SARDINIA 2026: THE NUMBERS BEHIND ITALY'S FASTEST-GROWING LUXURY DESTINATION

A market report for luxury travel advisors and hoteliers

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CONTENTS

Summary

Sardinia at a glance

01 From last to first: Sardinia's tourism growth, 2023-2025

02 Who is travelling to Sardinia

03 The American luxury traveller in Sardinia

04 Luxury travel in Sardinia: the Costa Smeralda and beyond

05 Growth across the whole island

06 Sardinia in 2026: a record year, and then more

07 Beyond the beach: culture, longevity and slow luxury

08 What to watch, and what it means for the trade

Frequently asked questions

About TRUE: Italy's leading luxury travel network

Sources and notes on method

ABOUT THIS REPORT

In 2023, Sardinia was the only Italian region where tourism declined. In 2025, ISTAT ranked it first in Italy for tourism growth. This report explains the turnaround with official data: who is travelling to Sardinia, where on the island the growth is happening, and what the 2026 season shows about the future of luxury travel in Sardinia.

It was presented at TRUE Sardegna 2026, the luxury travel trade event held on the Costa Smeralda from September 28 to October 1, 2026.

Sources are listed at the end of each chapter and in full in the final section. The online edition, with linked sources and updates, is at https://truevent.eu/reports/sardinia/2026.

KEY FIGURES

SARDINIA AT A GLANCE

21.9 million
nights in 2025, an all-time record (+15.9% on 2024, +34.2% on 2023)

5 million+
arrivals in 2025, a first for the island

56%
share of nights from international guests in 2025 (50% in 2023)

No.1
Italian region for tourism growth in 2025 (ISTAT)

+246%
American nights in 2025 compared with 2019

+8.24%
tourism growth in the first half of 2026, vs +4.43% for Italy

+11.4%
international guests in 2026 so far

67.2%
summer 2026 occupancy, 2nd in Italy (national average 61.8%)

May 21, 2026
first-ever direct flight between the US and Sardinia

Sources: Regione Sardegna; ISTAT via ANSA; Italian Ministry of Tourism.

