



STATISTICHE

Figures and charts to understand Veneto

Flash

Slow tourism is a new way to spend your holidays: the tourist aims to recharge by aligning one's pace to that of natural time, to the natural environment, allowing themselves the luxury to "observe", "taste" and "take a break". Perhaps we all begin to get a bit tired of the daily grind, or perhaps we are rediscovering the simple but essential pleasure of experiencing holidays in terms of its slowness;

SLOW TOURISM: COMBINATION BETWEEN NATURE AND FOOD

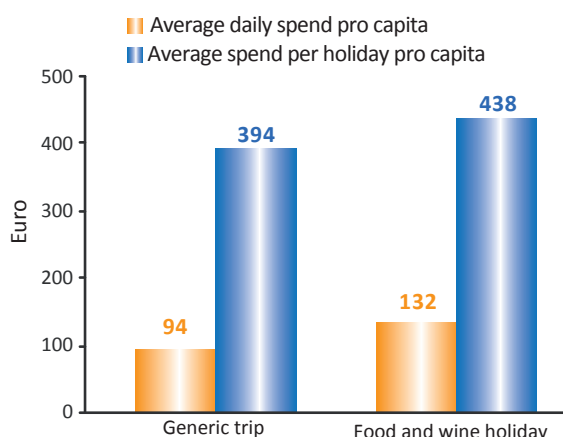
the fact is that slow tourism, in contact with nature and in all its forms, boasts a growing fortune, even in Veneto. The pleasure of tasting our culinary specialties accompanied perhaps by a tasting of renowned local wines, is a strong tourist attraction. Tasting delicacies of the Veneto on site therefore gives an incentive for the foreigners to purchase the same products, even after they have returned to their country of origin. The complex interconnected self-referential system composed by "tourism and export", if promoted well, can be a lever in order to return

to growth. The survey on international tourism by Banca d'Italia enables us to understand some features of food tourism and, in particular, with regards to foreign travellers staying overnight in accommodation facilities. Food and wine, which is everywhere and represents a key strength in terms of what our area can offer, becomes the main or secondary reason for a trip to Veneto for about 20-30 foreign travellers per 1,000. These are mostly travellers that combine the pleasure of food with the idea of visiting a city of art (more than 80% of cases) with the average daily spend of € 132, reserving about a quarter of the budget for restaurants. Those that choose a food and wine holiday remain in Veneto for an average of 3 nights and once they have reached their destination, they are likely to visit different places. This type of trip seems to be the opportunity to get people together: in fact, the percentage of people choosing a food and wine holiday in solitude is low, only 11.4% compared to 21.3% of generic travelling by foreigners in Veneto. The pyramid chart below helps to understand the dynamics of gender and per age groups of foreign tourists choosing food and wine holidays, compared to foreigners generally. One may notice that in this case, the involvement of the two genders is similar, and tourists are generally much younger¹. With regards to the organisation of the holiday, one notes that one third of foreigners choosing food and wine holidays opted for an organised trip or a tour package, compared to about a quarter on a generic trip; which in 38% of cases, are also "new" clients. The use of traditional structures is more widespread, with more than 80% choosing to stay in a hotel, compared with 69% as generic tourists. The quality of the offer and a positive response to expectations are crucial factors in order to retain tourists: the opinions expressed are very high and the most popular factors include the art that is on offer, the environment, safety, the cuisine, all with scores between 8 and 9; with the judgment on prices lagging behind (6.5).

¹ For example, in the case of a generic trip to Veneto, young people from 25 to 34 years represent 8.6%, whilst those choosing a food and wine holiday go up to 13.4%.

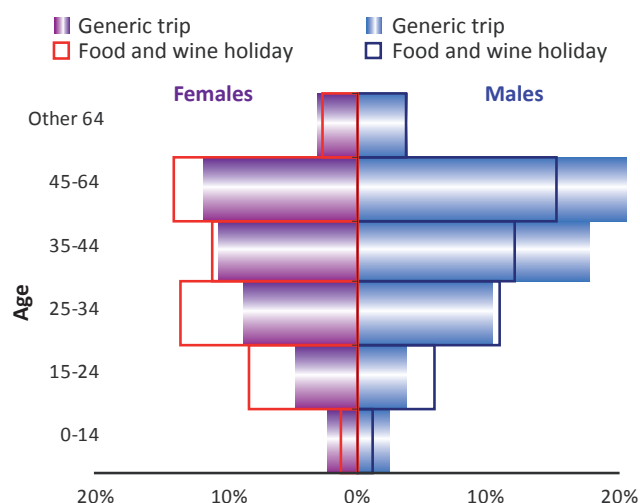
THE FOOD AND WINE TOURIST SPENDS MORE

The average spend of foreign travellers in Veneto – Period 2007-2014



YOUNGEST CLIENTS

Percentage distribution of foreign travellers per gender and age. Veneto – Period 2007-2014



