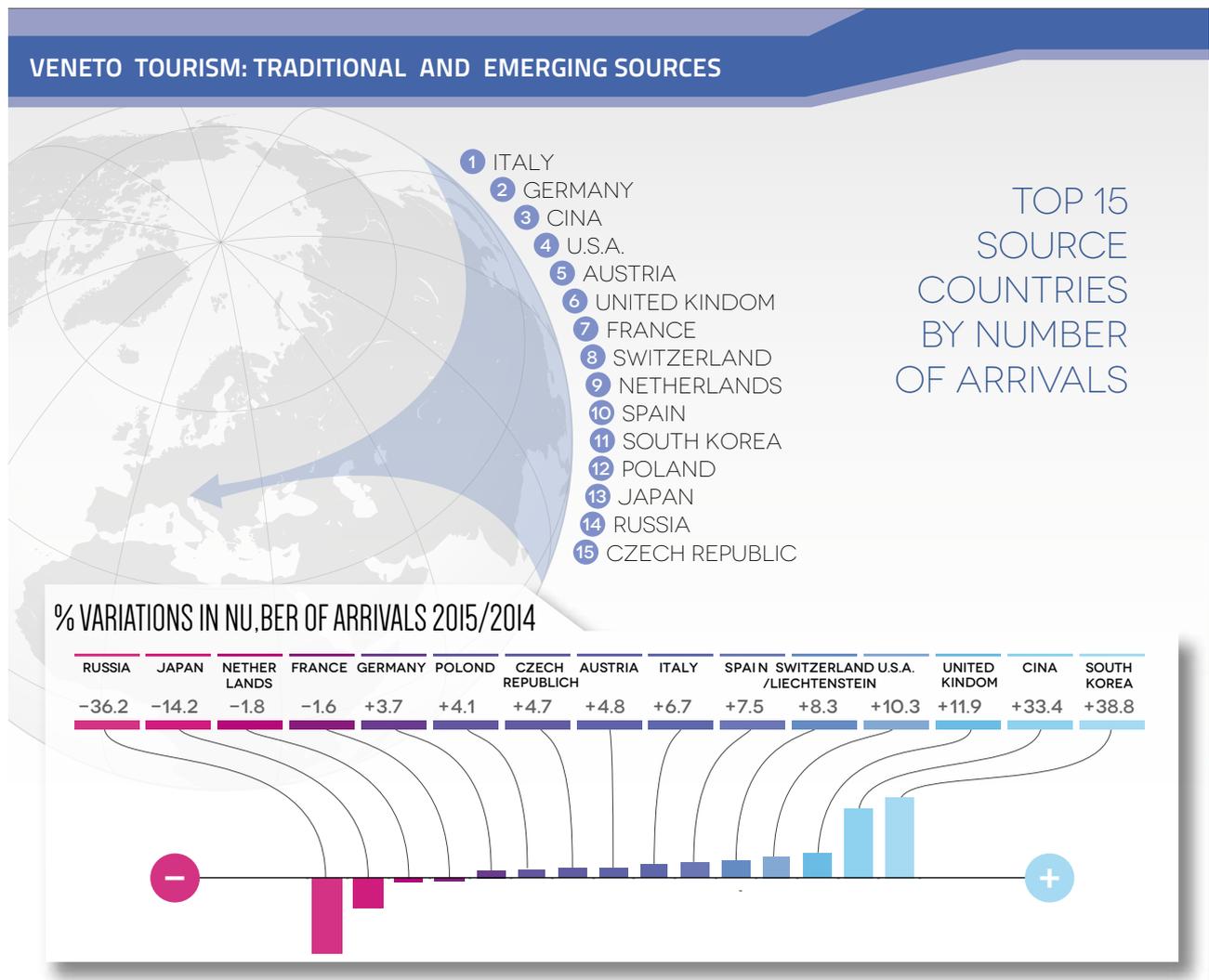


Cap.8 – Travel: from the web connection to the research of emotions in the real world

The creation and the management of a brand, even in the tourism sector, are becoming crucial. For accommodation establishments, a well laid out website represents not only a strength, but a necessary requirement for being present in the market and attracting a variety of possible clients from every corner of the world.