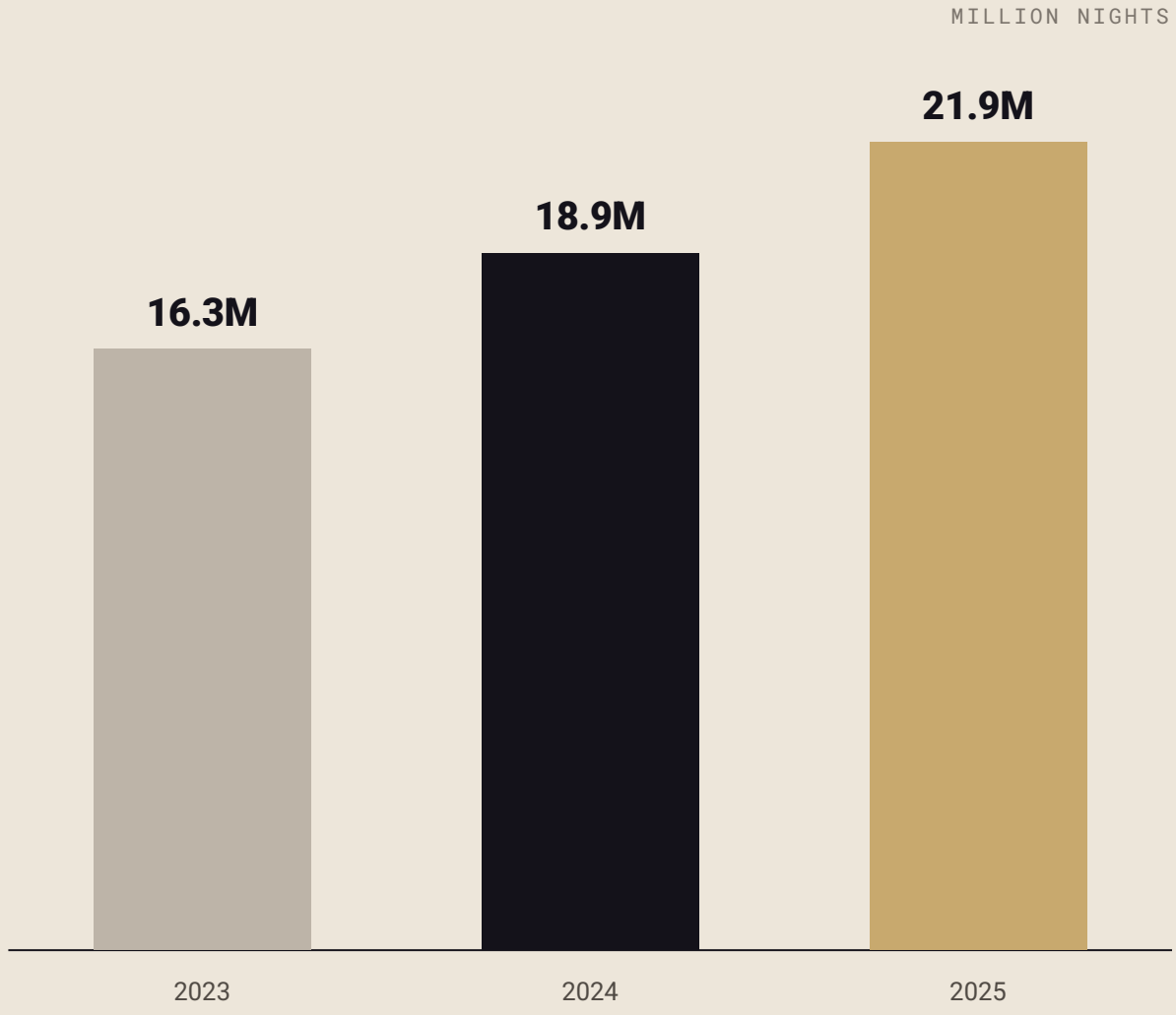
01

FROM LAST TO FIRST: SARDINIA'S TOURISM GROWTH, 2023-2025

The turnaround is recent and fast. In 2023, Sardinia recorded 14.2 million nights according to ISTAT, down 3.4% on 2022: the only region in Italy to decline in a year when the country as a whole beat its pre-pandemic record.

By 2025 the picture had reversed. The regional tourism observatory, which uses the same method year after year, counted 21.9 million nights and more than 5 million arrivals, with an average stay of 4.24 nights. That is +15.9% on 2024 and +34.2% on 2023. ISTAT's final 2025 figures placed Sardinia first in Italy for percentage growth in tourism flows, ahead of Sicily and Puglia.

Nights in Sardinia, 2023-2025 Regional tourism observatory series (like-for-like, short-term rentals included).

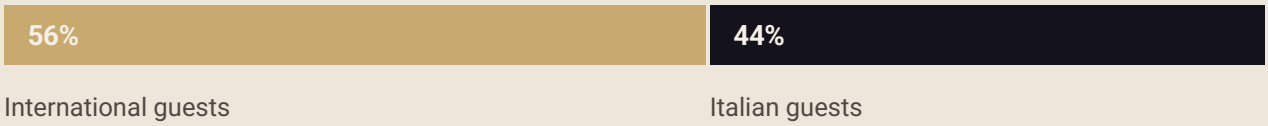


2023 and 2024 values derived from the observatory's published growth rates (+34.2% and +15.9%) on the 2025 total of 21.9 million nights. ISTAT's 2023 figure (14.2 million) uses a narrower perimeter.

The international tipping point

Growth came overwhelmingly from abroad. International nights rose 21.5% in 2025 and about 50% in two years, while Italian nights grew by around 10%. For the first time, foreign visitors clearly outnumbered Italians, with 56% of nights against 44%.

Share of nights, 2025



International guests | Italian guests

In 2023 the split was 50/50.

A NOTE ON THE NUMBERS

ISTAT began counting short-term rentals only in 2025, which inflates its year-on-year growth for Sardinia (+39% in nights). The regional observatory has always included them, so its +15.9% is the like-for-like figure, and the one used throughout this report.