Source: Veneto Region processing – Regional Statistics System Section on Banca d'Italia data

AVAILABLE HERE:

- Economic scenario: trend indicators – October 2015
- Foreign trade data 2015 (provisional 2nd quarter)
- Tourism in 2014

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

WEB

Flash

The close link between tourism and foreign trade is well known by all. Privileged and particularly stimulated promoters of products made in Italy, will be the people who were able to enjoy our food and wine on site and making purchases that, once at home, will testify the quality and originality of our productions.

The union between tourism and exports serves to encourage an even more economically profitable market: the exports of the agri-food sector of Veneto in 2014 alone was worth a total of 5.3 billion Euros¹ and proved an increase of 2.8% over the previous year despite the crisis period. It is therefore interesting to compare the countries of origin of foreign tourists with the Veneto's agri-food export markets. The graph on the bottom left-hand shows nations in grey that occupy the same position in the ranking based on the number of tourists and the value of agri-food exports in Euros. The first positions of each ranking look very similar, with Germany standing in first position it is distinctly

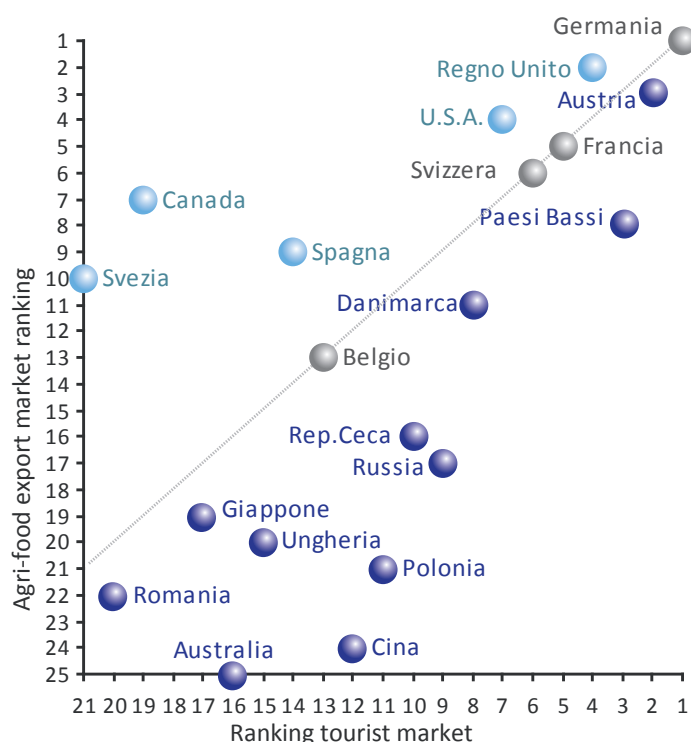
detached from other nations: in 2014, 34.6% of foreign tourists in Veneto were Germans, and 21.6% of Veneto's food exports had Germany as their destination. The nations that occupy a higher place in the export ranking in the chart take a light blue colour, such as Sweden which is just 21st among the tourist countries, but it is 10th for agri-food exports thanks to an average annual growth of 13.8% in the period 2007-2014.

Conversely, states which are the most relevant in the tourism sector are in dark blue. China highlights itself amongst these, which for the number of overnight stays, it is in 12th place, while ranking in 24th place in agri-food exports. But it seems to be only a matter of time, given the high rate of growth of exports of the sector to China, which marked the record of the +34.8% annual average, and confirmation of the trend in rapid growth in the last year as well (+ 9.4%). The Russian market, for which until 2013, very fast rates could be observed, summarised in a +15.7% annual average² of tourists and 11.6% of agri-food exports in 2014 has showed signs of an abrupt change, both in tourism (-3.7%) and in the exports of the sector (-19.1%). Among the major markets, Spain is the only case to record a loss on both fronts.

Japan, which does not appear among the top positions either for tourism or for export, is of considerable interest for future developments when considering the level of expenditure incurred: the €180-€190 spent on average per day, once they arrive at their holiday destination, make the Japanese the most desired clients, not just for accommodation facilities, mostly hotels and very often high class (70.8% of admissions are 4-5 star), but also for merchants, given that these tourists allocate almost a third of their budget to souvenirs, clothing, etc. ¹ This figure includes the export of agricultural products, forestry, fishing and food and drinks products, among which wine production is important.

