



STATISTICHE

UNDERSTANDING VENETO IN FIGURES AND DIAGRAMS

FLASH

In 2016, Veneto's tourist offer - unique, varied, high quality and enhanced by innovative proposals - set a new record, both for the number of tourists and the total overnight stays. In fact, 2016 concluded with an unprecedented 17.9 million arrivals (+3.5% as compared to 2015) and 65.4 million overnight stays (+3.4%). Veneto tourism is achieving increasing recognition from foreign visitors and is also benefitting from the return of Italian tourists, experiencing a trend reversal since 2015 that, however, has not yet returned to levels seen at the start of the century. In this sense, our region is also deemed more attractive based on its favourable position in terms of the current geopolitical situation in the Mediterranean, which rewards destinations perceived as being safer.

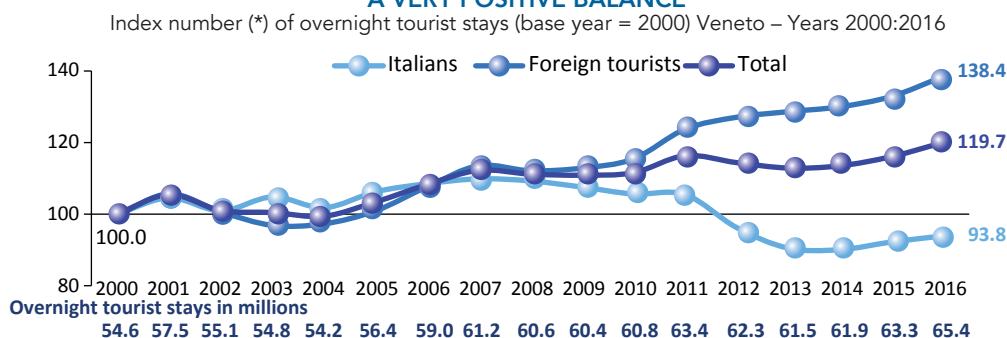
Among Italy's tourist regions, Veneto has now held the record both for the number of arrivals (15.2% of Italy) and in overnight stays (16.1%) for several years, as was confirmed again for 2015, the latest nationwide figures available.

TOURISM IN VENETO: 2016 BREAKS ALL PREVIOUS RECORDS

It should be noted that the survey, to which the analysis of this publication refers, only considers tourists that make at least one overnight stay, i.e. guests of Venetian tourist accommodation for reasons of leisure, business, medical, wellbeing, sports, religion, etc. All processing excludes daily tourism, which is an important consideration for our region's economy, with an estimated 13 million daytrips being made by Italians per year.

This first and concise analysis, resulting from the well-established collaboration between the Statistics Office and Tourism Management of the Veneto Region, is intended as a contribution to understanding the dynamics of the industry. Other insights on the topic are presented annually in the Veneto Region Statistical Report.

A VERY POSITIVE BALANCE



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

STRONG FOREIGN TOURIST INTEREST AND RETURN OF ITALIAN TOURISTS

Tourist movements according to origin and accommodation. Veneto - Year 2016

	Hotels		Non-hotel		Total accommodation	
	Arrivals	Overnight Stays	Arrivals	Overnight Stays	Arrivals	Overnight Stays
Italians	4,454,460	11,059,919	1,876,191	10,370,785	6,330,651	21,430,704
Foreign tourists	7,748,652	21,152,999	3,777,264	22,808,625	11,525,916	43,961,624
Total	12,203,112	32,212,918	5,653,455	33,179,410	17,856,567	65,392,328

Percentage variation 2016/2015

	Hotels		Non-hotel		Total accommodation	
	Arrivals	Overnight Stays	Arrivals	Overnight Stays	Arrivals	Overnight Stays
Italians	5.4	5.3	3.2	-1.6	4.7	1.8
Foreign tourists	0.5	3.4	7.8	4.9	2.8	4.1
Total	2.3	4.0	6.2	2.8	3.5	3.4

Source: Veneto Region Statistical Office processing of provisional ISTAT-Veneto Region data

