



STATISTICHE

figures and graphs to understand Veneto

Flash

THE POWER OF VENETO TOURISM 2012

Regardless of the unfavourable period of crisis, tourism in Veneto saw record numbers in 2011. And as we know, it is hard to bear comparison with figures well above the trend over the years. However, in 2012, the great potential of tourism offered by Veneto, enhanced by the entrepreneurial abilities of the operators and by a structured and synergic promotion plan, has enabled Veneto to maintain a record influx of visitors, which totalled around 15.8 million arrivals (+0.3%). The reduction of the length of stay in holiday

resorts, which has been ongoing for several years now, has marked a decrease in overnight stays of -1.7% while maintaining the remarkable number of over 62.3 million visitors which includes tourism, culture, food and wine, identity, landscape and territory, able to satisfy every requirement in the best possible manner. Thus the choice of Veneto as a holiday destination for many years now, has kept the region among the top Italian tourist regions, as confirmed again for 2011, the last year providing data on a

national scale, totalling 15.2% of the arrivals and 16.4% of tourists present over the entire peninsula. It should be noted that the survey, which forms the basis for the analysis in this publication, was only aimed at those who have had at least one overnight stay, i.e. guests of accommodation facilities in Veneto for leisure, business, well-being, healthcare, sports and religion etc. However, all data processing from daily tourism, although not completely quantifiable, is an important statistic for the economy of our region. This first and synthetic analysis, result of the now consolidated collaboration between the Directorate of the Regional Statistical System, the Directorate of Veneto Tourism and the seven Provinces of the territory, is intended as a contribution to furthering awareness of the dynamics of the sector. Further explorations on the topic are proposed annually in the Veneto Region Statistical Report.

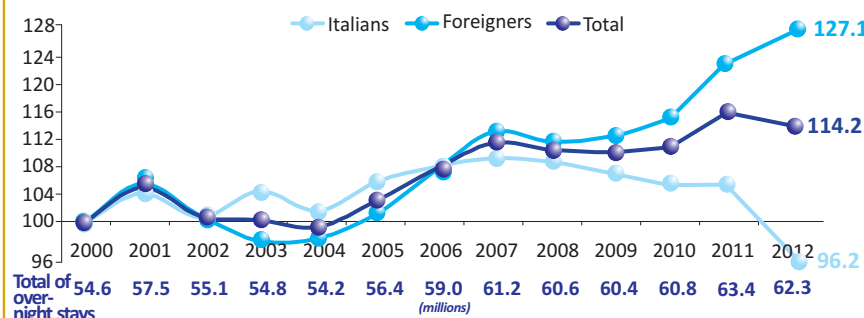
MOVEMENT OF TOURISTS IN VENETO PER PLACE OF ORIGIN AND FACILITY – YEAR 2012

	Hotel		Non-hotels		Total	
	Arrivals	Overnight stays	Arrivals	Overnight stays	Arrivals	Overnight stays
Italians	3,897,516	10,365,684	1,690,505	11,598,913	5,588,021	21,964,597
Foreigners	7,083,267	19,198,664	3,147,237	21,188,396	10,230,504	40,387,060
Total	10,980,783	29,564,348	4,837,742	32,787,309	15,818,525	62,351,657

Percentage variations 2011/2012

	Hotel		Non-hotels		Total	
	Arrivals	Overnight stays	Arrivals	Overnight stays	Arrivals	Overnight stays
Italians	-2.5	-6.7	-3.7	-10.5	-2.9	-8.7
Foreigners	+1.7	+1.7	+3.3	+3.6	+2.2	+2.7
Total	+0.1	-1.4	+0.8	-1.9	+0.3	-1.7

