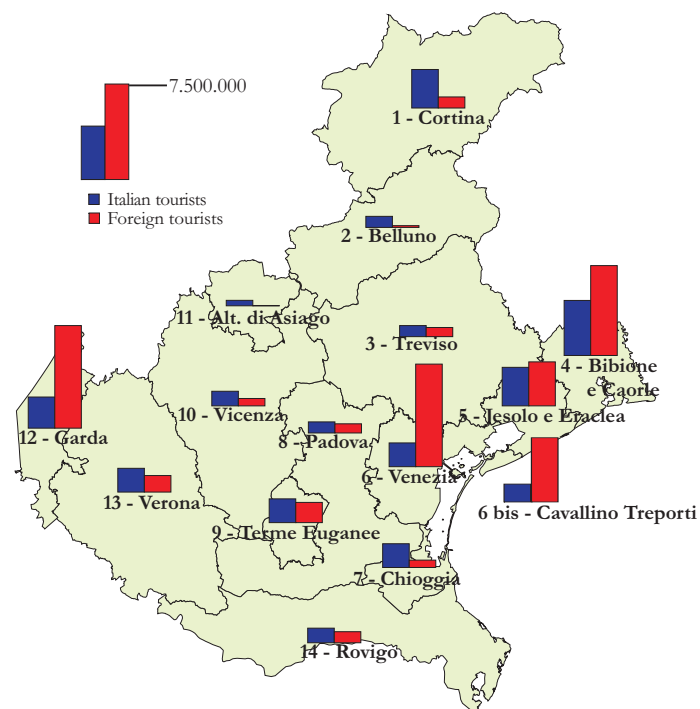


The territory

Tourist movements in Veneto provinces and holiday destinations - Year 2008

Province Destination	Italians				Foreign visitors				Total			
	Year 2008		08/07 % var.		Year 2008		08/07 % var.		Year 2008		08/07 % var.	
	Arrivals	Nights spent	Arrivals	Nights sp.	Arrivals	Nights spent	Arrivals	Nights sp.	Arrivals	Nights spent	Arrivals	Nights sp.
Belluno	593,677	3,600,697	-1.2	-3.8	230,629	942,377	2.3	4.5	824,306	4,543,074	0.3	-2.2
Mountains	593,677	3,600,697	-1.2	-3.8	230,629	942,377	2.3	4.5	824,306	4,543,074	0.3	-2.2
Padova	752,682	2,454,387	1.6	0.5	557,378	2,010,284	-3.7	-6.3	1,310,060	4,464,671	0.7	-3.2
Historical cities	386,904	808,015	0.6	0.9	335,592	633,826	-2.6	-4.2	722,496	1,441,841	-1.3	-2.4
Spa towns	365,778	1,646,372	4.5	0.3	221,786	1,376,458	-6.8	-7.2	587,564	3,022,830	0.1	-3.6
Rovigo	161,158	1,020,374	2.9	0.3	126,849	798,388	7.3	11.7	288,007	1,818,762	4.7	5.2
Historical cities	77,644	197,124	0.6	0.2	58,509	197,815	10.3	31.3	136,153	394,939	4.2	13.4
Seaside	83,514	823,250	5.8	0.4	68,340	600,573	4.4	6.5	151,854	1,423,823	5.1	2.9
Treviso	340,828	839,215	2.3	-8.7	305,575	708,767	-3.9	-11.0	646,403	1,547,982	0.7	-9.7
Historical cities	340,828	839,215	2.3	-8.7	305,575	708,767	-3.9	-11.0	646,403	1,547,982	0.7	-9.7
Venezia	2,075,585	11,513,819	1.8	0.7	5,203,761	22,015,060	-3.6	0.5	7,279,346	33,528,879	-3.0	0.8
Historical cities	696,098	1,744,698	0.4	4.2	2,988,287	7,071,042	-6.6	-5.4	3,684,385	8,815,740	-5.4	-3.7
Seaside	1,379,487	9,769,121	2.6	1.0	2,215,474	14,944,018	0.9	2.3	3,594,961	24,713,139	1.5	1.3
Verona	1,226,207	4,059,035	3.8	-3.5	1,893,870	8,609,751	1.6	-2.5	3,120,077	12,668,786	2.4	-2.8
Historical cities	604,037	1,413,919	4.3	-1.6	588,873	1,302,920	1.6	-7.7	1,192,910	2,716,839	3.0	-4.6
Lake	591,714	2,161,070	3.7	-1.4	1,303,577	7,302,752	1.5	-1.5	1,895,291	9,463,822	2.2	-1.5
Mountains	30,456	484,046	-3.9	-16.2	1,420	4,079	15.3	10.6	31,876	488,125	-3.2	-16.0
Vicenza	442,213	1,443,511	17.7	12.7	219,653	591,790	-2.8	-1.6	661,866	2,035,301	10.0	7.7
Historical cities	348,912	892,933	20.1	25.3	213,433	567,200	-2.8	-1.6	562,345	1,460,133	10.2	13.1
Mountains	84,610	493,929	9.1	-4.9	4,928	20,682	-6.4	-4.5	89,538	514,611	8.2	-4.8
Spa towns	8,691	56,649	11.4	3.5	1,292	3,908	12.5	8.2	9,983	60,557	11.6	3.8
Total Veneto	5,592,350	24,931,038	3.0	-0.6	8,537,715	35,676,417	-2.2	-1.2	14,130,065	60,607,455	-0.2	-0.9

