



STATISTICHE

Figures and graphs for understanding Veneto

Flash

The Directorate of Regional Statistical System on behalf of the Veneto Region participates in the European STAR (Statistical networks in Tourism sector of Adriatic Regions) Project, in collaboration with ten Partners from five countries, Italy (with the Regions of Emilia Romagna, Veneto, Marche, Abruzzi, and Apulia and the Province of Rimini), Bosnia and Herzegovina, Croatia, Albania, and Greece, all belonging to the Adriatic tourist basin.

As part of the project activities, the Veneto Region performed a direct sample survey in the past months of July and August, with the aim

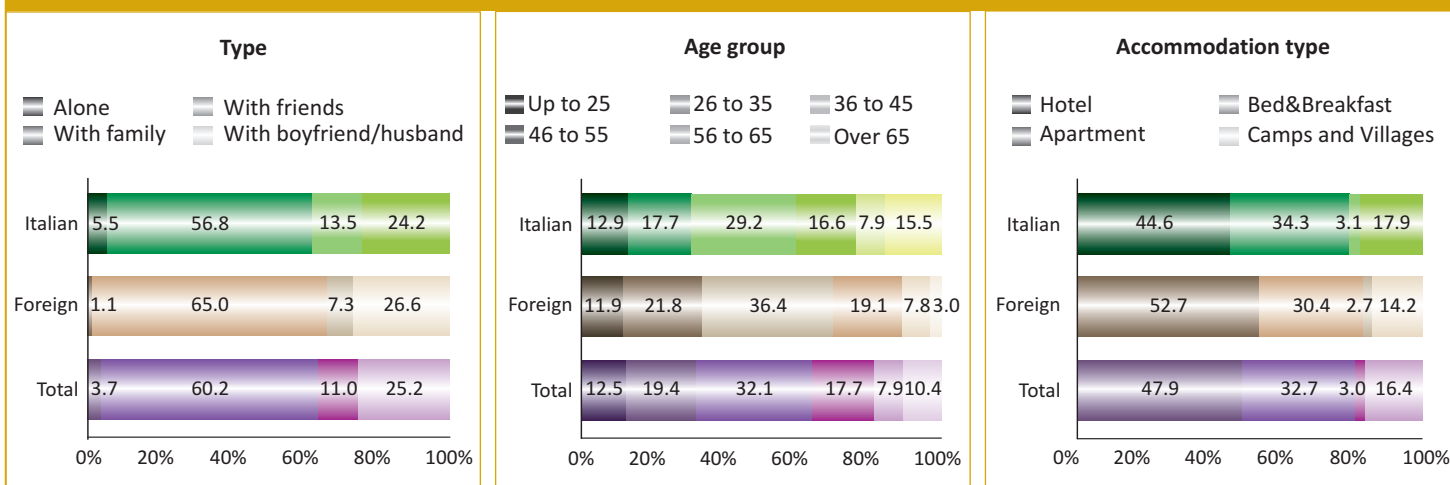
BEACH TOURISM: PROFILES AND APPRECIATION RATES

of profiling those tourists who stayed in our regional beach resorts and assessing their rate of satisfaction. The tourists who were surveyed reported an average vacation time of about a week spent mainly with their families (60.3%), less frequently with a partner (25.3%), or with friends (11%), and only occasionally alone (3.4%). Foreign tourists were more often accompanied by their families (65%) compared to their Italian counterparts (56.8%).

Beach tourism appears to be geared to a younger crowd, since the majority of the surveyed tourists was under 45 years of age, especially among foreigners, where they were more than 65%. The 36 to 45 tourist age group was the most represented in our sample, with about a third of the surveys. The over 65 tourist age group remained well-represented only among the Italians (15.5%) compared to foreign tourists (3.0%).

The Veneto Region has a wide and varied range of beach holiday facilities. Most of the surveyed tourists reported staying in hotels (47.9%), with a preference for 3-star type solutions. Apartment rentals (32.7%) were the second best choice among respondents, with fewer stays in tourist camps and villages (16.4%) and bed & breakfasts (3.0%). Foreign tourists reported staying in a hotel more frequently than Italian tourists (52.7% foreigners; 44.6% Italians).

% BREAKDOWN OF SURVEYED TOURISTS ACCORDING TO SOME PARAMETERS



MAIN PARAMETERS BY SURVEYED TOURIST TYPE

	Alone	With friend	With partner	With family
Age group	26 to 35	Up to 25	26 to 35	36 to 45
Vacation days	7	7	7	10
Referred facility	Hotel	Hotel/Apartment	Hotel	Hotel/Apartment
Italian national (%)	87.9	72.7	56.8	55.7
<50 Euros daily expenses (%)	36.4	38.4	23.3	24

Source: Processing by Veneto Region - Directorate of Regional Statistical System on Veneto Region data

Some interesting considerations derived from the analysis of available data regarding average daily expenses.