But an establishment which, once identified its own originality in the creation of a mix of emotions, is able to communicate it to the market in the most suitable way, will have even much more success, putting itself on the branding map. Making clear the mix of material and immaterial elements that everyone can offer represents a very good investment for the future. The strength for attracting clients isn't just the simple geographical position, but knowing how to direct the compass of the navigator towards the emotions that one wants to try.

Interesting results can be obtained from the usual statistics on tourist destinations – mountains, sea, lakes, cities of art, thermal baths – and from the analysis of data concerning the individuals that in these places have spent their holidays, in particular, focusing the attention on the votes expressed at the end of the experience.



of whom are next in line to achieve over 10,000 followers. In terms of interactions, which correspond to 'like and reply' on Instagram, Visit Tuscany recorded 106,300, followed by Visit Veneto (50,600) and Marche Tourism (30,000).

8.1 Veneto: one of the most dreamt about tourist destinations in the world

Our region's tourist offer is characterized by an incomparable variety, favoured by the natural conformation of the territory, that is enhanced by the entrepreneurial abilities of tourist operators, con-

stantly aiming to

renovate it, in order to best respond to the needs of the clients.

The very good results obtained by Veneto tourism in 2015 reflected again a growing interest on the part of Italians (+6.7% arrivals and +2.4% of presences) and a growing foreign flow, compared to the previous year, of 5.8% in terms of arrivals and 2.2% in terms of presences. International tourism, whose growth slowed down at the beginning of the global economic crisis and then timidly increased again already in 2009, now gets a larger consensus of the most faithful clients: Germans (+2% of presences), Austrians (+1.3%), English (+10.6%), Swiss (+7.2%)

Tab. 8.1.1 - Ranking of the presences by country of origin of the tourists. Veneto – Year 2015 Presence (milions)

	Presence (milions)	% share of Veneto total	% variation 2015/14	% variation 2015/07
Italia	21.0	33.3	2.4	-16.0
Germania	14.6	23.0	2.0	24.0
Austria	3.5	5.6	1.3	8.1
Paesi Bassi	2.5	3.9	-5.9	3.9
Regno Unito	2.3	3.7	10.6	-6.2
Svizzera-Liecht.	1.8	2.9	7.2	37.1
Francia	1.8	2.9	-2.5	-1.0
U.s.a.	1.8	2.9	11.7	-3.6
Danimarca	1.2	1.8	-4.4	-3.0
Cina	1.0	1.6	28.8	221.0
Repubblica Ceca	1.0	1.6	4.1	32.6
Polonia	0.9	1.5	2.2	52.5
Belgio	0.7	1.1	0.3	14.9
Russia	0.7	1.1	-29.9	62.1
Spagna	0.6	1.0	3.4	-37.7
Ungheria	0.6	0.9	7.1	-17.3
Australia	0.4	0.7	-1.5	30.2
Brasile	0.4	0.6	0.2	83.3
Romania	0.4	0.6	14.1	3.2
...				
Total	63.3	100.0	2.3	3.4