Nights spent by tourists in Veneto Local Tourist Networks (*) - Year 2008



The positive year for seaside resorts can be seen by the increases in numbers to Bibione-Caorle (+3.5% visitors), Cavallino (+2%), Chioggia (+2%) and Rosolina (+2.9%), whereas numbers to Jesolo-Eraclea decreased (-2.5%).

Tourist numbers to the mountain resorts of Vicenza and Belluno increased but the length of stay went down. After a summer of unfavourable atmospheric conditions, in December the skiing season started off really well thanks to heavy snowfall which caused bookings to go up in all destinations by +2.4% compared to the same month in 2007.

In the Spa towns and lake resorts too, as we have already seen, the number of tourists went up while the average length of stay became shorter. In the Abano-Montegrotto spa resorts the number of Italian vistors increased (+4.5%) as the number of foreign visitors decreased (-6.8%). In the area of Lago di Garda the high season was just an up-and-down with an increase in bookings in May and July but with losses in June, August and September.

The decline in tourism to the historical cities is mainly influenced by trends in the destinations within the province of Venice as these make up more than half of nights spent in all destinations. In 2008 these places saw a -3.7% decrease in the number of tourists. On the other hand, these areas depend significantly on foreign tourists, who, as we have seen, have strongly felt the effects of the economic downturn. The number of tourists to cities in the provinces of Verona and Treviso has increased, but also here the average length of stay has decreased.

Source: Processing by Regione Veneto – Direzione Sistema Statistico Regionale on Istat – Regione Veneto data

In accordance with Regional Law no. 8 of 2002, Ufficio di Statistica della Regione Veneto gathers, analyses and disseminates statistical information for the benefit of the region. The processed data herein is the patrimony of the entire region and is published in brochures as well as on the Regione Veneto website at www.regione.veneto.it/statistica.

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REGIONE DEL VENETO

Statistiche

Year 9 - February 2009



www.veneto.to

TOURISM IN VENETO Year 2008



Veneto, which is the leading region in terms of the tourism economy in Italy and which counted more than 60.5 million nights spent by tourists in 2008, is putting forward an innovative and unique image in order to fully promote all its different facets: now it puts tourism, culture, food and drink, identity and territory all under the one umbrella to ensure that both returning and new tourists continue to favour and appreciate everything Veneto has to offer.

