



STATISTICHE

figures and graphs to analyse the Veneto

Flash



Agrotourism is often used as a starting point for visiting Italy's beautiful cities and their monuments. However it is also a way for visitors to find out more about the life, history and culture of the villages and towns whose roots lie in the farming and craftsmanship that are the pillars of Italy's cultural heritage. Visitors wishing to discover Italy can choose from a vast array of agrotourism establishments, which afford a close-up of an area's food, wine, nature, art, history, people and tradition.

AGROTOURISM IN VENETO

The main requisite for agrotourism in Veneto is to provide hospitality on-site, as an agrotourism establishment is a working farm that provides tourist services with its own facilities and produce. Agrotourism establishments serve typical products that reflect local culinary traditions, and guests can spend the night in homely surroundings, far from the hustle and bustle of major cities.

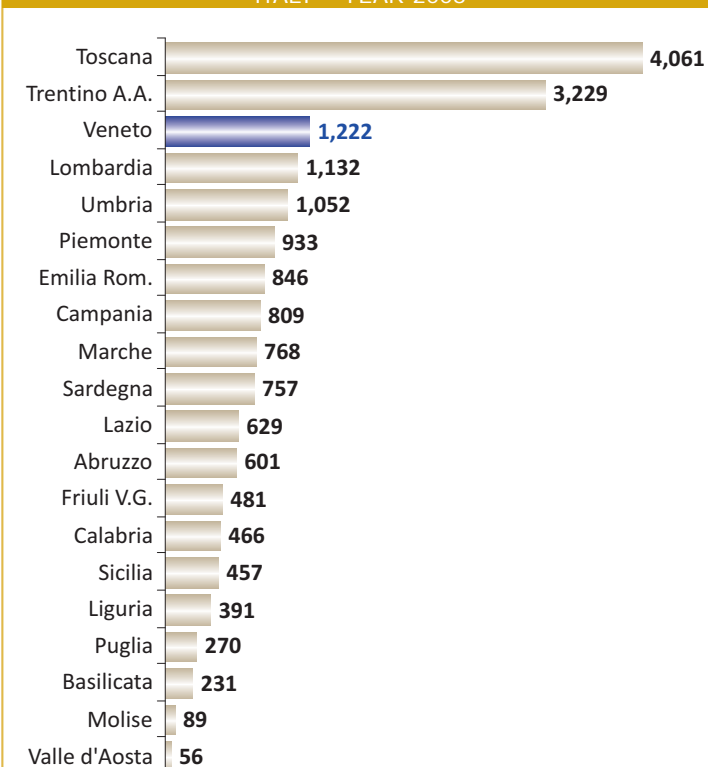
Over the last few years, we have seen continual growth within the industry, one that is expanding and much loved by both Italian and international visitors.

Veneto had 1,222 agrotourism establishments in 2008,

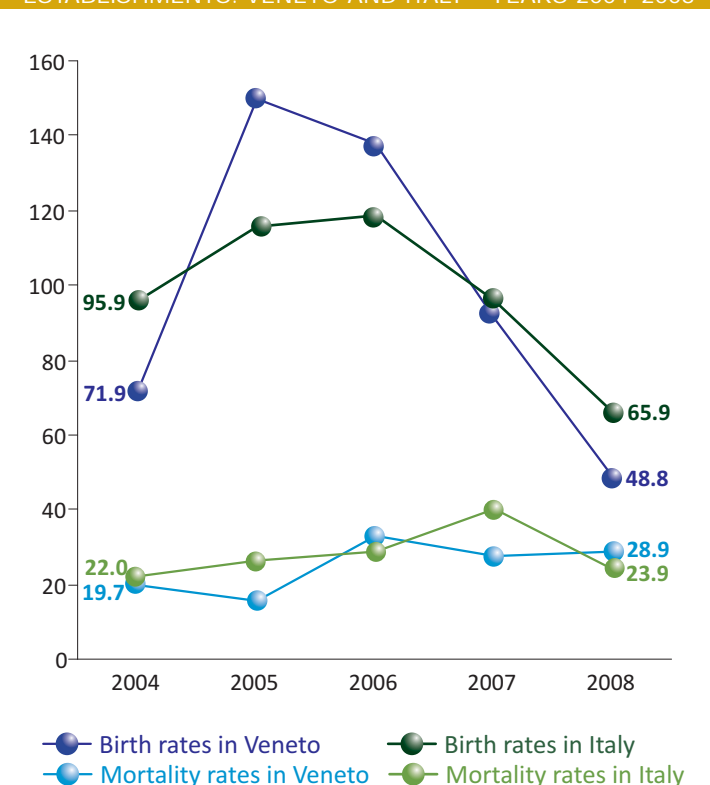
6.6% of the national total, a figure surpassed only by Toscana and Trentino Alto Adige, two regions where this type of tourism has a deep-rooted tradition.