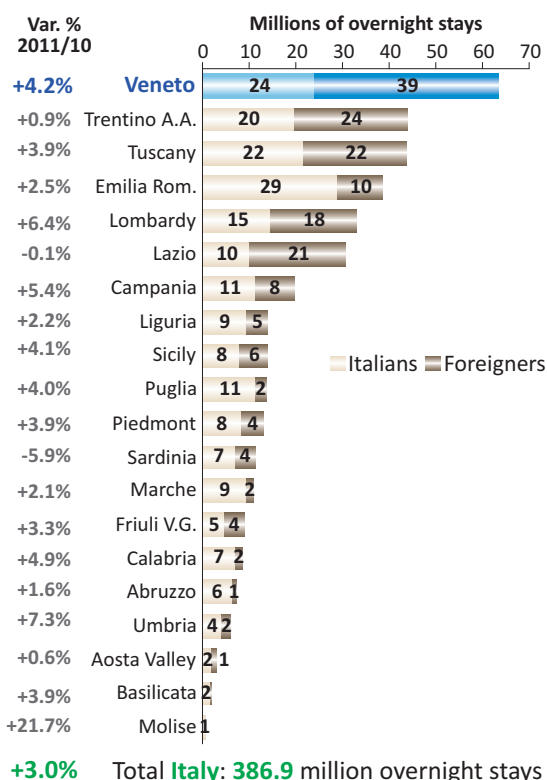
INDEX NUMBER (*) OF OVERNIGHT STAYS (BASE YEAR = 2000) VENETO - YEARS 2000:2012



(*) Number index = (attendance year t / attendance base year) x 100

Source: processing by Veneto region – Directorate of Regional Statistical System on Istat and Veneto Region data

OVERNIGHT STAYS IN ITALY PER REGION VISITED AND PLACE OF ORIGIN. YEAR 2011 E VAR. % 2011/10



ALSO AVAILABLE:

- Tourism. Definitive data for the whole of 2012
- Population Census 2011. Top definitive data
- Road accidents. Definitive data for the whole of 2011

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

The hold of tourism in Veneto is due to an increasing interest of foreign clientele that compensates for the reduction of holidays in our territory by Italians and especially people from Veneto themselves. The arrivals of foreigners has increased by 2.2%, the overnight stays by 2.7% while the arrivals of Italians have decreased by 2.9% and overnight stays by 8.7%.

PLACES OF ORIGIN

International tourism, the growth of which only began to slow down at the beginning of the global economic crisis, to then to make a timid reprise from 2009, now shows signs of increasing approval from the most faithful customers: the Germans (+2.6% of those present), the Dutch (+5.3%), the English (+9.3%), the Swiss (+4.8%), and the Americans (+0.6%) and the Danish (+10%).

Furthermore, the climb of the so-called BRICS area which today take on the role of new frontiers on which new promotional strategies must be applied: this year, Russia (+19.4%), China (+15.5%), Brazil (+2%) come 10th, 14th and 18th place in the ranking of foreign countries of origin, jumping forward 13, 4 and 3 ranks compared to 2000. Over the years, India has also shown significant increases enabling the country to be ranked in 28th place. The most popular travel destinations of the BRIC countries are art cities, with our region visited by over 95% of Chinese, Brazilians and Indians and 72% of Russians. In particular Venice, at times included in tourist packages with Florence and Rome, is the favourite destination of Brazilians (72.7%), the Chinese (41.1%) and Russians (31.4%), whilst 33.7% of Indian tourists prefer Venice alongside Padua, which is the greatest common attractor (38.7%). The importance of these figures is confirmed by the ranking of the foreign nationalities according to each type of tourism on offer: in the ranking of arrivals in cities of art, China holds 4th place, Russia 8th and Brazil 9th; for spa resorts Russia holds 5th place and China 6th; finally, Russia makes up a substantial part of visits to seaside resorts (11th), the lakes and the mountains (15th place for both).

