press release no. 4

TOURISM 2026: ITALY ATTRACTS INTERNATIONAL SPENDING, THE WAY PEOPLE TRAVEL IS CHANGING, INBOUND TOURISM UP 5%, A 43-BILLION-EURO SUMMER: TTG TAKES A LOOK AT THE MARKETS

ttgexpo.it | inoutexpo.it

Rimini, 9th October 2026 - Italian tourism continues to grow, driven by international visitor flows and domestic demand with the rising cost of living not deterring people from taking holidays. The full picture will be analysed at **TTG Travel Experience and InOut | The Hospitality Community** to be held at **Rimini Expo Centre from 14th to 16th October**.

The two **Italian Exhibition Group (IEG)** events will once again confirm their role as key events in the Mediterranean for global tourism and hospitality and place new consumer trends at the centre of the debate.

According to Nexi data, in the first eight months of 2026, foreign tourist expenditure in Italy reached **€16.2 billion, up 5% compared with the same period in 2025** and with a growth rate more than six times higher than that recorded a year earlier. At the same time, Federalberghi estimates that **36.2 million Italians went on holiday during the summer** generating a total turnover of 43 billion euros.

These two indicators point to an expanding market that is, however, undergoing profound changes: shorter and more frequent stays, greater attention to budget, a preference for nearby destinations, and a growing interest in authentic and personalised experiences.

FOCUS ON ITALY: FLOWS ARE INCREASING

Eurostat figures for the first half of 2026 placed Italy ahead of Spain and France in terms of the volume of overnight stays with over **65 million nights** compared with Spain's 57 million and France's 46 million. This result comes within a European context characterised by a more dynamic international demand. In the first six months of the year, the number of nights that foreign tourists spent in the European Union rose by 2.5%, almost three times the growth recorded for domestic tourism (+0.9%).

The summer season also showed positive signs. According to the Ministry of Tourism's analysis of data from the Alloggiati Web platform, between 15th June and 15th September, Italy recorded an **average OTA occupancy rate of 58.9%**, up 10.8% compared with 2025, with rates that were, on average, more contained. This figure exceeds that of Spain, which stood at 52.2%, and France, at 42.8%. This indicator relates to the occupancy of available accommodation on the main online portals, not to the total number of hospitality facilities.

The week of Ferragosto (mid-August) saw a peak of 65.4% with mountain destinations leading the way at 78.4%, followed by coastal destinations (74.3%), and lakeside locations (71.9%). Cities of art and cultural landscapes reached 56%, recording a 13.9% increase, the most significant rise compared with the previous year.

This growth also extended to less traditional destinations. Small municipalities recorded a 5.3% increase in arrivals and a 4.6% rise in overnight stays.

Results that highlight new opportunities for villages, inland areas and regions able to capitalise on the demand for nature-based, cultural and experiential tourism.

THE INTERNATIONAL MARKET: THE MEDITERRANEAN AT THE HEART OF COMPETITION

The growth in European tourism is accompanied by increasingly fierce competition amongst Mediterranean destinations, where accessibility, prices, weather conditions and safety all influence travellers' decisions.

Figures from the Ministry of Tourism showed that, during the summer of 2026, Italy recorded higher levels of online booking saturation than its main European competitors. Even in August, with a rate of 58.5%, the Italian market outperformed Spain and France at 54% and 41% respectively.

The Mediterranean also played a central role in the choices of Italians travelling abroad. According to Federalberghi, 12.4% of summer holidaymakers chose an international destination, mainly favouring coastal resorts and the most easily accessible countries, including Croatia, Greece and Spain.

Geopolitical tensions and transport cost trends also influenced these dynamics. The Udicon-Istituto Piepoli survey, as reported in TTG Italia's analysis, revealed that the **international context influenced the travel decisions of 62% of Italians**. Uncertainty did not necessarily halt demand, but it did affect the choice of destination, services and booking method.

INCOMING: 16.2 BILLION IN FOREIGN SPENDING IN THE FIRST EIGHT MONTHS

The contribution of international tourism was particularly evident in consumer spending trends. The initial findings from the second edition of Nexi's *Tourism and Incoming Watch* report, which will be presented at TTG Travel Experience, **show that foreign tourists spent 16.2 billion euros in Italy in the first eight months of 2026, a year-on-year increase of 5%**.

This figure is particularly significant for the sector because it shifts the focus from the mere number of visitors to the economic value generated by their presence. The distribution of spending across regions, source markets and times of year is, in fact, a key indicator for guiding investment, commercial strategies and destination development policies.

Demand vitality was also reflected in air travel. According to Assaeroporti, Italian airports handled over **25.5 million passengers** in July. As the year covered by the analysis progressed, passenger traffic reached nearly 137 million, representing an increase of 5.2%. A number of small and medium-sized airports were particularly busy, recording double-digit growth.

DOMESTIC TOURISM: 43 BILLION SPENT, BUT PRICE AFFECTED HOLIDAY PLANS

Summer 2026 confirmed Italians' keenness to travel albeit with a growing focus on holiday affordability.

According to the Federalberghi survey, **36.2 million Italians planned their summer holidays** with a clear preference for domestic destinations: 87.6% chose to stay in Italy. The estimated turnover amounted to **43 billion euros**, of which approximately 16.5 billion was concentrated in August, 12.9 billion in July, 11.5 billion in June and 2.1 billion in September.

The average expenditure on the main holiday, including travel, accommodation, meals and activities, was 917 euros per person, equivalent to around 94 euros a day. For additional holiday periods, the average budget fell to 527 euros.