In recent years, the number of agrotourism establishments in Veneto has increased at quicker rate than in Italy; this is mainly due to the boom in new permits in 2005 and 2006 (more than 140 per year). More recently, however, the number of new permits and closures has become more balanced across Italy and even more so across Veneto.

AUTHORISED AGROTOURISM ESTABLISHMENTS BY REGION.
ITALY - YEAR 2008



START-UP RATE (*) AND FAILURE RATE (**) OF AGROTOURISM
ESTABLISHMENTS. VENETO AND ITALY - YEARS 2004-2008



(*) Start-up rate = (new permits / average number of establishments) x 1000

(**) Failure rate = (closures / average number of establishments) x 1000

Source: processing by Regione Veneto - Direzione Sistema Statistico Regionale on Istat data

ALSO AVAILABLE:

- Statistical Report 2010. Veneto: sharing facts, comparing facts
- Scenario Economico. Bollettino luglio 2010
- Incidenti Stradali 2008

WEB Flash

<http://www.regione.veneto.it/statistica>

The Veneto provinces with the highest number of agrotourism establishments are Verona (23.8%), Treviso (22.6%), Vicenza (18.1%) and Padova (13.8%); they have more than 8 agrotourism establishments per 100 km². Belluno and Rovigo, however, have a lower density of establishments, but a much higher average size as they include surrounding land.

THE PROVINCES AND SPECIALISATION

We shall now look at the three main permits that are issued to agrotourism establishments: 'accommodation', 'catering', and 'tasting', namely the serving of vegetable and animal farm-produce, such as milk or fruit, or processed produce, such as oil, wine and cheese.

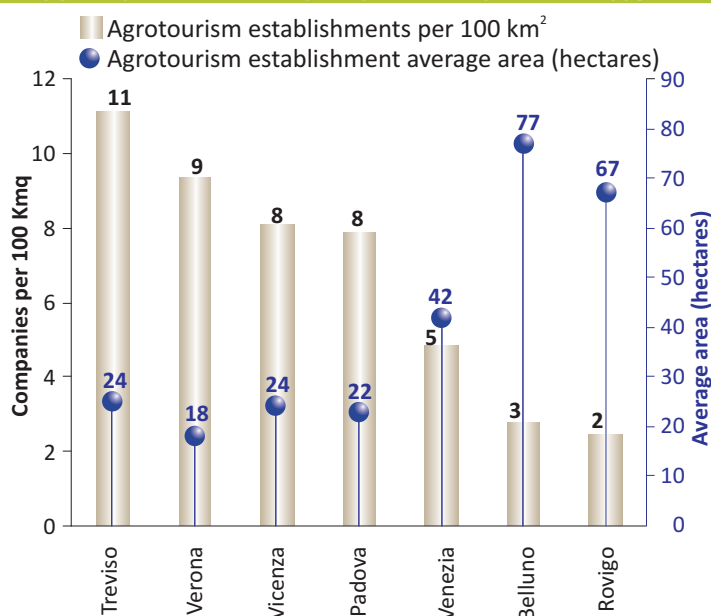
In Italy, 'accommodation' is the main activity of agrotourism establishments; in 2008 it was provided by 83% of establishments; 'catering' was provided by 48.3% of establishments.

