of these events up +4.2% compared to 2023, at around 61.500 euros, with the highest spending on catering (36%). (Source: ENIT Research Department based on CST data) (fig.13)

**fig.13 Food & wine tourism in Italy**

Source: ENIT Research Department based on CST data





Related activities generate close to 1 billion euros (compared to 500 million in 2018), distributed across a broad and professional supply

chain (the demand for wedding planners, for example, has risen to 46.3%). (fig.14)

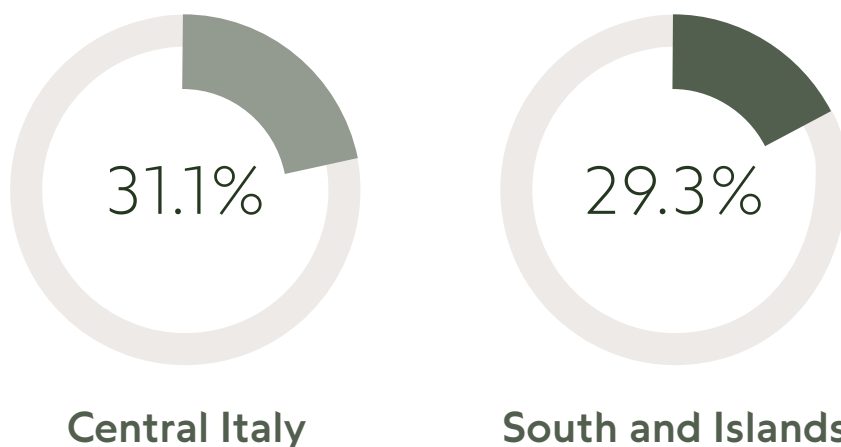


**fig.14 Economic income in Italy in 2024**

Source: ENIT Research Department based on CST data

Foreign couples are especially interested in Central Italy (31.1%), but the South and Islands are also increasingly sought-after (29.3%), Sicily

in particular being one of the most popular regions. (fig.15)



**fig.15 Geographical distribution of demand**

Source: ENIT Research Department based on CST data

'Destination Wedding' is an industry favouring delocalisation and enhancement of hospitality outside major centres. Those who come to Italy to get married want to feel Italian and are seeking an authentic experience in every detail, from culture to the food and setting. There is also significant interest among Italians, with 8,400 couples getting married outside

their region of residence. What is more, weddings transformed into major events are on the rise and, in a trend recorded this year. Also in growth are long-haul markets such as Canada, Japan, Argentina, India, the United Arab Emirates and South-East Asia, thanks to the attraction of Italian manufacturing and local products. (fig.16)

**fig.16 Long-haul markets on the rise**

Source: ENIT Research  
Department based on  
CST data

Long-haul markets  
on the rise



## Wellness tourism

Health and well-being are becoming an essential part of people's lives thanks to a growing global awareness of the importance of adopting a balanced lifestyle. More and more people recognise the value of preventive healthcare, good nutrition and mental healthcare, contributing to the expansion of the wellness

products and services market.

This growth is fuelled by several factors: rising healthcare expenditure, an ageing population and a newfound focus on personal care, accentuated by the effects of the 2020/2021 pandemic. The concept of 'health' has evolved from merely a physical, mental and social condition to first 'well-being' and

then 'wellness', with an increasing focus on inner balance, meditation and the practice of mindfulness. (fig.17)

**fig.17 What are new travellers seeking**  
Source: ENIT Research Department

## What are new travellers seeking?



**Immersive experiences**



**Physical and mental regeneration experiences**



**A central role for spas, nature and sustainability**

In the tourist industry, wellness tourism plays a much more significant role than you might imagine. The transition from traditional spas to modern 'wellness retreats' constitutes a radical change. The drivers of this transformation are, above all, the new generations - Millennials and Gen Z - who seek immersive and rejuvenating experiences with spas taking centre stage.

In wellness tourism, as in traditional tourism, 'experiences' have overtaken 'products', and what matters is no longer simply enjoying