The excellent results achieved by Veneto tourism in 2016 reflect the growing interest of Italian visitors as well as those from the foreign market. Lately, Italians are increasingly opting for national holiday destinations, particularly in Veneto, which are closer, safer and are of timeless appeal for those who appreciate art, breath-taking landscapes of mountains, lakes, lagoons, etc. The number of Italian tourists has increased, as compared to the previous year, by 4.7% for arrivals and by 1.8% for overnight stays. The number of foreign tourists increased by 2.8% in terms of arrivals and by 4.1% for overnight stays. International tourism, whose only stalled at the start of the global economic crisis, resuming tentatively from 2009, today shows increasing recognition from the most valued customers: Germans (+4.9% overnight stays), Austrians (+3.5%), Dutch (+6.2%), British (+ 11.3%), Swiss (+ 3.2%), French (+ 3.3%) , American (+ 0.2%), Danish (+ 11%). After a peak in 2015, which is most likely due to the Milan Expo effect, the number of Chinese tourists has returned to the 2014 figure (over 600,000 arrivals and 800,000 overnight stays). A comparison between the 2000 and 2016 rankings for foreign tourists' country of origin highlights some emerging markets: Romania, South Korea, Ireland, Russia and India. The growth in 2016 concerned both the hotel industry (+2.3% of arrivals and +4% of overnight stays) and the non-hotel sector (+6.2% and +2.8% respectively). Whereas, over the years, there is an evidently progressive and inexorable attraction exerted by the quality on offer thanks to the luxury tourist industry untouched by crisis, it must be noted that in 2016, tourist flows increased for all hotel categories. Excellent results were also achieved by outdoor accommodation facilities (+2.5% of overnight stays) and agritourism (+9.4%). A trend that is confirmed year after year is the progressive and continuous fall in stays at holiday resorts. The once long summer holidays have been replaced with one or more short holidays throughout the year, including in low season. This change in habits is more marked among Italian tourist who, since 2000 to today, have reduced their holidays at the seaside, lakes and spas by 2-3 nights, and have almost halved the number of nights spent in the mountains. The duration of foreign tourist holidays, however, appears more stable.

TREND

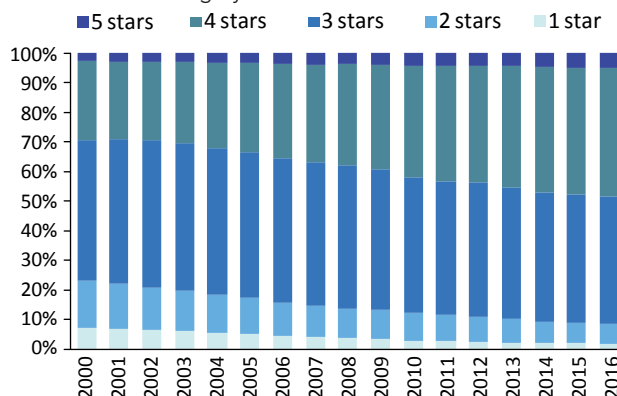
TOURIST COUNTRY OF ORIGIN

Ranking according to number of overnight stays. Veneto – Year 2016

	Overnight stays	% share of Veneto total	% var. 2016/15	% var. 2016/07
Italy	21.430.704	32.8	1.8	-14.5
Germany	15.292.756	23.4	4.9	30.0
Austria	3.651.501	5.6	3.5	11.8
Netherlands	2.634.347	4.0	6.2	10.3
UK	2.597.228	4.0	11.3	4.4
Switzerland-Lie.	1.867.362	2.9	3.2	41.5
France	1.867.342	2.9	3.3	2.3
USA	1.807.737	2.8	0.2	-3.4
Denmark	1.293.359	2.0	11.0	7.7
Poland	1.032.372	1.6	11.7	70.4
Czech Republic	933.374	1.4	-6.7	23.7
China	807.027	1.2	-22.5	148.8
Belgium	728.161	1.1	3.6	19.0
Spain	717.714	1.1	15.4	-28.1
Russia	684.053	1.0	-0.6	61.2
Hungary	578.998	0.9	2.8	-15.0
Ireland	421.636	0.6	16.6	16.2
Romania	419.904	0.6	10.9	14.4
Australia	410.732	0.6	-4.3	24.6
Israel	378.027	0.6	8.5	122.2
Sweden	348.318	0.5	9.1	6.7
South Korea	335.616	0.5	7.8	127.7
...				
Total	65.392.328	100.0	3.4	6.9

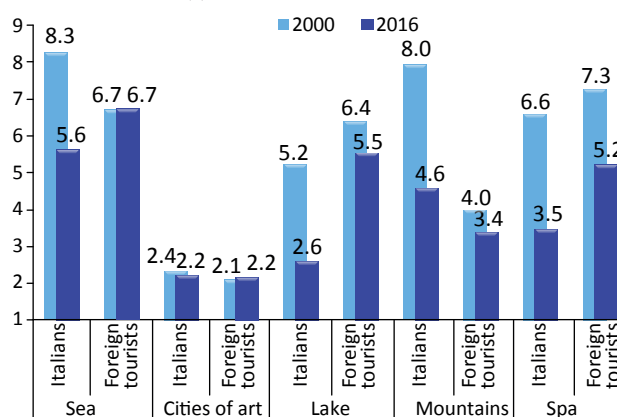
THE SEARCH FOR COMFORT

% share of overnight stays in hotels according to category. Veneto – Years 2000:2016