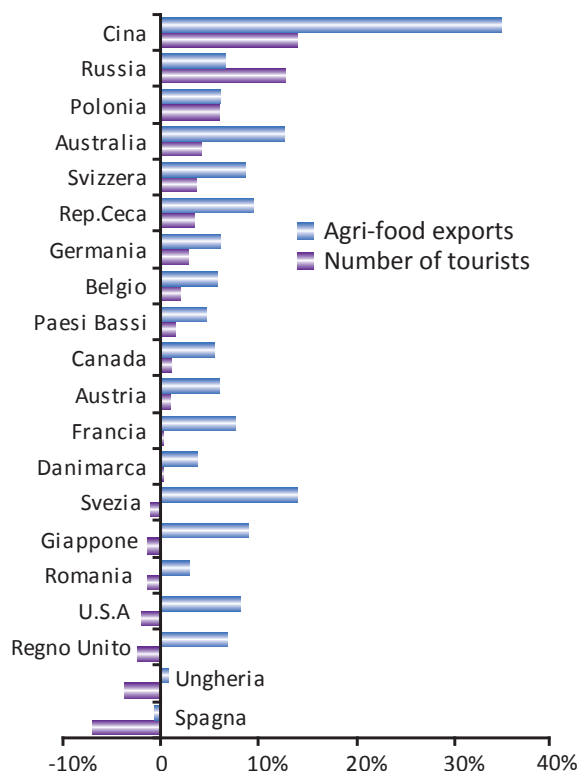
MARKETS THAT ARE MORE RELEVANT FOR AGRI-FOOD AND TOURISM EXPORTS COINCIDE

Foreign markets per position in the ranking of tourist numbers and of agri-food exports. Veneto -Year 2014



CONCORDANT AND DISCORDANT TRENDS

Average annual rate of change in the main foreign markets. Veneto - Period 2007-2014



The pleasure of being surrounded by nature can be precisely the main incentive of the holiday, with the intention of playing sports, travelling by bicycle, on horseback or simply walking tours that allow you to slowly and completely savour the environment and precious landscapes. Thanks to the Survey on international tourism of Banca d'Italia, we can outline a foreign tourist profile who chooses Veneto for this type of stay. Foreigners who choose sport holidays are predominantly male (about 64%) and, with respect

FOREIGNERS AMONG NATURE AND SPORT

to what usually happens in Veneto, traveling more often in company (87%), and therefore sharing the costs (29% vs. 18%).

Green holidays, however, see a similar participation between the two genders and involve a population of a higher average age (49 years old compared to general holiday-makers at 42 years old); also showing an even more marked tendency to travel in company (90% versus 79% of the generic trip).

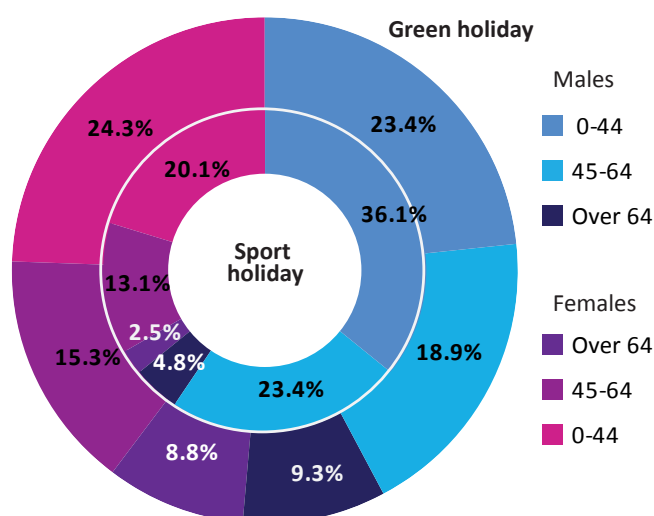
The organisation of the trip is also different: in the case of the sports holidays, only 14% use travel packages, compared with 24% of the generic holidays and 27% of the green holidays.

The holiday lasts 4 nights on average, but those who choose the green or sporting holiday spend more than the generic tourist on average per day tourist (approximately € 115 compared to € 94).

Those who are attracted by nature appreciate the aspects of the stay even more. For the sportsman, the score awarded to landscape reaches higher than 9. It is slightly stricter on cities and works of art, which are still awarded high scores, while not being the main focus of the trip. Unlike the generic traveller, those who choose a sports holiday are particularly fond of the destination visited, so come back repeatedly: one third of foreign visitors had already been here more than ten times. But in the case of the green holiday, there is a discrete renewal of clients.