In Veneto, however, a sustained increase in 'accommodation' permits,

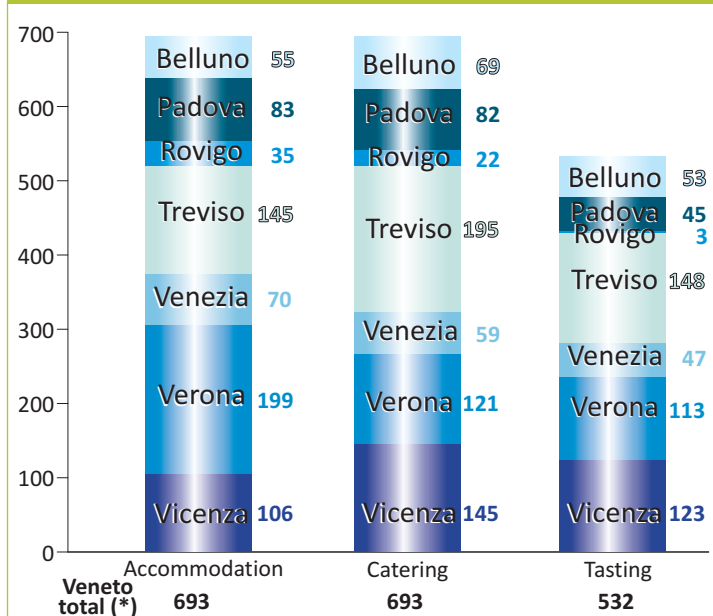
which rose by 55% between 2004 and 2008, enabled the region to offer a more equal balance of services: in 2008, 56.7% of agrotourism establishments offered 'accommodation' and the same amount also provided 'catering', either in addition or as an alternative. Furthermore, 43.5% had permits for 'tasting'. Agrotourism establishments are allowed to have more than one permit, which results in Veneto's 1,222 establishments providing a combination of services. A breakdown of the three main permits reveals that 47.5%, almost half of establishments, specialised: 24.2% offered 'accommodation' only; 14.1% 'catering' only; and 9.2% 'tasting' only. Many agrotourism establishments provided combined services, with 12.5% offering 'accommodation', 'catering' and 'tasting'.

As mentioned above, the province of Verona has the highest number of agrotourism establishments in Veneto in terms of the three aforementioned permits, and it also leads Veneto in terms of agrotourism establishments providing 'accommodation'. However, Treviso tops the ranking for agrotourism establishments that provide 'catering' and 'tasting', followed by Vicenza.

