# European outdoor report

Data and insights of outdoor tourism in major EU markets. Focus on Italy 2026 forecast.

2026

human company

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# Authors

ANDREA AGAZZANI
GIULIA ARDUINO

# Contacts

For further information on the contents of this report and on the analysis and research carried out by THRENDS, please contact

office@thrends-Italy.com

www.thrends-italy.com

# Summary

# Foreword by Human Company

For this sixth edition, the Observatory is taking a long-anticipated step: crossing national borders and establishing comparisons across Europe. This evolution is not a mere expansion of the perimeter, but a real perspective shift. It therefore provides a true picture of outdoor tourism: a structural phenomenon, shared by hundreds of millions of people throughout the continent, capable of generating economic, social and cultural value far beyond the borders of each individual market.

The data speaks for itself: 413 million outdoor guests in Europe in 2025, representing a growth of 7.3% compared to pre-pandemic levels. Additionally, Italy has been confirmed as the second European market, with 68 million guests and an international share exceeding 55% of the total, which represents an increase of more than 13 percentage points compared to 2019. These numbers reflect the health of the sector, but also reveal something deeper: an increasingly widespread and all-encompassing need to rediscover nature and simplicity, and to form close ties to the area and people.

The forecasts for 2026 indicate substantial continuity: 68.36 million expected guests. This prediction reflects a market that has passed the post-pandemic rebound phase and has entered a phase of maturity. It is no longer growing in double digits, but rather strengthening its position; in the ongoing geopolitical and economic uncertainty, this is a significant result.

For operators, this phase raises specific questions: how to increase the quality of the offer in a context of stable demand? How to conquer new international demand categories, lengthen the season, and boost the quality of the experience offered? How to transform outdoor tourism from an economically advantageous choice to a conscious choice, capable of competing with other forms of hospitality on an equal footing? With its new European perspective, this report offers valuable and unprecedented resources to respond to these questions.

However, we believe the most sustainable response must look beyond pure strategy to culture. Outdoor tourism has a unique advantage over other sectors: the ability to connect people, to build temporary but authentic communities, and to feed the value received back into the local area. This is the challenge that lies ahead, and it represents the most beautiful opportunity our industry has ever faced.

> "Open-air tourism has one defining quality that no other sector can claim with equal conviction — the ability to bring people together, to build communities that are temporary yet genuine, and to give back to the places from which it draws its value."

**Domenico Montano**
Group General Manager
Human Company

# Introduction by Thrends

## Revamped outdoor vacations are not just a post-Covid trend in Europe. They are here to stay.

This very first European perspective on the world of outdoor vacations, scrutinized through the evidences of supply and demand for camp-sites and camp-sites villages, unveils that our continent (EU28) is very likely the leading market for overall demand and a vibrant forge of outdoor chains and entrepreneurs.

Our effort to scale the Italian outdoor outlook to a wider European perspective has provided original insights. It has all started with the intention, shared with Human Company, to provide appropriate data, KPIs and food for thoughts to the camping industry and allow players, governments and stakeholders to sense the importance of an emerging force: the growing need, re-emerged in the post-Covid era, to experience open-air stays and vacations.

Based on the evidences of Eurostat data and our analyses, outdoor demand is worth 11.5% of all tourism demand in Europe in 2025. Roomnights generated by tourists in campsites and camping villages totalled 413 mln in this last year. To get an immediate feeling about the size of this market, we could assume a very general and simple opening period of 180 days per year (say 6 months) and conclude that in EU28, in 2025, on average almost 2 million people per each and every night spent a holiday in an outdoor establishment all along the outdoor season.

An impressive figure. Clearly, few countries absorb the most of this promising market: namely France, Spain, Netherlands, Croatia and, of course, Italy.

If you play or wish to play in the outdoor business, we are sure you will find the reading inspiring and, hopefully, useful.

> This first effort to scale the Italian outlook to a wider European perspective has provided original insights.
> We spotlighted the importance of outdoor vacations for a market which is today larger than 450 mln residents

Giorgio Ribaudo
Managing Director
THRENDS

# Key figures – Europe 2025

**3,088.4 mln** Overnight stays of all accommodations in Europe in 2025, +2.2% on 2024

**413.2 mln** Overnight stays of outdoor accommodations in Europe in 2025

**153.8 mln** Outdoor overnight stays in France in 2025, the leading European country for outdoor overnight stays

**85%** The share of outdoor tourism demand attributed to the top-5 main European countries (France, Spain, Germany, the Netherlands and Croatia) and Italy in 2025, for a total of 351.31 million overnight stays

**2°** Italy’s position in the European ranking for outdoor overnight stays

# Key figures – Italy 2025

**68.09 mln**

Outdoor overnight in Italy in 2025. Change compared with 2019: +1.9%; compared with 2024: -0.6%

**68.36 mln**

Forecast for outdoor overnight stays in Italy for 2026

**+13.1%**

Increase in outdooor overnight stays by foreign visitors in 2025 (37.49 million, 55.2% of the total) compared to 2019. This contrasts with a -9.2% decline in Italian visitor numbers between 2025 and 2019

**59.9%**

The share of visitors to northern Italy in 2025 (+0.6% compared with 2024)

**46%**

The share of outdoor demand accounted by the regions of North-East Italy (Friuli, Veneto, Trentino, Alto Adige and Emilia-Romagna) in 2025

# Purpose of this publication

The European Outdoor Report represent the evolution of the Outdoor Tourism Observatory, a report that has established itself as a key reference point for analysing the outdoor sector performance and gaining insights into the main trends and developments currently underway.

In this 6th edition, the Observatory broadens its scope, adopting a more European perspective and focusing on the main open-air tourism markets: France, Germany, Spain, the Netherlands and Croatia, which are the leading countries in the sector. We want to realise the first overview of this sector across all Europe.

The report focuses on the outdoor segment, which in this publication refers to the categories of campsites and camping villages, analysing their dynamics within an increasingly integrated competitive landscape at European level. The scope of our analysis includes, first and foremost, a historical review of the sector, offering a preview of 2025 performances in terms of overnights, both at an Italian level and in comparison with the main European markets.

The report then provides a forecast of overnights in Italy for 2026: thank to an established forecasting model we continue in trying to predict the performance of the sector in order to give useful insights to operators.

Finally, the 2026 Observatory is a key report for anyone who is interested in analysing the outdoor sector from an European point of view. We hope the report can help understanding the dynamics and taking the right decisions in a very challenging touristic environment.

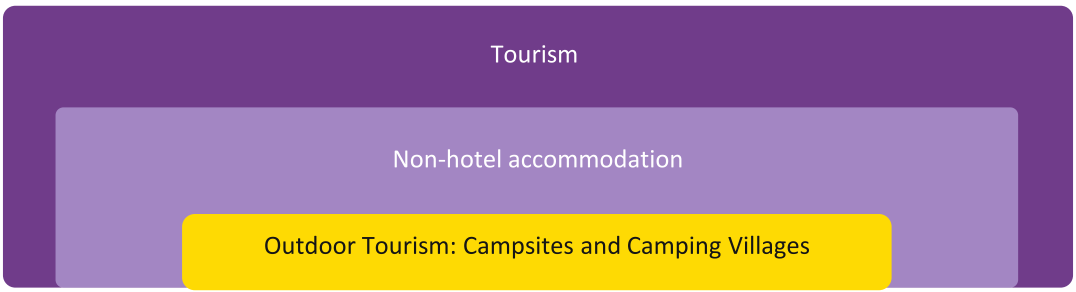
# Objectives of the report

**The objectives of this 6th edition of the Observatory can be summarised as follows:**

- Producing the 1st report offering an overall overview of the EU outdoor market, marking the first time this research has been conducted at a European level;
- Providing the sector with the 1st analysis of the market's performance in 2025, from an Italian and European level;
- Delivering a forecast for demand in Italy in 2026;
- Helping key stakeholders, players and institutions gain a clear picture of figures and insights related to the open-air sector.

Overall, the Observatory aims to provide the tools to interpret the signals of a new cycle for the sector, supporting informed and effective strategic decision-making.

# Scope of the analysis




1. **Demand analysis outdoor EU top 5 markets** — Overview of tourist flows in the outdoor sector in Europe; insights into the inbound outdoor tourism market with a focus on top-5 destinations
2. **Demand analysis outdoor Italy** — Overview of tourist flows in the outdoor sector in Italy with multiple insights
3. **Forecast demand Italy 2026** — Forecast of 2026 overnights in the outdoor tourism market in Italy
4. **Insights of competitive landscape** — An overview of the key players in Europe to give an overview of main business models and operators in the sector

# Methodology

## Overview

The 6th edition is based on an in-depth process of data collection and integration from National Statistical Institutes, Eurostat and the Regional Statistical Offices, followed by a structured phase of verification, review and analysis to ensure consistency, accuracy and comparability. This approach is particularly important in an edition that expands its scope to the European level, focusing on the main outdoor tourism markets such as: France, Germany, Spain, the Netherlands and Croatia.

Data collection involved multiple sources like Istat, Eurostat and the relevant offices of all Italian regions, enabling analysis at different levels of detail and providing a comprehensive overview.

The use of multiple sources was necessary to support the different analytical levels:

- For comparisons between European countries, Eurostat data were used. Is important to underline that Eurostat consider for outdoor sector only companies related to NACE 55.3.
- For insights on European markets we use also data from the National Statistical Institutes of the top five European outdoor tourism markets. This permits to have more details on the demand respect to data collected from Eurostat;
- For the analysis of Italian outdoor tourism Istat data was used. Data refer to historical overnights on campsites and camping villages. Otherwords these data are related to NACE 55.3 and 55.2.1. That is the reason why numbers for Italy could be different in the European chapter from the Italian one;
- For 2025 outdoor overnights in Italy, figures from the Regional Statistical Offices were used, making these estimates unique, as Istat have not yet published official data at the time of writing, that makes the data provisional.

Regarding the methodology of forecast for Italy outdoor market 2026 the preparation required a detailed reconstruction of 2025 historical data for Italy. Thanks to collaboration with the Regional Statistical Offices, the report provides a preview of results considered provisional and not yet included in official Istat publications. To estimate visitor numbers, the model used in previous editions was retained. Its assumptions are based on historical trends (2017-2019), pandemic years (2020-2021) and the period 2022-2025, with a distinction between domestic and international markets.

To clarify, in this document, the term outdoor is used as a synonym for the open-air segment, which includes campsites, holiday villages, and mixed-use facilities combining both campsites and villages.

# Methodology

## Forecast model

Regarding the methodology of the forecast for Italy outdoor market 2026 the preparation required a detailed reconstruction of 2025 historical data for Italy.

Thanks to collaboration with the Regional Statistical Offices, the report provides a preview of results considered provisional and not yet included in official Istat publications.

To estimate visitor numbers, the model used in previous editions was retained. Its assumptions are based on historical trends (2017-2019), pandemic years (2020-2021) and the period 2022-2025, with a distinction between domestic and international markets.

### STRUCTURE OF THE ANALYSIS

| ANALYSIS OUTLINE | FORECAST METHODOLOGY |
|---|---|
| Demand analysis outdoor Italy (Istat) | Current assessment of market conditions |
| + | ↓ |
| Demand analysis outdoor EU top-5 markets (Eurostat data) | Region-specific data analysis (italian Regional Statistical Offices) |
| + | ↓ |
| Insights on outdoor EU top-5 markets (National Statistical Offices) | Forecast for 2026 (outdoor) |

# Methodology

## Data sources and uniqueness

### Data sources
which sources were consulted and compiled

**ISTAT**

Italy data relating to the outdoor sector.
The data refers to NACE codes 55.2.1 and 55.3

**EUROSTAT**

Outdoor data for European countries.
In this case, the outdoor figures refer solely to NACE code 55.3

**FOREIGN MARKETS STATISTICS OFFICES**

Outdoor tourism insights for European countries

**ITALIAN REGIONS STATISTICS OFFICES**

Provisional figures for outdoor attendance in 2025 from the regions that shared the data

### Analysis uniqueness
what exclusive information the report provides

**A 1st look at the 2025 results in Italy**

In a preview, the Observatory presents the performance figures for the outdoor sector for the year 2025. These figures have not yet been provided by any institutional source in Italy.

**The 1st estimate of overnights for 2026 in Italy**

In a preview, the Observatory is presenting, for the first time, its estimates for 2026, offering industry professionals an exclusive insight into trends in passenger flows to help them plan their strategies.

**The 1st comparative analysis of the top 5 EU open-air markets**

The Observatory presents an exclusive comparison between Italy and other European countries, as well as a focus on the main foreign markets.

# 01

# Tourism in Europe: Italy vs the other major markets

# EU tourism market 2025

## New record of overnights

In 2025, the European tourism market consolidates its recovery, with overnight stays in the EU reaching 3,088.4 million, up +2.2% (+66.4 million) compared to 2024 and above pre-pandemic levels (2,878.2 million in 2019), setting a new all-time high.
Growth is more moderate than in the immediate post-pandemic years, pointing to a phase of stabilisation. Demand remains supported by major markets such as France, Spain, Italy, Germany, the Netherlands, Greece and Croatia.
Data for 2025 are not yet fully complete (including Switzerland for 2024, which may result in slight upward revisions.
Overall, the 2015-2025 trend shows structural growth, interrupted only during 2020-2021 and followed by a strong recovery.

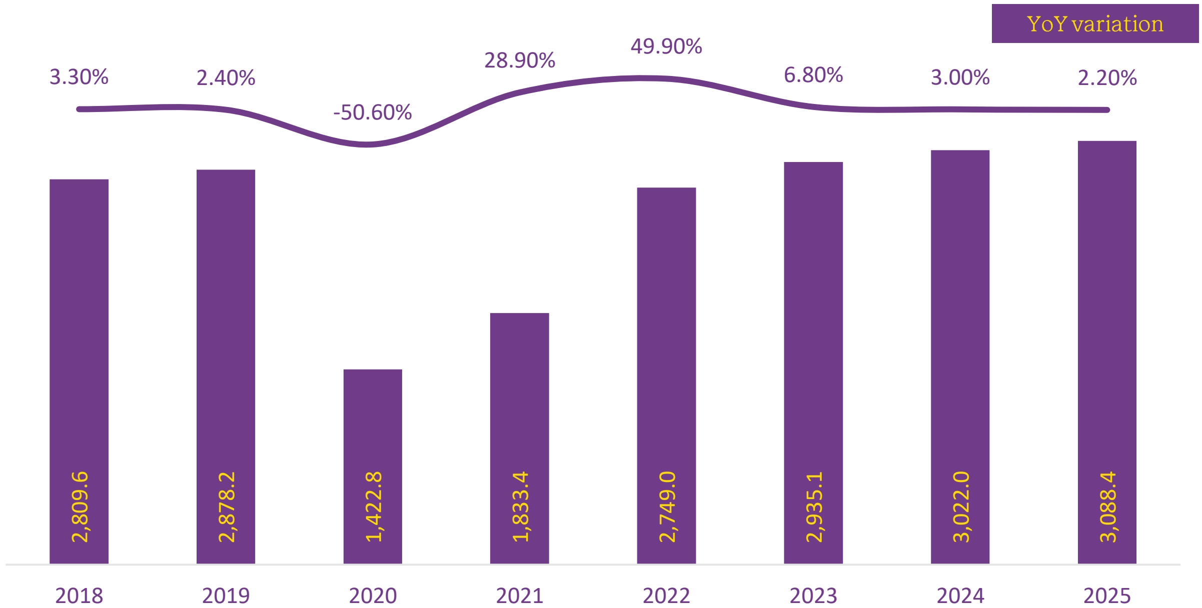
**3,088.4 mln**
Overnight stays
in 2025

In 2025, tourism in Europe recorded 3,088.4 million overnights (Eurostat data), a figure that is on the rise.

**+2.2%**
Growth in overnights in 2025
compared with 2024

In 2025, overnights stays rose slightly compared with 2024 (+2.2%), with an additional 66.4 million visitors; however, these figures do not include data for Switzerland in 2024.

EUROPE OVERNIGHTS 2025 (mln)




Data source: Eurostat (Eurostat only includes NACE 55.3). Excluding the UK; data for Switzerland in 2024 is missing

# EU tourism market 2025

## Leading markets in European tourism

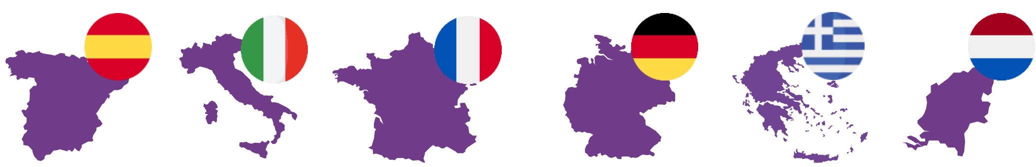
According to Eurostat overnight stays, France, Spain, Italy, Germany, the Netherlands and Croatia remain in the top positions.
Spain retains its leading position within Europe with over 513.6 million overnight stays (around 20% of European overnight stays).
Among the top six markets, the one with the highest growth compared to 2019 is the Netherlands (+19.8%), followed by France (+9.3%).
The majority of overnight stays, more than 60% (excluding the UK, for which 2019 data is not available), are accounted for by the top four countries: Spain, Italy, France and Germany, the only ones to reach and exceed the 400 million mark.