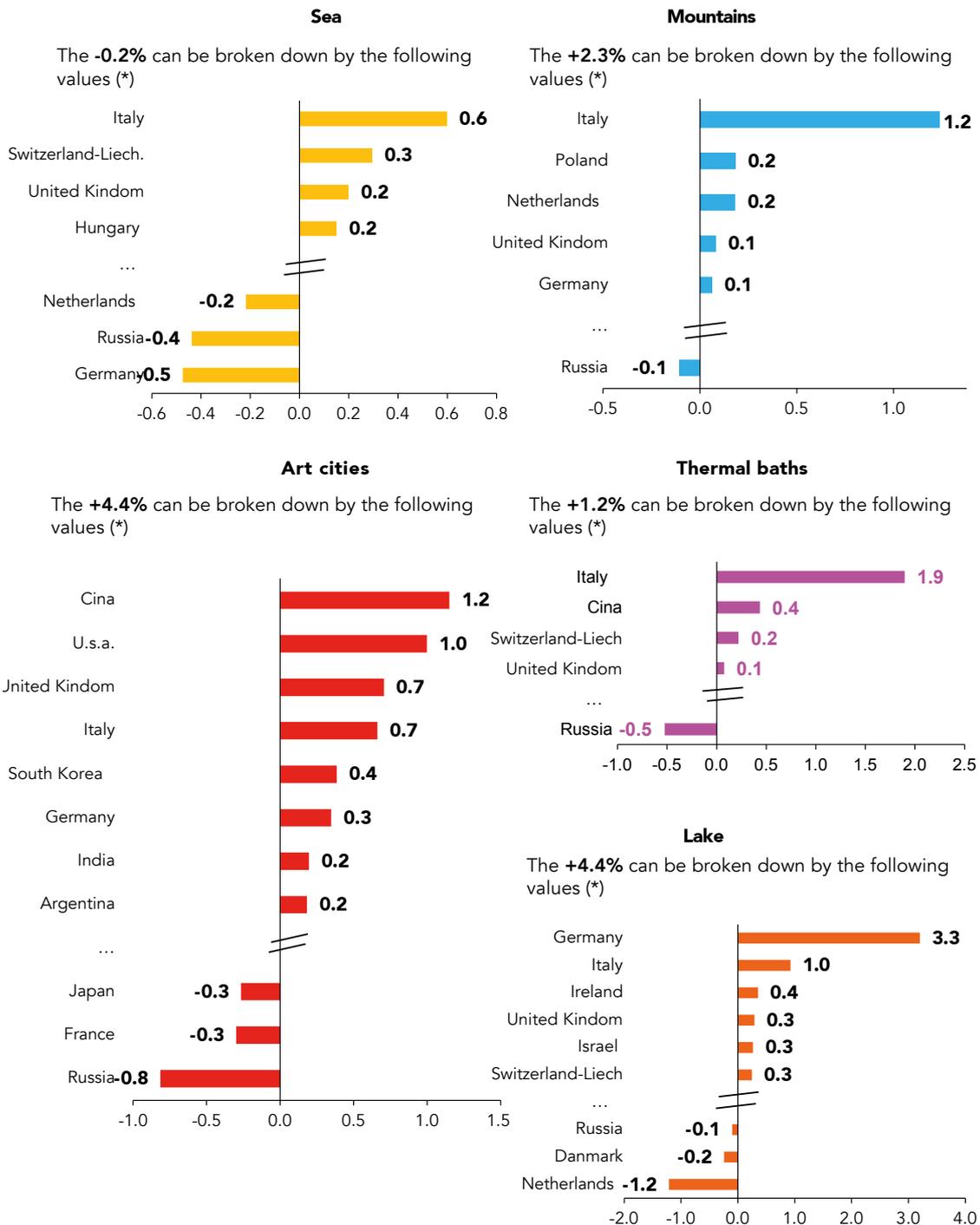
Source: Veneto Region Processing - Regional Statistics System on Istat data - Veneto region

TRAVEL: FROM THE WEB CONNECTION TO THE RESEARCH OF EMOTIONS IN THE REAL WORLD

and Americans (+11.7%). China continues the climb (+28.8%), arriving this year in 9th place for foreign states by number of presences and second in terms of arrivals. In the last ranking it came just after Germany in second place, gaining 5 places from 2011 to now, beating Austria, America, France, UK, and the Netherlands. In 2015, 830,000 Chinese visited

Veneto: in 2007-2015 there was an overall growth equal to 269%, compared to an annual average growth of about 18%. The nights spent add up to one million, with a growth of 221% in 2007-2015 and an average annual increase of 16%. 94% of the Chinese who arrived in Veneto had an art city as a destination, whilst the establishments most used

Fig. 8.1.1 - The most important countries of origin for each tourist district. Contribution to the growth of the presences compared to the previous year. Veneto – Year 2015



(*) Contribution to growth = (variation in presences 2015/14 from the country of origin) x (% share of presences 2014 from the country of origin)

Source: Veneto Region Processing - Regional Statistics System on Istat data – Veneto region

are hotels (95%). The average daily spend is one of the highest, estimated around 140 euro per head². Another important market rich in opportunities is the Russian one: they seem to appreciate above all the art cities, where 65% of Russians arriving in Veneto are direct to and they prefer hotels (77%). The collapse of the oil price, the strong depreciation of the rouble, the growth of inflation and western sanctions have seriously affected the Russian economy over the course of the last year, condemning it into stagnation. The repercussion in the tourism sector was a -3.7% of presences in 2014 followed by -29.9 % in 2015, after years when the annual average rate was +16%. The reduction of Russian tourists affected each tourist sector, as is evident in the graphics which follow, that identify for each type of destination the markets that most contributed – in a positive or a negative sense – to the presence growth in 2015. The lost revenue linked to the Russian market is even more important for the tourist industry in an extended sense if we consider that their average daily spend is one of the highest whatever the motivation for travelling is.