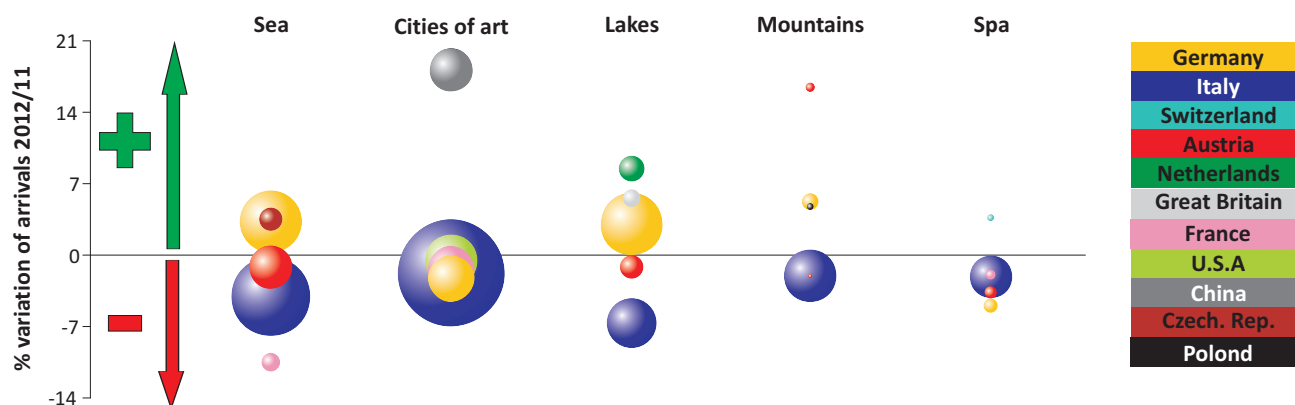
ORIGIN OF FOREIGN TOURISTS
RANKING PER OVERNIGHT STAYS - YEAR 2012

	No. of overnight stays	% variation 2012/11	% share out of total Veneto
Germany	13,969,108	2.6	22.4
Austria	3,463,991	-2.2	5.6
Netherlands	3,033,988	5.3	4.9
France	1,975,883	-1.1	3.2
Great Britain	1,940,758	9.3	3.1
Switzerland-Liecht.	1,584,570	4.8	2.5
U.S.A.	1,556,493	0.6	2.5
Denmark	1,371,175	10.0	2.2
Czech Republic	1,000,759	3.6	1.6
Russia	864,362	19.4	1.4
Poland	812,847	1.6	1.3
Belgium	687,731	1.1	1.1
Spain	681,957	-20.0	1.1
China	587,345	15.5	0.9
Hungary	483,622	-12.2	0.8
Japan	422,304	6.2	0.7
Australia	409,161	-1.0	0.7
Brazil	377,867	2.0	0.6
Romania	333,529	0.0	0.5
Canada	332,365	-0.4	0.5
...			
Total foreigners	40,387,060	2.7	64.8

ORIGIN OF ITALIAN TOURISTS
RANKING PER OVERNIGHT STAYS - YEAR 2012

	No. of overnight stay	% variation 2012/11	% share out of total Veneto
Veneto	8,543,256	-12.3	13.7
Lombardy	4,240,170	-6.2	6.8
Trentino Alto Adige	1,307,468	3.3	2.1
Emilia Romagna	1,238,077	-2.6	2.0
Lazio	1,114,141	-10.0	1.8
Piedmont	1,094,584	-9.8	1.8
Friuli Venezia Giulia	900,704	-4.2	1.4
Tuscany	690,700	-7.1	1.1
Campania	528,164	-12.9	0.8
Puglia	494,158	-9.6	0.8
Sicily	441,287	-8.0	0.7
Liguria	317,386	-11.1	0.5
Marche	278,365	-4.3	0.4
Abruzzo	181,335	-9.7	0.3
Sardinia	164,437	-7.1	0.3
Calabria	156,780	-3.7	0.3
Umbria	147,719	-12.9	0.2
Basilicata	58,387	-9.8	0.1
Aosta Valley	36,016	-9.6	0.1
Molise	31,463	-15.9	0.1
Total Italians	21,964,597	-8.7	35.2

THE MOST SIGNIFICANT TOURIST ORIGINS FOR EACH RESORT TYPE
% VARIATION 2012/11 OF ARRIVALS AND % SHARE OUT OF THE GENERAL TOTAL (BUBBLE SIZE)



Veneto has always been appreciated for the variety of tourism offered as well as the culture and hospitality which distinguish it as a region. It is acclaimed for its attention to the needs of continually changing demand. As well as the traditional tourism supply, there is also a wealth of nature and landscapes, historical villages and walled cities, villas as well as numerous opportunities to practice sports

such as golf, horse riding, cycling, not to mention the variety of supply in terms of conferencing tourism, religious routes and fishing, all enriched with the flavours of our food and wine culture.

