



TTG 2022

Outdoor tourism: a sustainable experience

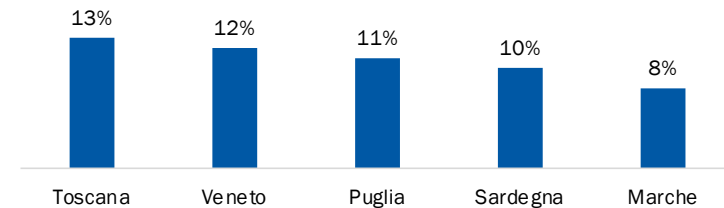
ROBERTA GARIBALDI
CEO OF ENIT

Thursday, 13 October 2022

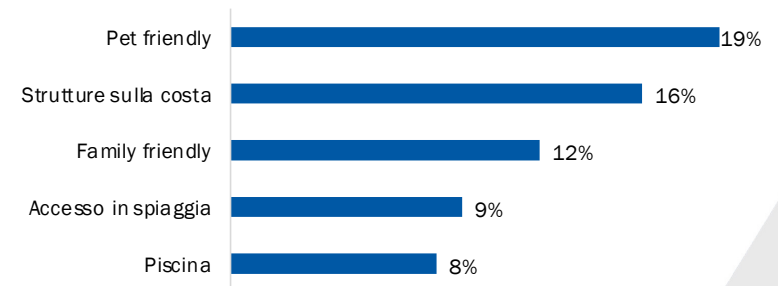
Sustainability in outdoor tourism facilities

- Interest continues to grow in outdoor tourism, which combines an environmentally friendly approach with closer contact with nature.
- **In the first four months of 2022**, searches for outdoor holidays in the summer season ahead were up by **150%** on the same period in 2021 and **8%** on 2019.
- Tuscany (13%), Veneto (12%) and Puglia (11%) were the most-searched destinations.
- **The services** in highest demand were **pet-friendly facilities** (chosen by **19%** of users), establishments on the coast (16%) and family-friendly services (12%).

Most searched outdoor tourism destinations
TOP 5



The services in biggest demand

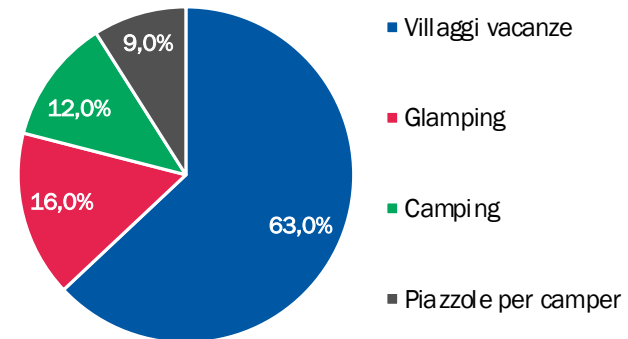


Source: ENIT Research Department using data from Camping.com - Camping Report (CaRe)

Sustainability in outdoor tourism facilities

- Outdoor tourism has always been considered somewhat of a no-frills affair, but recent trends have revealed the rapid spread of the “glamorous” style of camping known as “**glamping**” (16%), which involves greater comfort and superior facilities compared to traditional approaches.
- There was also a substantial increase in searches in other countries in the first four months of the year. This was especially true of Germany, where searches were up by 54% on the first four months of 2021.

*Most searched solutions
between January and April 2022*

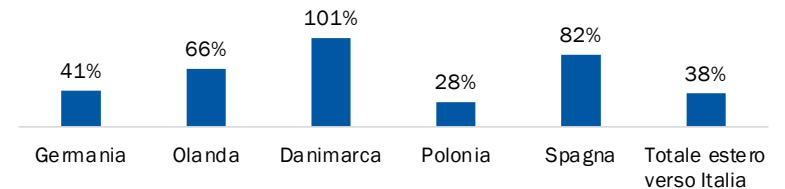


Source: ENIT Research Department using data from Camping.com - Camping Report (CaRe)