The highest percentage of surveyed tourists (43.5%) ranked in the middle with respect to their average daily expenses, from 51 to 100 Euros per day. Compared to the average value, differences were observed among the various age groups with regard to financial

AVERAGE DAILY EXPENSES

resources: the youngest and oldest (retirees) tourists ranked as the lowest spending with respect to other age groups. On the other hand, the central working age group (36 to 65) proved to be able to spend more. In particular, almost half (48.5%) of those under the age of 25 and 41.1% of those over 65 spent less than 50 Euros per day, while the

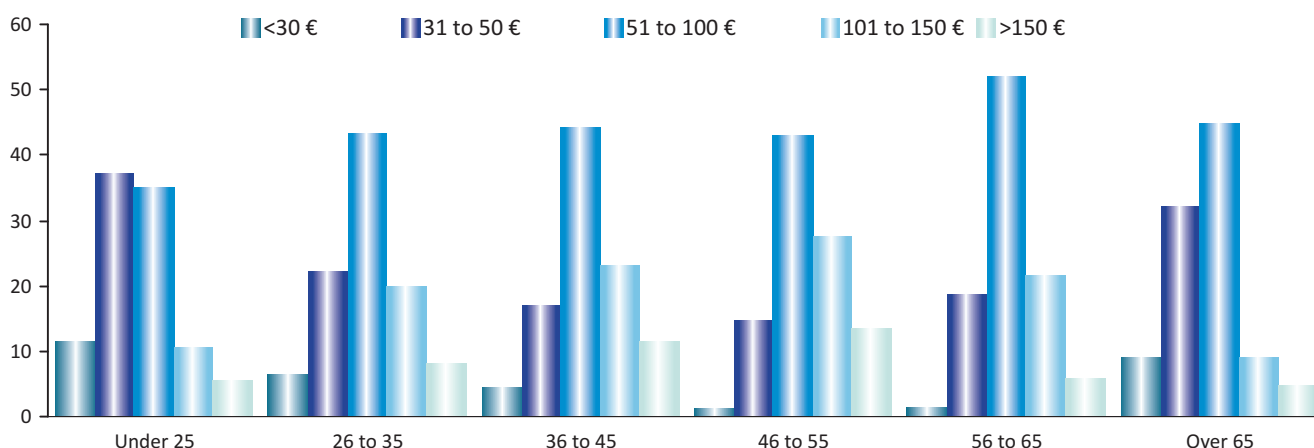
highest percentage (41.1%) of those who spent more than 100 Euros per day fell in the 46 to 55 age group.

Foreign tourists seemed to have greater financial resources, since they ranked among the highest spending, twice as Italian tourists.

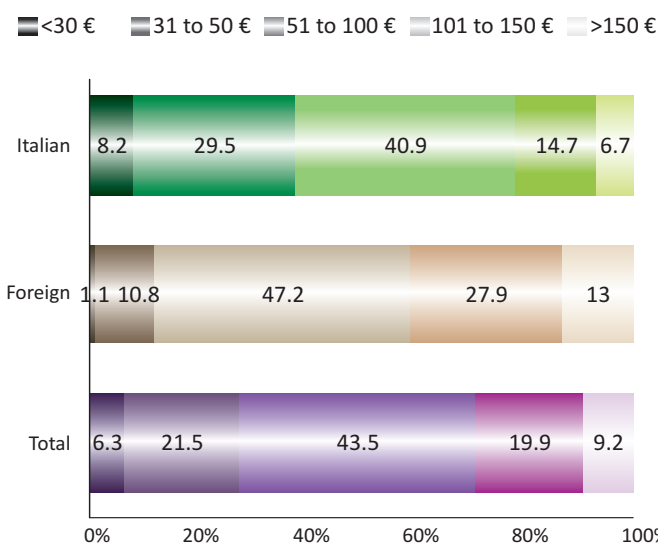
Holiday duration changed according to the reported average daily expenses: limited to a week for those who spent more than 50 Euros, longer (10 to 14 days) for those who spent less.

Availability of financial resources also affected the type of selected accommodation: over 50% of those who could spend more than 50 Euros per day stayed at a hotel, a percentage that reached 70 for tourists who could spend more than 150 Euros daily. On the contrary, those who could afford to spend less than 50 Euros per day opted mostly for the apartment rental solution (38.4% in the 31 to 50 Euros spending range, 67.4% in the less than 30 Euros range). The camping/village solution was selected mostly by surveyed tourists with a daily budget ranging from 31 to 50 Euros, whereas the bed & breakfast choice turned out to be the least sought out.