Value has been added to the wide range of features Veneto provides tourists with by well-organised promotion and by the great business acumen of our tour operators. The results can be seen from last year's data where figures for Veneto remained more or less stable, showing only a slight drop compared to 2007, this is despite the critical economic situation and the difficulties experienced on an international scale during the year.

The sector has remained solid against a “crumbling” backdrop. This is what can be seen from the figures on tourism in Veneto in 2008. In the last three years the number of tourists has stood at around 60 million, a considerable number, with 14 million visitors choosing our region.

The number of tourists has remained mostly stable compared to 2007. As a matter of fact, the -0.2% decrease in the number of arrivals corresponds to a drop of around 25,500 units, this is accompanied by a moderate decline in

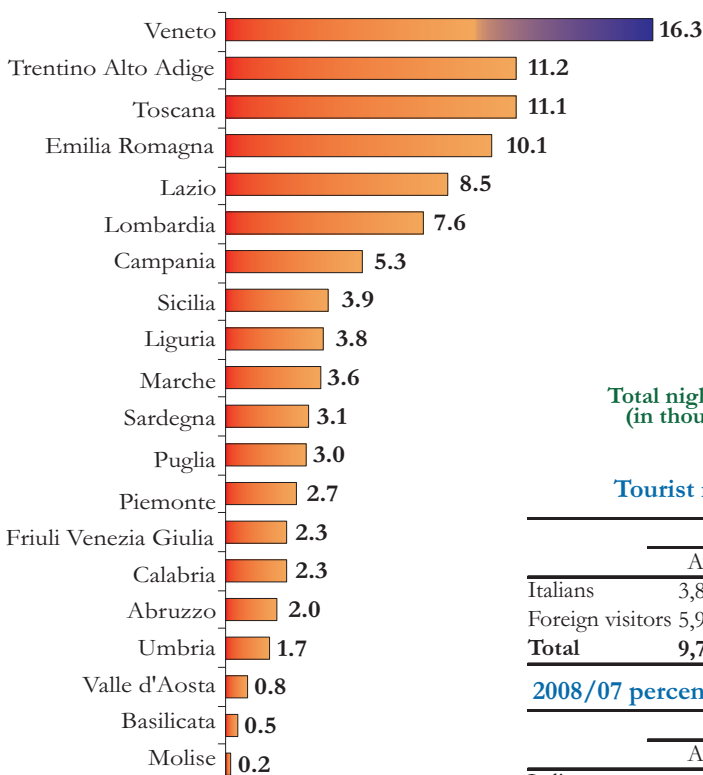
overall presences (-0.9%), which serves to confirm the general trend for both Italian and foreign tourists to reduce the length of their holidays. Despite the fact that tourism has been affected by some well-known international crises, the number of tourists has actually increased constantly since 2000, +10.9%.

This initial, brief analysis of the situation was brought about through the now long-standing collaboration between Direzione Sistema Statistico Regionale and the Tourism Department of the Veneto Region and its Provinces. It affords an insight into tourism in Veneto, the single most important industry for the local economy, both in terms of directly produced wealth and in terms of the economy upstream and downstream of tourism.

This survey, however, takes into account only tourists who stay for at least one night, namely visitors staying in accommodation for tourism, business, wellbeing or religion, etc.. The calculations therefore do not take into account same-day visitors drawn by important events and exhibitions. Although they cannot be quantified, they are a significant presence for our region.

