SICILY 2026: THE NUMBERS BEHIND THE GROWTH OF INTERNATIONAL LUXURY TRAVEL

A market report for luxury travel advisors and hoteliers

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ABOUT THIS REPORT

Sicily entered 2026 from an already high base, and its growth is now driven by international travellers, longer stays and rising hotel rates at the top of the market. This report brings together the latest available data: who is travelling to Sicily, the weight of North America, the performance of Palermo, Taormina and the southwest, and what it means for luxury travel advisors and hoteliers.

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/sicily/2026.

KEY FIGURES

SICILY AT A GLANCE

+18.4%
overnight stays, January-August 2026 compared with 2024*

+4.9%
arrivals, January-August 2026 compared with 2024*

+5.8%
overnight stays, January-August 2026 compared with 2025

+8.5%
North American arrivals, first half of 2026 compared with 2025

380K
US arrivals in 2024

~€1,500
leading Taormina five-star average daily rate

+43%
luxury hotel average daily rate compared with 2019

€1bn
real-estate investment in five years

67%
share of investment capital from abroad

2,500+
premium hotel rooms in the pipeline to 2030

~46%
international share, Province of Agrigento

+15.9%
US nights in Agrigento, 2025 compared with 2024

*Two-year compounded change from comparable January-August growth rates.

01

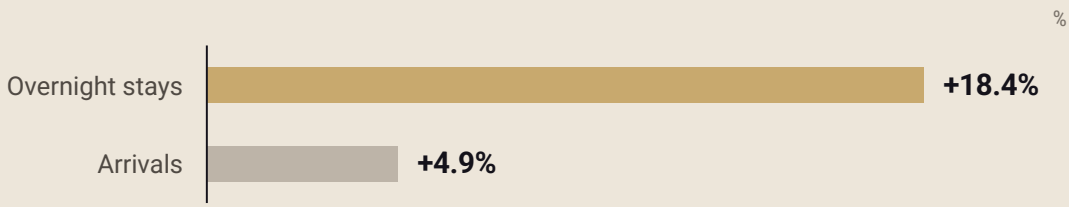
SICILY'S TOURISM GROWTH, 2024-2026

Sicily entered 2026 from an already high base. In 2024 the regional series, including short-term rentals, recorded more than 22.4 million overnight stays. International travellers accounted for 12.05 million of them.

Growth continued through 2025 and accelerated again in 2026. From January to August 2026, arrivals rose 3.6% and overnight stays 5.8% compared with the same period of 2025.

On a comparable January-August basis, the compounded two-year change is about +18.4% in overnight stays and +4.9% in arrivals. Nights have grown around four times faster than arrivals: travellers are staying longer.

January-August 2026 compared with 2024 Two-year compounded change from comparable January-August growth rates.



WHAT IT MEANS FOR LUXURY TRAVEL

More nights per trip mean more room nights and more spending on restaurants, private transfers, guides, experiences, wine, shopping and additional destinations on the island.

SOURCES Regione Siciliana / Osservatorio Turistico; Regional Tourism Department, 2026; UniCredit / Prometeia, 2026.

02

INTERNATIONAL DEMAND IS DRIVING THE MARKET

12.05M
international overnight stays in 2024

54%+
international share of nights entering 2026

International travel has been one of the strongest drivers of Sicily's growth. Foreign travellers already generated 12.05 million nights in 2024, and by 2025 international demand had strengthened further while domestic demand softened.

In the first half of 2026, North American arrivals rose 8.5% and French demand 4.2%. A larger international base supports five-star hotels, luxury resorts, villas, DMC services, private transfers and a broader shoulder season.

SOURCES UniCredit / Prometeia, 2026; Assoimpresa Italia, 2026.

03

NORTH AMERICA: A LUXURY GROWTH MARKET

379,829
American arrivals in 2024

~1 million
American overnight stays in 2024

+8.5%
US and Canadian arrivals, first half of 2026 compared with 2025

The United States was Sicily's second-largest foreign market in 2024. In Taormina, American travellers generated about 262,000 hotel nights: 19% of all hotel nights and 22% of international hotel nights.

22%
US share of international hotel nights in Taormina

~€1,500
average daily rate at Taormina's leading five-star hotels

North American growth directly supports the products where Sicily's luxury market is expanding:

- five-star hotels and resorts, suites and villas;
- private transfers and private guides;
- wine and gastronomy, yachts and celebration travel;
- multi-stop itineraries across the island.

SOURCES Regione Siciliana; ISTAT, tourism flows 2024; Taormina market data; HVS; 2026 North America growth data.