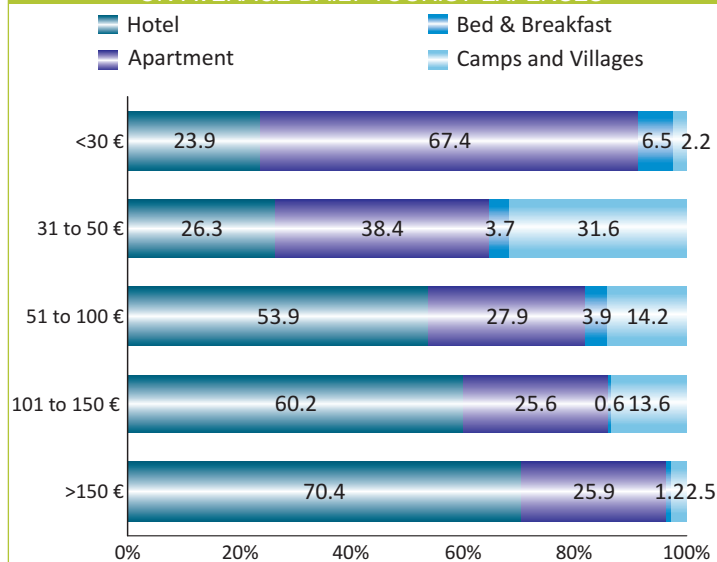
% BREAKDOWN OF AVERAGE DAILY EXPENSES BY SURVEYED TOURIST AGE GROUP



AVERAGE DAILY EXPENSES OF ITALIAN, FOREIGN, AND TOTAL SURVEYED TOURISTS



CHOICE OF ACCOMMODATION FACILITY BASED ON AVERAGE DAILY TOURIST EXPENSES



In order to gauge tourist satisfaction, we evaluated the different aspects of a vacation using a scale from 1 (lowest) to 5 (highest), and we calculated the percentages of excellent ratings (scores of 4 or 5). The higher scores were related to factors such as Safety, Health Services, Accommodation Comfort, Food Quality, Cleanliness, and the scenery.

CUSTOMER SATISFACTION

Notwithstanding the very satisfactory overall scores, we detected a diminished appreciation for the factors related to the holiday's quality/price ratio, public transportation in the town (although used by only 42.5% of respondents), and cultural offer. This last aspect - moreover confirmed also by the survey on international tourism in Italy carried out by the Bank of Italy - may be worth thinking about, considering the cultural potential that our region has to offer; was the

lower rating due to the fact that tourists vacationing by the beach will not move to visit Veneto's most classic destinations (offering cultural events) or to the fact that their expectations were somewhat disappointed?

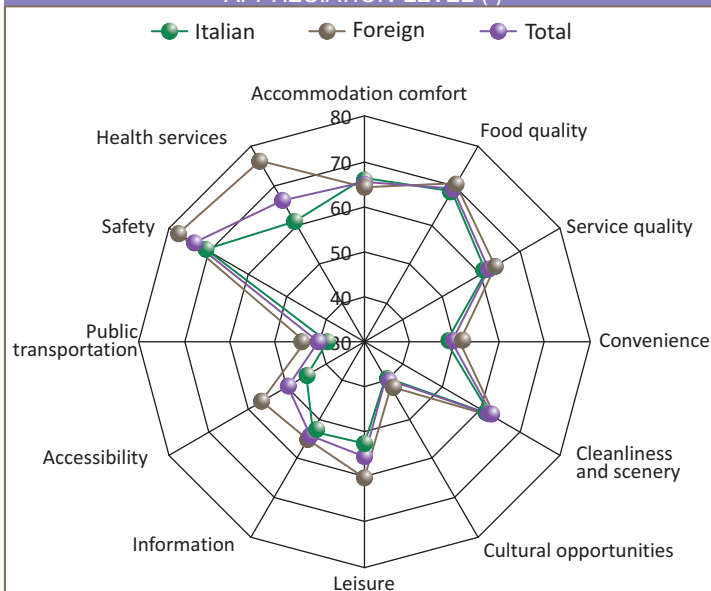
The foreign respondents were generally more satisfied than their Italian counterparts, showing a greater appreciation for the health services, accessibility, and safety of their beach resort. Given that 89.6% of respondents said they intended to return to the same resort, we employed appropriate statistical methodologies to identify the factors that most affected tourist satisfaction, and which might have had a greater impact leading to this choice. The results of our analysis showed that those who expressed excellent opinions about the comfort level of their chosen accommodation, or the local public transport system, or the quality/price ratio of their holiday, or the quality of their meals were more likely to return to the place they visited (the other factors were not statistically significant). Returning to our previously proposed tourist profiling according to four parameters (alone, with friends, with partner, and with family), we could identify some features differentiating how tourists evaluated their stay. People who went on a holiday alone reported a greater appreciation for the quality of the food and public transportation, whereas they were more critical with regard to health services, beach cleanliness, and the quality of the scenery.