**513.6 mln**
Overnight stays in Spain, the leading European market

**+19.8%**
Higher growth than in 2019 in the Netherlands

**> 60%**
Overnight stays in the top four countries: Spain, Italy, France and Germany

TOTAL OVERNIGHT STAYS ACROSS ALL TOURISM SEGMENTS IN EUROPE (mln)



| | 1° | 2° | 3° | 4° | 5° | 6° |
|---|---|---|---|---|---|---|
| 2019 | 469.8 | 436.7 | 446.5 | 437.0 | 143.6 | 123.4 |
| 2024 | 505.1 | 466.2 | 457.6 | 439.6 | 152.9 | 145.4 |
| 2025 | 513.6 | 476.9 | 471.7 | 442.1 | 156.2 | 147.9 |
| Var. 25-19% | +9.3% | +9.2% | +5.6% | +1.2% | +8.8% | +19.9% |
| Var. 25-24% | +1.7% | +2.3% | +3.1% | +0.6% | +2.2% | +1.7% |

Data source: Eurostat (Eurostat only includes NACE 55.3). Excluding the UK; data for Switzerland in 2024 is missing

# EU tourism market 2025

## The Big Six

**413.2 mln**
Campsite visitor numbers in 2025

In 2025, outdoor tourism in Europe is projected to reach 413.2 million visitor arrivals (Eurostat data), a figure that is on the rise (+14.2% compared to 2024, or an increase of 51.3 million arrivals in absolute terms)

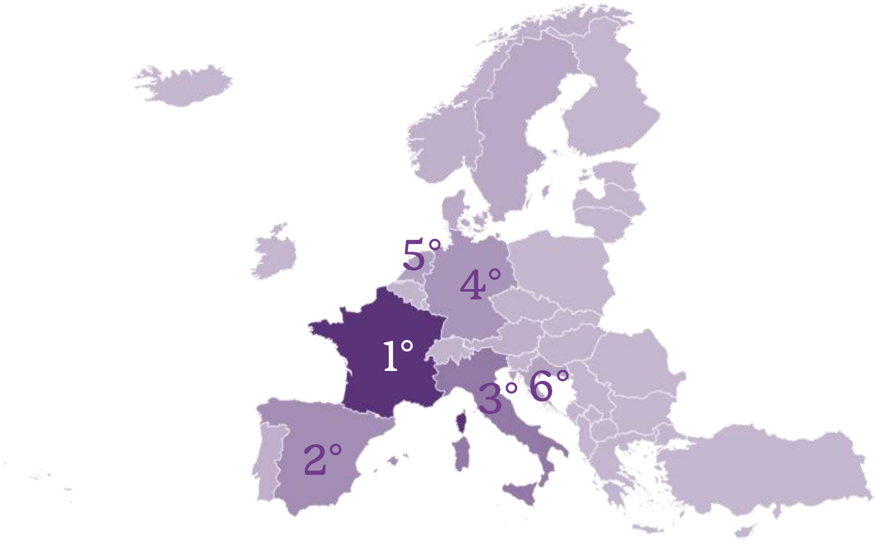
**+1.1%**
Growth in campsite overnight stays in 2025 compared with 2024

In 2025, visitor numbers rose slightly compared with 2024 (+1.1%), with an additional 51.3 million visitors; however, these figures do not include data for Switzerland in 2024.

**+7.3%**
**Increase in visitor numbers in 2025 compared with 2019**

This result is largely due to growth in some of the leading countries in this sector in Europe (France, Spain, Italy, Germany, the Netherlands and Croatia).

OVERNIGHT STAYS IN OUTDOOR TOURISM IN EUROPE




| | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 |
|---|---|---|---|---|---|---|---|---|
| Overnight stays (mln) | 352.2 | 361.9 | 256.7 | 327.2 | 388.7 | 401.6 | 408.6 | 413.2 |
| YoY | - | 2.8% | -29.1% | 27.5% | 18.8% | 3.3% | +1.8% | 1.1% |

Data source: Eurostat (Eurostat only includes NACE 55.3). Excluding the UK; data for Switzerland in 2024 is missing

# EU outdoor market 2025

## The Big Six

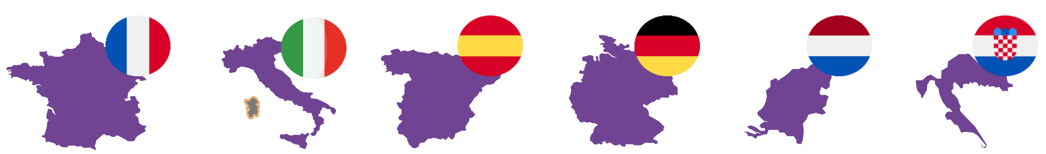
According to Eurostat data on overnight stays in the outdoor sector, France, Spain, Italy, Germany, the Netherlands and Croatia are the main markets, together with Italy.
France retains its leading position within Europe with over 153.8 million visitors (around one-third of total outdoor overnight stays that in 2025 recorded over 413 millions). Among the top six markets, the one with the highest growth compared to 2019 is Germany (+25.9%), followed by the Netherlands (+22.4%).
The majority of overnight stays, more than two-thirds (excluding the UK, for which 2019 data are not available), are accounted for by the top four countries: France, Spain, Italy and Germany, the only ones to reach and exceed the 40 million mark.
It should be noted that the figures for Italy differ from those of Istat (campsites and holiday villages) as the Eurostat source classifies only properties with NACE code 55.3 under the 'campsite' category, excluding those with code 55.2 (holiday villages).

**-1.1%**
A decline in overnight stays at campsites in Italy in 2025 compared with 2019

**54.01***
Overnight stays in million for Italy (NACE 55.3 only), estimated based on the change between the March 2025 figure and the final 2025 figure

**+20%**
Increase in overnight stays at campsites in Germany, the Netherlands and Spain in 2025 compared with 2019

TOTAL OVERNIGHT STAYS ACROSS OUTDOOR SEGMENT IN EUROPE (mln)



| | 1° | 2° | 3° | 4° | 5° | 6° |
|---|---|---|---|---|---|---|
| 2019 | 128.6 | 54.6 | 40.7 | 35.8 | 21.9 | 19.1 |
| 2024 | 147.8 | 54.6 | 49.1 | 43.2 | 26.2 | 21.4 |
| 2025 | 153.8 | 54.01* | 49.8 | 45 | 26.8 | 21.9 |
| Var. 25-19% | 19.6% | -1.1% | 22.4% | 25.7% | 22.4% | 14.7% |
| Var. 25-24% | 4.1% | -1.1% | 1.4% | 4.2% | 2.3% | 2.3% |

Data source: Eurostat (Eurostat only includes NACE 55.3). Excluding the UK; data for Switzerland in 2024 is missing

# EU outdoor market 2025

## Foreign visitors share per destination

| 2019 | 2025 |
|---|---|
| 4.7 mln | 4.8 mln |

Var. 19-25 %

1.2%

International visitors out of the total number of visitors in 2025

10.6%

| 2019 | 2025 |
|---|---|
| 5.9 mln | 8.3 mln |

Var. 19-25 %

46.2%

International visitors out of the total number of visitors in 2025

31.1%

| 2019 | 2025 |
|---|---|
| 18.7 mln | 21.1 mln |

Var. 19-25 %

12.9%

International visitors out of the total number of visitors in 2025

96.3%

| 2019 | 2025 |
|---|---|
| 19.4 mln | 23.0 mln |

Var. 19-25 %

18.2%

International visitors out of the total number of visitors in 2025

23.0%

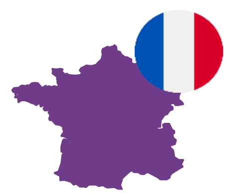
| 2019 | 2025 |
|---|---|
| 27.1 mln | 30.0 mln* |

Var. 19-25 %

0.6%

International visitors out of the total number of visitors in 2025

55.6%



| 2019 | 2025 |
|---|---|
| 40.2 mln | 47.0 mln |

Var. 19-25 %

17.1%

International visitors out of the total number of visitors in 2025

30.6%

*Data for Italy (NACE 55.3 only), estimated based on the change between the March 2025 figure and the final 2025 figure

Data source: Eurostat (Eurostat only includes NACE 55.3). Excluding the UK; data for Switzerland in 2024 is missing

# EU outdoor market 2025

## Overall spending

According to Eurostat data on spending at European campsites, France, Germany, the Netherlands, Spain, Norway and Austria rank as the top six markets, accounting for more than 80% of total spending.
Among the top five markets, the one with the highest growth in total expenditure compared to 2019 is Croatia (-155.6%), followed by Sweden (+96.8%). Only Italy saw a decline, with a year-on-year change of -22.3%.

TOP 5 COUNTRIES, ITALY AND CROATIA FOR TOTAL EXPENDITURE AT CAMPSITES IN EUROPE (mln)

| | 1° | 2° | 3° | 4° | 5° | 8° | 19° |
|---|---|---|---|---|---|---|---|
| 2019 | 1,985.9 | 2,287.2 | 257.7 | 373.0 | 227.1 | 277.2 | 12.2 |
| 2023 | 2,334.9 | 2,237.6 | 761.3 | 583.9 | - | 265.1 | 15.8 |
| 2024 | 3,,674.5 | 2,342.7 | 658.7 | 550.9 | 447.0 | 271.0 | 21.3 |
| Var. 24-19% | +85.0% | +2.4% | +155.6% | +47.7% | +96.8% | -22.3% | +74.1% |
| Var. 24-23% | +57.4% | +4.7% | -13.5% | -5.6% | - | +2.2% | +34.8% |

Data source: Eurostat (Eurostat only includes NACE 55.3). Excluding the UK; data for Switzerland in 2024 is missing

# EU outdoor market 2025

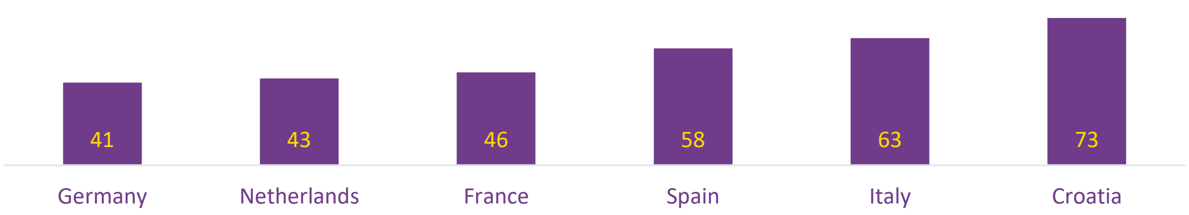
## Average campsite prices in 2026

An analysis of average campsite prices in Europe, based on data from a Pincamp study and referring to the cost of a camper pitch per night in high season, highlights notable differences across regions. Northern Europe remains the most affordable area, with Germany among the lowest-priced countries, while Italy and Croatia record the highest average rates, with Croatia also showing a significant year-on-year increase.

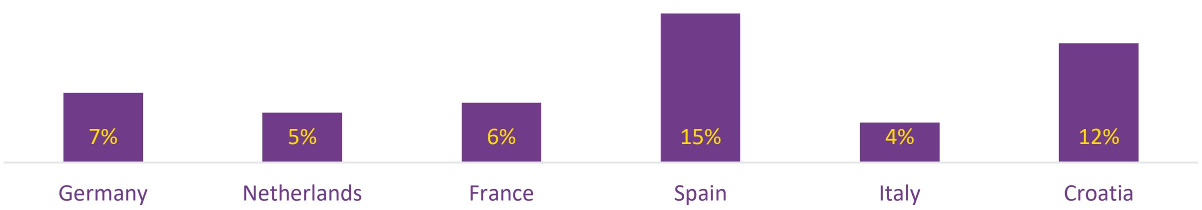
Location is a key factor: campsites in coastal areas are generally much more expensive than those inland. This gap is particularly evident in France, where seaside campsites cost almost 50% more on average, followed by Spain and Croatia, while Germany shows minimal differences. Prices also vary depending on quality, with 5-star campsites significantly more expensive, especially in Southern European countries.

Seasonality strongly impacts pricing: rates peak in July and August, while outside the high season prices drop by around 30%. On average, a family spends about €49 per night in high season, around 7% more than last year, yet campsites remains a relatively affordable option for a wide range of travellers.

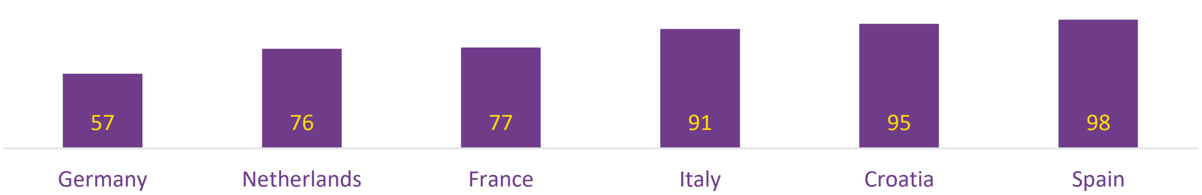
CAMPSITES PRICES* IN A COUNTRY COMPARISON




CHANGE COMPARED TO THE PREVIOUS YEAR IN A COUNTRY COMPARISON




AVERAGE PRICES FOR 5-STAR** CAMPSITES IN A COUNTRY COMPARISON




*cost of a camper pitch per night in high season
**only country with at least 5 prices for appropriately classified and inspected facilities

Data source: Pincamp.de

# EU outdoor market 2025

## The supply dynamics

The European campsite market comprises around 13,000 accommodation facilities (NACE code 55.3, according to Eurostat data).
France has the largest number of facilities, with around 8.000 open-air sites – more than twice as many as Germany, which ranks second.
Italy ranks as the fourth European country with over 2.000 sites.
The concentration of open-air sites per 100 km² offers a different perspective on the European market.
The Netherlands has an extremely high concentration of sites across its territory (around 64 per 100 km²), unrivalled anywhere else in Europe.
France and Croatia are on a par, with around 15 sites per 100 km².
Germany, Italy and Austria have a concentration of between 7 and 9 sites per km².

| Country | N° Campsites 2019 (.000) | N° Campsites 2023 (.000) | N° Campsites 2024 (.000) | Campsites Per 1.000 Km² |
|---|---|---|---|---|
| France | 8.0 | 8.1 | 8.0 | 14.5 |
| Germany | 3.1 | 3.2 | 3.2 | 9.0 |
| Netherlands | 2.7 | 2.7 | 2.7 | 63.5 |
| Italy | 2.3 | 2.3 | 2.4 | 7.9 |
| Spain | 1.3 | 1.4 | 1.4 | 2.8 |
| Sweden | 1.0 | 1.0 | 1.0 | 2.3 |
| Romania | 0.7 | 0.9 | 1.2 | 4.9 |
| Norway | 0.7 | 0.9 | 0.9 | 2.4 |
| Croatia | 0.9 | 0.9 | 0.9 | 15.4 |
| Austria | 0.6 | 0.7 | 0.7 | 8.7 |

Data source: Eurostat (Eurostat only includes NACE 55.3). Excluding the UK; data for Switzerland in 2024 is missing

# 02

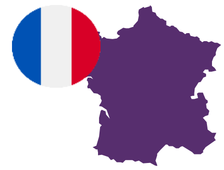
## Top-5 European outdoor markets in details

# Focus: Top5 EU markets

## Comparing Europe’s main outdoor markets

The analysis of the main European outdoor tourism markets, France, Germany, Spain, Croatia and the Netherlands, was conducted through a harmonised approach combining data from Eurostat with information sourced from the respective National Statistical Institutes. In particular, national data were retrieved from INSEE (France), DESTATIS (Germany), INE (Spain), DZS (Croatia) and CBS (Netherlands).
This dual-source methodology made it possible to ensure both comparability at the European level and a higher level of detail at the national level. Eurostat data provided a consistent framework for cross-country comparison (notably for the campsite segment under NACE 55.3), while national sources allowed for deeper insights into each market’s structure, performance and trends.