04

BACK TO THE ROOTS TRAVEL

A growing number of international travellers are coming to Sicily to rediscover their family heritage, exploring the places, stories and traditions of their ancestors.

In Italy this is called turismo delle radici, roots tourism: journeys made by Italians abroad and their descendants to the places their families came from. According to Italy's Ministry of Foreign Affairs (MAECI), the potential audience is close to 80 million people worldwide. In the United States alone, about 16 million people report Italian ancestry.

Sicily is one of the main places of origin. In a survey of roots travellers carried out with MAECI support, it ranks third among Italian regions of origin (10.5%), after Veneto and Calabria, with Palermo, Catania, Agrigento, Messina and Ragusa the most cited areas. The motivation is personal: 78% of respondents have visited or would like to visit places linked to their family history, and 94% their ancestors' home.

For high-end hospitality this means personal, made-to-measure travel: private guides, research in parish and civil archives, visits to ancestral towns and family reunions across generations. MAECI's Italea card already brings together more than 760 partners and more than 13,000 registered travellers, and roots travellers to Italy are expected to reach 7.4 million in 2026.

~€5 billion

economic flow generated by roots tourism in Italy in 2024, +34.4% on 2023

6.6M

roots travellers to Italy in 2024

63.8%

of Palermo's overnight stays generated by international visitors in 2025, up from 60.4% in 2024

Same roots. New journeys.

SOURCES Ministero degli Affari Esteri (MAECI), Turismo delle radici; MAECI, Scoprirsi italiani. I viaggi delle radici in Italia (2022); Calandra Italian American Institute, Italian Americans: Who We Are; Comune di Palermo / Osservatorio Turistico Regione Siciliana.

05

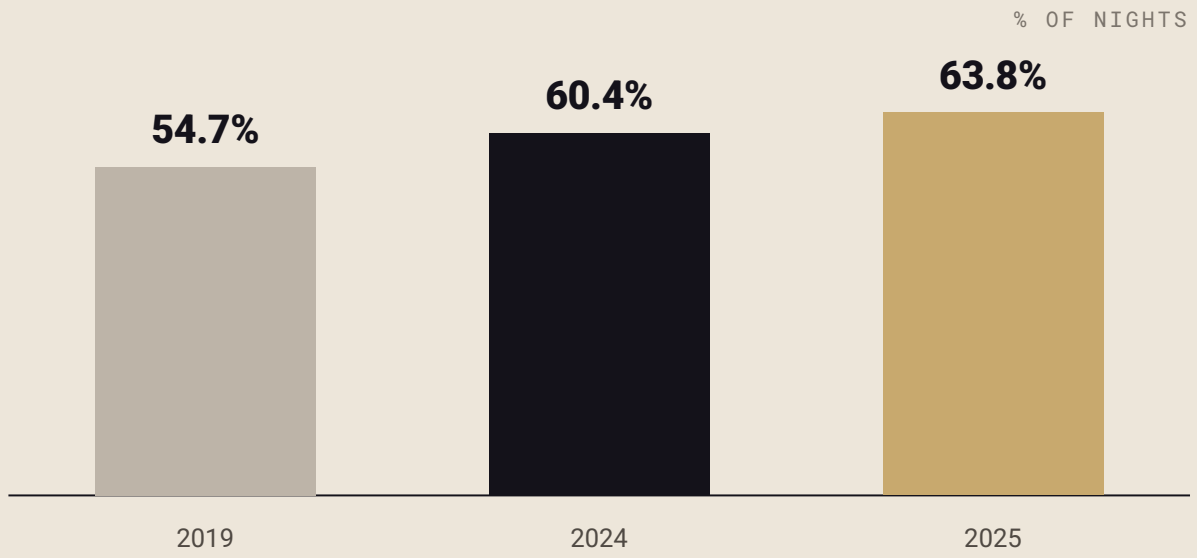
PALERMO: INTERNATIONAL DEMAND GAINS SHARE

2.1M
overnight stays in Palermo in 2025

+13.4%
international nights, 2025 compared with 2024

63.8%
international share of nights in 2025

Palermo: international share of nights



The largest increase by nationality in 2025, in absolute terms, came from the United States: +22,756 nights.

For luxury travel, Palermo is both a high-end city destination and the gateway to Western Sicily: Cefalù, Monreale, Scopello, Trapani, Marsala and the Egadi Islands.

SOURCES Comune di Palermo / Osservatorio Turistico Regione Siciliana.