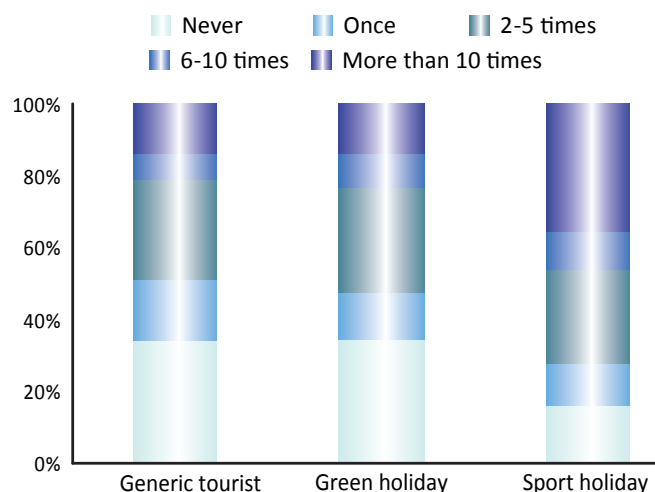
GREEN HOLIDAYS FOR ALL AGES

Percentage distribution of foreign travellers on a green or sport holiday per gender and age. Veneto – Period 2007 – 2014



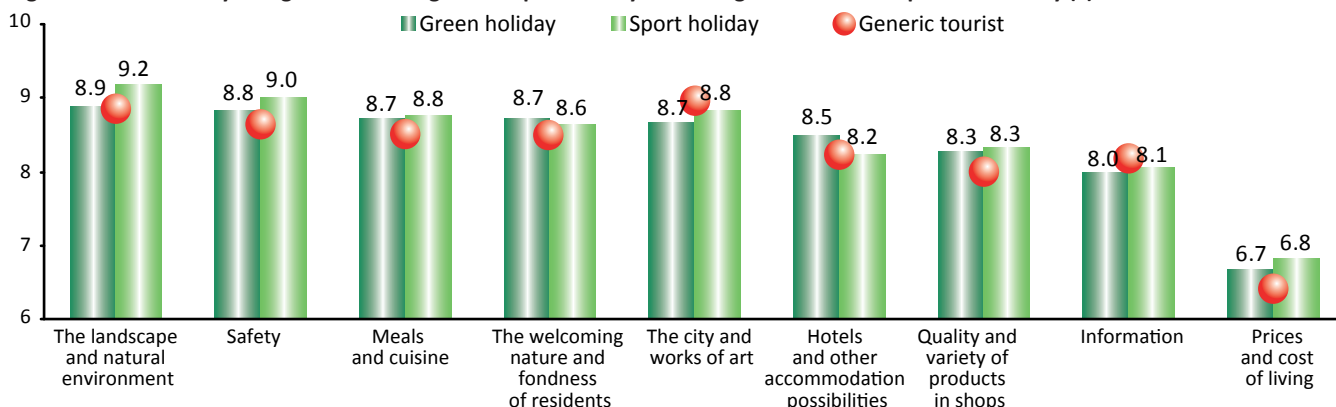
THOSE THAT CHOOSE A SPORT HOLIDAY WILL BE GLAD TO REPEAT THE EXPERIENCE

Percentage of foreigners on holiday per number of previous visits. Veneto – Period 2007 – 2014



SATISFACTION IS HIGHER

Average scores awarded by foreign travellers to green or sport holidays according to the various aspects of the stay (*). Veneto – Period 2007-2014



(*)Score awarded with a minimum of 1 (very bad) and a maximum of 10 (excellent)

Source: Veneto Region processing – Regional Statistics System Section on Banca d'Italia data

Veneto boasts five Regional Parks, with the addition of the Dolomiti Bellunesi National Park. The nature offers visitors great emotions through a myriad of green paths, to discover on foot, horseback, or by boat. In these protected areas there are winding routes, which are rewarding cycling crossings in fascinating environments and characterised by biodiversity-rich habitats. All in the name of slow tourism, and much desired by the visitors, whilst at the same time a source of economic development for entire communities far from the most celebrated destinations. The Euganean Hills welcome almost half of the tourists who stay overnight

NATURAL PARKS

directly towards the Natural Parks of Veneto. The natural beauty is enhanced by a rich historical and artistic heritage, represented by villages, fortresses and castles and places of prayer as hermitages and convents. If your aim is relaxation, the Park offers the area of Terme Euganee spa, renowned throughout Europe for the uniqueness of its muds and treatments, and three greens for golf enthusiasts. The second most popular park is the River Sile, which is dotted with the beautiful villas built by the Venetian nobles between the 15th and 18th centuries. Based