INCREASINGLY SHORT STAYS, ESPECIALLY FOR ITALIAN GUESTS

Average stay according to origin and tourist resort (*). Veneto – Years 2000 and 2016



(*) Average stay = overnight stays/ arrivals

Veneto is a region that has always been appreciated for its varied tourism and its characteristic culture of hospitality and it has always been able to cope with a constantly changing demand. As well as traditional tourism, Veneto is rich in nature and scenery, historic towns, walled cities and Venetian villas; but Veneto also offers the opportunity to practice sports such as golf, horse riding, bike trips, in addition to wellness facilities, motorbike tourism, conference tourism, religious holidays, fishing holidays, all enriched by the flavours of our local food and wine. In 2016, seaside resorts recorded substantially stable tourist flows, as compared to the previous year (-0.6% in overnight stays), with a weak early season due to adverse weather but compensated by the prolonged good weather that encouraged seaside trips and stays well into September. Beach resorts attracted fewer Italian tourists but an increasing number of tourists from beyond the Alps: Germans (+ 3.7%), who usually choose our beaches for long holidays (around 8 nights), and Austrians, who, once arrived at their destination, spend more than the average. In all other Veneto tourist districts, the number of tourists has grown at a fast pace: the interest shown by both national and international tourists exceeded the records already recorded in 2015. There was an all-time record for cities of art, whose tourist accommodation welcomed nearly 10 million guests for more than 20 million overnight stays. Among the culture enthusiasts, Italians take the lead, followed by Americans, who regained second position after yielding to the Chinese during the year of the Milan Expo. Lakeside holidays also broke records for arrivals and overnight stays, mainly thanks to a strong increase in numbers of traditionally loyal tourists, namely the Germans, Italians and Dutch. For spa breaks, the record number of arrivals of nearly 800,000 was not reflected in a record number of overnight stays, despite recorded increases (+ 4.4%). The same goes for mountain holidays, which for the first time exceeded one million arrivals. For both destinations, the sharp fall in the length of stay prevents them from reaching past figures: mountain holidays which lasted an average of 7.5 nights in 1997 now last 4.2 nights, and spas stays that lasted more than 7 nights in the 1990s now last just 4.




TOURISM OPTIONS

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DESTINATIONS AND PRINCIPLE MARKETS

The most important markets: arrivals, length of stay and daily spending in each district




Sea: arrivals -0.7%. overnight stays -0.6%

Origin	% var. arrivals 2016/15	Average stay (nights)	Daily spending per capita: average €64 (*)	
			Below average	Above average
 36.2% Italy	↓ -3.5%	5.6		✓
 24.1% Germany	↑ +3.7%	8.3	✓	
 12.2% Austria	↑ +1.8%	5.2		✓




Cities of art: arrivals +3.9%. overnight stays +6.1%

Origin	% var. arrivals 2016/15	Average stay (nights)	Daily spending per capita: average €113 (*)	
			Below average	Above average
 31.6% Italy	↑ +9.1%	2.2		✓
 8.0% U.S.A	↑ +1.0%	2.1		✓
 5.6% Germany	↑ +8.6%	2.5	✓	




Lake: arrivals +6.2%. overnight stays +7.2%

Origin	% var. arrivals 2016/15	Average stay (nights)	Daily spending per capita: average €74 (*)	
			Below average	Above average
 39.1% Germany	↑ +7.8%	5.3	✓	
 26.2% Italy	↑ +2.1%	2.6		✓
 6.6% Netherlands	↑ +10.4%	9.4	✓	

Mountains: arrivals +7.5%. overnight stays +2.7%

Origin	% var. arrivals 2016/15	Average stay (nights)	Daily spending per capita: average €106 (*)	
			Below average	Above average
 66.7% Italy	↑ +4.1%	4.6	✓	
 7.4% Germany	↑ +15.0%	2.8	✓	
 2.1% UK	↑ +18.5%	3.7		✓

Terme: arrivi +5.6%. presenze +4.4%

Origin	% var. arrivals 2016/15	Average stay (nights)	Daily spending per capita: average €121 (*)	
			Below average	Above average
 68.0% Italy	↑ +9.1%	3.5		✓
 8.6% Germany	↑ +2.9%	7.5	✓	
 5.7% Austria	↓ -0.6%	4.9		✓

(*) Includes the cost of accommodation, restaurants and bars, shopping, transport within the country visited and other services; in the case of foreign tourists the cost of the return trip is excluded

Source: Veneto Region Statistical Office processing of Banca d'Italia, Ciset and provisional ISTAT-Veneto Region data