06

LUXURY HOTEL RATES ARE OUTGROWING THE MARKET

+43%
luxury hotel average daily rate in Sicily compared with 2019

>80%
real growth in Taormina's average daily rate since 2018

~76%
hotel occupancy in Taormina, April-October

Taormina's leading five-star hotels achieved average daily rates of about €1,500 in 2025. The increase has been driven mainly by rate rather than by a comparable rise in occupancy. At the luxury end, Sicily is growing through value per occupied room, not only through visitor numbers.

Investment and new luxury inventory

€1 billion
real-estate investment in five years

46%
share directed to hotels

67%
share of capital from abroad

More than 2,500 premium hotel rooms are in the pipeline through 2030. New luxury openings bring global sales networks, international PR and access to high-value distribution.

SOURCES HVS; CBRE Italy.

07

SOUTHWESTERN SICILY

1.73M
overnight stays in the Province of Agrigento in 2025

~46%
international share of nights

+15.9%
US nights, 2025 compared with 2024

US overnight stays in the province reached 103,227 in 2025, with an average stay of 3.8 nights. The area brings together Verdura, Sciacca, Agrigento, Selinunte and Menfi, in a market where international travellers already generate half of all nights.

The luxury opportunity is measurable: established resorts, major archaeology, wine and coastline can support longer stays and higher-value itineraries, while the area is still less internationally developed than Taormina or Palermo.

SOURCES Osservatorio Turistico Regione Siciliana, Province of Agrigento 2025.

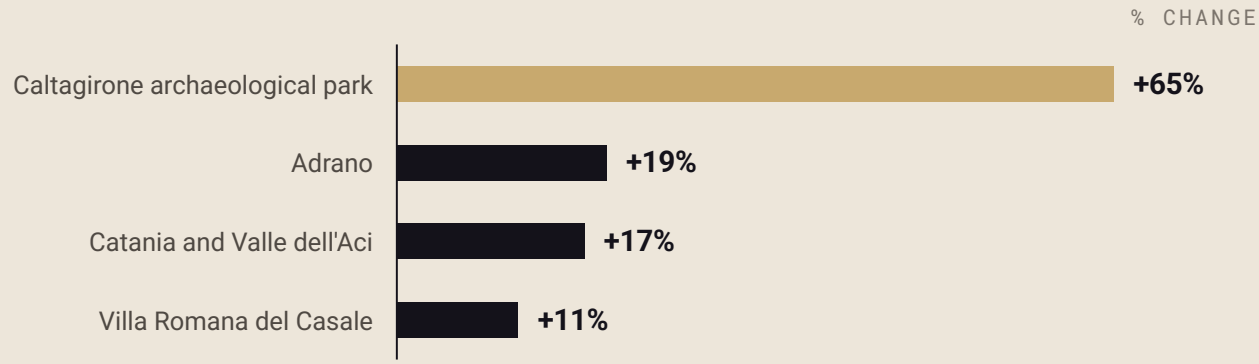
08

CULTURE IS GENERATING SCALE

1M+

visitors to the Valley of the Temples, first half of 2026

Visitors to archaeological parks, first half of 2026



Archaeology, architecture and historic cities give travellers reasons to visit outside the summer, and provide the content for private guiding, specialist access and multi-stop itineraries. For the luxury segment, cultural assets can turn a resort stay into a longer journey across Sicily.

SOURCES Regione Siciliana archaeological parks; Valley of the Temples data.

09

A LONGER SEASON

65.6%

accommodation occupancy, summer 2026

+12%

experience bookings, 2026 compared with 2025

January and March 2026 each grew by about 7%, while overnight stays from January to August rose 5.8%. Summer demand remained high. The opportunity is to grow April to June and September to November through culture, wine, gastronomy, archaeology and golf.

Longer stays and stronger demand for experiences increase the value of private guides, restaurants, wineries, boats, drivers, artisans and cultural access. Growth in nights and experiences matters more economically than growth in arrivals alone.

SOURCES Ministero del Turismo, summer 2026; Assoimpresa Italia, 2026.

10

EAST AND WEST: TWO COMPLEMENTARY GROWTH STORIES

Eastern and Western Sicily are not competing destinations. Their different levels of international recognition, hotel infrastructure and visitor distribution can help sell richer, longer itineraries across the whole island.

Eastern Sicily: the established luxury benchmark

From Taormina and Mount Etna to Catania, Siracusa and the Val di Noto, Eastern Sicily combines international brand recognition, iconic cultural sites and a mature luxury hospitality offer.