Even though the contribution from the Russian market appears to be negative overall, the contribution of the Italians is positive everywhere and is a decisive result for the seaside resorts, as well as for the good year for the thermal and mountain sectors. The English also contributed to the growth of each tourist sector, meanwhile the Germans bought a positive contribution on lake, art cities and mountain getaways, but a negative one for sea and thermal baths.

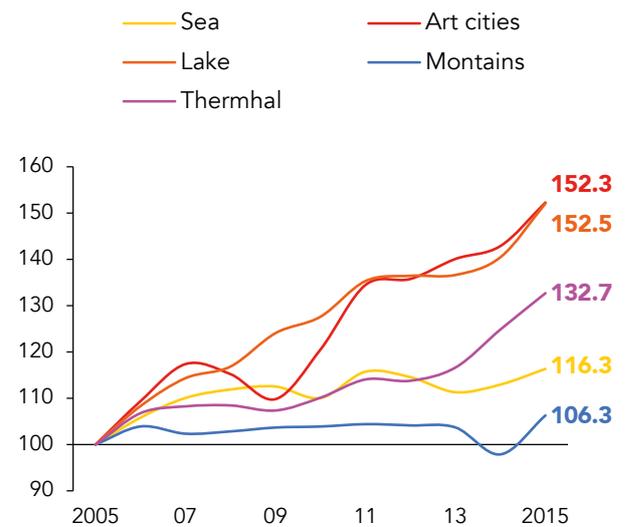
Destinations

In 2015, the number of tourists grew with a consistent rhythm in all tourist Veneto sectors, and this is evident referring whether to the national or international flow. Thanks to these increases each sector topped its own historical record. Local seaside resorts reached around 4 million arrivals (+3%), thanks to a growing foreign clients accounting for 0.3%, but also a strong increase in domestic tourism (+7.8%). It was a record for the lake destinations too, thanks to a +8.5% increase of arrivals reaching almost 2 million and a half. The same can be said

² This includes the costs of the stay, restaurants and bar, purchases, transport in the visited country and other services, excluding the cost of the outbound and inbound flight. In this chapter, although not specified, we are considering spending data and the average votes of foreigners staying in accommodation establishments.

also for the mountain (+8.6% and almost 1 million tourists), thermal (+6.3% and 731,000 arrivals) and art cities that recorded a +6.6% increase. Thanks to 570,000 arrivals more than the previous year, in 2015, the cities hosted over 9 million tourists.

Fig. 8.1.2 – Index number (*) of tourist arrivals by district (base year = 2005). Veneto – Years 2005:2015



(*) Index number = (arrivals per year / arrivals on the base year) x 100

Source: Veneto Region Processing - Regional Statistics System on Istat data - Veneto region

All of these records are not always true also for the number of overnight stays.

Art cities and the localities of Lake Garda recorded results never obtained before in terms of presences (19.7 million for the former and 11.7 million for the latter). Whereas, in the other cases, the strong decline in the length of the stay prevents them obtaining the results of the past: mountain holidays that in 1997 lasted on average 7.5 nights, now last 4.4