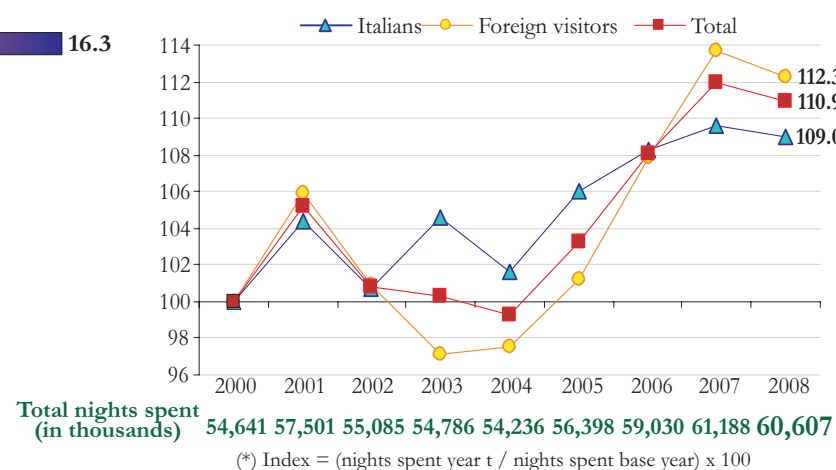
Thanks to the millions of tourists who choose Veneto as their holiday destination, it has been the leading tourist region in Italy for quite a few years now. This continued into 2007, the last year for which national data is available, as it counted 14.7% of arrivals and 16.3% of nights spent in the entire country.

Tourist movements in Italian regions (% share of Italian total) - Year 2007



Italian total: 376,642 thousands of nights spent

Nights spent by tourists index (*) (base year = 2000) Veneto - Years 2000:2008



Tourist movements by origin and type of accommodation - Year 2008

	Hotels		Other accommodation		Total establishments	
	Arrivals	Nights spent	Arrivals	Nights spent	Arrivals	Nights spent
Italians	3,862,616	11,363,208	1,729,734	13,567,830	5,592,350	24,931,038
Foreign visitors	5,920,553	17,230,844	2,617,162	18,445,573	8,537,715	35,676,417
Total	9,783,169	28,594,052	4,346,896	32,013,403	14,130,065	60,607,455

2008/07 percentage variations

	Hotels		Other accommodation		Total establishments	
	Arrivals	Nights spent	Arrivals	Nights spent	Arrivals	Nights spent
Italians	0.8	-2.7	8.4	1.3	3.0	-0.6
Foreign visitors	-3.5	-4.8	1.0	2.4	-2.2	-1.2
Total	-1.9	-4.0	3.8	2.0	-0.2	-0.9

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



also available

- Veneto in Figures 2007-2008

- Company databases

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

Countries of origin

Italian tourists: ranking of nights spent. Veneto - Year 2008

Origin	Year 2008			2008/07 % variation	
	Nights spent	Arrivals	% share of nights spent out of Veneto total	Nights spent	Arrivals
Veneto	10,113,944	1,523,785	16.7	-0.4	6.3
Lombardia	4,515,470	1,079,049	7.5	2.1	3.4
Lazio	1,429,761	469,400	2.4	0.7	1.8
Emilia Romagna	1,271,841	399,029	2.1	-3.6	3.8
Piemonte	1,233,117	363,888	2.0	-0.3	4.2
Trentino Alto Adige	1,214,244	263,440	2.0	1.8	4.8
Friuli Venezia Giulia	968,502	205,615	1.6	0.6	3.7
Toscana	776,294	265,027	1.3	-2.9	-1.0
Campania	662,070	195,037	1.1	-6.1	-4.2
Puglia	618,450	174,955	1.0	-2.,0	1.7
Sicilia	531,144	141,872	0.9	-3.5	-2.9
Liguria	366,207	123,605	0.6	-1.8	-0.9
Marche	297,497	104,604	0.5	-6.5	-0.2
Abruzzo	222,469	72,687	0.4	-1.1	2.1
Calabria	191,188	54,200	0.3	-7.4	-6.6
Sardegna	188,024	53,371	0.3	-7.4	-0.9
Umbria	179,551	58,508	0.3	-5.6	-2.1
Basilicata	69,030	19,162	0.1	-13.1	-2.8
Molise	41,365	12,668	0.1	-7.4	-3.0
Valle d'Aosta	40,870	12,448	0.1	6.7	12.4
Total italians	24,931,038	5,592,350	41.1	-0.6	3.0