# French outdoor demand



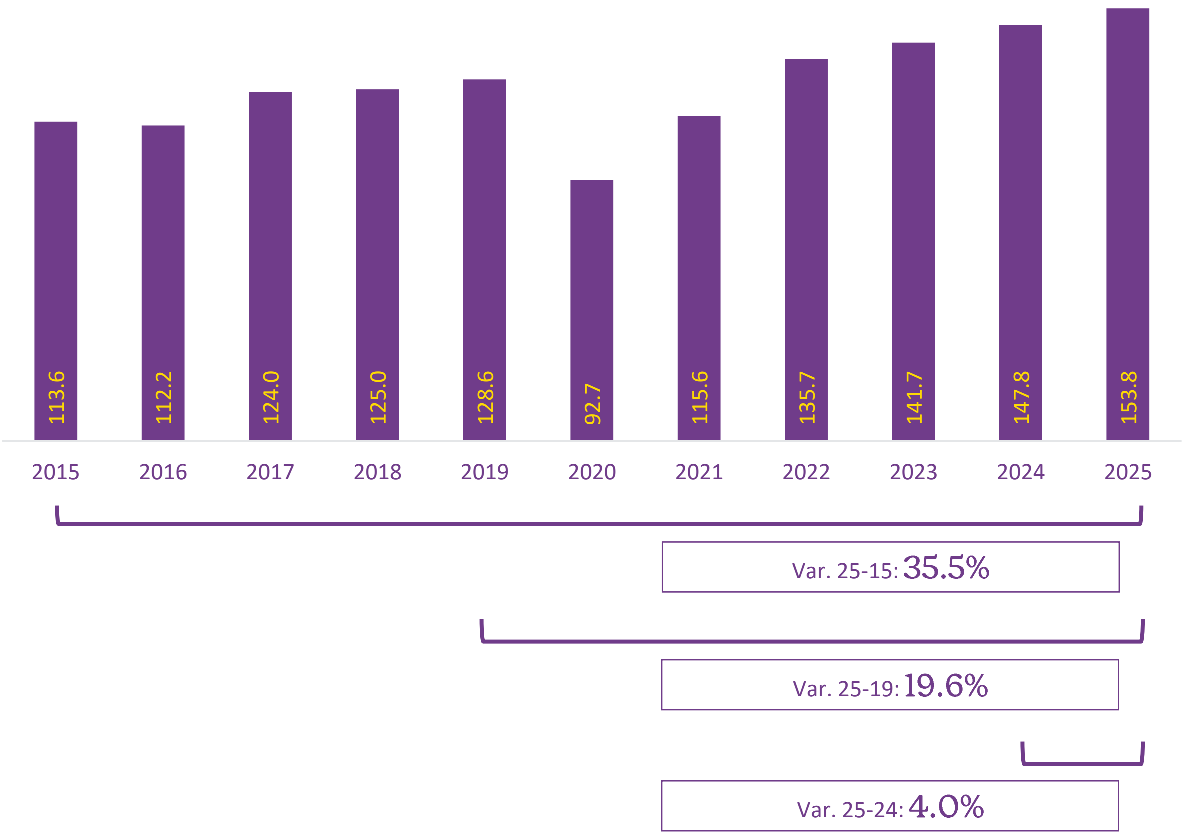
## More overnigths for less nights

**153.8 mln**
Campsite overnight stays in France in 2025

**-11.1%**
Variation in average length of stay from 2015 to 2024

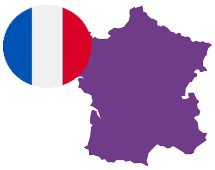
**30.6%**
**Percentage of foreign visitors out of the total number of campsite visitors**

OVERNIGHT STAYS OUTDOOR TREND 2015-2025 (mln)



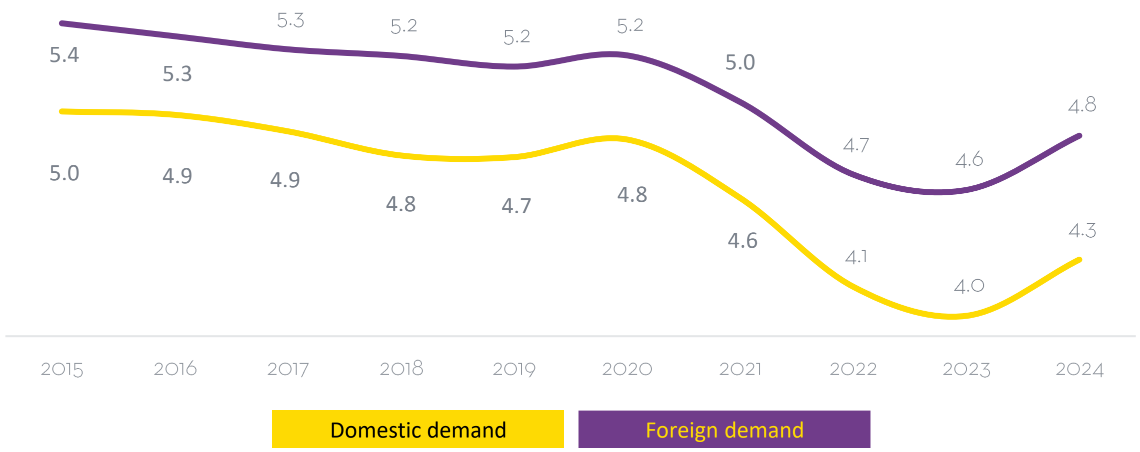

Data source: Eurostat (Eurostat only includes NACE 55.3). Excluding the UK; data for Switzerland in 2024 is missing

# French outdoor demand

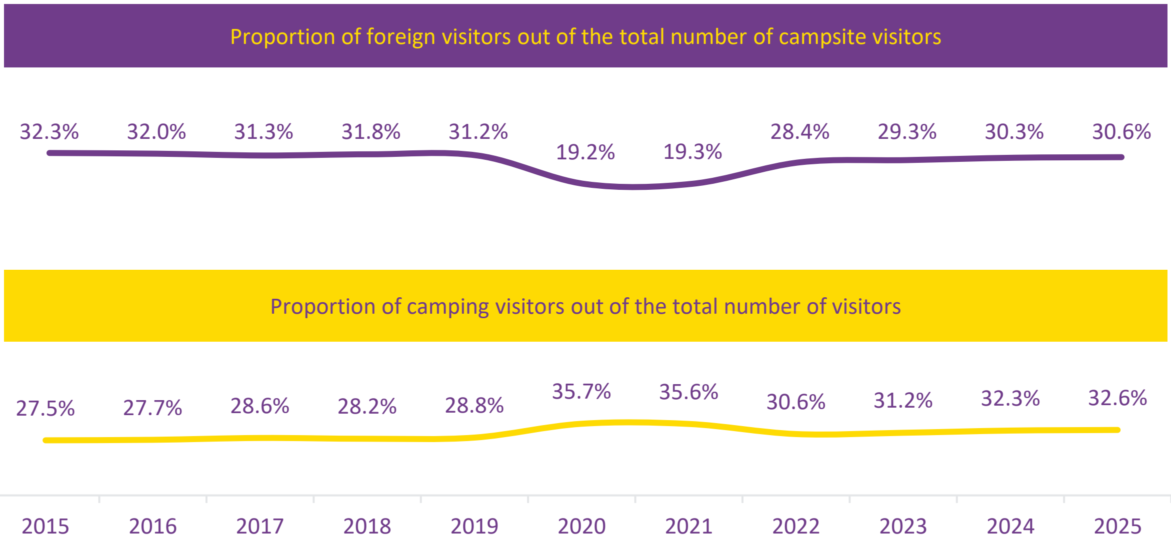


## One third of visitors goes to campsites

ALOS AT CAMPSITES FOR DOMESTIC AND FOREIGN TOURISTS

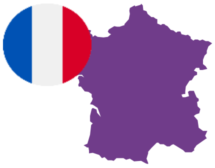



PERCENTAGE OF OVERNIGHT STAYS BY FOREIGN VISITORS OUT OF THE TOTAL NUMBER OF CAMPSITE STAYS AND PERCENTAGE OF CAMPSITE STAYS OUT OF THE TOTAL NUMBER OF STAYS




Data source: Eurostat (Eurostat only includes NACE 55.3). Excluding the UK; data for Switzerland in 2024 is missing

# French outdoor demand



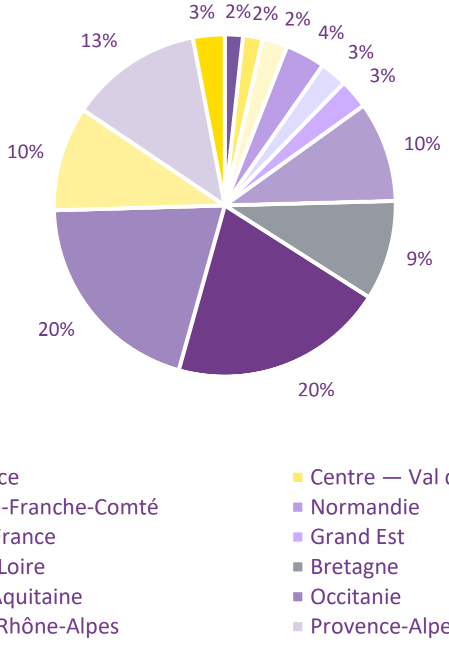
## Dutch on top

| **31.9%** | **> 90%** | **> 50%** |
|---|---|---|
| Of Dutch visitors out of the total number of foreign visitors to campsites in France in 2025 | Of foreign visitors come from the top six countries | Of outdoor overnight stays are in the Pays de la Loire, Nouvelle-Aquitaine and Occitanie regions |

TOP 5 COUNTRIES BY NUMBER OF TOURIST VISITS TO CAMPSITES IN 2019 AND 2024 (mln)

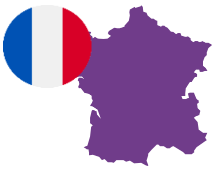
| Top 5 Countries | 2019 | 2024 | Proportion Of Overnight Stays Out Of Total Foreign Attendance In 2024 |
|---|---|---|---|
| Netherlands | 12 | 13.7 | 31.9% |
| Germany | 8.8 | 11.2 | 26.0% |
| Belgium | 4.9 | 5.4 | 12.6% |
| United Kingdom | 5.7 | 5.1 | 11.9% |
| Switzerland | 1.8 | 2.4 | 5.6% |
| Spain | 1.9 | 1.7 | 4.0% |

PERCENTAGE OF OUTDOOR OVERNIGHT STAYS IN FRENCH REGIONS IN 2024




Data source: Eurostat, INSEE

# French outdoor supply



## Growing numbers

**7,370**
Campsites in France in 2025

**848 k**
Pitches in 2025

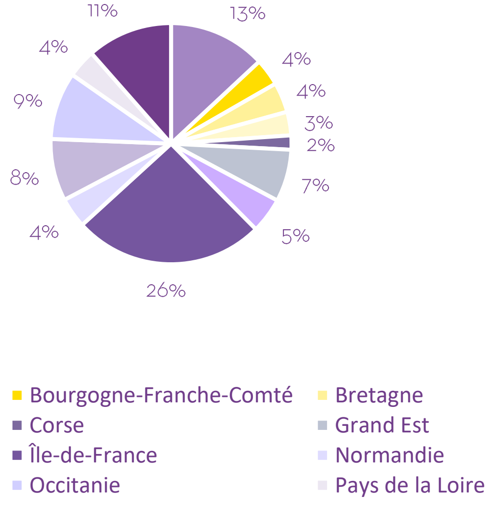
**> 50%**
**Of the campsites in France are located in Île-de-France, Corsica and Auvergne-Rhône-Alpes**

NUMBER AND CAPACITY OF CAMPSITES, 2024, 2025

| Stars | Establis. 2024 | Pitches 2024 (.000) | Occupancy Rate 2024* | Establis. 2025 | Pitches 2025 (.000) | Var. Establis. 25-24 | Var. Pitches 25-24 |
|---|---|---|---|---|---|---|---|
| Total | 6,608 | 637 | 41.7% | 7,370 | 848 | 11.5% | 33.1% |
| 1-star | 251 | 16 | 26.7% | 312 | 23 | 24.3% | 43.8% |
| 2-stars | 1,097 | 72 | 34.8% | 1,179 | 100 | 7.5% | 38.9% |
| 3-stars | 2204 | 194 | 37.6% | 2,347 | 255 | 6.5% | 31.4% |
| 4-stars | 1,235 | 209 | 47.6% | 1,327 | 279 | 7.4% | 33.5% |
| 5-stars | 259 | 86 | 56.1% | 281 | 104 | 8.5% | 20.9% |
| Unclassified | 1,562 | 61 | 27.0% | 1,924 | 87 | 23.2% | 42.6% |

*Average occupancy rate (the ratio of the number of occupied pitches to the number of pitches available from April to September)

PERCENTAGE OF CAMPSITES IN FRENCH REGIONS IN 2025




Data source: Eurostat, INSEE

# Spanish outdoor demand

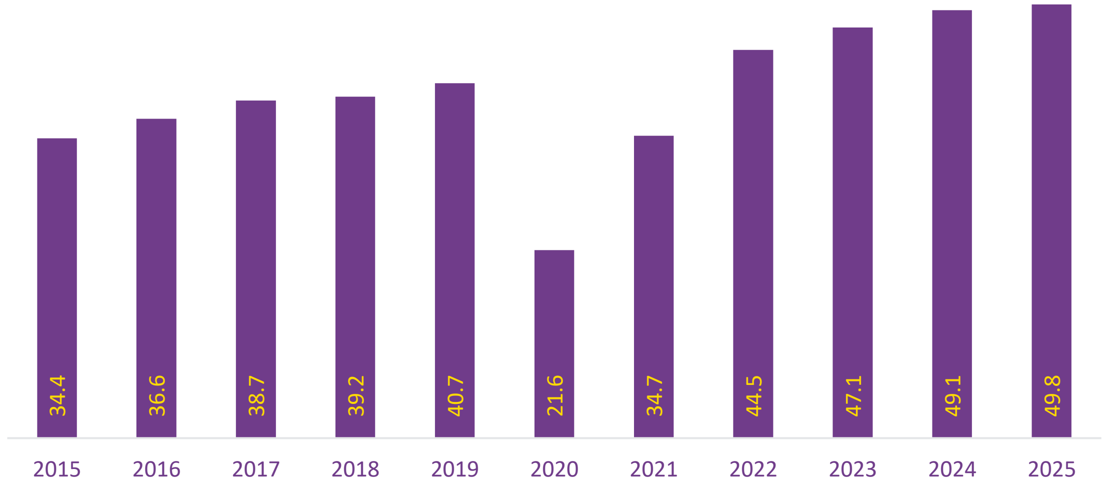
## Visitors are booming

**49.8 mln**
Campsite overnight stays in Spain in 2025

**-5.9%**
Variation in average length of stay from 2015 to 2024

**46.2%**
**Percentage of foreign visitors out of the total number of campsite visitors**

OVERNIGHT STAYS OUTDOOR TREND 2015-2025 (mln)




Var. 25-15: 44.7%

Var. 25-19: 22.2%

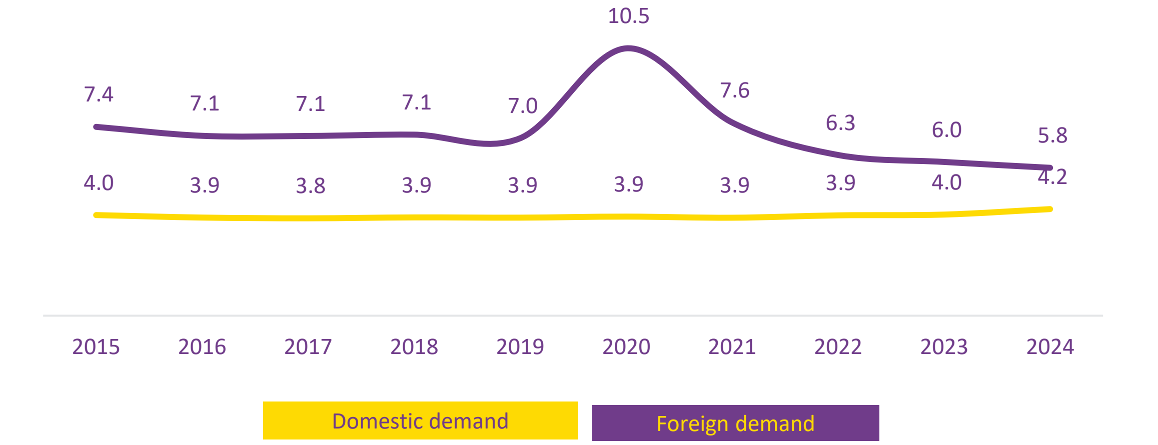
Var. 25-24: 1.4%

Data source: Eurostat (Eurostat only includes NACE 55.3). Excluding the UK; data for Switzerland in 2024 is missing