Over the past six decades, tourism has recorded such high rates of growth that it has become one of the most important industries in the world. As the United Nations World Tourism Organisation (UNWTO) points out, over the years, more and more destinations and countries have opened their doors to tourism and invested in its development, making modern tourism a key factor of economic progress. In 2012, a record of over one billion international tourist arrivals were recorded globally, with estimates of 1,134,000 in 2014 and 1,186,000 in 2015. Europe remains the number one continent in the world for international arrivals (51.2% of the entire planet), relying mainly on three strengths: cultural heritage, variety of landscape and quality of

VENETO IN EUROPE

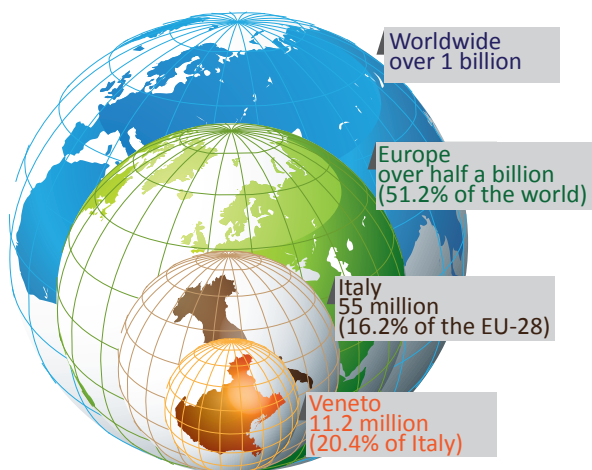
offer. Up until now, data has been sourced from UNWTO, the only organisation enabling a comparison of countries around the world according to international tourist arrivals.

In terms of Eurostat data, which includes domestic tourism, the fundamental role played by the most popular tourist destination countries emerges; Spain, France, Italy, Germany and the United Kingdom represent 70% of overnight stays made by tourists in the whole EU-28. There is marked rapid growth in tourist flows towards Spain, a destination that topped the European top 5 in 2015. Italy came third, behind another historic competitor, France.

Let us examine how our region fits into the European scene. It achieves its best rankings in terms of arrivals: in 2015, Veneto was in 4th place among European regions, after Île de France, Catalonia and Andalusia. Veneto even surpassed the French Provence-Alpes-Côte d'Azur region, thanks to a superior increase in number of arrivals (+ 6.1% for Veneto against + 3.4% for its competitor). However, taking a closer look at international arrivals, it can be seen that Veneto lost out on 3rd place to Croatia, with a difference of just 60,000 arrivals, making future comparisons an interesting prospect. If we compare European regions according to the number of overnight stays, Veneto falls to 6th place, preceded mainly by Spanish and Croatian seaside regions with longer average stays.

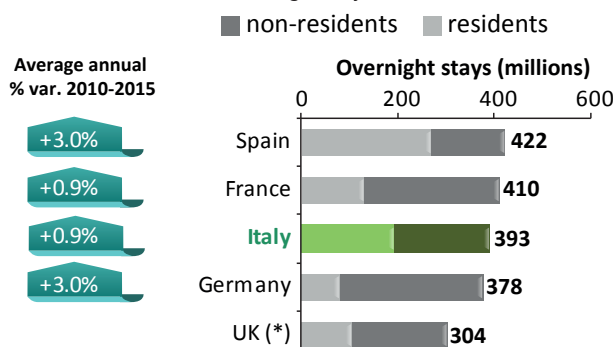
TOURISTS DISCOVERING THE WORLD

International arrivals. Year 2015



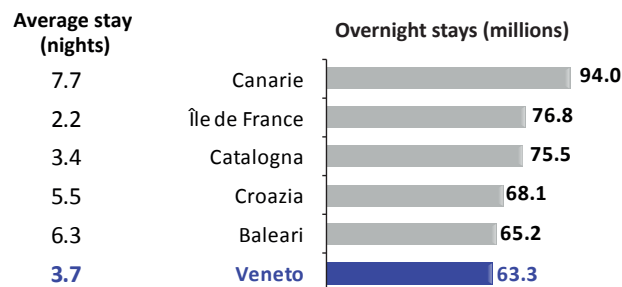
ITALY IS THE 3RD EUROPEAN NATION FOR TOURIST OVERNIGHT STAYS

Top 5 EU-28 nations according to number of national and international tourist overnight stays (in millions). Year 2015



VENETO IS THE 6TH EUROPEAN REGION FOR TOURIST OVERNIGHT STAYS

The top 6 European regions according to number of national and international tourist overnight stays. Year 2015



(*)For the UK, the most recent available data relates to 2012; a year, among other things, non-comparable to previous years due to a break in the time series

Source: Veneto Region Statistical Office processing of Eurostat, ISTAT-Veneto Region and UNWTO data

Veneto Region

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