The overall cost of accommodation has become one of the key factors influencing consumer choices. According to the Udicon-Istituto Piepoli survey, 31% of Italians look for cheaper accommodation, 27% prefer nearby destinations, and 19% choose the low season.

HABITS ARE CHANGING: LONG HOLIDAYS ARE GIVING WAY TO SHORTER BREAKS

The shift in demand not only concerns spending power but also leisure time organisation. The traditional holiday, concentrated in a single period, is gradually giving way to several stays spread throughout the year, with implications for seasonality and commercial opportunities for destinations.

According to preliminary findings from the Confturismo-SWG Observatory, **58% of Italians spread their holidays over several periods and 69% plan one or more short breaks**. This trend is also reflected in Federalberghi's summer surveys: 28.9% of holidaymakers planned additional breaks on top of their main one.

August still played a central role, accounting for 41.4% of main holiday preferences, but July, chosen by 28.8% of travellers, and June with 24.4%, helped to extend the tourist season.

This presents a new challenge for operators: to capitalise on a less concentrated demand by offering flexible holiday packages, personalised experiences and products that develop local areas and attractions even outside the peak season.

HOTELS AND ALTERNATIVE ACCOMMODATION: HOSPITALITY AMID NEW NEEDS AND INNOVATION

The shift in consumer behaviour also directly affects the hospitality sector. According to Federalberghi, 30.6% of Italian holidaymakers prefer hotels and holiday villages, followed by staying with relatives and friends (28.6%), owner-occupied second homes (11.9%), bed and breakfast facilities (7.8%), campsites (6.8%) and short-term rentals (5.1%).

A diverse market, in which the quality of service, personalised experience and operational efficiency are becoming increasingly important.

For the hotel industry, this transformation also involves generational turnover, new professional skills and applying artificial intelligence to operational processes. These are just some of the topics that will be explored at TTG Travel Experience and InOut through the Hotel Chains project, meetings with Federalberghi's Young Hoteliers and seminars organised by the Glion and Les Roches international schools.

Attention will also be paid to the alternative accommodation sector, which will take centre stage at InOut with a Florence University study on the contribution of operators, hosts and property managers to the economic, social, cultural and environmental development of local areas.

TRAVEL TRENDS 2026: EXPERIENCES, ARTIFICIAL INTELLIGENCE AND NEW DESTINATIONS

From looking for less crowded destinations to personalising their holidays, travellers in 2026 show increasingly diverse needs.

Climate change is helping to reshape the geography of holidays, fuelling the *coolcationing* phenomenon, which is driving part of the demand towards destinations with milder temperatures. At the same time, there is growing interest in nature-based tourism, walking trails, outdoor activities and wellness experiences.

Beach weddings are also among the emerging segments. In 2025, beach weddings accounted for 38.7% of the global destination wedding market with an estimated value of around 15.7 billion dollars out of a total of 40.6 billion. This trend opens up new opportunities for coastal destinations, accommodation providers and companies specialising in event organisation.

On the technological front, artificial intelligence is playing an increasingly direct role in travel planning and purchasing. From offer personalisation to service automation, right through to including destinations in responses produced by generative systems, innovation is reshaping the relationship between tourism supply and demand.

ABOUT TTG TRAVEL EXPERIENCE - INOUT | The Hospitality Community
Event: international trade show; **organiser**: Italian Exhibition Group SpA; **frequency**: annual; **edition**: 63rd; **entry**: trade only; **website**: www.ttgexpo.it - #ttgexpo

PRESS CONTACT IEG, TTG TRAVEL EXPERIENCE
Elisabetta Vitali, head of corporate communication & media relation; Marco Forcellini, Pier Francesco Bellini, press office manager media@iegexpo.it

MEDIA AGENCY TTG TRAVEL EXPERIENCE
Martina Vacca: martina@mindthepop.it, mob. +39 339 748 5994; Fabrizio Raimondi: fabrizio@mindthepop.it, mob. +39 335 389 848; Stefano Chiossi: stefano@mindthepop.it, mob. + 39 388 739 4358; Maria Laura Piazza: marialaura@mindthepop.it, mob: +39 393 564 1179

ITALIAN EXHIBITION GROUP
Providing the future

FOCUS ON

Italian Exhibition Group S.p.A., a joint stock company listed on Euronext Milan, a regulated market organised and managed by Borsa Italiana S.p.A., has, with its facilities in Rimini and Vicenza, achieved national leadership over the years in the organisation of trade shows and conferences. The development of activities abroad - also through joint-ventures with global or local organisers, in the United States, United Arab Emirates, Saudi Arabia, China, Mexico, Germany, Singapore, Brazil, for example – now sees the company positioned among the top European operators in the sector.

This press release contains forecast elements and estimates that reflect the management's current opinions ('forward-looking statements'), particularly regarding future management performance, realization of investments, cash flow trends and the evolution of the financial structure. For their very nature, forward-looking statements have a component of risk and uncertainty, as they depend on the occurrence of future events. The effective results may differ (even significantly) from those announced, due to numerous factors, including, only by way of example: food service market and tourist flow trends in Italy, gold and jewellery market trends, green economy market trends; the evolution of raw material prices; general macroeconomic conditions; geopolitical factors and evolutions in the legislative framework. Moreover, the information contained in this release, does not claim to be complete, and has not been verified by independent third parties. Forecasts, estimates and objectives contained herein are based on the information available to the Company as at the date of this release.