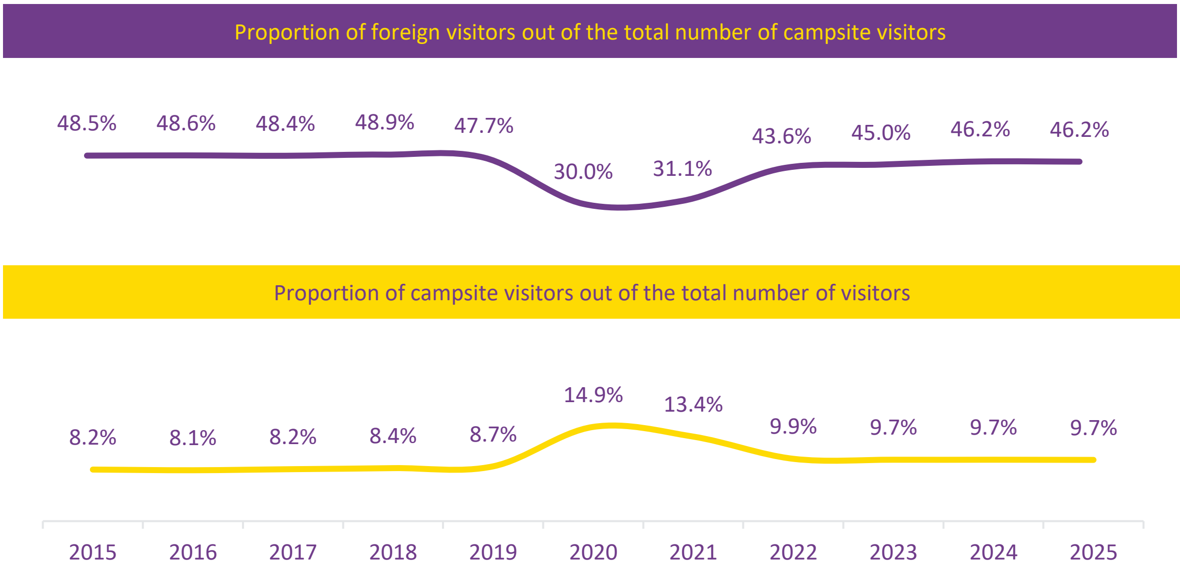
# Spanish outdoor demand

## Domestic guests: a growing role

ALOS AT CAMPSITES FOR DOMESTIC AND FOREIGN TOURISTS




PERCENTAGE OF OVERNIGHT STAYS BY FOREIGN VISITORS OUT OF THE TOTAL NUMBER OF CAMPSITE STAYS AND PERCENTAGE OF CAMPSITE STAYS OUT OF THE TOTAL NUMBER OF STAYS




Data source: Eurostat (Eurostat only includes NACE 55.3). Excluding the UK; data for Switzerland in 2024 is missing

# Spanish outdoor demand

## German on top

**23.8%**
Percentage of german visitors out of the total number of foreign visitors to campsites in Spain in 2024

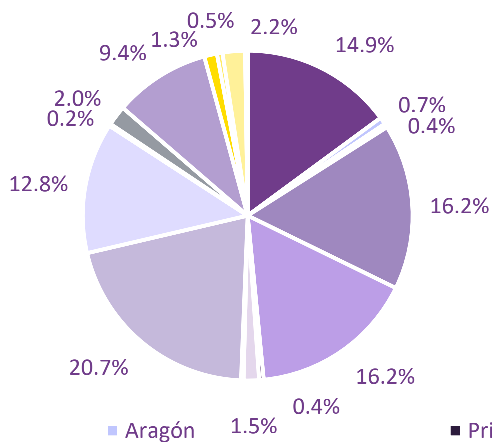
**> 85%**
Of foreign visitors come from the top five countries

**> 50%**
Of outdoor overnight stays are in Andalucía, Cataluña and in Galicia

TOP 5 COUNTRIES BY NUMBER OF TOURIST VISITS TO CAMPSITES IN 2024 (mln)

| Top 5 Countries | Proportion Of Overnight Stays Out Of Total Foreign Attendance In 2024 |
|---|---|
| Germany | 23.8% |
| Netherlands | 21.9% |
| France | 18.9% |
| United Kingdom | 15.3% |
| Belgium | 5.4% |

PERCENTAGE OF OUTDOOR OVERNIGHT STAYS IN SPANISH REGIONS IN 2024




Data source: Eurostat, INE - Istituto Nacional de Estadística

# Spanish outdoor supply

## Cataluña leads the rank

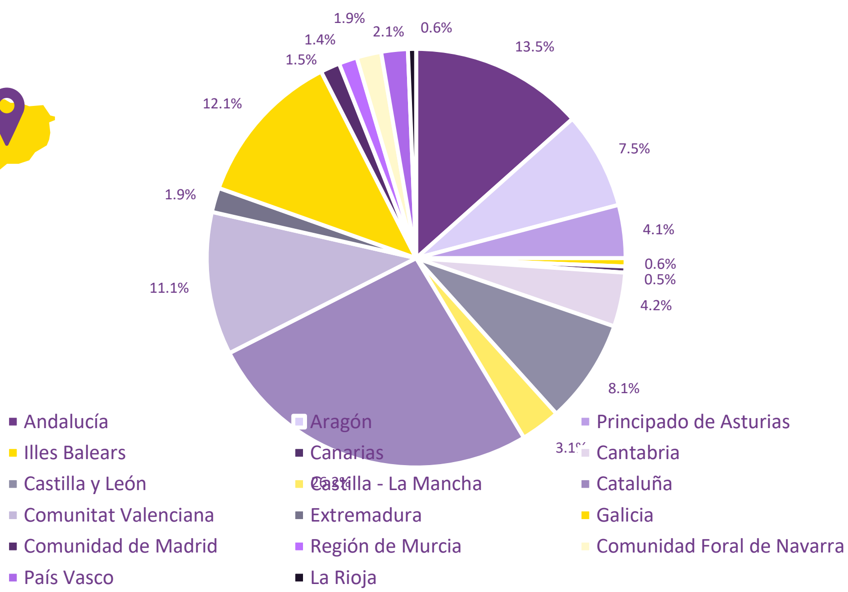
| **1,262** | **767,889** | **> 50%** |
|---|---|---|
| Campsites in Spain in 2024 | Pitches in 2023 | Of the campsites in Spain are located in Cataluña, Andalucía e Galicia |

NUMBER AND CAPACITY OF CAMPSITES, 2024, 2025

| Year | Campsites | Luxury And 1° Class | 2° Class | .3° Class |
|---|---|---|---|---|
| **2019** | 1,199 | 299 | 661 | 240 |
| **2020** | 1,116 | 284 | 618 | 215 |
| **2021** | 1,187 | 297 | 658 | 232 |
| **2022** | 1,226 | 299 | 689 | 240 |
| **2023** | 1,253 | 293 | 703 | 257 |
| **2024** | 1,262 | 293 | 705 | 266 |
| **Var. 24-19** | 5.3% | -2.0% | 6.7% | 10.8% |
| **Var. 24-23** | 0.7% | 0.0% | 03% | 3.5% |

| Year | Pitches | Luxury And 1° Class | 2° Class | 3° Class |
|---|---|---|---|---|
| **2019** | 764,645 | 322,482 | 356,156 | 86,007 |
| **2020** | 732,436 | 315,323 | 336,881 | 80,232 |
| **2021** | 761,304 | 323,421 | 352,793 | 85,151 |
| **2022** | 767,656 | 325,673 | 358,197 | 84,920 |
| **2023** | 767,889 | 320,744 | 360,373 | 87,911 |
| **2024** | 228,840* | 92,680* | 110,121* | 26,241* |

PERCENTAGE OF CAMPSITES IN 2024 BY REGION IN SPAIN




Data source: Eurostat, INE - Istituto Nacional de Estadística

# German outdoor demand

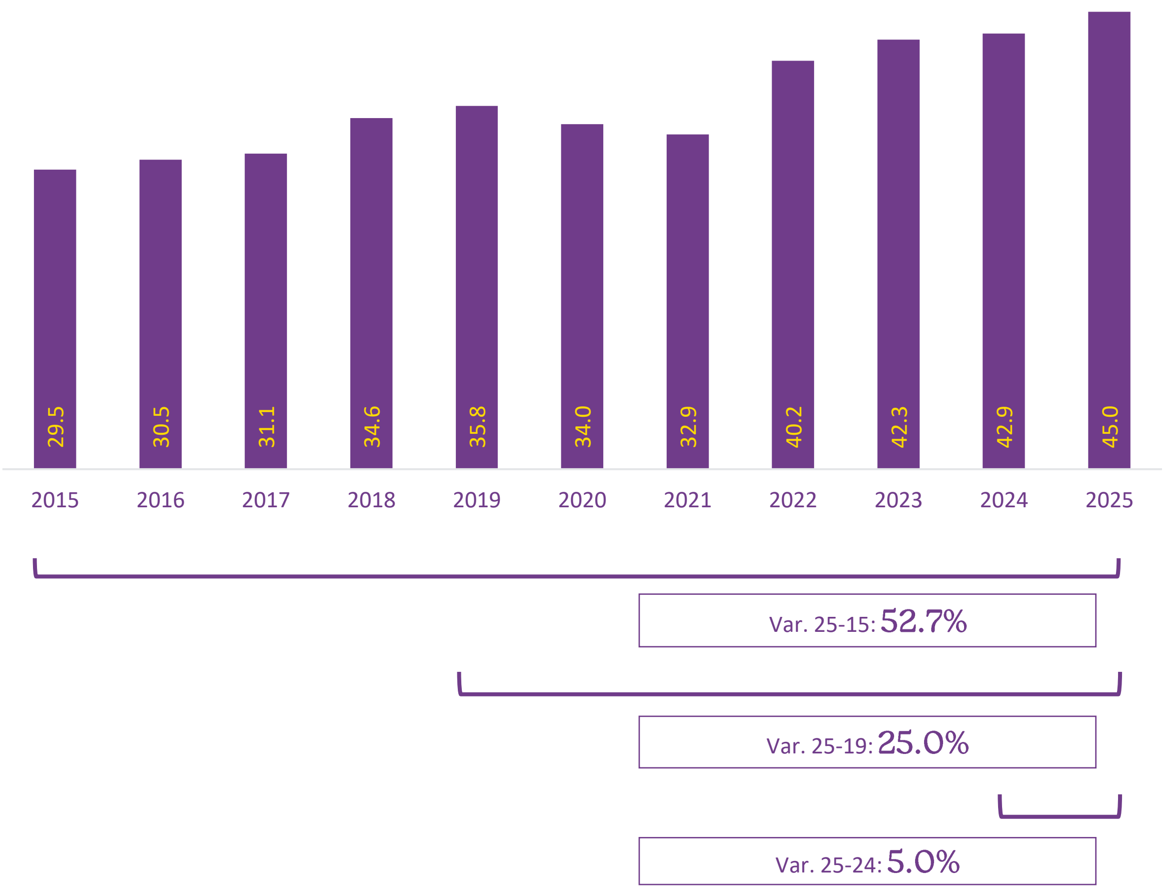
## Mainly a matter of domestic guests

**45.0 mln**
Campsite overnight stays in Germany in 2025

**-6.4%**
Variation in average length of stay from 2015 to 2024

**10.6%**
Percentage of foreign visitors out of the total number of campsite visitor

OVERNIGHT STAYS OUTDOOR TREND 2015-2025 (mln)

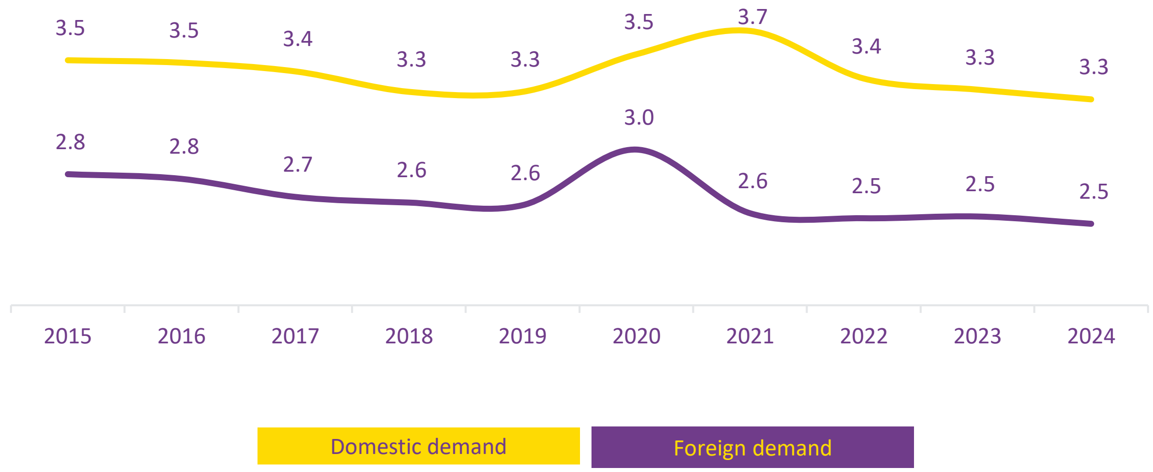



Data source: Eurostat (Eurostat only includes NACE 55.3). Excluding the UK; data for Switzerland in 2024 is missing

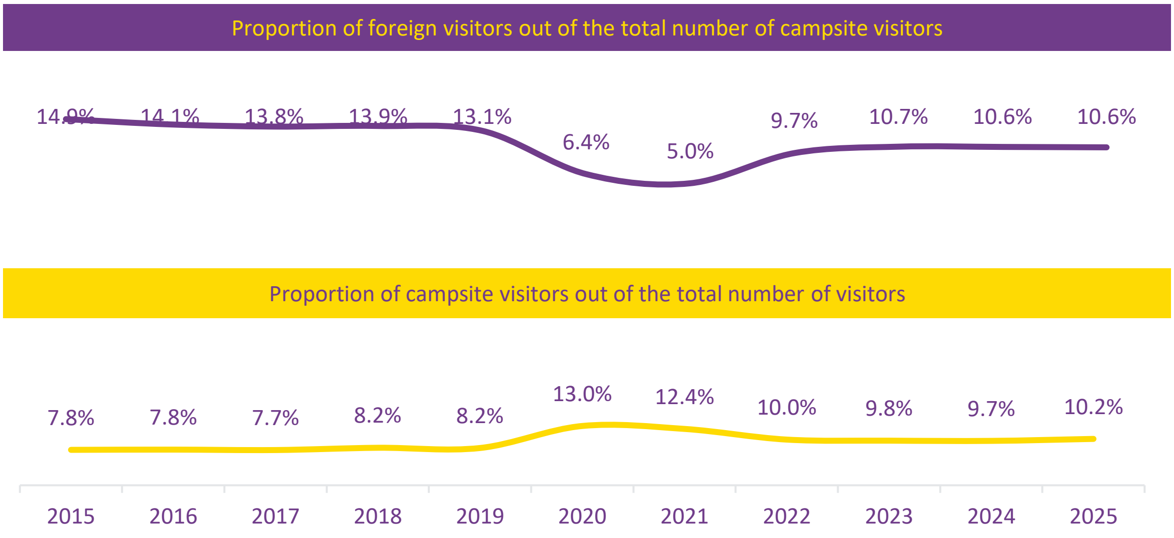
# German outdoor demand

## International guests are on the rise

ALOS AT CAMPSITES FOR DOMESTIC AND FOREIGN TOURISTS




PERCENTAGE OF OVERNIGHT STAYS BY FOREIGN VISITORS OUT OF THE TOTAL NUMBER OF CAMPSITE STAYS AND PERCENTAGE OF CAMPSITE STAYS OUT OF THE TOTAL NUMBER OF STAYS




Data source: Eurostat (Eurostat only includes NACE 55.3). Excluding the UK; data for Switzerland in 2024 is missing

# German outdoor demand

## Dutch on top

**15.0%**
Percentage of Dutch visitors out of the total number of foreign visitors to campsites in Germany in 2025

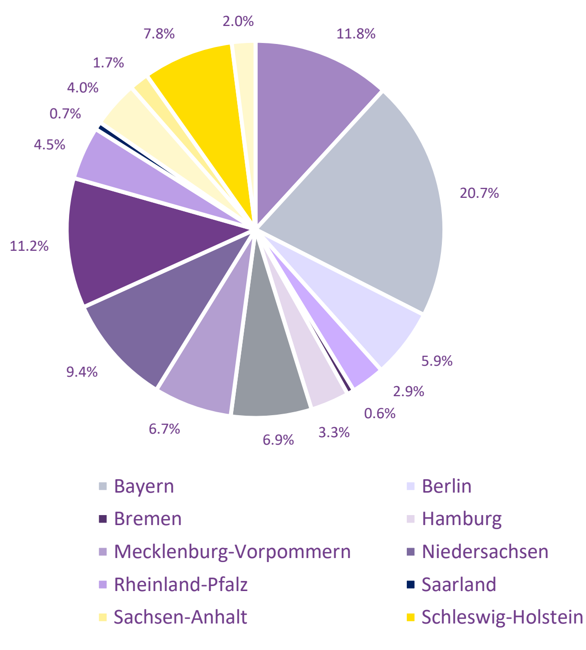
**> 45%**
Of foreign visitors come from the top six countries