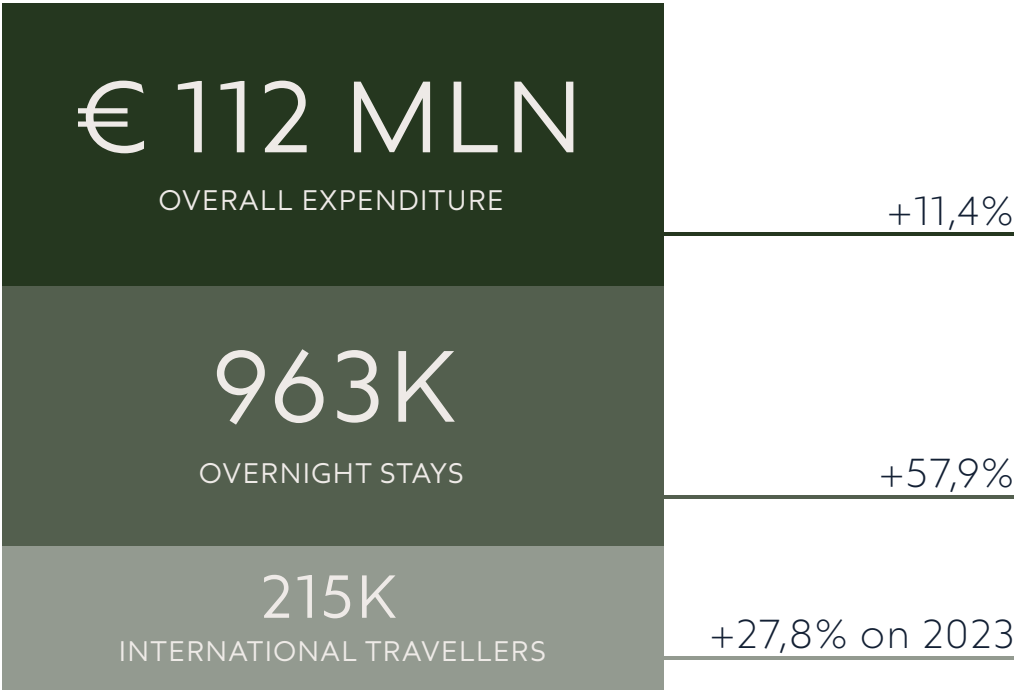
aesthetic or therapeutic treatments but having meaningful experience on a physical, emotional and relational level. This is the direction in which major investments are being directed, both nationally and internationally.

International tourism is strongly attracted to this type of tourist experience, especially when offered in a product mix, combined with sports, wine tasting, meditation, locations of cultural and archaeological value, etc.

In 2024, international travellers who chose Italy for this reason numbered more than 215 thousand (+27.8% on 2023) and stayed for around 963 thousand nights (+57.9%) with a total expenditure of 112 million euros (+11.4%). (Source: ENIT Research Department based on Bank of Italy data) **(fig.18)**

**fig.18 Sustained growth in 2024**

Source: ENIT Research Department based on Bank of Italy data



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# ITALY'S TRADE ASSOCIATIONS

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# Italcares

## Trade associations description

Launched in October 2024, **Italcares** is the national platform that integrates healthcare, wellness, and tourism, conceived by Confindustria Federterme with the co-financing of the Ministry of Tourism. With more than 100 thermal and healthcare facilities, 300 programs, and an alliance with Italy's leading health booking platform (6,100 facilities, 65,000 professionals), Italcares makes Italian excellence in prevention, care, and longevity accessible worldwide. A single portal designed to experience Italy as a global destination for health, wellness, and the Silver Economy.