SOURCES ISTAT, tourism flows 2023 (via ANSA); Regione Sardegna, 2025 results (July 2026); ISTAT, tourism flows 2025 (via ANSA).

02

WHO IS TRAVELLING TO SARDINIA

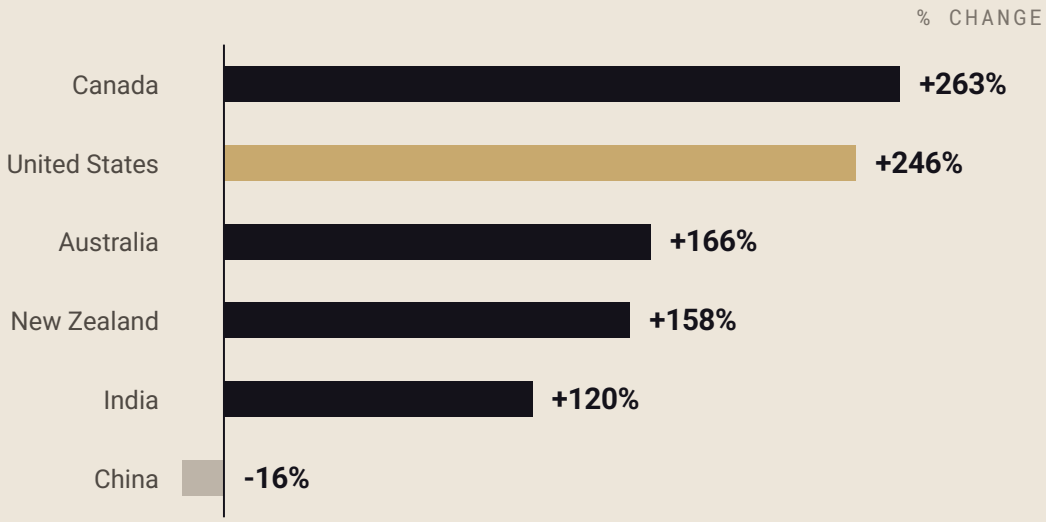
Germany, France and Switzerland are the backbone of Sardinian tourism, and all three set records in 2025.

Top international markets, 2025

MARKET	NIGHTS 2025	VS 2024	NOTE
Germany	3.26M	+19.8%	No.1 market, first time above 3 million; stays average 4.8 nights
France	1.6M	+21.6%	French nights have more than tripled in ten years
Switzerland	1.04M	-	Above 1 million nights for the first time
United States	400,860	+34%	First market outside Europe
Canada	116,000	+31%	Fastest long-haul growth since 2019

The fastest growth comes from long-haul markets. Compared with 2019, Canada is up 263%, the United States 246%, Australia 166%, New Zealand 158% and India 120%, while China is still 16% below pre-pandemic levels. For luxury travel advisors this matters because long-haul travellers stay longer, book through advisors and travel outside the Italian peak weeks.

Long-haul markets: nights in 2025 vs 2019



SOURCES Regione Sardegna, July 2026; Regione Sardegna data at BIT 2026, elaborated by Cipnes Gallura / UniOlbia.

03

THE AMERICAN LUXURY TRAVELLER IN SARDINIA

American travellers are still a small share of Sardinia's total, but no market has grown faster or matters more at the luxury end. In 2025, Sardinia welcomed 121,118 American visitors, who spent 400,860 nights on the island. About half of those nights are spent in Gallura, home of the Costa Smeralda, and US nights there doubled in two years.

121,118	**400,860**	**€80.05**	**+26%**
American visitors in 2025	American nights in 2025 (+34% on 2024)	highest average card payment of any nationality, first half of 2026	US passengers arriving in Olbia by private jet in 2025 (to November)

- American visitors make the highest average card payment of any nationality in Sardinia: €80.05 in the first half of 2026.
- US passengers arriving in Olbia by private jet rose 26% in 2025 (to November) compared with 2024.
- In a 2025 study of superyachts in Gallura, US owners were the largest single group: 72 of the 347 identified superyachts.