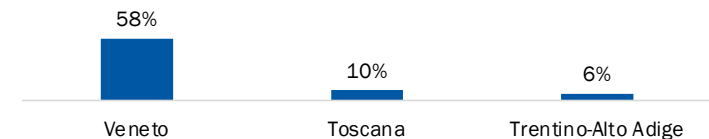
Sustainability in outdoor tourism facilities

- In the first eight months of 2022, there was an overall increase in searches of **5%** compared to the same period in **2019**.
- In terms of the requests from **foreign markets** for outdoor tourism in Italy, there was an increase of **38.0% on 2021 and 78.0% on 2020**.
- Germany was once again the country that showed the greatest interest, with an increase of 41.0% compared to January-August 2021.
It was followed by the Netherlands (+66.0%), Denmark (+101.0%), Poland (+28.0%) and Spain (+82.0%).
- The most popular regions were Veneto (58.0%), Tuscany (10.0%) and Trentino-Alto Adige/Südtirol (6.0%). They were followed by Piedmont, Liguria, Sardinia, Marche and Puglia.

Top 5 countries of origin
Var. % Jan-Aug 2022 and 2021



Top 3 most-searched destinations from foreign countries

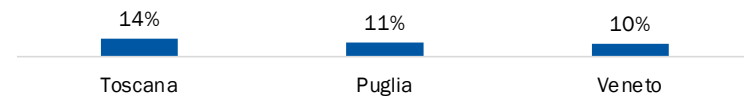


Source: ENIT Research Department using data from Camping.com - Camping Report (CaRe)

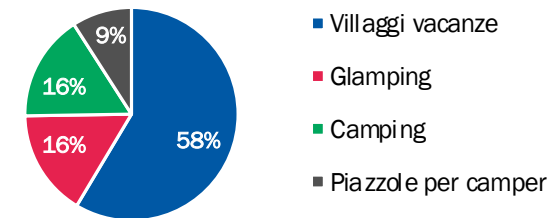
Sustainability in outdoor tourism facilities

- In the first eight months of the year, the most-searched destinations by **Italian users** were Tuscany (14%), Puglia (11%) and Veneto (10%). They were followed by Marche, Sardinia, Emilia-Romagna, Campania, Trentino-Alto Adige/Südtirol, Liguria, Abruzzo and Sicily.
- **Holiday villages** (58%) were the most popular choice among both Italian and foreign users. They were followed by **glamping and camping** (both 16%) and motorhome pitches (9%).
- In terms of services, pet-friendly and family-friendly facilities remained in big demand (24% and 15%).
- The most common length of stay in requests for quotes was 7 nights (55%).

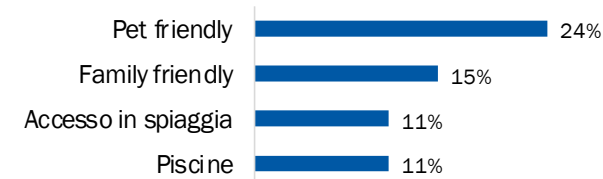
Top 3 most-searched destinations from foreign countries



Most searched solutions



The services in biggest demand



Source: ENIT Research Department using data from Camping.com - Camping Report (CaRe)

Sustainability in outdoor tourism facilities

- Capable of appealing to a range of target groups, outdoor tourism was already playing a prominent role in 2021.
- The number of people staying in Italian holiday villages and campsites was up by 45.6% on 2020 and it had climbed back up to approximately 82% of the figure from 2019.
- Breaking it down, international flows were up by approximately 97.0% on 2020, while the number of Italian tourists increased by 20.3%.
- Once again, the gap compared to 2019 narrowed due to both international demand at 73.6% of pre-COVID levels and Italian demand at 89.7%.

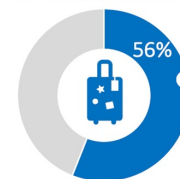
PEOPLE STAYING IN HOLIDAY VILLAGES AND CAMPSITES						
	2019	2020	2021	Var. % 21/19	Var. % 21/20	% volume 2021 vs. 2019
Total	66,844,384	37,516,650	54,618,034	-18.3	45.6	81.7
Other countries	33,142,449	12,384,748	24,386,072	-26.4	96.9	73.6
Italy	33,701,935	25,131,902	30,231,962	-10.3	20.3	89.7

Source: ENIT Research Department using ISTAT data

Overview of the outdoor holidays of Italian tourists in summer 2022

- During the summer, 56% of the Italians interviewed had a holiday. The average length was nine nights.
- 19% stayed in outdoor facilities, where they spent an average of 8 days.
- July (37%) and August (53%) remain the months with the highest shares of holidaymakers.
- 57% of outdoor holidaymakers directly contacted the establishment to book their holidays.
- 80% of outdoor holidaymakers spent their stay in Italy, while 9% chose to go to other countries.
- Beach resorts remain the most popular choice (65%), followed by destinations in the mountains (27%).