3.99M
overnight stays in the Province of Messina in 2024

+7.2%
Province of Messina, nights compared with 2023

22%
US share of international hotel nights in Taormina

Taormina remains Sicily's most internationally established luxury destination. Heritage hotels, international hospitality brands, dramatic scenery and cultural programming have supported premium pricing, with leading five-star average daily rates about €1,500. These figures describe the top of the Taormina market, not an island-wide average.

Catania and Etna
Airport access, the volcanic landscape, wineries and outdoor experiences make a gateway for premium itineraries and shoulder-season demand.

Siracusa and Ortigia
Archaeology, architecture, waterfront hospitality and private cultural experiences appeal strongly to experiential luxury travellers.

Val di Noto
Noto, Modica and Ragusa bring UNESCO-listed Baroque heritage, design-led stays and a distinctive food identity.

What comes next: Eastern Sicily's opportunity is to build on established demand while spreading tourism more widely across the region. Better connections between the major gateways, resorts and cultural destinations can encourage longer itineraries and reduce concentration in peak-season hotspots.

Western Sicily: a growing luxury destination

Western and Southwestern Sicily bring together Agrigento, Sciacca, Menfi, Selinunte, Marsala, Trapani and Palermo. The area offers a complementary luxury proposition built on coastal resorts, archaeology, wineries and food, connected in an itinerary rather than centred on one resort town.

1.73M
overnight stays in the Province of Agrigento in 2025

~46%
international share, Province of Agrigento, 2025

+26.7%
nights in the Province of Agrigento, 2025 compared with 2019*

Sciacca recorded 514,897 overnight stays in 2025. The Agrigento-Sciacca corridor links the Valley of the Temples with resort hospitality and the surrounding coastline, and US nights in the province rose 15.9% in 2025.

Rocco Forte's Verdura Resort is an internationally recognised luxury anchor. Its golf, wellness, food and coastal setting support premium stays, and its location introduces guests to Agrigento, Selinunte and Menfi. The opportunity is to connect

international resort demand with local guides, wineries, restaurants, transport and cultural experiences.

Selinunte and Menfi
Archaeology, vineyards and coastal experiences can extend resort-based stays.

Marsala and Trapani
Wine heritage, historic towns, the salt pans and access to the Egadi Islands support varied itineraries.

Palermo
A major international city gateway, cultural destination and complementary stop on a western itinerary.

The development priority: the opportunity is to turn strong cultural interest and growing international demand into longer stays, higher local spending and more year-round employment. Destination access, consistent service quality and high-end experiences will be essential.

Comparable provincial snapshot, 2024

Messina (East) and Trapani (West), 2024

INDICATOR	MESSINA / EAST	TRAPANI / WEST
Overnight stays	3,991,919	2,544,726
Growth compared with 2023	+7.2%	+11.8%
Reading	Larger established market	Faster growth in 2024

A NOTE ON THE COMPARISON

These are province-level figures for a single year: they do not show that the whole western region is growing faster than the whole eastern region. Agrigento's 2025 figures are not directly comparable with these 2024 totals, and the 2019-2025 Agrigento growth excludes rental accommodation.

Distinct commercial advantages

Eastern Sicily
Globally recognised luxury gateways, high hotel pricing power, established international distribution, iconic cultural attractions and sophisticated resort infrastructure.

Western Sicily
Established luxury anchors alongside emerging circuits, strong archaeological and coastal assets, meaningful international demand and opportunities to build higher-value multi-stop itineraries.

A strategic role for TRUE Sicily 2026

The commercial goal is not simply to sell a second hotel, but more nights in Sicily. An itinerary linking Taormina, Etna and Siracusa with Agrigento, Sciacca and the western coast introduces new experiences, increases spending in the destination and gives returning clients a reason to explore further. Hosting TRUE at Verdura Resort showcases the southwest while keeping the whole island in view.

SOURCES Regione Siciliana tourism reports; HVS Taormina Market Pulse 2026; Agrigento Chamber of Commerce. *2019-2025 Agrigento growth excludes rental accommodation. Messina is a provincial benchmark, not a complete Eastern Sicily total; Taormina hotel indicators refer to a narrower market.