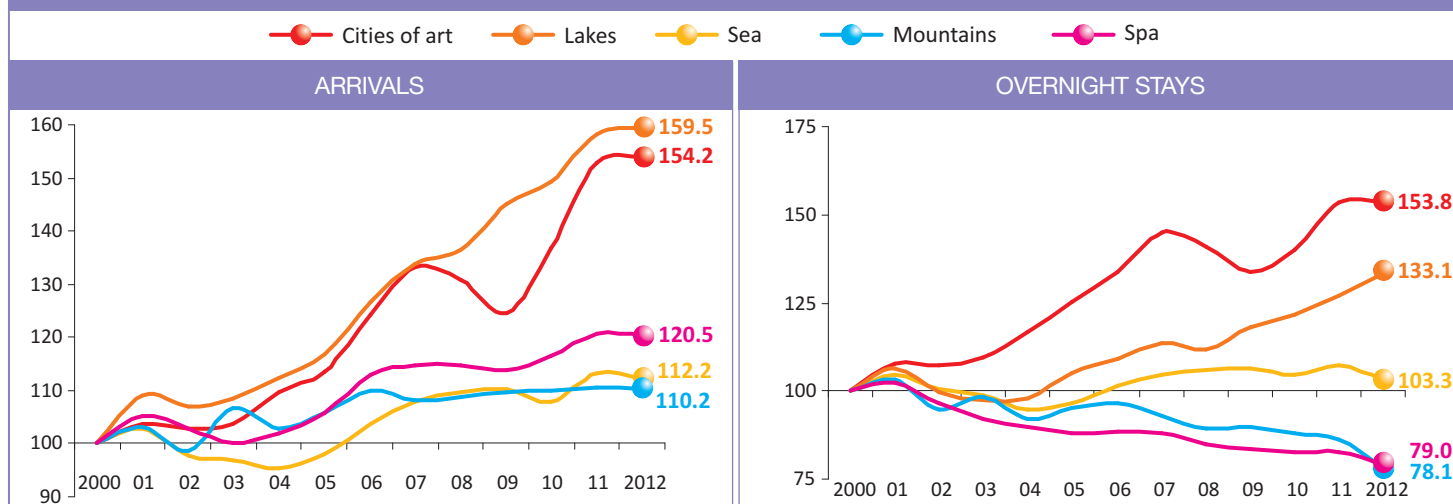
To sum up 2012, it should be noted that in each of the five classes of tourist destination, the influx of foreigners is increasing, where as the

THE DESTINATIONS

number of Italian visitors is decreasing. Thus the sectors with a predominantly foreign clientele have shown increases of both arrivals and overnight stays – as is the case of Lake Garda and cities of art, which boast a new record – whilst those hosting mainly Italians have recorded an overall reduction of visits (mountains and thermal spas). In the case of seaside resorts, the increase in foreigners, who constitute 62.9% of clientele (+0.9% of arrivals), is not enough to compensate fully for the decrease in visiting Italians (-4,1%).

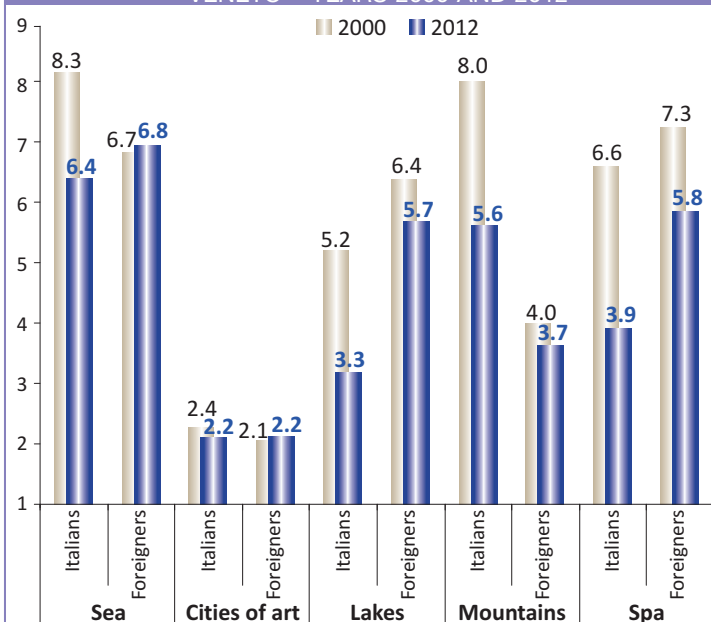
In addition to behavioural patterns strictly tied to this particular period of crisis, recent years have seen a gradual and continual reduction in the length of stay at holiday resorts. Again in this case there is a more marked variation in the habits of Italians, who, within little more than a decade, have reduced the length of their stay at the sea and the lakes on average by 2 days and in the mountains and thermals spas by almost 3 days.