The surveyed tourists on vacation at the beach with friends expressed their better assessments to the accessibility and safety of the place they visited, with lower values reserved for health services and available leisure activities.

Respondents who claimed to be on vacation with their partner gave assessments similar to those vacationing with a group of friends; in fact, they reported a greater satisfaction rate for the accessibility and safety factors, less for local health services. They also added a lesser rating for beach cleanliness and scenery. Finally, tourists on vacation with their families gave better evaluations for the accessibility and quality of services factors. Lower appreciation rates were associated with health services and safety, reflecting a greater need for these aspects for those who travel with their children.

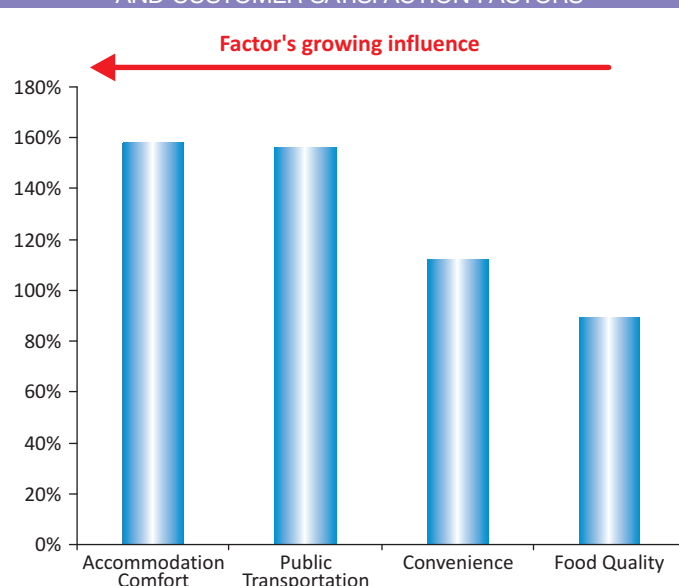
¹ Tourist propensity toward returning to a particular resort was assessed using odds ratios estimated through a multivariate logistic model adjusted for gender, interviewer, nationality, and age group.

% OF SURVEYED TOURISTS EXPRESSING A HIGH APPRECIATION LEVEL (*)



(*) assessments equal to "excellent" or "very good," >3 on a scale of 1 to 5.

ASSOCIATION BETWEEN THE PROPENSITY TOWARD RETURNING (IN %) TO VISITED PLACES AND CUSTOMER SATISFACTION FACTORS



EVALUATION OF HOLIDAY ASPECTS ACCORDING TO SURVEYED TOURIST TYPE

	Alone	With friends	With partner	With family
Higher assessment	food quality public transportation	accessibility safety	accessibility safety	accessibility quality of service
Lower assessment	health services scenery cleanliness	health services leisure	health services scenery cleanliness	health services safety

Source: Processing by Veneto Region - Directorate of Regional Statistical System on Veneto Region data

STATISTICHE *Flash*

The 2013 beach summer season registered 3,362,416 arrivals (-1.5% with respect to the same period of the previous year) and an attendance equal to 23,825,956, corresponding to a 2.3% decrease, the sign of a reduced permanence in vacation towns.

It was mostly foreigners who took advantage of the accommodations on our coastline (almost 64%), but significantly differentiated according to municipality with respect to the origin of tourist flows (national/international) and the choice of hospitality (hotel/other than), as may be seen in the pie charts placed in the map below.

Taking into account beach towns and just the Lido for the city of Venice, we may note that there was usually a numerical predominance of foreign guests, ranging from 53% of foreign arrivals in the municipality of Eraclea to 84.2% for the Lido of Venice. Only the towns of Chioggia and Rosolina were visited by mostly Italian tourists.