11

THE NUMBERS, AND WHAT THEY MEAN FOR THE TRADE

The numbers behind Sicily's growth

INDICATOR	PERIOD	CHANGE
Overnight stays	Jan-Aug 2026 vs Jan-Aug 2024*	+18.4%
Arrivals	Jan-Aug 2026 vs Jan-Aug 2024*	+4.9%
North American arrivals	H1 2026 vs H1 2025	+8.5%
Palermo, international nights	2025 vs 2024	+13.4%
Agrigento, US nights	2025 vs 2024	+15.9%
Luxury hotel average daily rate	Latest vs 2019	+43%
Experience bookings	2026 vs 2025	+12%

What it means for advisors and hoteliers

01 **Sell more nights, not only more arrivals.**
Nights are growing much faster than arrivals, and Sicily has the product for longer stays across several destinations.

02 **Build for international demand.**
Foreign travellers are the majority, and increasingly important outside the summer peak.

03 **Treat North America as a core luxury market.**
Almost one million American nights in 2024, and North American demand is still growing.

04 **Follow the rate growth.**
Luxury rates are 43% above 2019, and Taormina shows the spending power at the top of the market.

05 **Watch Southwestern Sicily.**
About half of Agrigento's nights are international, and US nights are growing at double-digit rates.

06 **Sell the shoulder season.**
Culture, wine, food and golf give Sicily the product to grow beyond July and August.

FAQ

FREQUENTLY ASKED QUESTIONS

About Sicily

Is Sicily a luxury travel destination?

Yes. Taormina's leading five-star hotels reach average daily rates of about €1,500, luxury hotel rates across Sicily are 43% above 2019, and more than 2,500 premium hotel rooms are in the pipeline to 2030. Palermo, Siracusa, the Val di Noto and the southwest around Verdura Resort complete the offer.

Is tourism in Sicily growing?

Yes. From January to August 2026, overnight stays rose 5.8% and arrivals 3.6% compared with 2025, about +18.4% in nights compared with 2024. International travellers account for more than half of all nights.

How important are American travellers to Sicily?

Very. The United States was Sicily's second-largest foreign market in 2024, with about 380,000 arrivals and almost one million nights. North American arrivals rose a further 8.5% in the first half of 2026.

When is the best time for luxury travel to Sicily?

April to June and September to November combine pleasant weather with culture, wine, food, archaeology and golf, and fewer crowds than July and August. January and March 2026 each grew by about 7%, a sign that the season is getting longer.

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 Sicily?

TRUE Sicily is the Sicilian edition of TRUE. It brings selected international travel advisors to meet Sicily's luxury hotels, resorts, villas and DMCs through B2B meetings, fam trips and immersive experiences. The 2026 edition is held at Verdura Resort from November 10 to 13, 2026.

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 Dolomites, TRUE Sardegna and TRUE Sicily.

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

- Regione Siciliana - Osservatorio Turistico: Il turismo in Sicilia, Rapporto 2024 (March 2026)
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- Regione Siciliana - Dipartimento Turismo: 2025 and 2026 tourism performance and seasonality releases
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- ISTAT - I flussi turistici, anno 2024
- HVS - Taormina Market Pulse 2026: luxury average daily rate, occupancy and long-term rate performance
- CBRE Italy - Sicilia on Stage: real-estate investment, foreign capital and premium hotel pipeline
- Ministero del Turismo: summer 2026 accommodation occupancy
- Comune di Palermo / local tourism statistics: city overnight stays and international share
- Regione Siciliana archaeological parks / Valley of the Temples: cultural-site visitation
- Assoimpresa Italia: 2026 North American and experiential-demand indicators
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- Agrigento Chamber of Commerce
- Osservatorio Turistico Regione Siciliana via Distretto Turistico Valle dei Templi - Province of Agrigento 2025: overnight stays, international share and US market (La Sicilia, February 2026)
- Ministero degli Affari Esteri e della Cooperazione Internazionale (MAECI) - Turismo delle radici: roots travellers and economic flow 2024
- Gabrieli, Giumelli, Licata, Sommario - Scoprirsi italiani. I viaggi delle radici in Italia (Rubbettino 2022, with the support of MAECI): regions of origin and travel motivations
- Calandra Italian American Institute - Italian Americans: Who We Are (2024), on US Census Bureau American Community Survey 2022 data

2026 data is partial

2026 figures cover part of the year and should not be read as full-year results.

Compounded two-year changes

The +18.4% in overnight stays and +4.9% in arrivals for January-August 2026 compared with 2024 are calculated by compounding comparable consecutive growth rates.

Different perimeters

Definitive and provisional regional series, and provincial or city statistics, may use different accommodation perimeters, so they are not treated as interchangeable. Comparisons between East and West use only matching periods and are not a unified time series.

HOW TO CITE THIS REPORT

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TRUE

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