**> 50%**
Of outdoor overnight stays are in Bayern, Baden-Württemberg, Nordrhein-Westfalen and Niedersachsen

TOP 5 COUNTRIES BY NUMBER OF TOURIST VISITS TO CAMPSITES IN 2024 (mln)

| Top 5 Countries | Overnight Stays | Percentage Out Of The Total Number Of Foreign Visitors |
|---|---|---|
| **Netherlands** | 11.8 | 15.0% |
| **USA** | 7.2 | 9.1% |
| **Switzerland** | 6.9 | 8.8% |
| **United Kingdom** | 5.3 | 6.7% |
| **Austria** | 4.4 | 5.6% |

PERCENTAGE OF OUTDOOR OVERNIGHT STAYS IN THE GERMAN FEDERAL STATES IN 2025




Data source: Eurostat, Destatis-Genesis

# German outdoor supply

## A limited but steady growth

**3.143**
Campsites in Germany in 2024

**233.570**
Pitches in 2024

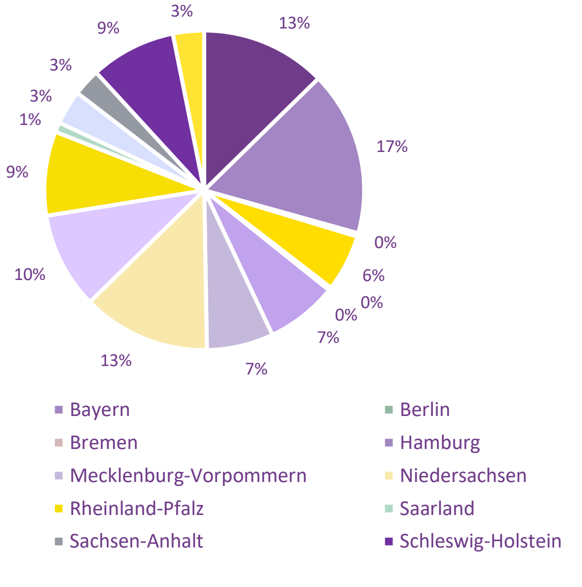
**> 50%**
**Of the campsites in Germany are located in Hessen, Niedesachsen, Nordrhein-Westfalen, Baden-Wüttemberg**

NUMBER AND CAPACITY OF CAMPSITES, 2024

| Year | Campsites | Pitches | Occupancy Rate* |
|---|---|---|---|
| **2015** | 2,874 | 221,486 | 12.7 |
| **2016** | 2,919 | 219,794 | 13.1 |
| **2017** | 2,954 | 220,914 | 13.3 |
| **2018** | 2,979 | 223,640 | 14.8 |
| **2019** | 3,011 | 225,158 | 15.2 |
| **2020** | 2,862 | 209,103 | 16.3 |
| **2021** | 2,936 | 215,497 | 15.8 |
| **2022** | 3,064 | 227,743 | 16.3 |
| **2023** | 3,124 | 231,520 | 17.2 |
| **2024** | 3,143 | 233,570 | 17.1 |
| **Var. 24-15** | 9.4% | 5.5% | |
| **Var 24-19** | 4.4% | 3.7% | |
| **Var 24-23** | 0.6% | 0.9% | |

*Average occupancy rate (the ratio of the number of occupied pitches to the number of pitches available from April to September)

PERCENTAGE OF CAMPSITES IN 2024 BY GERMAN FEDERAL STATE




Data source: Eurostat, Destatis-Genesis

# Dutch outdoor demand

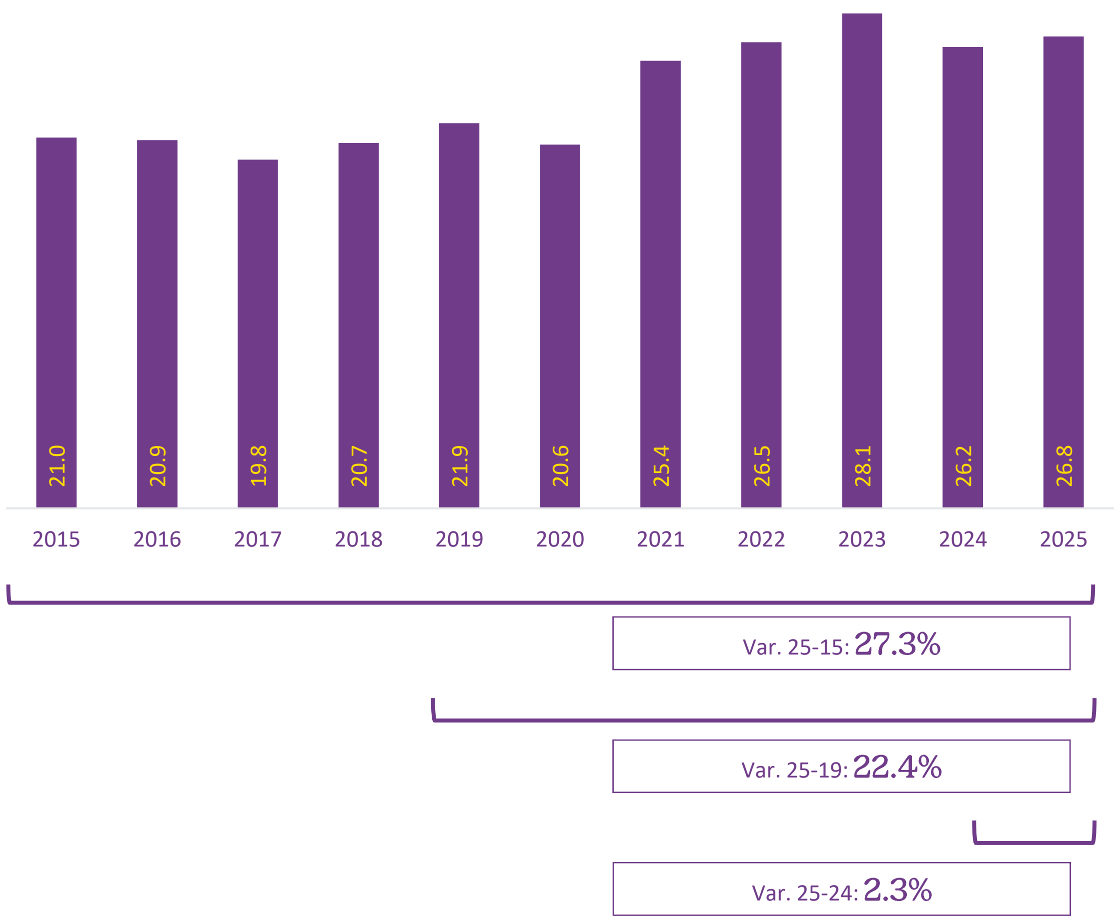
## More overnights, fewer nights

**26.8 mln**
Campsite overnight stays in Netherlands in 2025

**-7.0%**
Variation in average length of stay from 2015 to 2024

**31.1%**
**Percentage of foreign visitors out of the total number of campsite visitors**

OVERNIGHT STAYS OUTDOOR TREND 2015-2025 (mln)

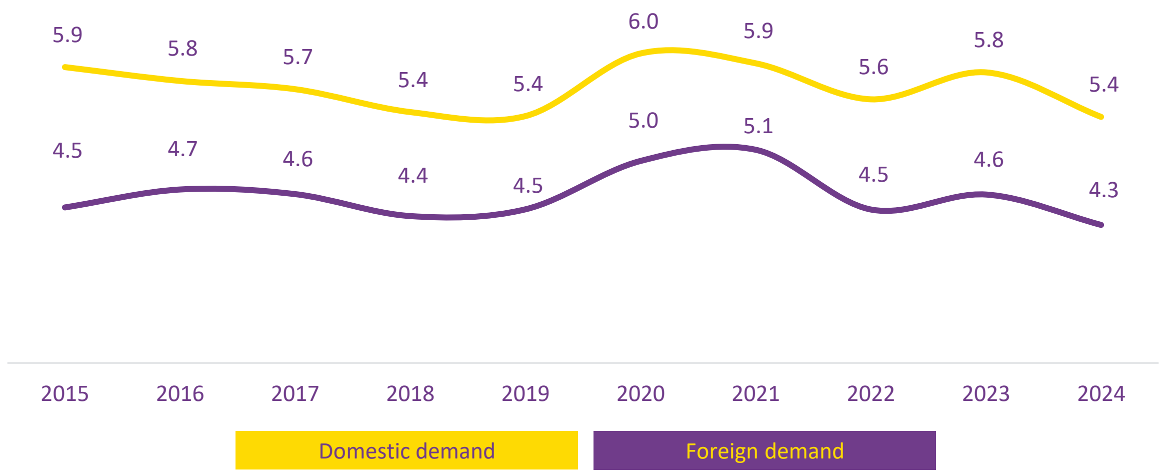



Data source: Eurostat (Eurostat only includes NACE 55.3). Excluding the UK; data for Switzerland in 2024 is missing

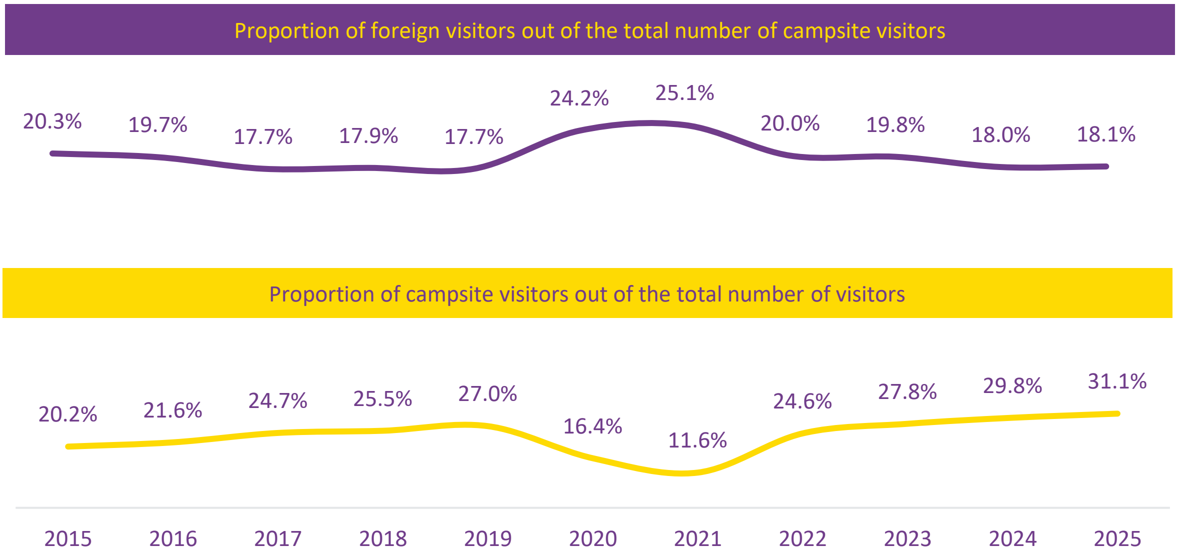
# Dutch outdoor demand

## One third of visitors goes to campsites

ALOS AT CAMPSITES FOR DOMESTIC AND FOREIGN TOURISTS




PERCENTAGE OF OVERNIGHT STAYS BY FOREIGN VISITORS OUT OF THE TOTAL NUMBER OF CAMPSITE STAYS AND PERCENTAGE OF CAMPSITE STAYS OUT OF THE TOTAL NUMBER OF STAYS




Data source: Eurostat (Eurostat only includes NACE 55.3). Excluding the UK; data for Switzerland in 2024 is missing

# Dutch outdoor demand

## One third of foreign tourists are German

**33.0%**
Percentage of german visitors out of the total number of foreign visitors to campsites in Netherlands in 2025

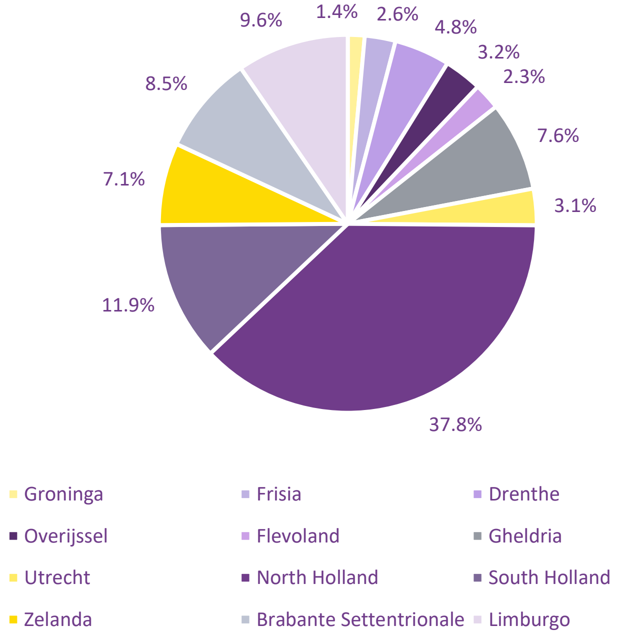
**> 65%**
Of foreign visitors come from the top six countries

**> 50%**
Of outdoor overnight stays are North Holland, South Holland and Limburg

TOP 5 COUNTRIES BY NUMBER OF TOURIST VISITS TO CAMPSITES IN 2024 (mln)

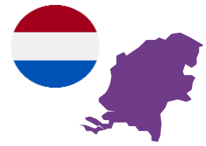
| Top 5 Countries | Proportion Of Overnight Stays Out Of Total Foreign Attendance In 2024 |
|---|---|
| Germany | 33.0% |
| Belgium | 11.3% |
| United Kingdom | 10.1% |
| USA | 8.1% |
| France | 5.9% |

PERCENTAGE OF OUTDOOR OVERNIGHT STAYS IN DUTCH REGIONS IN 2024




Data source: Eurostat, CBS - StatLine

# Dutch outdoor supply



## Decreasing numbers

**2,682**
Campsites in Netherlands in 2025

**653,403**
Pitches in 2023

**>40%**
**Of the campsites in Netherland are located in Gelderland, Zeeland and North Brabant**

NUMBER AND CAPACITY OF CAMPSITES, 2024, 2025

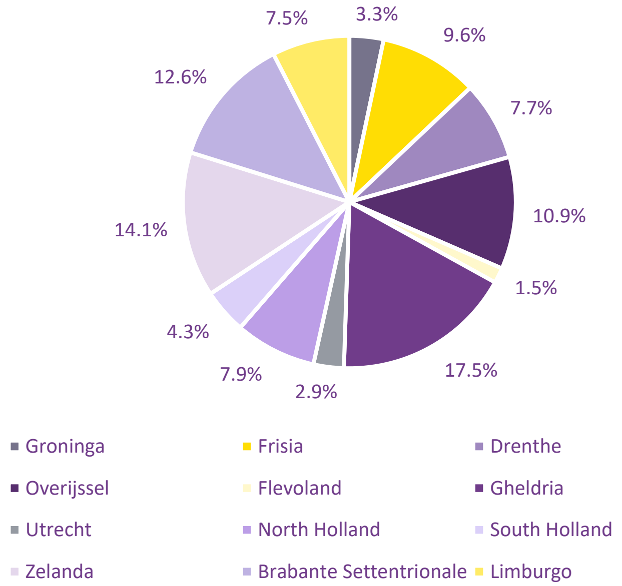
**Campsites**

| | |
|---|---|
| **2019** | 2,739 |
| **2024** | 2,662 |
| **2025** | 2,682 |
| **Var. 25-19** | -2.10% |
| **Var. 25-24** | 0.80% |

**Pitches**

| | |
|---|---|
| **2019** | 723,994 |
| **2024** | 681,216 |
| **2025** | 653,403 |
| **Var. 25-19** | -9.80% |
| **Var. 25-24** | -4.10% |