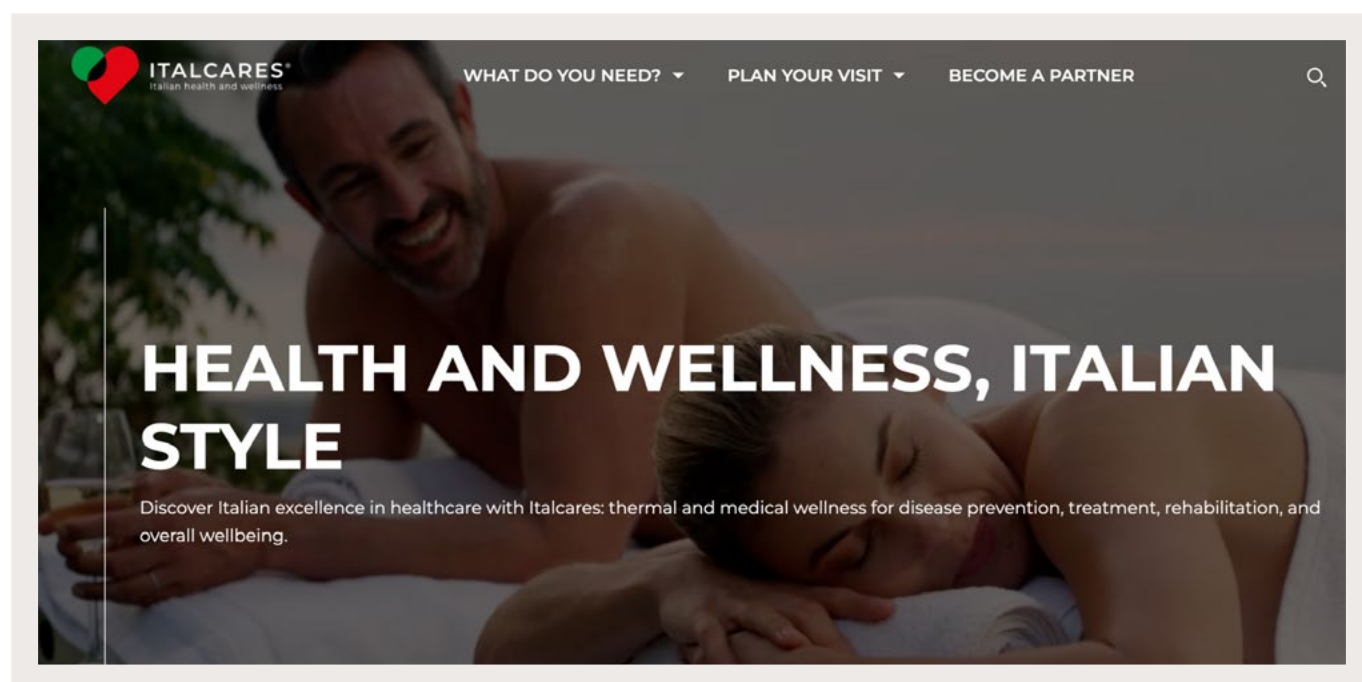
## Collaboration opportunities

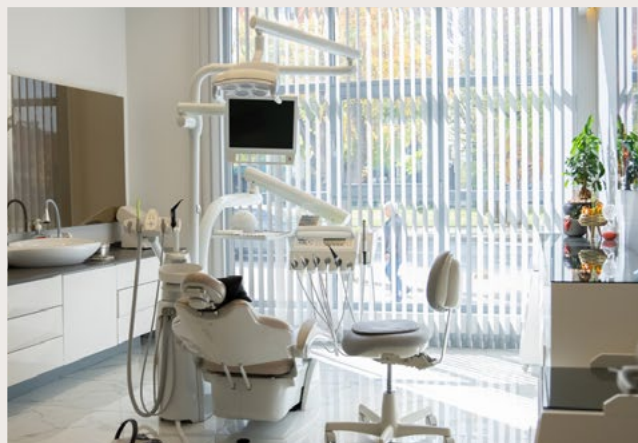
Italcares is open to strategic collaborations with institutions, companies, start-ups, local

authorities, and thermal/spa facilities. The national platform integrates hospitals, spas, thermal centers, resorts, and digital innovations, offering prevention, care, and wellness programs. Our partners benefit from global visibility, qualified leads, marketing campaigns, and institutional support from national and local entities.

<https://www.italcares.it/>

Abroad, we seek strategic partnerships to attract high-quality health tourism. We cooperate with start-ups and research centers to develop digital technologies and co-marketing activities. With local authorities, we promote territorial projects linked to Silver Tourism and the Golden Age Project, generating shared economic and social value.





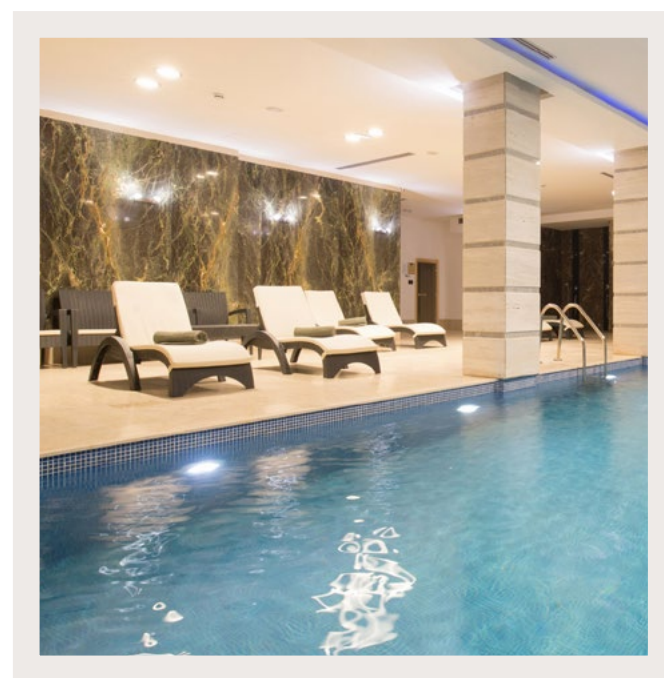
### Potential points of interest for international media

Italcare represents a unique case study for international media: the first national platform that combines tourism, healthcare, and wellness, supported by the Ministry of Tourism and Confindustria Federterme. Points of interest include the integration—thanks to the partnership with Italy’s leading health booking platform—of 6,100 facilities and 65,000 professionals in a single digital portal; the key role of thermal medicine within the National Health Service; and Italy’s positioning as a global hub for longevity and Silver Tourism. Moreover, the Golden Age Project highlights senior living models, favorable tax regimes for foreign retirees, and new trends in long-stay tourism.

### Potential Business Opportunities for WTTC Members

Italcare offers WTTC members strategic opportunities at the intersection of travel, healthcare, and wellness. As Italy’s official platform for medical and longevity tourism, Italcare connects facilities and professionals, enabling the creation of premium packages

that integrate clinical care, thermal protocols, wellness treatments, and cultural experiences. WTTC members can leverage co-branding and co-marketing initiatives, invest in Silver Tourism and long-stay models. With institutional support from the Ministry of Tourism, Italcare provides a reliable gateway to a rapidly growing market with high international demand.





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