VENETO: THE 2013 BEACH SUMMER SEASON¹

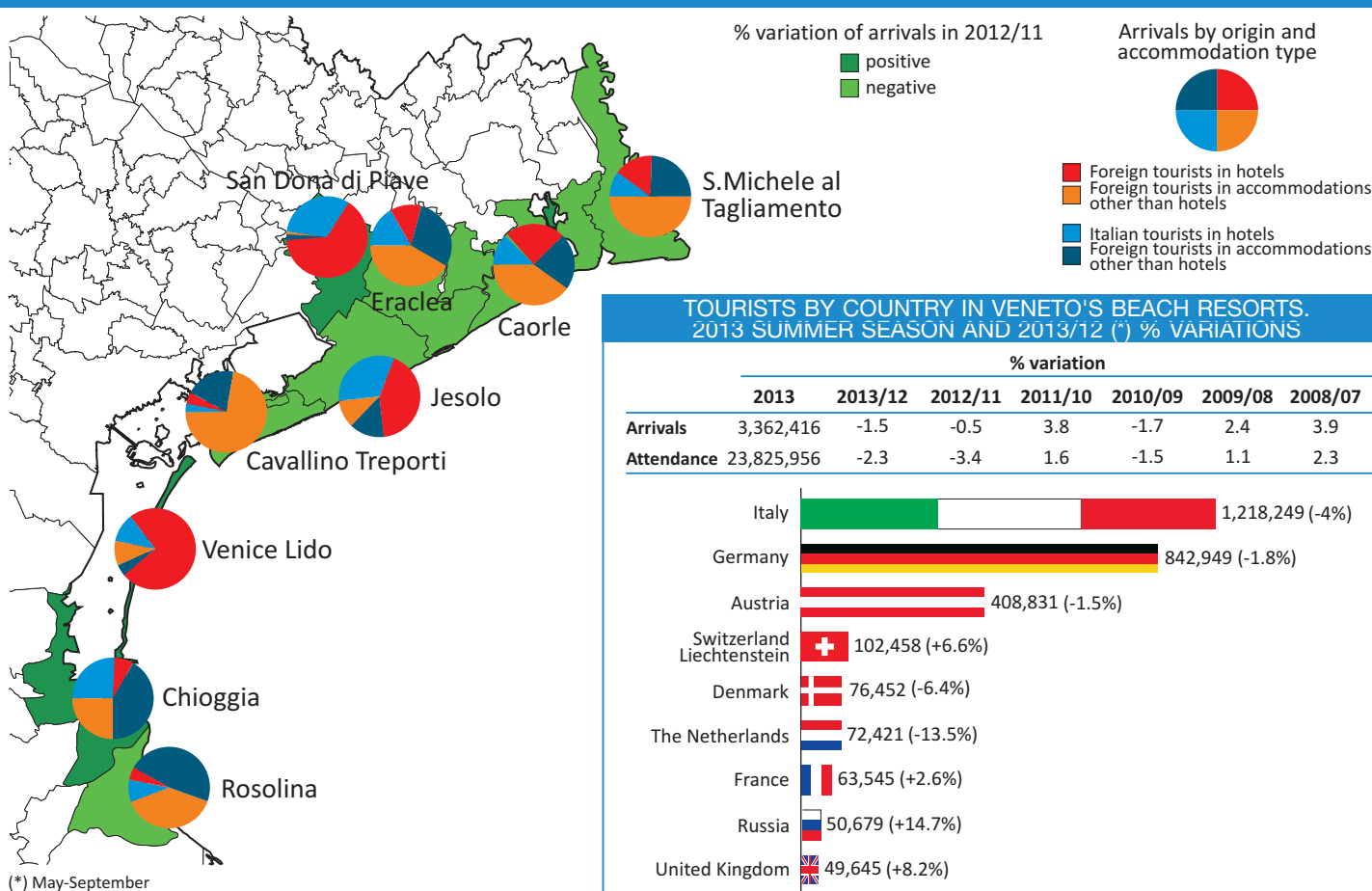
Hotels were home to most of the tourists staying in the town of Jesolo (77.3% of arrivals), the Lido of Venice, and San Donà di Piave, while accommodations other than hotels were the most popular in other areas (ranging from Caorle's 61.1% to Cavallino-Treporti's 95.3%).

Regarding the newly emerging markets - the so-called BRIC2 - we observed that Russia began to play a touristic role in Jesolo (4% of the total arrivals in the town), Rosolina (3.1%), the Lido of Venice (2.8%), and San Donà di Piave (2.2%). By the same talking, German tourists remained the most decisive in terms of numbers, with 842,949 arrivals, albeit declining by 1.8%.

¹ May-September

² Brazil, Russia, India, China

TOURIST ARRIVALS FOR THE 2013 SUMMER SEASON (*)



Source: Processing by Veneto Region - Directorate of Regional Statistical System on Istat - Veneto Region data



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