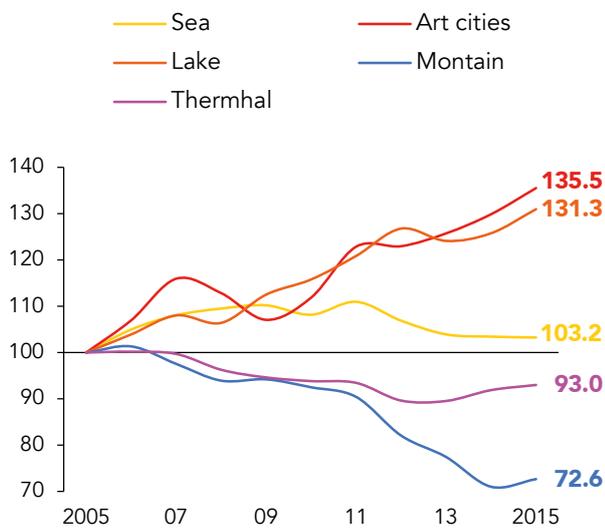
In art cities China was the leader among foreign visitors

nights, stays at the thermal baths were 6.8 nights on average in 2001 and now are only 4.1. The record for the number

of presences in seaside resorts dates back to 2011. There was a particular interest shown in our art cities: for years, they have been strong attractions, welcoming more than half of the tourists that arrived in Veneto (53.2%), which totalled 31.1% of the regional presences. The number of arrivals and presences over the years is always rising, apart from

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Fig. 8.1.3 – Index number (*) of the tourist presences by district (base year = 2005). Veneto – Years 2005:2015



(*) Index number = (presences per year / presences on the base year) x 100
 Source: Veneto Region Processing - Regional Statistics System on Istat data – Veneto Region

light fluctuations recorded after the fall of the twin towers and the beginning of the global economic crisis.

Art cities getaways are characterised by the length of the stay, which is much shorter than for other types of destinations: the average number of nights spent is 2.1. In this sector, not only has the 'Italian' component diminished less than in the rest of Veneto, but in recent years it stabilised and in 2014 it gave a first sign of recovery, resulting in 4.9% growth of arrivals and 2.1% of presences in 2015. Art cities are however appreciated by a mainly international client base (almost 70% of arrivals and presences) that guarantee a growing demand also for the future. If, until 2014 foreign tourists were above all Americans, since 2015 the Chinese have taken top foreign market spot, exceeding 780,000 arrivals. Only considering the overnight stays, USA gain top spot again in the ranking, followed by historical European markets such as France and Germany. Another market which was raised up in the last few years, but which had a serious setback, is Russia: in 2013, it achieved 7th place in the ranking in terms of number of arrivals, but due to recent events, in 2015 it fell to 14th place.

Tab. 8.1.2 - Tourist arrivals and presences by provinces/metropolitan cities. Veneto – Year 2015

Absolute values in millions						
	Total		Italians		Foreigners	
	Arrivals	Presences	Arrivals	Presences	Arrivals	Presences
Belluno	0.9	3.9	0.6	2.8	0.3	1.0
Padova	1.7	5.1	0.9	2.7	0.8	2.3
Rovigo	0.3	1.5	0.2	0.7	0.1	0.8
Treviso	0.9	1.7	0.4	0.8	0.5	0.9
Venezia	8.7	34.2	2.1	9.4	6.5	24.8
Verona	4.2	15.2	1.5	3.4	2.7	11.7
Vicenza	0.7	1.8	0.4	1.1	0.3	0.7
Total	17.3	63.3	6.0	21.0	11.2	42.2
Percentage variations 2015/14						
	Total		Italians		Foreigners	
	Arrivals	Presences	Arrivals	Presences	Arrivals	Presences
Belluno	9.6	4.0	9.8	3.7	9.3	5.0
Padova	8.8	5.6	6.6	5.7	11.5	5.6
Rovigo	5.9	0.6	7.0	2.4	4.6	-1.0
Treviso	7.2	3.9	3.9	0.6	10.1	7.0
Venezia	4.0	0.4	4.9	0.1	3.7	0.5
Verona	8.8	5.0	9.0	6.7	8.7	4.5
Vicenza	5.7	2.8	6.5	-0.6	4.3	8.5
Total	6.1	2.3	6.7	2.4	5.8	2.2

Elaborazioni: Regione Veneto - Sezione Sistema Statistico Regionale su dati Istat - Regione Veneto

There were very positive results also on a provincial level: in 2015, all of the provinces had an increase both of arrivals and presences. Interest in our destinations grew quickly and everywhere, be it from Italians or foreigners.

Accommodation establishments

Over the years it is clear the process of restoration of the establishments, all aiming to offer a service of ever-increasing quality and competitiveness to the clients.