Direct flights between New York and Sardinia

On May 21, 2026, Delta launched the first-ever non-stop route between the US and Sardinia, New York JFK to Olbia, four times a week through October. The route carried about 2,700 passengers in its first weeks, with strong demand in business and premium cabins. United adds Newark-Olbia from May 27, 2027, three times a week. From 2027, northern Sardinia will have seven weekly flights to the New York area.

MAY 21, 2026

Delta: New York JFK - Olbia

First-ever non-stop US-Sardinia route, four weekly flights through October.

MAY 27, 2027

United: Newark - Olbia

Three weekly flights. Seven weekly flights to the New York area from 2027.

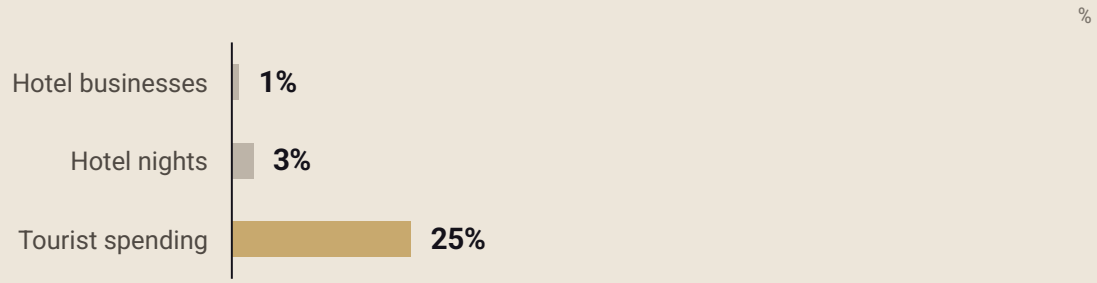
SOURCES Regione Sardegna; Sardegna Press, May 2026; La Nuova Sardegna, Feb 2026; TTG Italia; olbia.it, June 2026; Gallura Oggi, Aug 2026.

04

LUXURY TRAVEL IN SARDINIA: THE COSTA SMERALDA AND BEYOND

Luxury tourism is a small slice of volume and a large slice of value. Across Italy, an Altagamma analysis found that 5-star and 5-star luxury hotels account for 1% of hotel businesses and 3% of hotel nights, but generate 25% of tourist spending; their guests spend nine times more than the average visitor.

Five-star hotels in Italy: share of the total



Altagamma analysis. Five-star guests spend nine times more than the average visitor.

The Costa Smeralda is the heart of luxury travel in Sardinia. Gallura holds about 60% of the island's top-tier hotels, and Arzachena, the Costa Smeralda's municipality, ranks first in Sardinia for tourism value despite recording fewer nights than Alghero, with the highest average short-rental revenue at $51,250 per listing a year.

Luxury real estate

Porto Cervo holds Italy's record villa value, at up to €70,000 per square metre. It averages €11,575 per m² and, in the villa segment, now tops Portofino at around €21,000 per m².

Private aviation

Olbia Costa Smeralda airport handled about 15,000 private aviation movements in 2024 (+10%), with more than 220 on peak days. Its operators report that private jet clients increasingly travel beyond the Costa Smeralda to the rest of the island.

Yachting

2,330 yachts and superyachts visited the Costa Smeralda area in summer 2023, 30% more than in 2018. A 90-metre superyacht spends around €40,300 a day on shore.

New luxury hotels in 2026

W Hotels on the Costa Smeralda and a 5-star luxury NH Collection in Cagliari, part of a national pipeline of 167 luxury openings expected in Italy by 2029.

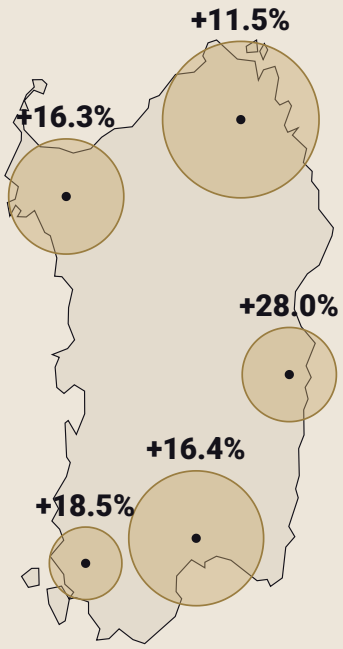
SOURCES Altagamma via Cipnes Gallura; Sardegna Press, June 2026; Il Sole 24 Ore, Aug 2026; La Nuova Sardegna (Geasar / Eccelsa); Cipnes / UniOlbia; Forbes Italia; JLC News.