PERCENTAGE OF CAMPSITES IN 2024 BY REGION IN NETHERLAND




Data source: Eurostat, CBS - StatLine

# Croatian outdoor demand

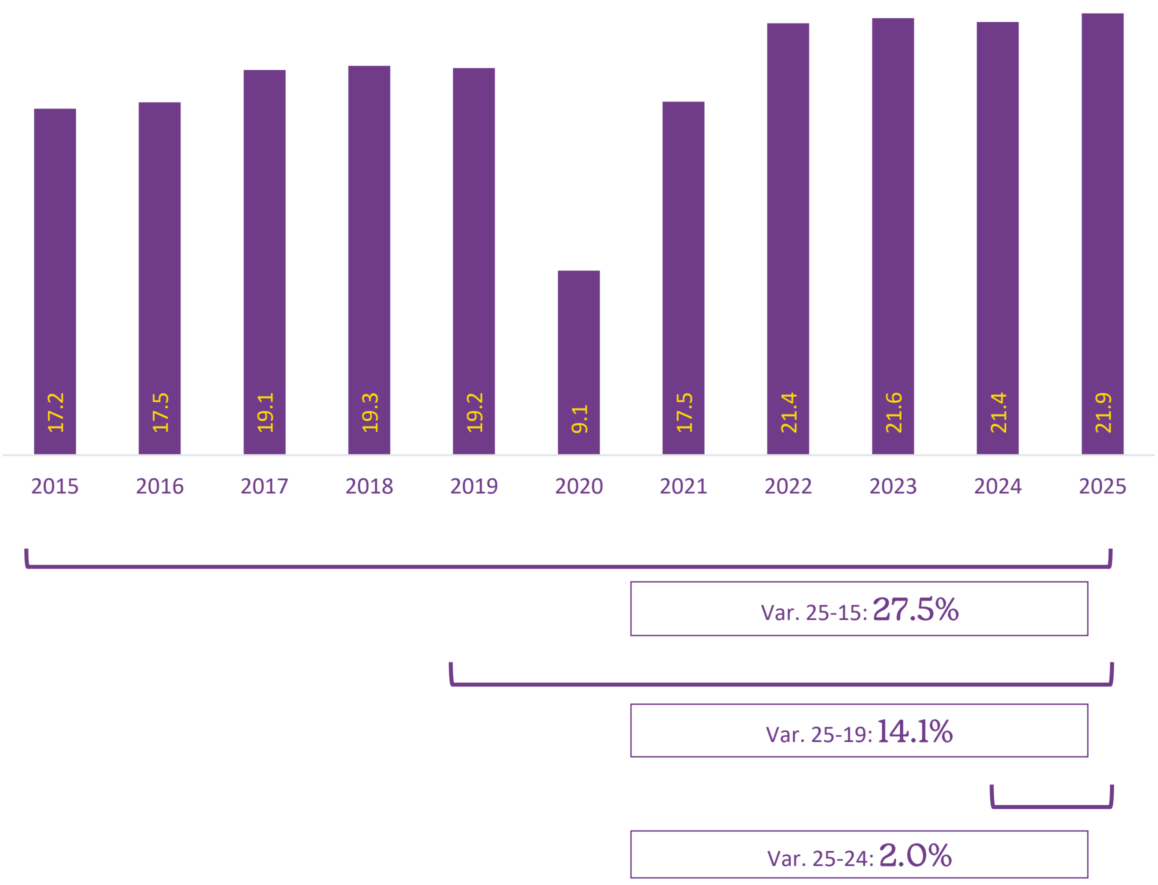
## Visitors are mostly international

**21.9 mln**
Campsite overnight stays in Croatia in 2025

**-9.2%**
Variation in average length of stay from 2015 to 2024

**96.3%**
**Percentage of foreign visitors out of the total number of campsite visitors**

OVERNIGHT STAYS OUTDOOR TREND 2015-2025 (mln)

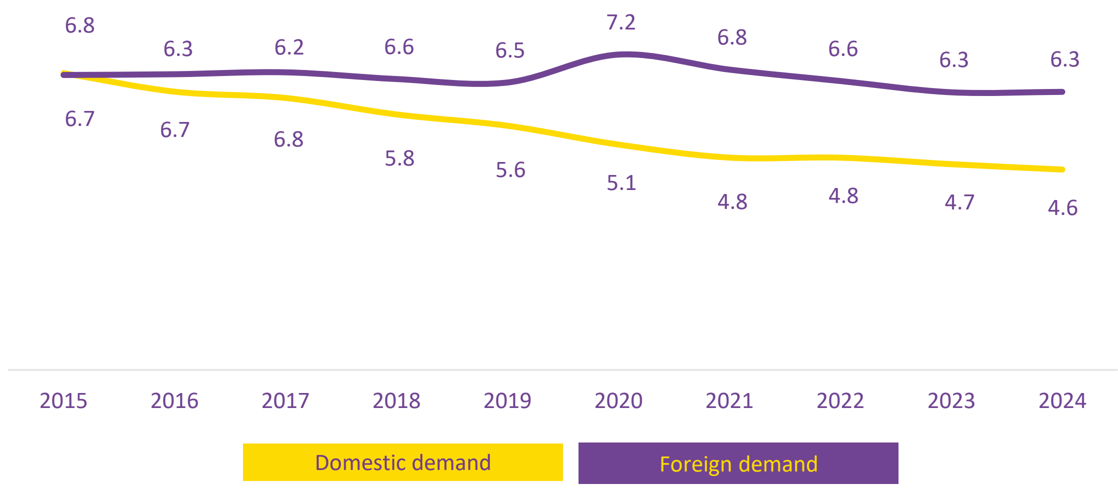



Data source: Eurostat (Eurostat only includes NACE 55.3). Excluding the UK; data for Switzerland in 2024 is missing

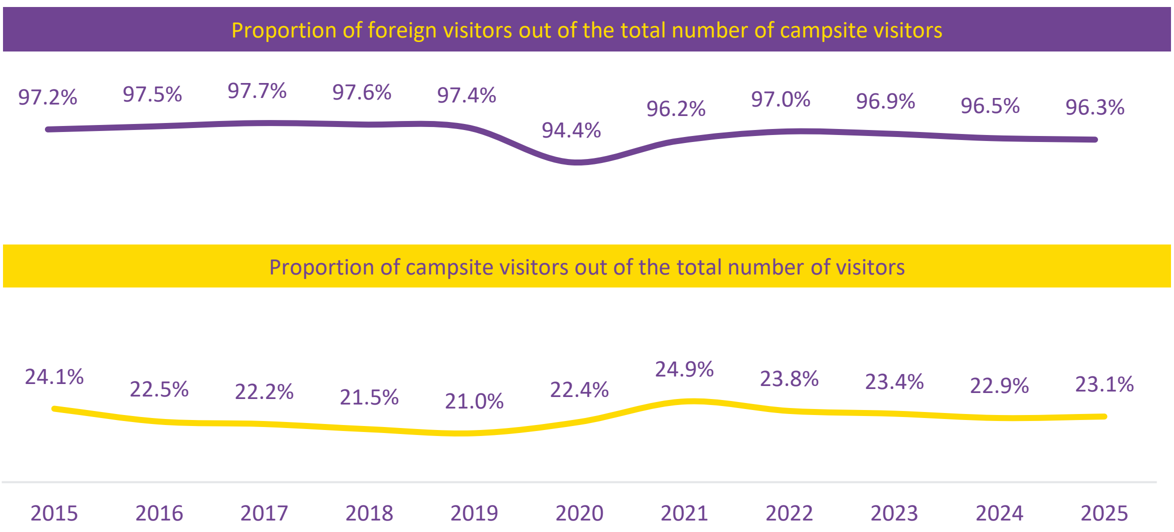
# Croatian outdoor demand

## Shorter stays for domestic guests

ALOS AT CAMPSITE FOR DOMESTIC AND FOREIGN TOURISTS




PERCENTAGE OF OVERNIGHT STAYS BY FOREIGN VISITORS OUT OF THE TOTAL NUMBER OF CAMPSITE STAYS AND PERCENTAGE OF CAMPSITE STAYS OUT OF THE TOTAL NUMBER OF STAYS




Data source: Eurostat (Eurostat only includes NACE 55.3). Excluding the UK; data for Switzerland in 2024 is missing

# Croatian outdoor demand

## A quarter of foreign guests are German

**24.6%**
Percentage of german visitors out of the total number of foreign visitors to campsites in Croatia in 2025

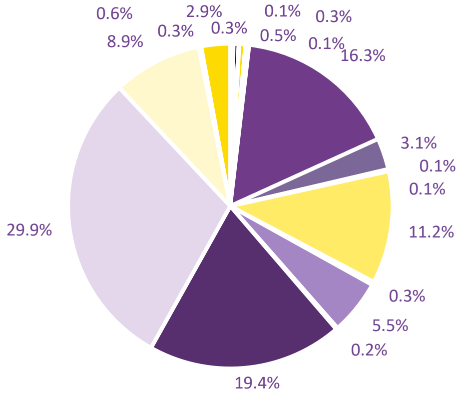
**> 55%**
Of foreign visitors come from the top six countries

**> 50%**
Of outdoor overnight stays are in Istarska, Splitsko-dalmatinska e Primorje-Gorski Kotar

TOP 5 COUNTRIES BY NUMBER OF TOURIST VISITS TO CAMPSITES IN 2024 AND IN 2025 (mln)

| Top 5 Countries | Percentage On Foreign Attendance 2024 | Overnight Stays (Mln) 2024 | Percentage On Foreign Attendance 2025 | Overnight Stays (Mln) 2025 |
|---|---|---|---|---|
| **Germany** | 24.8% | 21.1 | 24.6% | 21.0 |
| **Slovenia** | 9.3% | 7.9 | 9.4% | 8.0 |
| **Austria** | 8.9% | 7.5 | 8.8% | 7.5 |
| **Poland** | 8.0% | 6.8 | 8.2% | 7.0 |
| **Czech Republic** | 5.5% | 4.6 | 5.2% | 4.5 |

PERCENTAGE OF OUTDOOR OVERNIGHT STAYS IN CROATIAN REGIONS IN 2024




- Zagabria
- Krapina-Zagorje
- Sisak-Moslavina
- Karlovac
- Varaždin
- Koprivnica-Križevci
- Bjelovar-Bilogora
- Primorje-Gorski Kotar
- Lika e Segna
- Virovitica-Podravina
- Požega-Slavonia
- Brod-Posavina
- Zara
- Osijek-Baranja
- Šibensko-kninska
- Vukovarsko-srijemska
- Splitsko-dalmatinska
- Istarska
- Dubrovačko-neretvanska
- Međimurska
- Grad Zagreb

Data source: Eurostat, , Državni zavod za statistiku, DZS

# Croatian outdoor supply

## Decreasing numbers

**341**
**Campsites in Croatia in 2024**

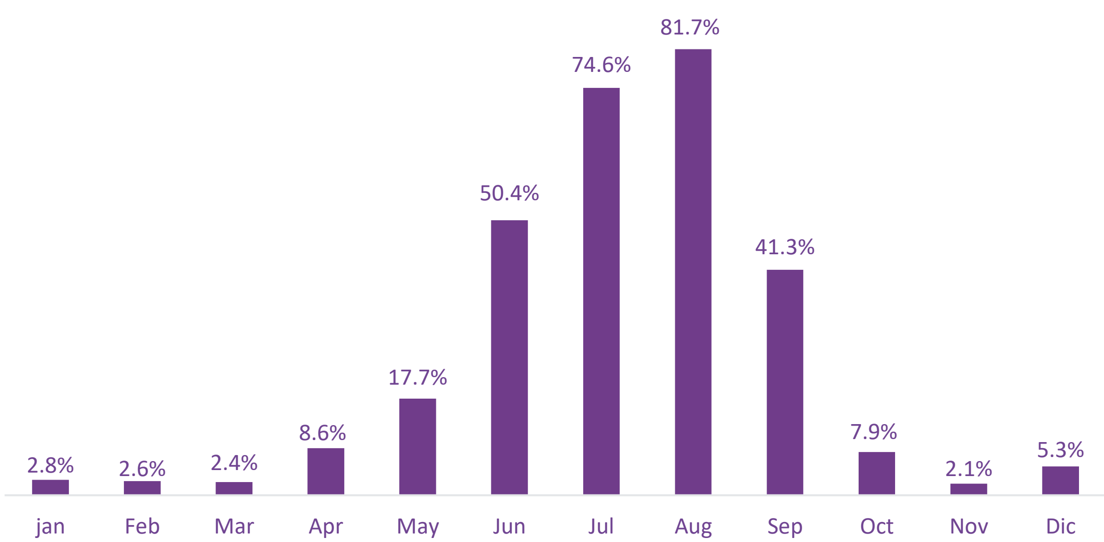
**88,531**
Pitches in 2024

**> 80%**
**Occupancy rate in Croatia in August**

NUMBER AND CAPACITY OF CAMPSITES, 2024, 2025

| Year | Campsites | Pitches |
|---|---|---|
| **2016** | 653 | 250,456 |
| **2017** | 726 | 256,965 |
| **2018** | 821 | 262,391 |
| **2019** | 852 | 277,214 |
| **2020** | 835 | 256,622 |
| **2021** | 866 | 263,961 |
| **2022** | 870 | 268,830 |
| **2023** | 856 | 264,647 |
| **2024** | 871 | 273,076 |
| **Var 24-19** | 2.2% | -1.5% |
| **Var 24-23** | 1.8% | 3.2% |

OCCUPANCY RATE OF CAMPSITES IN CROATIA IN 2025




Data source: Eurostat, , Državni zavod za statistiku, DZS

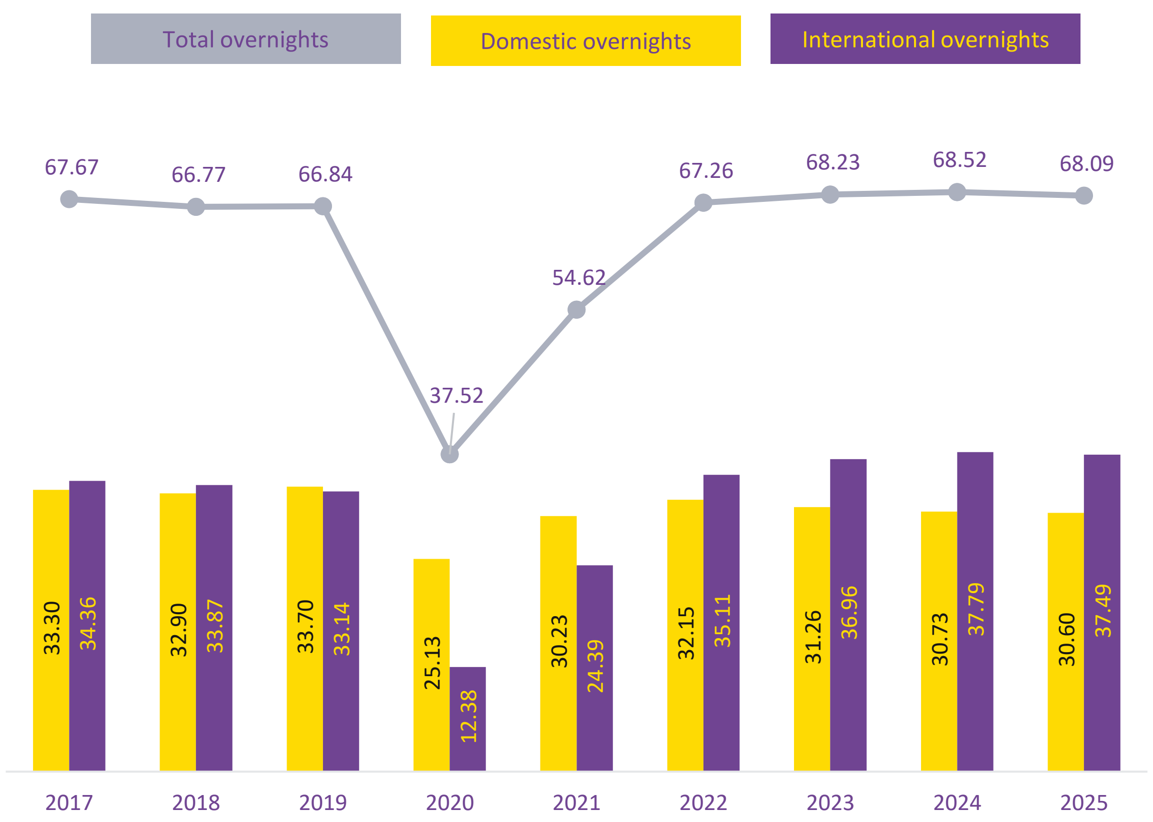
# 03

# Italy outdoor market: 2025 overview

# Outdoor Italy 2025

The outdoor tourism market in Italy has shown a strong recovery and stabilisation following the pandemic shock. After a sharp decline in 2020, 37.52 million overnight stays, driven by the collapse of international demand, the sector quickly rebounded, returning to pre-pandemic levels by 2022 and reaching 68.52 million overnight stays in 2024. This recovery has been largely supported by international tourists, whose share has progressively increased, accounting for over 55% of total overnight stays in 2024 and 2025. Conversely, domestic demand, which had peaked during the pandemic, 67.0% in 2020, has gradually decreased in relative terms, stabilising at around 45%. Overall, the data highlight a structurally strong and internationally attractive market, characterised by a balanced but increasingly export-oriented demand mix.