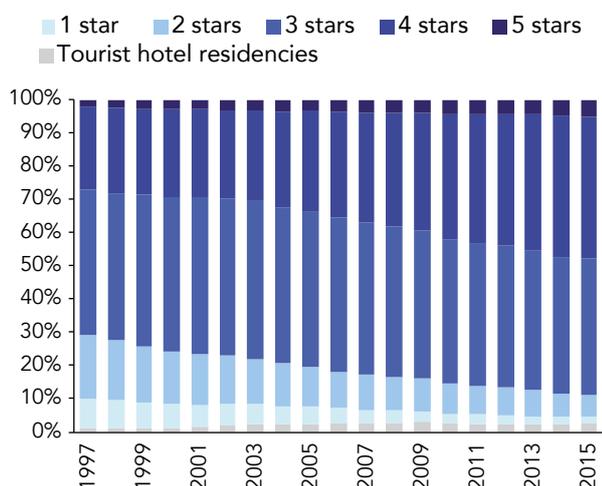
Hotels: awareness of quality increases over time

In almost 20 years of our statistics on tourism, whe

re there was an overall increase recorded for the hotel sector of 6 million presences, it seems evident the progressive and overwhelming attractiveness coming from the medium-high categories and vice versa the reduction of the space left by the market for the low categories.

Also in 2015, hotels recorded encouraging results for the higher categories of accommodation thanks to a luxury tourism which doesn't suffer any crisis (+15.6% of presences for 5 stars and +4.1% for 4 stars), and a loss for 1 or 2 star hotels (-0.5%). Among the guest accommodations there was a 6.7% growth for farm tourism, a 10.3% growth for B&B's and a stabilization of +1.6% for outdoor lodgings.

Fig.8.1.4 – Percentage distribution of presences in hotels by number of stars. Veneto – Years 1997:2015



Source: Veneto Region Processing - Regional Statistics System on Istat data - Veneto Region

Foreigners judging their experience as unforgettable

The choice of the place where people spend their holiday is ruled by emotions, already experienced in the past, or expected, searched for, desired. All tourism is a way to relive previous experiences or to have new ones. Feelings moving people are naturally personal, and not always clear, even for the same traveller.

Normally, the tourism statistics do analysis on the destinations – mountains, sea, lake, art cities, thermal baths – aggregated places with an offer which is somehow similar. Much more complex or even unexplored categories that could combine individuals, not the places, are not analysed.

Let's try, then, to go beyond and guess what foreigners that after having visited Veneto, demonstrated to be completely satisfied with the experience made, have in common. They will certainly be more encouraged to repeat the trip, but not only this: once they have returned home, they will be our

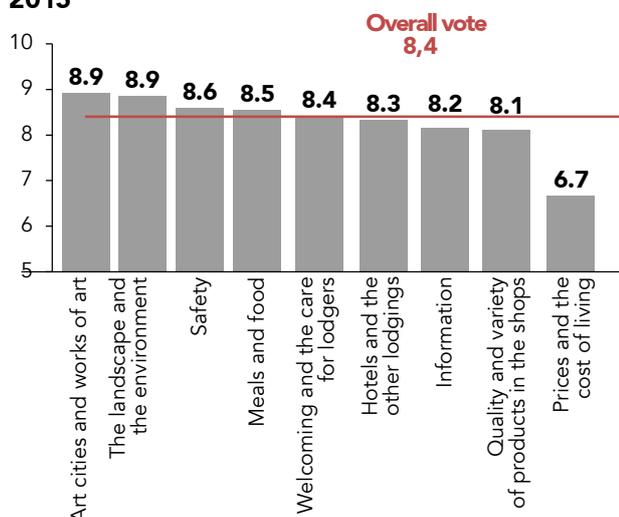
Tab, 8,1,3 - Arrivals and presences by type of accommodation, Veneto – Year 2015