05

GROWTH ACROSS THE WHOLE ISLAND

Every Sardinian province grew in 2025. The fastest percentage growth came from Ogliastra on the east coast and the Sulcis in the southwest, areas known for nature, archaeology and food.

Nights 2025 by area and growth on 2024



Gallura +11.5% vs 2024 · +34.6% vs 2023	**7.7M**
Cagliari metropolitan area +16.4% vs 2024 · +34.0% vs 2023	**5.17M**
Sassari metropolitan area +16.3% vs 2024 · +34.7% vs 2023	**3.30M**
Ogliastra +28.0% vs 2024 · +42.9% vs 2023	**1.77M**
Sulcis +18.5% vs 2024 · +50.3% vs 2023	**687,000**

Bubble size proportional to nights in 2025. Labels show growth on 2024.

Six towns now pass one million nights a year: Alghero (1.8 million, the most visited town on the island), Arzachena (about 1.4 million), Olbia (about 1.2 million), Cagliari, Orosei and San Teodoro.

A longer season

A third of all nights now fall in April, May, September and October. Mid-season nights grew 39.2% compared with 2023, and winter nights 32.1%, although winter is still only 4% of the total. International guests drive the shoulder months: in 2023 they accounted for 71% of nights in May and 75% in October, and September had already overtaken June as the third busiest month.

1/3	**+39.2%**	**71% / 75%**
of all nights fall in April, May, September and October	mid-season nights compared with 2023	international share of nights in May and October (2023)

SOURCES Regione Sardegna / ISTAT, July 2026; Sardegna Press, June 2026; Cipnes / UniOlbia.

06

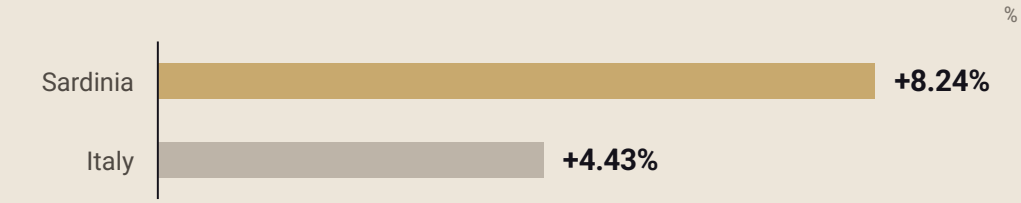
SARDINIA IN 2026: A RECORD YEAR, AND THEN MORE

Full-year 2026 figures will only be published next summer, but every indicator available so far points upward.