AGROTOURISM ESTABLISHMENTS AND AVERAGE SURFACE AREA BY PROVINCE. VENETO - YEAR 2008

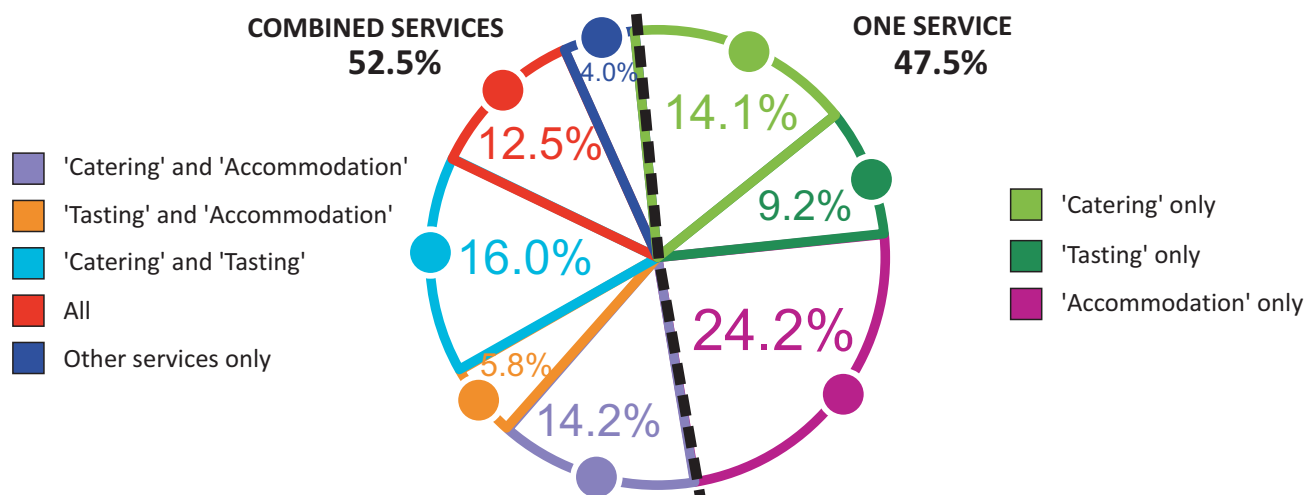


MAIN PERMITS ISSUED TO AGROTOURISM ESTABLISHMENTS BY PROVINCE. VENETO - YEAR 2008



(*) The total number of permits does not provide the overall number of establishments because each one may be issued with more than one permit.

AGROTOURISM ESTABLISHMENTS BY SPECIALISED PERMIT. VENETO - YEAR 2008



An EU-funded project has enabled Veneto's regional government and local authorities to establish within the region 32 areas of interest for agrotourism establishments that promote the region's natural beauty, history, and food and drink. At provincial level, the figures reveal that agrotourism establishments providing 'catering' in the province of Treviso are concentrated around the areas of