Traditional foreign markets: ranking of nights spent. Veneto - Year 2008

Origin	Year 2008			2008/07 % variation	
	Nights spent	Arrivals	% share of nights spent out of Veneto total	Nights spent	Arrivals
Germany	11,462,879	1,901,052	18.9	-2.5	-2.9
Austria	3,027,202	635,668	5.0	-7.3	-3.3
The Netherlands	2,684,718	355,275	4.4	12.5	9.2
Great Britain	2,321,814	575,693	3.8	-6.6	-6.6
France	1,832,459	597,242	3.0	0.4	5.0
U.S.A.	1,522,205	652,527	2.5	-18.6	-21.2
Denmark	1,396,527	179,270	2.3	16.3	12.9
Switzerland-Liechtenstein	1,273,166	243,973	2.1	-3.5	-2.7
Spain	892,472	390,685	1.5	-10.6	-10.4
...					
Total foreign visitors	35,676,417	8,537,715	58.9	-1.,2	-2,2

New foreign markets: ranking of nights spent. Veneto - Year 2008

Origin	Year 2008			2008/07 % variation	
	Nights spent	Arrivals	% share of nights spent out of Veneto total	Nights spent	Arrivals
Czech Republic	859,404	148,306	1.4	13.9	15.2
Poland	737,509	172,274	1.2	21.8	22.8
Russia	500,912	162,688	0.8	18.0	19.7
Sweden	361,189	86,509	0.6	10.6	11.9
Australia	346,208	142,587	0.6	5.0	5.4
Brazil	247,017	107,620	0.4	19.3	22.3
Norway	223,781	54,176	0.4	3.0	4.0
Slovakia	215,260	37,275	0.4	9.6	15.8

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

Most of the visitors to Veneto are international tourists. In 2008 foreign visitors made up 58.9% of tourists to the region, this accounts for 35.5 million presences. The economic problems now being faced worldwide will test the resilience of these important visitors as well as of our Italian visitors. Tourism in Veneto is coping well however, even if a little patchily. There was a very slight drop in foreign visitors (-1.2%), but domestic tourism remained largely stable (-0.6%). Furthermore, it is to be reminded that percentage variations are compared to the year 2007 which was actually a record year, the best year we've seen in the last decade.

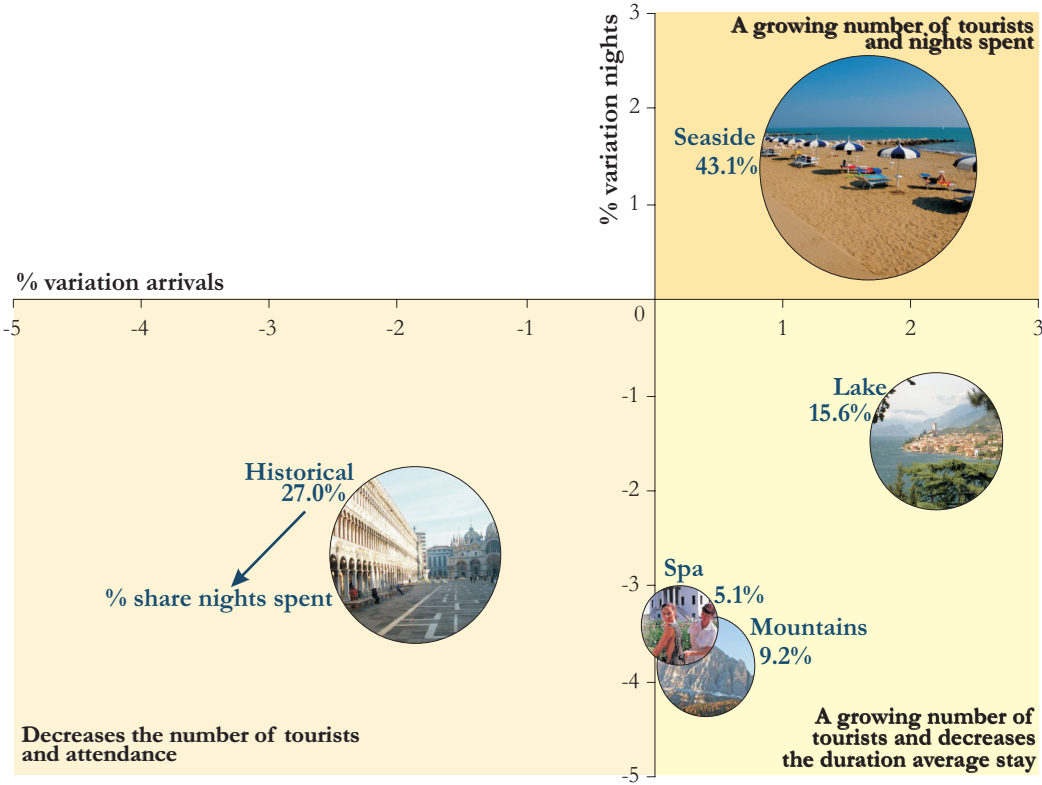
Of traditional foreign visitors, the decrease in the number of German, British and Spanish visitors bring figures back in line with those of 2006, whereas the biggest drop can be seen in the number of Austrian (-7.3% nights spent compared to 2007) and American visitors (-18.6%). On the other hand, a further increase was seen in the number of Dutch (+12.5%), French (+0.4%) and, most notably, Danish visitors (+16.3%), this latest is the market which shows the biggest amount of growth.