Sardinia vs Italy, 2026

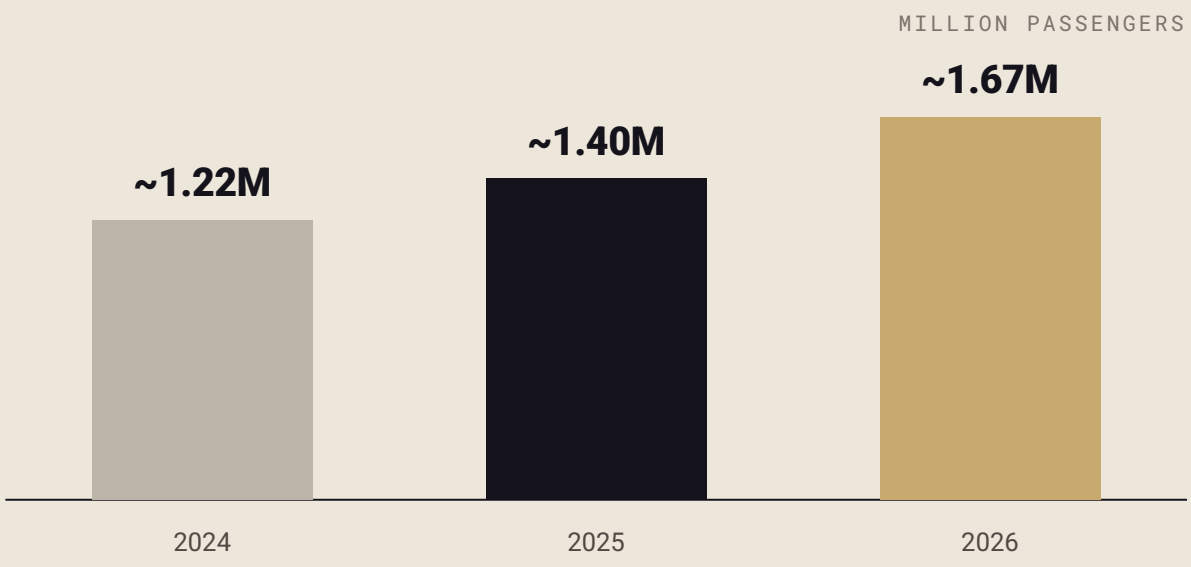
INDICATOR	SARDINIA	ITALY
Tourism growth, Jan-Jun 2026	+8.24%	+4.43%
Summer 2026 occupancy	67.2% (2nd in Italy)	61.8%

Tourism growth, January-June 2026



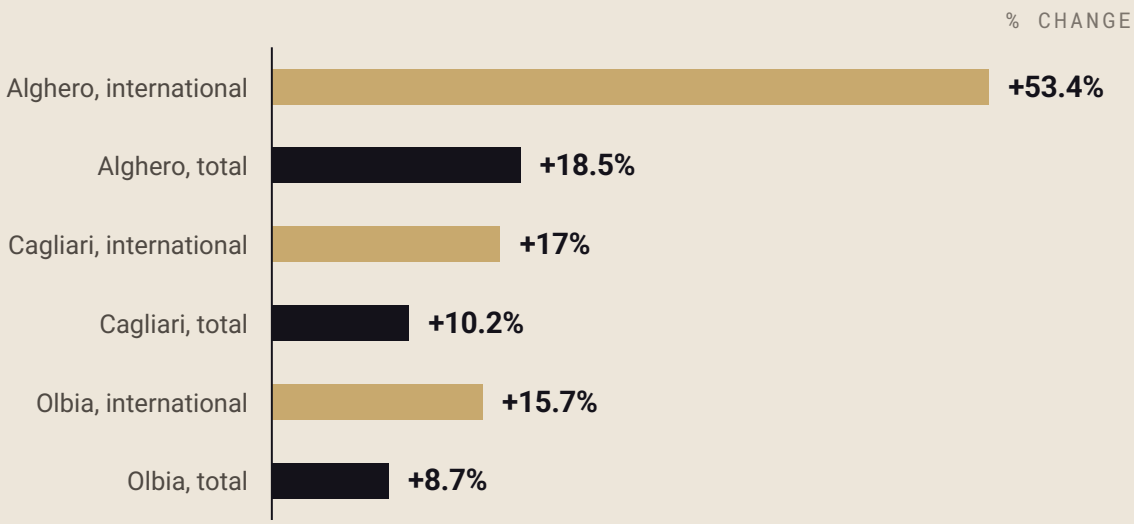
- International guests: +11.4% in 2026 so far, against +4% for Italian guests.
- Summer occupancy: up 13% on summer 2025.
- Foreign air passengers: +19.3% compared with 2025 and +36.9% compared with 2024, from about 1.22 million in the first half of 2024 to about 1.67 million in the first half of 2026.
- Every airport growing: in July 2026, Alghero +18.5%, Cagliari +10.2%, Olbia +8.7%. International passengers grew even faster: Alghero +53.4%, Cagliari +17%, Olbia +15.7%.
- August: almost 1.3 million arrivals by air and sea in the first 28 days, level with 2025's record.
- Autumn: nights booked for September were up 16.2% on 2025, and for October up 7.9%.

Foreign passengers at Sardinian airports, January-June



+19.3% on the first half of 2025 and +36.9% on the first half of 2024.