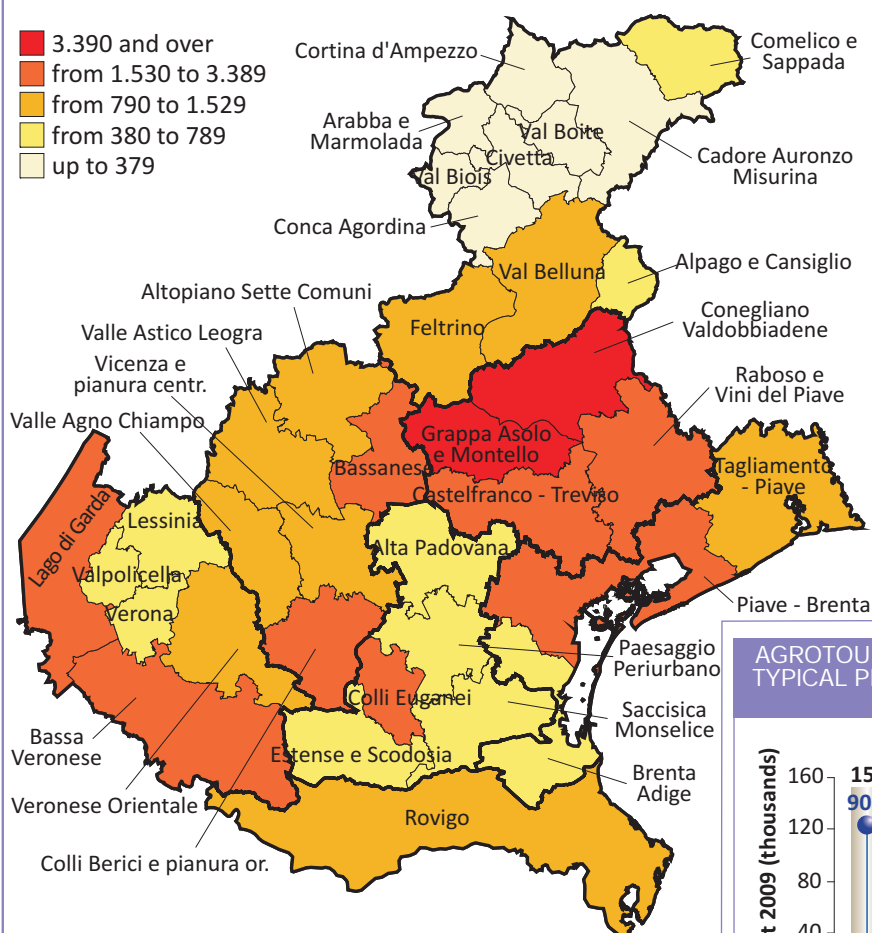
THE REGION

Grappa-Asolo-Montello and Conegliano-Valdobbiadene, both of which can seat more than 3,300 people. Agrotourism establishments providing 'accommodation' in Verona are concentrated around the area overlooking Lago di Garda, which has more than 2,000 bed places. Nowadays, tourism and food and drink services are an increasingly popular combination, one that is no longer a niche product; what is more it is little affected by the economy, income and consumer trends. Agrotourism establishments are one example of this success story and

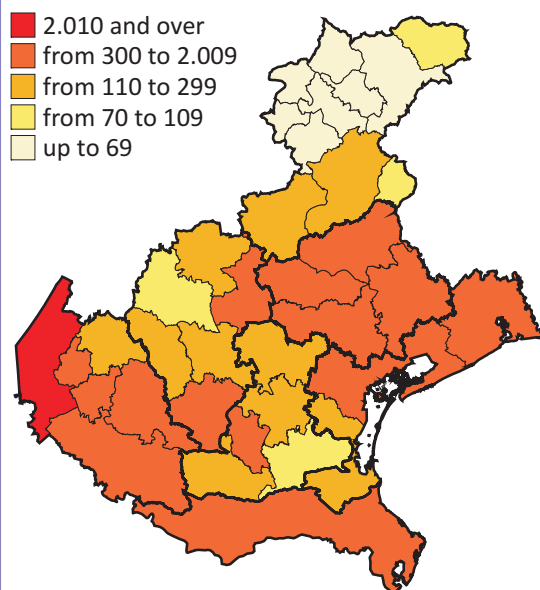
this is especially true of those situated along the Wine and Typical Product Roads. These routes are recognised at national and regional level and their aim is to promote local areas renowned for the excellence of their produce. Wine and Typical Product Roads cross parts of Veneto that are well-known for their production of Controlled Designation of Origin and Controlled and Guaranteed Designation of Origin wine (DOC and DOCG in Italian), as well as for their Protected Designation of Origin and Protected Geographical Indication farm and food produce (DOP and IGP in Italian). The Roads are associations made up of public and private enterprises, including farm businesses, agrotourism establishments, wineries, hotels, restaurants, as well as artisan businesses, local organisations and authorities. The Roads wind their way through production areas and past production establishments, enabling visitors to discover the culture and nature of the local area.

There are currently nineteen official Roads: the majority were set up in 2002 and the last two in 2007. Toscana is the only other Italian region to have achieved a similar number.

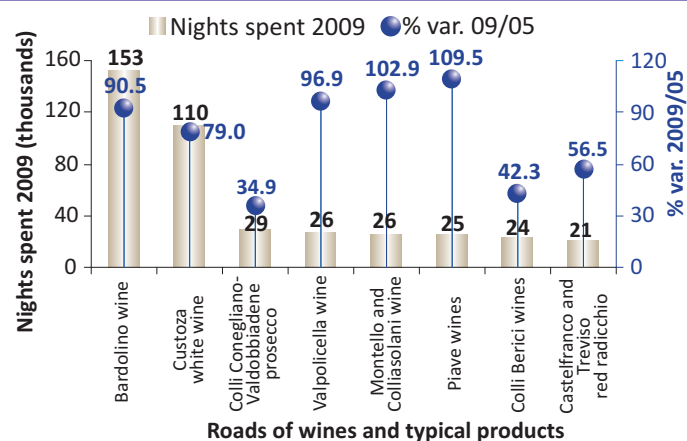
SEATING PLACES IN AGROTOURISM ESTABLISHMENTS WITH 'CATERING' PERMIT BY AREA OF INTEREST - YEAR 2008



BED PLACES IN AGROTOURISM ESTABLISHMENTS WITH 'ACCOMMODATION' PERMITS BY AREA OF INTEREST - YEAR 2008



AGROTOURISM IN MUNICIPALITIES CROSSED BY WINE AND TYPICAL PRODUCT ROADS. THOUSANDS OF NIGHTS SPENT 2009 AND % VARIATIONS 2009/05 (*)



(*) Shows the top 8 Roads in terms of nights spent in agrotourism establishments. Some municipalities are crossed by more than one road.