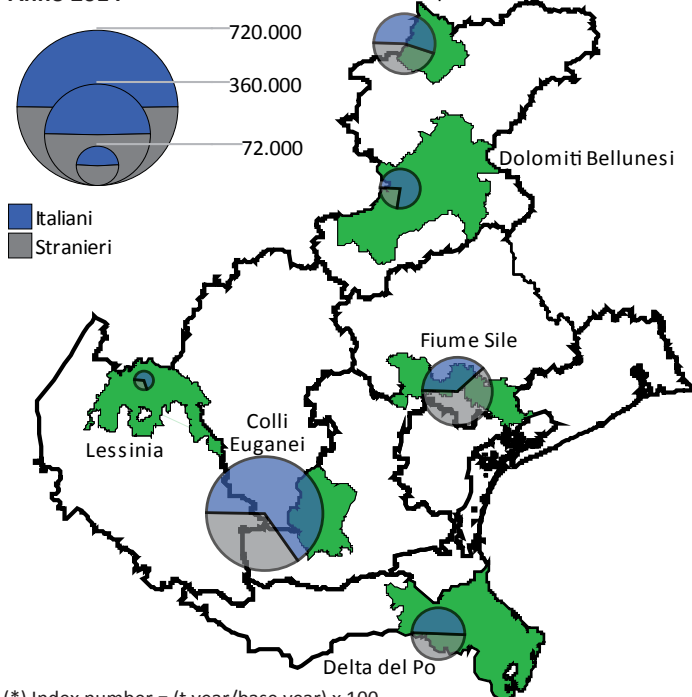
on the number of guests at accommodation facilities, the Dolomiti d'Ampezzo Park ranks in third place, a pristine space made of towering peaks and spectacular spires included in the UNESCO World Heritage List. Another area with natural treasures of immeasurable value is the Dolomiti Bellunesi National Park, not to mention the Lessinia Park, featuring karst phenomena that are unique to Europe. One of the most striking natural oases of Italy is the Po Delta, where the river forms a fan-shaped delta before emptying into the Adriatic.

The tourist attraction exerted by the Natural Parks is evident over throughout years of strong growth, leading to host over a million and a half tourists in 2014. Instead the length of stay drops, which is on average 4 nights, remaining higher than the generic trip to Veneto (3.8). Guests of the accommodation facilities in these areas are mostly Italian (58.3% compared to 34.8% of the tourists visiting our region). Exceptions are the Sile River Park, where 61% of guests are foreigners, and the Po Delta, where the number of Italians and foreigners are equal. In all parks the number of foreign tourists grows, but also the interest of Italians is increasing, except on the mountainside. As usually happens in Veneto, even in destinations located in Natural Parks, most tourists use the hotel facilities (77.2% of arrivals), with the exception of Lessinia (38.8%) and the Po Delta (22%), where clients seem to prefer alternative solutions such as villas, camping sites, holiday homes and private rentals.

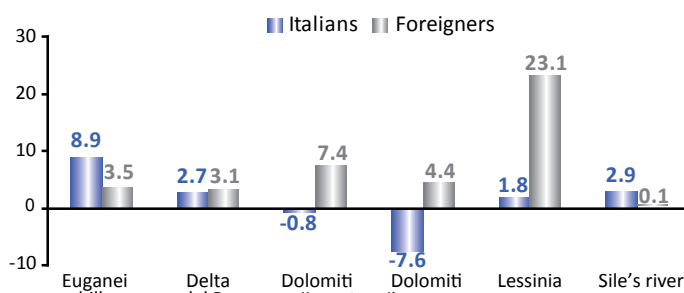
IN THE ACCOMMODATION FACILITIES OF THE NATURAL PARKS... TOURISTS ARE MOSTLY ITALIAN

Arrivals in accommodation facilities of the natural parks per provenance. Veneto

Anno 2014

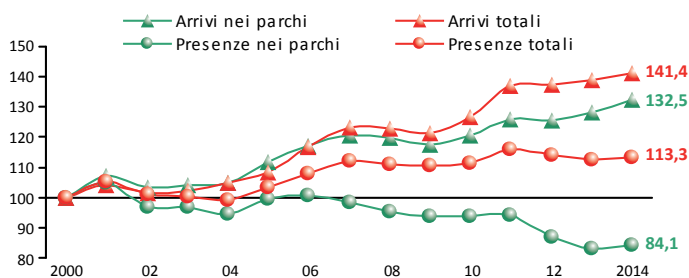


% Variation 2014/13



A GROWING INTEREST

Index number (*) of tourist travels (base year = 2000). Veneto



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

Source: Veneto Region processing – Regional Statistics System Section on Istat data – Veneto Region



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