At the same time, new tourist markets are emerging, with Eastern European countries in first place: the Czech Republic (+13.9%), Poland (+21.8%), Russia (+18.0%) and Slovakia (+9.6%). We can also count in the Northern European countries (Sweden +10.6% and Norway +3.0%) and overseas countries such as Australia (+5.0%) and Brazil (19.3+%).

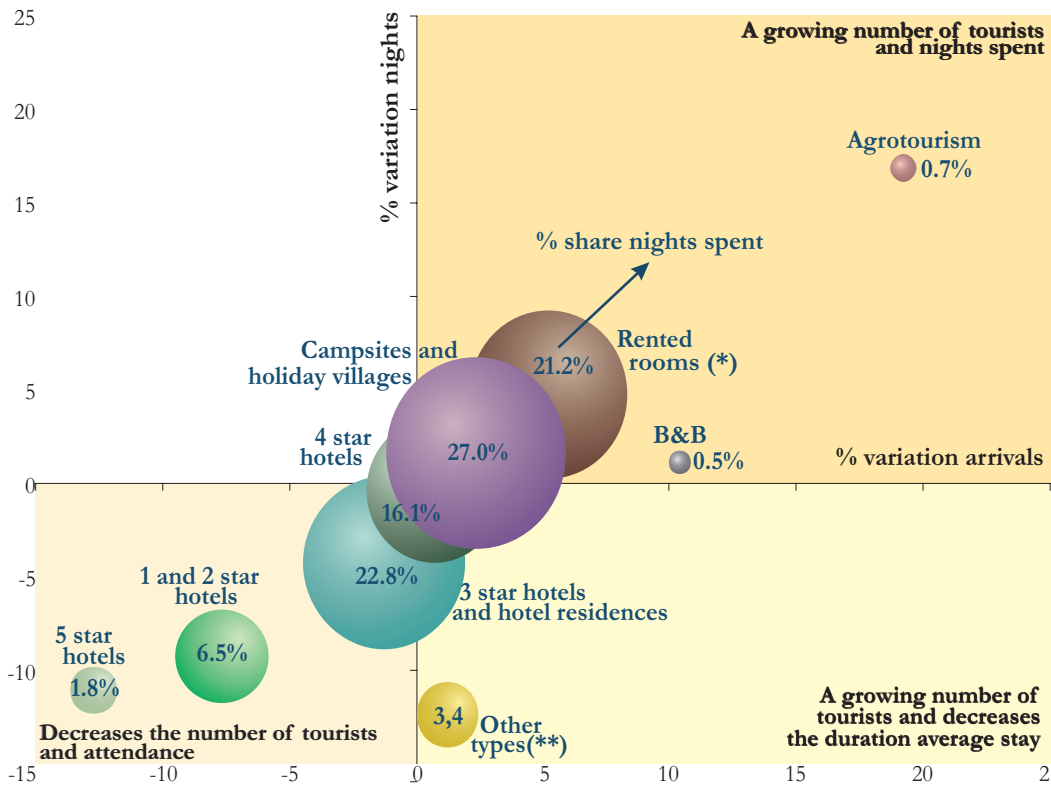
As for domestic tourism, Veneto residents who take holidays within the region have always made up an important part of Italian tourism, their numbers are second only to German tourists. They are followed by visitors from Lombardia, whose numbers have increased by 2.1% and then, but quite far behind, come visitors from Lazio and Emilia-Romagna. The number of tourists from Veneto itself increased (+6.3%) in 2008, although the average length of stay decreased from 7.1 to 6.6 days in just one year. It should be pointed out that the decrease in average length of stay is not only visible for visitors from Veneto but also for all the other Italian visitors, except for those from Lazio, Sicilia, Liguria and Calabria.