¹Law no.268 dated 27/07/1999

²Regional Law no.17 dated 17/09/2000

³Controlled Designation of Origin

⁴Controlled and Guaranteed Designation Origin

STATISTICHE *Flash*

Traditional accommodation still plays a fundamental role in Veneto's tourism industry, yet in recent years there has been a noticeable rise in tourists staying in agrotourism establishments. Although agrotourism establishments hosted only 0.8% of the tourist flow to Veneto in 2009, the attractiveness of this type of accommodation has grown at a sustained rate. In recent years, nights spent by tourists

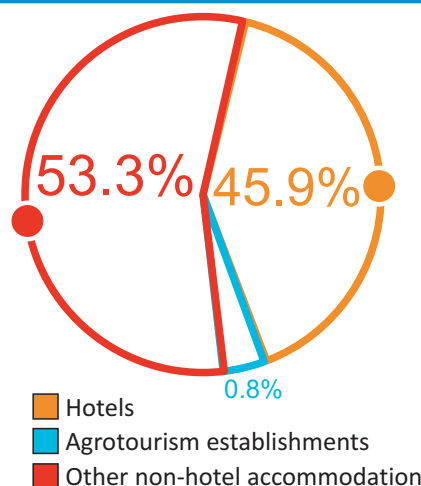
ACCOMMODATION

have almost doubled from approximately 250,000 in 2005 to 470,000 in 2009. Figures were not even affected by the economic crisis that began in 2008, a factor that was, however, a major setback for hotels.

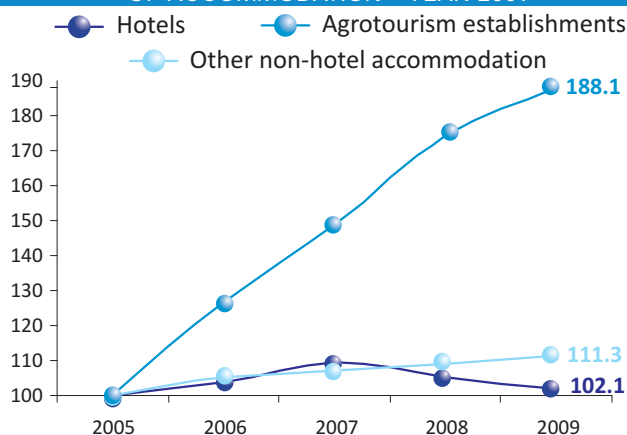
A geographical survey at municipal level shows that the highest concentration of agrotourism establishments, especially those offering accommodation, lies in the hills. Particularly high concentrations are to

be found in the hills of Soligo, Montello and Grappa, Bassanese, Colli Berici, Colli Euganei and Valpolicella. High concentrations of establishments are also to be found in the municipalities of Lago di Garda.

% SHARE OF NIGHTS SPENT BY TOURISTS BY TYPE OF ACCOMMODATION. YEAR 2009



% SHARE OF NIGHTS SPENT BY TOURISTS BY TYPE OF ACCOMMODATION - YEAR 2009



(*) Index number = (nights spent year t / nights spent base year) x 100

Source: processing by Regione Veneto - Direzione Sistema Statistico Regionale on Istat data - Regione Veneto

AGROTOURISM ESTABLISHMENTS WITH 'ACCOMMODATION' PERMIT ON 31/12/2008 BY MUNICIPALITY, PROVINCE AND GEOGRAPHICAL AREA



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