Airport passengers, July 2026 vs July 2025



SOURCES Regione Sardegna / Viminale Alloggiati Web, July 2026; Italian Ministry of Tourism, Sept 2026; Assaeroporti, foreign passengers January-June 2024-2026; Assaeroporti via Sassari Notizie, Sept 2026; L'Unione Sarda, Aug 2026. September and October figures are bookings as of late August.

07

BEYOND THE BEACH: CULTURE, LONGEVITY AND SLOW LUXURY

Sardinia's growth outside the peak months and outside the famous coastline rests on assets most international travellers have not yet discovered. They are also the stories that justify a longer, higher-value itinerary.

UNESCO heritage

In July 2025, UNESCO inscribed the domus de janas, prehistoric rock-cut tombs known as "fairy houses", as Italy's 61st World Heritage Site: 17 sites from Montessu in the Sulcis to Anghelu Ruju near Alghero, out of about 3,500 across the island. They join the Su Nuraxi nuraghe at Barumini, listed in 1997.

Longevity

The villages of Barbagia and Ogliastra form the world's first identified Blue Zone. In Perdasdefogu, centenarians are 13 times more common than the Italian average, and men and women reach 100 in equal numbers.

Recognition

Lonely Planet named Sardinia in its Best in Travel 2026 list, the only European destination included.

These are the experiences that make Sardinia a destination for May, June, September and October, when most of the island's visitors are international.

SOURCES Ministero della Cultura; UNESCO Italy; Musei Nazionali Sardegna; BlueZoneNews; La Nuova Sardegna, Feb 2026.

08

WHAT TO WATCH, AND WHAT IT MEANS FOR THE TRADE

Watch points

Summer concentration
CNA Sardegna warns that international demand is increasingly concentrating in the summer months, the same weeks Italians choose. That raises exposure to price pressure, capacity limits and external shocks. At Olbia, 68% of 2025 traffic fell between June and September.

Value per visitor
Arrivals are rising, but in summer 2026 Confesercenti and Confcommercio reported spending in bars, restaurants and tourist services down 20-25%, with travellers more price-conscious. Growth in volume does not automatically mean growth in value.

Infrastructure
Peak-season congestion is a recurring issue, from airport security lines in Cagliari to traffic on the Costa Smeralda.

What it means for advisors and hoteliers

01 **Sell the shoulder months.**
May, June, September and October deliver the island at its best, with better availability and an international crowd.

02 **Look beyond the Costa Smeralda.**
Ogliastra, the Sulcis, the interior and Alghero are growing fastest and offer the heritage and food stories long-haul clients want.

03 **Build for the American client.**
With seven weekly New York flights from 2027, US demand will keep rising. Premium cabins filled first in 2026.

04 **Book peak weeks early.**
With occupancy at 67% across the summer and top properties near capacity, early commitments protect the best inventory.

SOURCES CNA Sardegna, April 2026; Gallura Oggi (Geasar data), Aug 2026; L'Agenzia di Viaggi Magazine / L'Unione Sarda, Aug 2026.

FAQ

FREQUENTLY ASKED QUESTIONS

About Sardinia

Is Sardinia a luxury travel destination?

Yes. Sardinia, and the Costa Smeralda in particular, is one of Italy's leading luxury destinations. It has the country's highest villa prices in Porto Cervo, a concentration of five-star hotels in Gallura, one of Europe's busiest private aviation airports in summer, and a major superyacht scene.

Is tourism in Sardinia growing?

Yes. ISTAT ranked Sardinia first in Italy for tourism growth in 2025, with a record 21.9 million nights. In the first half of 2026, tourism grew a further 8.24%, almost twice the national rate.

Is there a direct flight from the US to Sardinia?

Yes. Since May 21, 2026, Delta has flown non-stop from New York JFK to Olbia. United will add Newark-Olbia from May 27, 2027.

When is the best time for luxury travel to Sardinia?

May, June, September and October offer warm weather, fewer crowds and the island's international atmosphere. In 2026, nights booked for September were up 16.2% on 2025.

About TRUE

What is TRUE?