OUTDOOR OVERNIGHT EVOLUTION ITALY (mln)




Source:: Istat

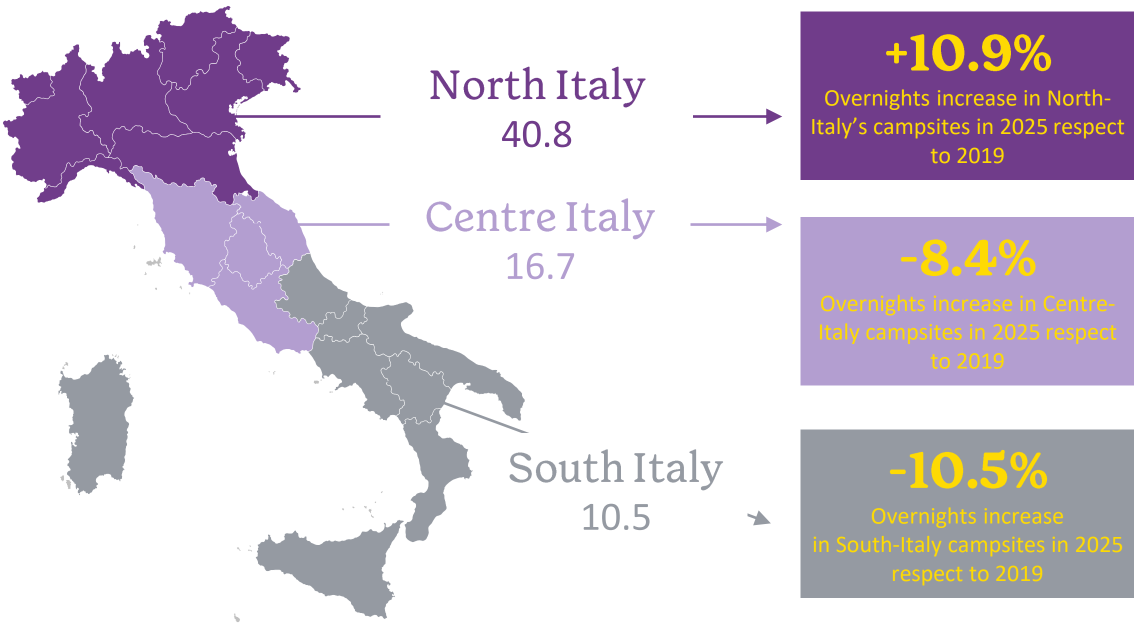
# Change in overnight stays

| | Domestic | International | Total |
|---|---|---|---|
| 2025 vs 2024 | -0.4% | -0.8% | -0.6% |
| 2024 vs 2023 | -1.7% | +2.2% | +0.4% |
| 2025 vs 2019 | -9.2% | +13.1% | +1.9% |
| 2025 vs 2017 | -8.1% | +9.1% | +0.6% |

Source:: Istat

# 2025 performance by area

ITALY OUTDOOR OVERNIGHTS 2025 BY AREA (mln)




| Millions overnights | 2023 | 2024 | 2025 | 2024 vs 2023 | 2025 vs 2024 |
|---|---|---|---|---|---|
| North* | 40.3 | 40.3 | 40.8 | 0% | 1.2% |
| Domestic | 12.0 | 12.0 | 12.4 | -0.1% | 2.9% |
| International | 28.3 | 28.3 | 28.5 | 0.1% | 0.5% |
| Centre* | 17.5 | 17.5 | 16.7 | 0% | -4.6% |
| Domestic | 11.5 | 11.0 | 10.6 | -4.3% | -2.8% |
| International | 6.0 | 6.5 | 6.0 | 8.2% | -7.4% |
| South and Islands* | 10.4 | 10.7 | 10.5 | 2.5% | -1.1% |
| Domestic | 7.7 | 7.7 | 7.6 | -0.4% | -2.4% |
| International | 2.6 | 2.9 | 3.0 | 11% | 2.1% |

Source: Istat till 2024. Regional statistic office for 2025 (provisional data)

# Top 5 destinations of domestic market in Italy

In 2025, the domestic outdoor tourism market in Italy is lead by Tuscany with 5.3 million overnight stays (17% share), followed by Veneto (3.7 million, 12%) and Emilia-Romagna (3.4 million, 12%). Marche and Apulia complete the top five destinations, with 2.6 million (9%) and 2.4 million (8%) overnight stays respectively. Overall, these regions account for a significant 57% share of domestic demand, although trends vary: Emilia-Romagna and Marche show growth compared to 2019 (+10% and +6%), while Tuscany, Veneto and Apulia remain below pre-pandemic levels. In the short term, the market appears relatively stable, with a slight overall decrease of -1% between 2024 and 2025.

| | Overnights | Share on 2025 | Var. 25-19 | Var. 25-24 |
|---|---|---|---|---|
| Tuscany | 5.3 mln | 17% | -14% | -5% |
| Veneto | 3.7 mln | 12% | -8% | -1% |
| Emilia-Romagna | 3.4 mln | 12% | +10% | +1% |
| Marche | 2.6 mln | 9% | +6% | -2% |
| Apulia | 2.4 mln | 8% | -7% | -2% |
| Total Domestic | 30.6 mln | | -10% | -1.2% |

Source: Istat till 2024. Regional statistic office for 2025 (provisional data)

# Top 5 destinations of international market in Italy

In 2025, the international outdoor tourism market in Italy is highly concentrated: top 5 regions account for 71% of total overnights in 2025, with Veneto clearly dominating at 16.4 million overnight stays, accounting for 44% of the total. It is followed by Tuscany, 3.9 million, 10%, and Lombardy, 3 million, 8%, while Alto Adige, 1.8 million, 5%, and Emilia-Romagna, 1.6 million, 4%, complete the top five. Overall, these destinations highlight a strong recovery of international demand, with total overnight stays reaching 37.6 million, up 14% compared to 2019. Growth dynamics vary across regions: Emilia-Romagna and Lombardy show particularly strong increases, +31% and +20%, while Tuscany remains slightly below pre-pandemic levels, -1%, and records a more marked short-term decline, -12% between 2024 and 2025. In contrast, Veneto and Alto Adige show stable performance in the latest year, confirming their consolidated attractiveness for international tourists.

| | Overnights | Share on 2025 | Var. 25-19 | Var. 25-24 |
|---|---|---|---|---|
| Veneto | 16.4 mln | 44% | +13% | +0.1% |
| Toscana | 3.9 mln | 10% | -1% | -12% |
| Lombardia | 3.0 mln | 8% | +20% | -1% |
| Alto Adige | 1.8 mln | 5% | +13.0% | +0.1% |
| Emilia-Romagna | 1.6 mln | 4% | +31% | +4% |
| Total International | 37.5 mln | | +13.2% | -0.7% |

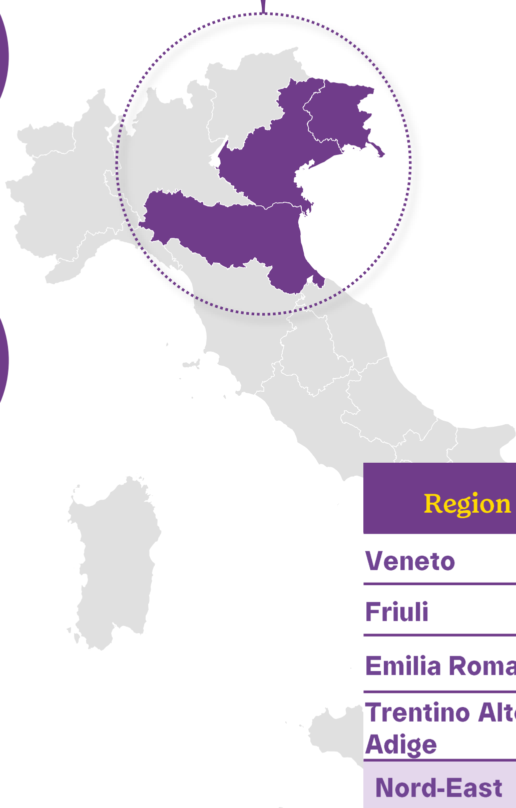
Source: Istat till 2024. Regional statistic office for 2025 (provisional data)

# Italy 1st outdoor cluster: North-East

The North-East of Italy confirms its position as the leading outdoor tourism catchment area in 2025, with a total of 31.4 million overnight stays, accounting for 46% of total outdoor demand nationwide and 61% of all overnight stays within the cluster. This strong concentration highlights the strategic importance of the region, driven primarily by Veneto, which alone records over 20 million overnight stays and remains stable compared to 2024. Other regions show moderate growth, with Friuli-Venezia Giulia increasing by 5%, and Emilia-Romagna and Trentino-Alto Adige both growing by 3%. Overall, the North-East cluster records a +1% increase compared to the previous year, confirming a phase of consolidation at high volumes and reinforcing its role as the core hub of Italy's outdoor tourism market.

**1°**
Outdoor demand catchment area

**31.4**
mln total overnight stays in 2025



**46%**
Of overnight stays in the North-East cluster in 2025 as a proportion of the total for outdoor accommodation

**61%**
Of international overnight stays in the North-East cluster in 2025 as a proportion of the total for the cluster

| Region | 2025 | Var. 25-24 |
|---|---|---|
| Veneto | 20.09 | 0% |
| Friuli | 1.76 | 5% |
| Emilia Romagna | 5.06 | 3% |
| Trentino Alto-Adige | 4.45 | 3% |
| Nord-East | 31.39 | 1% |

Source: Istat till 2024. Regional statistic office for 2025 (provisional data)

# Outdoor supply Italy: the picture

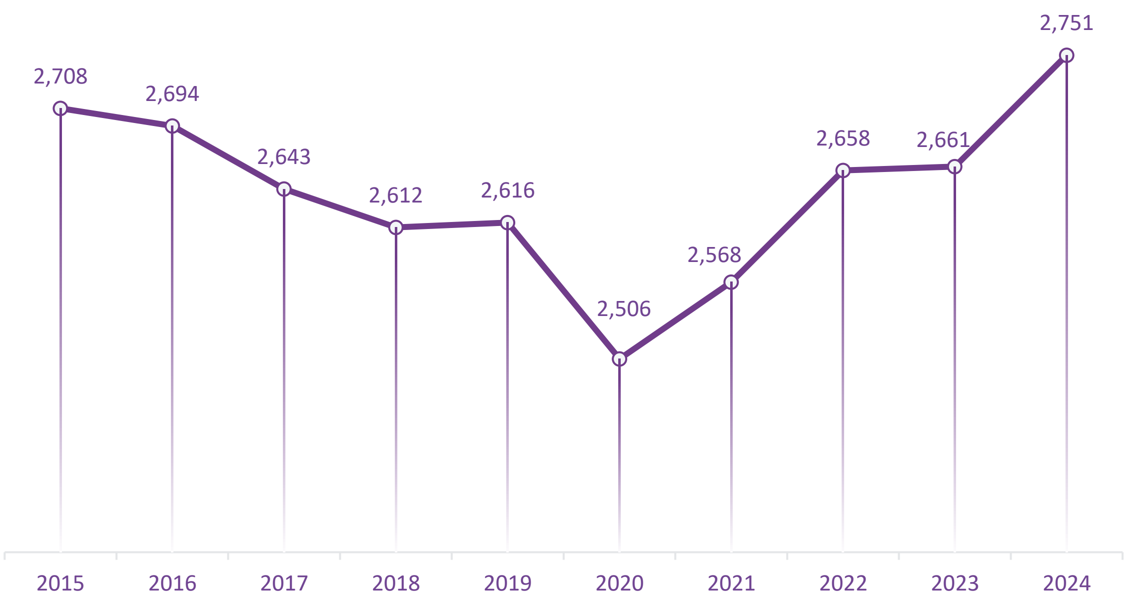
Over the past decade, the supply of outdoor accommodation in Italy has shown a U-shaped trend, with an initial decline followed by a gradual recovery in recent years. After decreasing from 2,708 properties in 2015 to a low of 2,506 in 2020, the sector has steadily rebounded, reaching 2,751 properties in 2024, slightly above pre-decline levels. Overall, between 2015 and 2024, the total supply increased by 1,6%, confirming a phase of renewed expansion. This growth is also reflected in capacity, with approximately 1.3 million bedplaces recorded in 2024. Alto Adige stands out as the area with the most significant increase in the number of campsites (+20 over the period), while Tuscany, Veneto, Friuli-Venezia Giulia, Emilia-Romagna and Lazio remain the regions with the highest concentration of bedplaces. Overall, the data highlight a sector that, after a period of contraction, has regained momentum and is once again growing in both size and capacity.

**1.3 mln**
Total bedplaces of outdoor properties in Italy 2024

**+2%**
Increase of total outdoor supply between 2015 and 2024

**Alto Adige**
The area with the highest increase between 2015 and 2024 (+20 campsites)

TOTAL OUTDOOR SUPPLY IN ITALY




Source: Istat

# Outdoor supply Italy: the picture

| | Region | N° of campsites | Share of total | Beds per campsite |
|---|---|---|---|---|
| 1 | Tuscany | 275 | 10.0% | 697 |
| 2 | Lombardia | 236 | 8.6% | 370 |
| 3 | Apulia | 226 | 8.2% | 408 |
| 4 | Piedmont | 195 | 7.1% | 276 |
| 5 | Lazio | 185 | 6.7% | 524 |
| 6 | Veneto | 183 | 6.7% | 1,256 |
| 7 | Trentino | 182 | 6.6% | 224 |
| 8 | Marche | 171 | 6.2% | 400 |
| 9 | Campania | 157 | 5.7% | 318 |
| 10 | Liguria | 156 | 5.7% | 368 |
| 11 | Calabria | 143 | 5.2% | 444 |
| 12 | Emilia-Romagna | 134 | 4.9% | 680 |
| 13 | Abruzzo | 100 | 3.6% | 402 |
| 14 | Sardinia | 96 | 3.5% | 536 |
| 15 | Sicily | 68 | 2.5% | 299 |
| 16 | Alto Adige | 67 | 2.4% | 240 |
| 17 | Valle d'Aosta | 63 | 2.3% | 268 |
| 18 | Friuli-Venezia Giulia | 40 | 1.5% | 685 |
| 19 | Umbria | 38 | 1.4% | 299 |
| 20 | Basilicata | 19 | 0.7% | 356 |
| 21 | Molise | 17 | 0.6% | 203 |
| | **Italy** | **2,751** | **100%** | |

Source: Istat

# 04

## Italy 2026 outdoor forecast

# Forecast 2026: Italy perspective

We introduce the forecast for 2026 of how outdoor segment will perform in Italy. In particular we're referring to the estimate for 2026 of overnights in Italy for campsites and villages.

Forecast model could not predict any demand shock caused by the actual geo-political context so the estimates reflect the actual situation.. We imagine a flat evolution of the overnights, with total values similar to the previous two years. That reflect into a phase of stable demand with minimal changes in the overall performances.

Here we present the assumptions considered for the forecasting model and the limitations of this model.

**Forecast model**

## Assumptions taken into account for forecasting model

- Historical analysis of demand flows by region, distinguishing between pre-Covid trends, the slump in 2020 and the rebound in 2021/2022
- Analysis of the global macroeconomic context to understand travel trends
- Assessment of feedback received from industry operators
- Historical analysis of growth trajectories in the tourism sectors
- Identification of demand trends over the last three years and definition of a growth/decline rate for demand by region, distinguishing between the domestic and international markets for 2026

**Limits**

## Limitations on the assumptions used in the estimation model

- As official Istat data for 2025 are not available, some provisional figures may be overestimated or underestimated
- The estimates do not take into account any peaks in demand resulting from new openings or special commercial agreements not known at the time of drafting
- The macroeconomic and geopolitical context at the time of drafting is taken into account, without considering specific impacts on certain target markets or regions due to uncertain events or those occurring subsequently

# Impact factor on outdoor demand

To produce the estimates for forecasting the 2026 we took into consideration several elements that are affecting the demand. Here we present a list of these most significant factors that could have an impact on the open-air demand. Outdoor tourism demand is increasingly shaped by external factors such as geopolitical uncertainty, which influences destination choices, and climate change, with heatwaves driving shifts in travel periods. Economic pressures, including inflation linked to energy costs, also affect travel behaviour. At the same time, the perception of outdoor accommodation is evolving towards hotel-like standards, due to recent investments by the operators, while the supply side remains relatively stable, with no major change at the horizon for 2026.

| | |
|---|---|
| Geopolitical uncertainty | Increasingly influences destination choices, with travellers favouring safer and more stable locations. |
| Heatwaves | Are reshaping travel patterns, encouraging a shift in holiday periods towards milder seasons. |
| Oil crisis / inflation | Rising costs are impacting travel budgets and overall demand sensitivity. |
| Perception of product | Outdoor accommodation is progressively aligning with hotel standards in terms of quality and services. |
| Supply offer | Remains relatively stable, with no significant structural changes in recent years and expected for 2026. |

# Forecast 2026 Italy: flat trend

The forecast for 2026 confirms a stabilisation of the Italian outdoor tourism market, with overnight stays expected to reach 68.36 million, marking a marginal increase of +0.4% compared to 2025. Following the sharp contraction in 2020 (-45.6%) and the strong rebound in the subsequent two years, the market has entered a phase of maturity, characterised by limited year-on-year fluctuations.