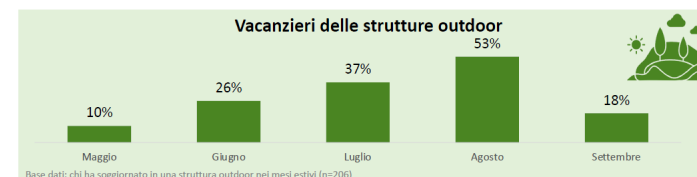
Quanti italiani dichiarano di avere fatto vacanze nei mesi estivi



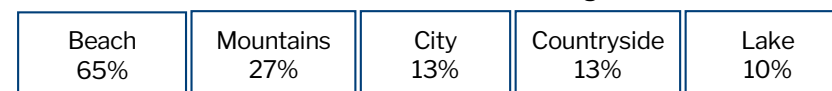
Con un pernotto medio del periodo più lungo di 9 gg

**STRUTTURE
OUTDOOR**
19%

Con un pernotto medio del periodo più lungo di 8 gg



More than one answer can be given

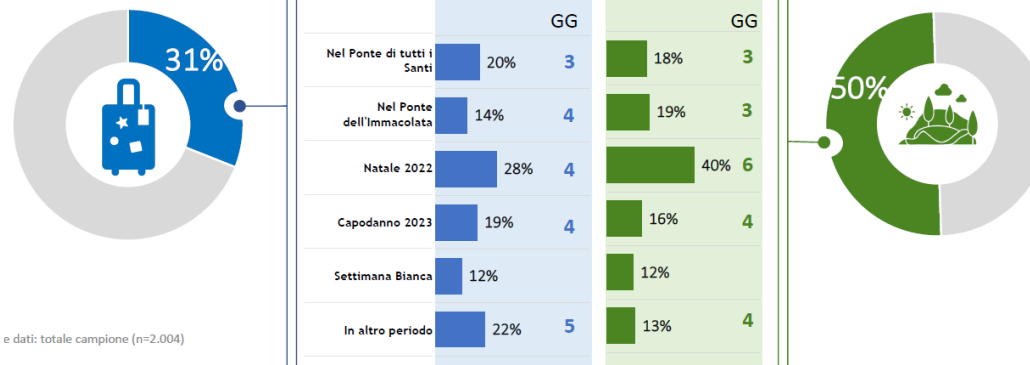


Italian outdoor holiday trends in the coming months

- 31% of the Italians interviewed are planning one or more holidays with at least one overnight stay in the autumn and winter.
- The share of holidaymakers increases to 50% for stays in outdoor establishments.
- The most popular time is Christmas (40%), with stays of 6 nights, but there is also a lot of interest during the long weekends around the Italian public holidays on 8 December (19%) and 1 November (18%).

Nel prossimo autunno – inverno, Lei pensa di fare uno o più periodi di vacanza con almeno una notte di pernottamento?

Vacanzieri delle strutture outdoor



Source: ENIT Research Department using Human Company and Istituto Piepoli data. October 2022

Italian outdoor holiday trends in the coming months

- Chosen by 78% of outdoor holidaymakers, Italy remains the most popular choice in the coming months.
- The appeal of destinations in other countries is growing, with 16% of interviewees planning to go abroad.

LUOGO DELLA VACANZA AUTUNNALE/INVERNALE: CRESCE L'ESTERO NELLE INTENZIONI DEGLI ITALIANI, MA PER 7 ITALIANI SU 10 LA VACANZA SARÀ IN ITALIA



Source: ENIT Research Department using Human Company and Istituto Piepoli data. October 2022