TRUE is Italy's leading luxury travel network and B2B event platform. It connects over 5,000 luxury travel advisors worldwide with more than 300 hotels, resorts, villas and DMCs in Italy through immersive regional events that combine one-to-one meetings with fam trips.

What is TRUE Sardegna?

TRUE Sardegna is the Sardinian edition of TRUE. It brings selected international travel advisors to meet Sardinia's luxury hotels, resorts, villas and DMCs through B2B meetings, fam trips and immersive experiences. The 2026 edition took place from September 28 to October 1 on the Costa Smeralda.

What are the best luxury travel networking events in Italy?

TRUE runs regional luxury travel trade events in Puglia, Sicily, the Dolomites and Sardinia, with Campania and Tuscany from 2027. Each edition brings selected international travel advisors together with the region's luxury hotels, resorts, villas and DMCs.

How is TRUE different from a traditional travel trade show?

TRUE combines one-to-one B2B appointments with fam trips, site inspections and destination experiences. Each edition features only suppliers from the host region, and participation is all-inclusive.

Can travel advisors join a fam trip to Italy with TRUE?

Yes. Luxury travel advisors can apply to attend a TRUE edition. Selected advisors take part in an all-inclusive program of B2B meetings, fam trips and experiences in the host region.

How can travel advisors or hotels take part in TRUE?

Travel advisors can apply to attend a TRUE edition, and luxury hotels, resorts, villas and DMCs can join as exhibitors, through the TRUE application's forms.

TRUE

ABOUT TRUE: ITALY'S LEADING LUXURY TRAVEL NETWORK

TRUE is Italy's leading luxury travel network and B2B event platform, connecting over 5,000 luxury travel advisors worldwide with more than 300 hotels, resorts, villas and DMCs across Italy. Founded in 2022 by Luigi De Santis, TRUE has quickly become a reference point for luxury travel networking between Italian hospitality and the world's top travel advisors, especially from the United States, Latin America and Australia.

How TRUE works

Each TRUE event is dedicated to one Italian region and features only hotels, resorts, villas and DMCs from that region. Instead of a traditional trade show, TRUE uses an immersive format. Advisors meet exhibitors in pre-scheduled one-to-one B2B appointments, then experience the destination through fam trips, site inspections and curated experiences. Advisors come home knowing the product first-hand, and hotels meet buyers who are ready to sell. Participation is all-inclusive for both exhibitors and advisors, covering accommodation, B2B meetings, meals, transfers and events.

A growing network

Since 2022, TRUE has grown from a single event into a series of regional luxury travel events across Italy.

2026 editions
TRUE Puglia, TRUE Sicily, TRUE Dolomites and TRUE Sardegna.

2027
TRUE Campania and TRUE Tuscany join the calendar.

Selected advisors
Each year, hundreds of luxury travel advisors apply to attend TRUE, and about 180 top performers are selected, sent by the leading travel agencies and consortia in the US, Latin America and Australia.

Road to TRUE
Once a year, TRUE takes about 60 Italian luxury hotels abroad to meet around 150 buyers in a key market such as New York.

TRUEtalk
At every edition, a panel of hoteliers, buyers and journalists discusses the destination and the future of luxury travel.

Why hotels and advisors choose TRUE

For hotels, resorts, villas and DMCs

Direct access to qualified luxury travel advisors from high-value long-haul markets, in a setting where they experience your property instead of just hearing about it.

For travel advisors

An all-inclusive luxury fam trip in Italy combined with one-to-one meetings, destination training and relationships with the properties they sell.

NOTES

SOURCES AND NOTES ON METHOD

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- ISTAT, tourism flows in accommodation establishments 2025, via ANSA and UniOlbia
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Nights vs arrivals

"Nights" count each night spent in accommodation; "arrivals" count guests checking in. Growth rates are not interchangeable between the two.

2026 data is provisional and partial

First-half figures come from the Alloggiati Web platform as analysed by the Region, and some sources describe the +8.24% as arrivals and others as nights. September and October figures are bookings, not final results.

Older figures

Seasonality shares (2023), yacht arrivals (2023), private aviation (2024) and the Gallura five-star hotel share are the most recent published figures found and may since have changed.

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TRUE

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