INDEX NUMBER (*) OF TOURISTS PER TYPE OF RESORT (BASE YEAR = 2000). VENETO – YEARS 2000:2012



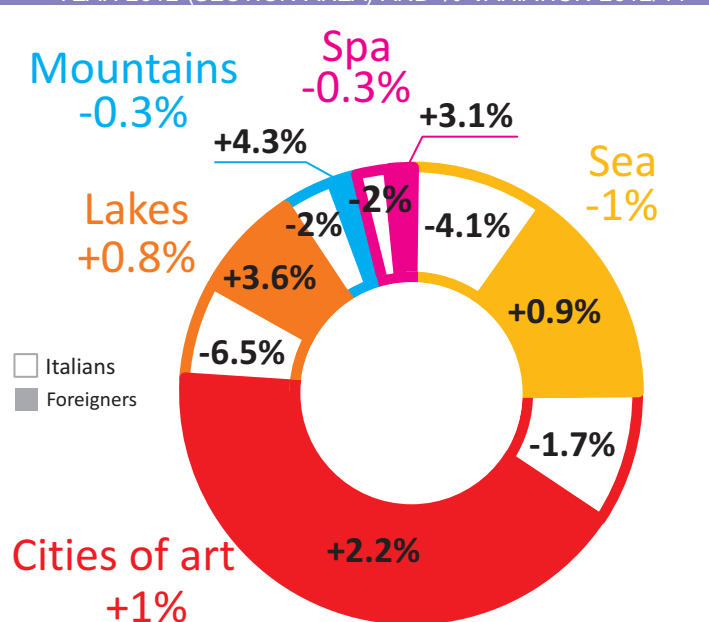
(*) Index number = (year t / base year) x 100

AVERAGE DAYS OF STAY (*) VENETO – YEARS 2000 AND 2012



(*) Average stay = overnight stays / arrivals

ARRIVALS PER PLACE OF ORIGIN AND TYPE OF RESORT YEAR 2012 (SECTION AREA) AND % VARIATION 2012/11



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A unique and quality tourism supply has been able to withstand the economic crisis by attracting, during the year and in particular during the festivities, a number of growing clients wishing to spend a holiday immersed in Veneto tradition. By comparing the number of tourists hosted in our accommodation facilities over the past year with the pre-crisis situation, an increase in arrivals has been recorded in each festive period analysed: Carnival (+6.6%), Easter (+6.9%), mid-August national bank holiday (+12.6%), Christmas (+20.9%). Going into further detail, during the mid-August national bank holiday all types of destinations have experienced significant growth (sea +7.3%, city +15.5%, lakes +19.8%,