Arrivals and nights spent by tourists

2008/07 % variation of arrivals and nights spent by tourists by destination (bubble size = % share nights spent 2008)



2008/07 % variation of arrivals and nights spent by tourists by type of accommodation establishment (bubble size = % share nights spent 2008)



(*) The "rented rooms" category includes: rented rooms, rented apartments, accomm. In catering establishments, furnished housing units used for tourism and residential hotels

(**) The "other types" category includes: hostels, holiday homes, religious establishments geared towards accommodation, study centres, guest lodgings, holiday camps, mountain and adventure lodges

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

Our region contains so much variety it can satisfy every tourist's requirements.

Veneto's seaside resorts, which alone account for 43% of the nights spent in the entire region, became increasingly popular with both Italian and international visitors in 2008 both in terms of arrivals (+1.7%) and of nights spent (+1.3%).

Spa towns, mountain resorts and lake resorts in particular have seen an increase in the number of arrivals (+0.2%, +0.4% and +2.2% respectively) and, at the same time, a decrease in the number of nights spent (-3.4%, -3.8% and -1.5%), yet further proof of the trend of a reduction in the average length of holidays.

The historic cities are the ones that have suffered the most at the hands of the economic situation as they have seen a reduction both in the number of arrivals and in nights spent compared to 2007. The blame for the "not terribly positive" trend in cultural tourism can be laid at the feet of foreign tourists as their flow decreased by 5.3%, a figure which could not even be compensated for by the significant increase in Italian visitors (+2.4%).

If we look more closely at the different types of accommodation establishment, a drop in the hotel sector stands out (-1.9% of arrivals and -4.0% of nights spent) compared to good increases for other types of accommodation (+3.8% for arrivals and +2.0% for nights spent). The middle-low range hotels have seen the biggest losses (-9.3% of nights spent for 1 and 2-star hotels) and also the exclusive hotels (-9.3% for 5-star hotels). The decrease in nights spent in middle range hotels was less dramatic (-4.3% for 3-star hotels), whereas 4-star hotels remained mostly stable with a decrease of 0.4% in nights spent compared to an increase of 0.8% in arrivals. In each type of hotel, the biggest drop was in numbers of foreign tourists.

Other types of accommodation are becoming more attractive to visitors: more nights were spent in agrotourism establishments (+16.9%) and also in rented accommodation (+4.8%), on campsites (+1.6%) and in Bed & Breakfasts (+1.1%).

The change in holiday habits is fairly evident as all types of accommodation establishments have seen a reduction in visitors' average length of stay.