From 2022 onwards, growth has progressively slowed, oscillating around stability, with minor increases and slight corrections between 2023 and 2025. The 2026 will align to this trend confirming a flat trend of the demand evolution.

ITALY OUTDOOR OVERNIGHTS – FORECAST 2026 (mln)


Source: Istat. 2026 forecast by Thrends

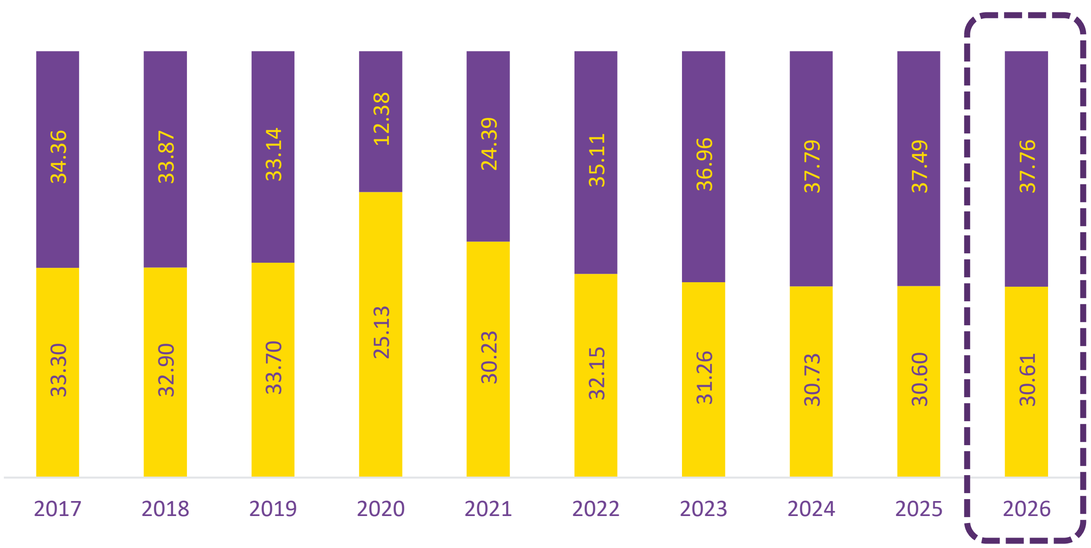
# 2026 forecast by market

The 2026 forecast highlights a continued divergence between international and domestic demand in Italy's outdoor tourism sector. International overnight stays are expected to reach 37.76 million, accounting for 55.2% of the total market, with a moderate increase of +0.7% compared to 2025 and a strong growth of +13.9% compared to 2019. This confirms the structural strengthening of international demand, which has not only fully recovered from the pandemic but has also expanded its weight within the overall market.

In contrast, domestic demand is projected to remain stable at 30.61 million overnight stays, showing no growth compared to 2025 and still below pre-pandemic levels (-9.2% vs 2019). With a market share of 44.8%, the domestic segment continues to play a significant role, although its relative importance has gradually declined over time. Overall, the data point to an increasingly internationalized market, where growth is primarily driven by foreign demand, while domestic flows appear more mature and stable.

ITALY OUTDOOR OVERNIGHTS – FORECAST 2026 BY MARKET (mln)

| | Var. 2026-2025 | Var. 2026-2019 | 2026 market share |
|---|---|---|---|
| International demand | +0.7% | +13.9% | 55.2% |
| Domestic demand | 0.0% | -9.2% | 44.8% |

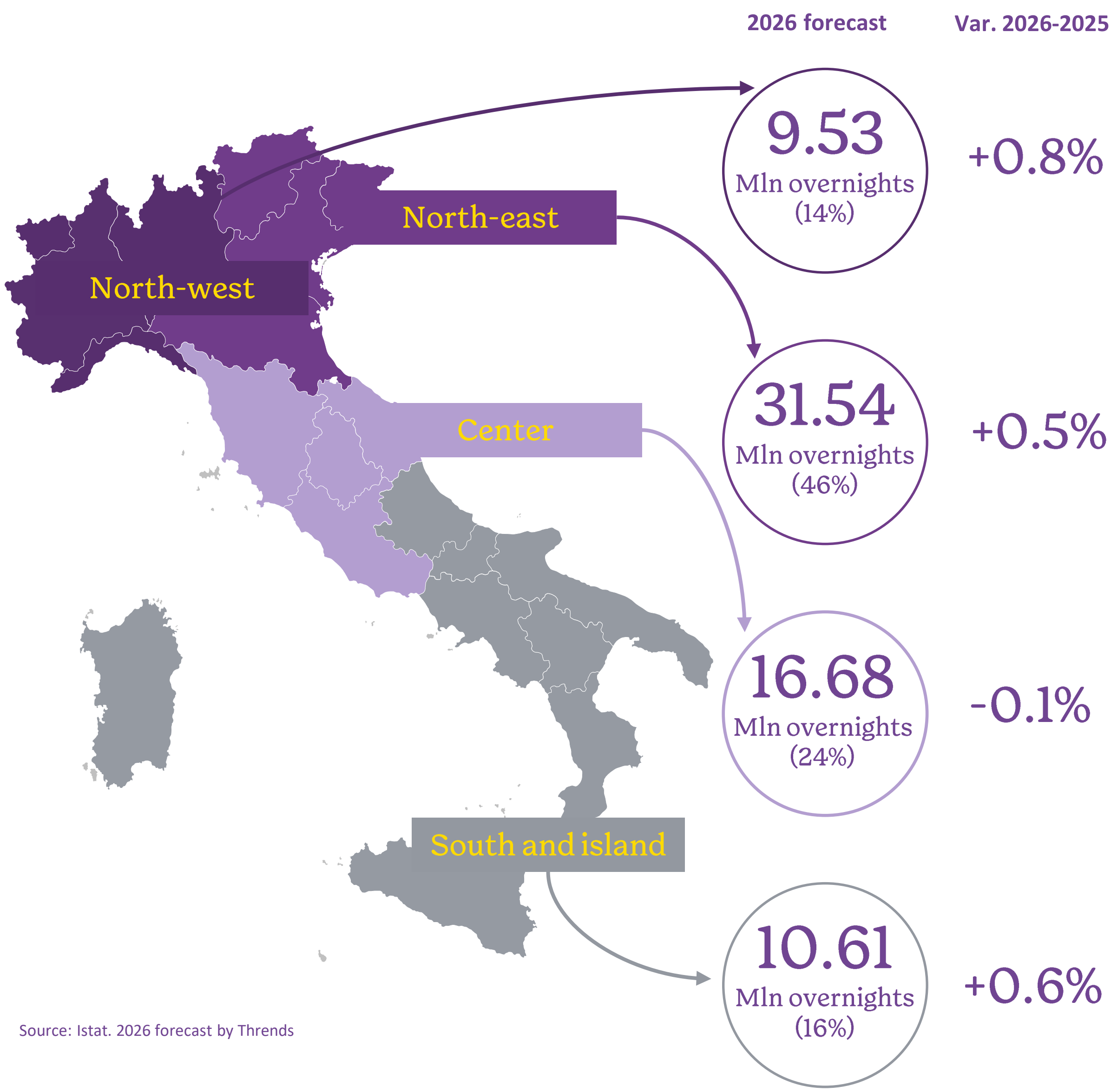



Source: Istat. 2026 forecast by Thrends

Thrends estimate

# 2026 forecast by area

The 2026 outlook confirms a highly concentrated distribution of outdoor tourism demand across Italian macro-areas, with the North-East maintaining its clear leadership at 31.5 million overnight stays, representing 46% of the total and showing moderate growth (+0.5% vs 2025). The Centre follows with 16.7 million overnight stays (24%), remaining broadly stable with a slight decline (-0.1%). The South and Islands are expected to reach 10.6 million overnight stays (16%), recording a modest increase of +0.6%, while the North-West accounts for 9.5 million overnight stays (14%), with a slightly stronger growth rate of +0.8%.




Source: Istat. 2026 forecast by Thrends

# 05

# Top-5 European outdoor markets: main operators

# Outdoor operator: business model overview

There are several business model adopted by companies in the outdoor sector. Here we give a short overview of the most frequent ones just to have a general context.

The purpose of this overview is to clarify the different business models in order to create a big picture of main European players in the sector (next pages).  Differences could be barely noticeable when surfing the net due to the merge that companies made of type of business models.

In the next page we focus on main operator that manage campsites and villages through-out Europe and then we highlights the top-10 operators in Italy.

| | description | sample |
|---|---|---|
| Operator | Directly operates the campsites. It could be also the owner of the property.<br>It could operate through one or more brands. | • Human Company<br>• CapFun |
| Franchisor/ selling network | Create a commercial agreement with a franchisee who enter the network of the franchisor. This network is generally made of independent properties under the brand of the franchisor. | • Sunelia<br>• Maeva |
| OTA | Online travel agencies focused on open-air hospitality. They aggregate the campsites in order to create a one-stop-shop for tourist. | • Pincamp<br>• Pitchup |
| unit provider | Supplier of mobile homes, maxicaravan or glamping units that create a relationship with the property for installing units and selling it through their network. | • Homair<br>• Kampaoh |

# Outdoor operator: a glance

The European outdoor hospitality market is characterised by a diverse landscape of operators and business models, ranging from large integrated groups to franchising networks. France stands out as the most structured market, with major players such as Maeva, European Camping Group and CapFun managing or affiliating hundreds of campsites through a mix of franchising, direct operations and distribution networks. In other countries, the sector appears more concentrated: in Germany and Spain, operators tend to manage smaller portfolios, while in Croatia a few key groups, such as Valamar and Aminess, dominate the market. The Netherlands represents a more consolidated model, with large operators like Landal and EuroParcs managing extensive networks of sites. Overall, the data highlight a fragmented yet evolving sector, with different levels of maturity and integration across European markets.

| Group | Main business model | N° Campsites / Camping villages |
|---|---|---|
| **Maeva** | Franchisor, selling network | +1,300 |
| **ECG - European Camping Group** | Operator, franchisor, selling network | +450 |
| **CapFun** | Operator | 250 |
| **Yelloh Village** | Franchisor | 98 |
| **Sandaya** | Operator | 69 |
| **Sunelia** | Franchisor | 63 |
| **Ciela Village** | Operator | 24 |

| Group | Main business model | N° Campsites Camping villages |
|---|---|---|
| **Knaus Campingparks** | Operator | 25 |

# Outdoor operator: a glance

| Group | Main business model | N° Campsites / Camping villages |
|---|---|---|
| Hola Camp | Operator | 13 |
| Wecamp | Operator | 12 |
| Group Senia | Operator, selling network | 9 |
| Taiga Camping & Rersorts | Operator | 8 |

| Group | Main business model | N° Campsites / Camping villages |
|---|---|---|
| Valamar | Operator | 88 |
| Aminess Hospitality Group | Operator | 36 |
| Maistra Hospitality Group | Operator | 15 |
| Arena Hospitality Group | Operator | 8 |

| Group | Main business model | N° Campsites / Camping villages |
|---|---|---|
| Landal | Operator | 226 |
| EuroParcs | Operator | 51 |

# Top 10 outdoor groups in Italy

In Italy, there are 15 groups (or branded operators) active in the campsite and camping-village segment that we can map through a scan of all the players that are operating a campsite. Overall, outdoor accommodation facilities managed by Italian groups still represent a relatively small share of total supply, accounting for 104 properties out of over 2,000 campsites nationwide (around 5%). However, these groups account for a significantly higher share in terms of mobile homes, representing around 30% of the total.

Thanks to public data we can collect we realised a rank of main operator by revenue. Human Company with approximately 170 million in 2025 is the first operator in Italy, followed by Club del Sole with around 123 million in 2025 and Baia Holiday with over 59 million (in 2024).

ITALY TOP 10 CAMPSITE GROUPS

| Group | Turnover 2024 (mln) | N° Campsites/ Camping villages |
|---|---|---|
| Human Company | 170 (2025) | 11 |
| Club del Sole | 123 (2025) | 29 |
| Baia Holiday | 59.5 | 14 |
| Bella Italia | 51.2 | 5 |
| Bibione Mare | 27.7 | 3 |
| Gruppo Vacanze & Natura | 21.9 | 3 |
| Vacanze di Charme | 21.4 | 6 |
| Gitav | 20.2 | 6 |
| Vacanze col Cuore | 12.2 | 9 |
| Manzionna Holiday Group | 10.3 | 4 |

**30%**
Share of mobile homes in group-operated properties

**60%**
of group-operated properties are located in seaside destinations

**32%**
of group-operated properties are 4-star properties

Source: Thrends elaboration

# 06

# Economic impact of outdoor segment in Italy

# Introduction

Here we present an estimate of the economic impact of the outdoor sector in Italy for 2026.
The figures presented here are intended as an initial guide for the sector, providing benchmarks that can serve as a basis for analysis and adjustments.
We present:

- an estimate of the outdoor sector direct economic impact in Italy for 2026
- an estimate of the outdoor sector total economic impact in Italy for 2026

What follows are limitations to the figures represented.

## Limitations to direct economic impact estimate

A few clarifications are needed regarding the figures of direct economic impact:

- We start from daily per capita direct expenditure of tourists, €74.9, that is the result of an estimate that takes into account various analysed sources and considers factors such as the choice between pitches, bungalows or other accommodation types (e.g. glamping).
- To arrive at this figure, we take into consideration the inflation rate that was actual at the date of realization of this report from Istat.

## Limitations to total economic impact estimate

A few clarifications are needed regarding the figures of total economic impact:

- Firstly, the estimated figure is based on a direct impact value that takes into account only the accommodation expenditure of outdoor tourists.
- Furthermore, general sector multipliers are applied to account for the fact that there is no specific multiplier for outdoor tourism, but several exist for the tourism sector in general.

Therefore, the figures identified may represent a range of the total contribution of the outdoor sector, taking into account travellers' direct expenditure.

# Direct economic impact of Italy outdoor sector – a 2026 forecast

We can estimate that the direct economic impact of the outdoor sector for 2026 stands at around €5.12 billion. This figure represents the contribution to the economy made by the spending of tourists who opt for outdoor activities.
This value is obtained starting from an estimate of the average daily budget of an outdoor tourist in Italy., that equals to 74.9€. This budget include accommodation costs and any other cost that has been done inside the campsite. As these are prices paid by the public, the figures include VAT.

**Direct economic impact**

**~ 5.12 mld**

Forecast of direct economic impact of outdoor sector in Italy for 2026

AVERAGE DAILY BUDGET PER TOURIST

**74.9 €**

- Accommodation costs (average of pitches, bungalows and glamping units)
- Includes the cost of any on-site meals
- Includes the cost of access to included facilities, such as the beach
- Figure includes estimated inflation for 2026 in Italy

FORECAST OUTDOOR OVERNIGHTS 2026

**68.36 mln**

- 2026 outdoor sector overnights forecast for Italy (by Thrends)

Source: Osservatorio Nazionale Federconsumatori; Istat; Banca d'Italia. 2026 forecast by Thrends

# Total economic impact of Italy outdoor sector – a 2026 forecast

In order to estimate the outdoor sector contribution to the Italian economy, a range of figures has been calculated to give an idea of this value. Starting from the estimate of the direct economic impact (approximately 5.12 billion), two different expenditure multipliers for the tourism sector (derived from other studies and obtained using different methods) were applied.
This leads to an estimate that the outdoor sector in Italy could generate a total economic impact between 9.12 billion and 13.32 billion in 2026.

TOTAL ECONOMIC IMPACT – FORECAST 2026 – OUTDOOR SECTOR ITALY

| | | |
|---|---|---|
| Total economic impact outdoor sector | ~ 9.12 mld | ~ 13.32 mld |
| Multiplier index | 1.78<br>• Average multiplier of direct economic impact in tourism in Italy (IRPET) | 2.6<br>• Multiplier of the ratio GDP/tourism expenses (OpenEconomics e Fondazione TorVergata) |

Source: IRPET, OpenEconomics

# Research team

## Technical coordination and publication

Enrico Gori - Human Company
enrico.gori@humancompany.com

## Research and analysis

Andrea Agazzani - THRENDS
Giulia Arduino – THRENDS

For information on methodology
and data, please write to:
office@thrends-italy.com

## Press office: bpress

Eleonora Bresesti
Sara Caringella
Carolina Ratti
Chiara Paolucci
Silvia Galbiati
humancompany@bpress.it

**Human Company**
humancompany.com
osservatorio.humancompany.com

human company

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