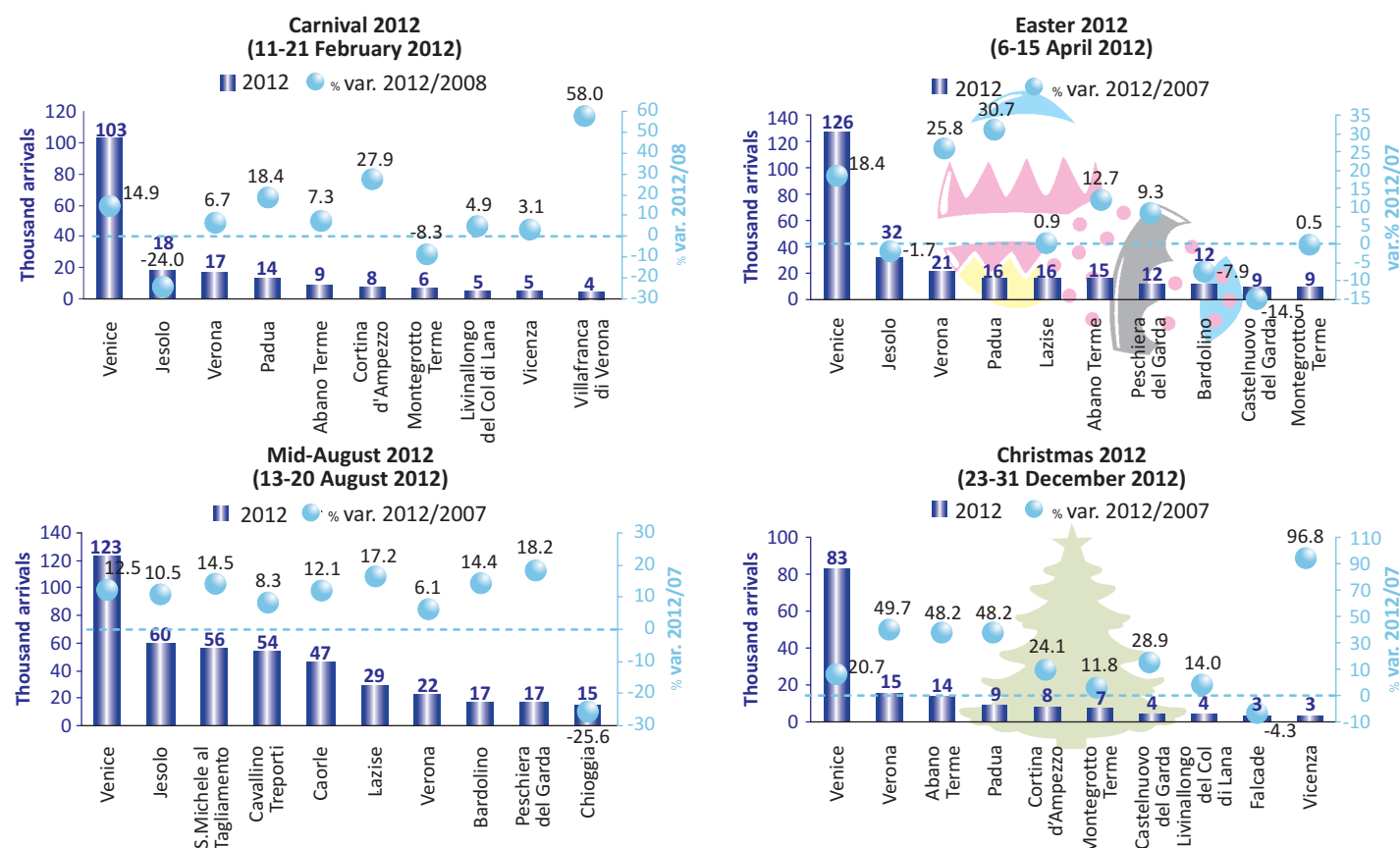
2012 FESTIVITIES

mountains +22.8%). For the Christmas holidays, a strong increase can be noted in the number of arrivals in the cities of art (+29.6%) and thermal spas (+35.8%) whilst the number in the mountain resorts has decreased by 1.2%. In the cities of art in Veneto, an increase in arrivals was experienced during the Carnival period (+13.4%) and during Easter (+17.4%). The graphs below

show the variations in arrivals recorded in the Veneto municipalities identified as the main destinations of each festivity. The number of tourists is generally increasing. Furthermore, it should be noted that during the holidays, the Italian component is much more relevant compared to the rest of the year. In particular, the number of foreigners decreases significantly in each municipality, thus leaving space for national tourism, except for Venice, which is always visited by a mostly foreign flow (86.3% of arrivals recorded in 2012). To give some examples, in Lazise, Castelnuovo and Peschiera del Garda, the Italian guests, which generally make up around 28%, 42% and 30% of the arrivals respectively, during the Easter period, constitute around half of the clientele. National tourism also rises in Jesolo during the week of mid-August national bank holiday (63.4% compared to 42.4% of the whole year). In Verona, the share of Italians, which is normally 39.8% of the arrivals, rises to 54.7% during carnival and 57.6% at Christmas. Italians who stay the night in accommodation facilities in Cortina jump from the annual average of 59.8% to 81.9% during Christmas, and in Falcade from 75.8% to 89.4%. As soon as they are available, data on the recent Epiphany and Carnival seasons will be released.

¹ It compares: the Carnivals in February 2012 and in March 2008; Easter of April 2012 and 2007; the mid-August national bank holiday in 2012 and 2007; Christmas 2012 and 2007.

RANKING OF VENETO MUNICIPALITIES PER ARRIVALS DURING THE MAIN FESTIVE PERIODS. YEAR 2012 AND COMPARISON WITH THE PRE-CRISIS PERIOD



Source: processing by Veneto Region – Directorate of Regional Statistical System on Istat and Veneto Region data

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- Regional Secretariat for Culture
- Directorate of Tourism

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