Type of establishment	Arrivals		Presences	
	2015	% variation 2015/14	2015	% variation 2015/14
1-2 stars	911,134	-0,9	2,696,586	-0,5
3 stars and tourist hotel residencies	4,690,990	4,9	13,444,002	3,2
4 stars	5,742,440	7,4	13,208,594	4,1
5 stars	589,520	14,4	1,620,195	15,6
Farm stays	254,224	10,3	786,384	6,7
Camping and village holidays	2,540,724	5,4	17,695,466	1,8
B&B	299,590	18,8	688,960	10,3
Other stays	2,228,270	5,3	13,116,960	-1,4
Total	17,256,892	6,1	63,257,147	2,3

Elaborazioni: Regione Veneto - Sezione Sistema Statistico Regionale su dati Istat - Regione Veneto

best promoters without knowing it. The survey of the Bank of Italy on international tourism can help us. It includes interviews with foreign travellers arrived in Italy, whether for holiday, work, or other personal reasons. At the end of their travel, among other things, they are asked to rate their overall trip between 1 and 10, but also to vote on different aspects of their experience. The judgements which Veneto received were generally very high and among the most appreciated aspects there have been for years: the art offer, the environment, the safety, the food, whilst, at the tail end of the ranking came the prices. The judgements on the prices are not only the lowest, but they also split travellers the most. First of all it is interesting to evaluate if some aspects affected the overall vote more than others: it could be the praise in the comments of friends/acquaintances/parents, with an undeniable chain effect on the opinions of those who remained at home making up the potential client base.

Fig. 8.1.5 – Average votes of foreign tourists on the aspects of their holiday (*). Veneto – Year 2015



(*Provisional data. Votes are expressed from a minimum of one (the worst) to a maximum of 10 (the best)
Source: Veneto Region Processing - Regional Statistics System on Bank of Italy data.

The following analysis uses the individual data taken from overnight foreign³ guests in Veneto (in accommodation establishments but also at friends or parents' home) made available from the cityed

³ Foreigners who voted on all of the above categories.

source across the vast survey span of 2007-2014. Generally, a high overall rating corresponds to high ratings for all of the aspects of a holiday. Therefore, when the experience was good, the satisfaction shown in the overall vote well represented the traveller's opinion on art, landscape, safety, meals, welcoming, lodging, information received and shop products⁴.

At this point, we are going to leave behind the specific votes and concentrate on the judgement expressed on the travel as a whole. What were the main influences not only on the positive, but also the very good opinions? We would like to know which factors make for the best holiday experience. Among the most influential elements on the success of a visit, and which can be deduced from the information taken from the survey, there are characteristics of the interviewees, from their gender to their age, but also travelling with other people, the involvement of children, the budget available, having opted for an organized holiday or a holiday package. We ask us if and which of these elements explain the very good opinion on travelling. Since we expect different results for every reason of travel, and it is exactly this difference which interests us, we build different models of analysis⁵.

Travelling together is more exciting

Differently to what we would expect, the economic factor wasn't always decisive for the satisfaction with the

travel. It was so for those who spent a holiday in an art city which includes lots of additional costs in order to quench the cultural thirst. Costs are above the average also for wine and food holidays, as well as sporting, green, cruise and cultural events

⁴ All those who expressed a very high overall rate had average votes for per each specific aspect between 8 and 10 (98.3%).

⁵ An analysis of logistical regression was carried out for every reason of travel. The aim of this analysis was to discover the probability of success (Y, in our case, indicates a rating of between 9 and 10) based on a group of explanatory variables (Xi indicate the gender and the age of the interviewee, whether they have travelled with other people, or with children no older than 14, their average spend for that specific holiday type, whether it is a self-organised holiday or a holiday package). The relationship between each variable X and the variable Y is evaluated simultaneously taking into account the effects of all other independent variables within the model.

holidays. In all other types of holidays, the incurred cost came in second place, and other aspects, such as sharing the experience with good company, are decisive for the full satisfaction with the experience. The gender of the interviewee was never a determining factor. Therefore, males were no more likely than females to give a very good vote.

Mountain holidays were very rewarding for those who went there with company, or chose 'all inclusive' travels. These are organized holidays or holiday packages which include two or more services among transport, overnight stays, meals, or other services. This last format brought about positive results in terms of satisfaction also for lake holidays, and non-holiday travels, but for religious reasons, for healing, for shopping and for honeymoons.

The Capital of the European Winemaking Culture in 2016

Prosecco, white wine distinguishable by the finesse and freshness of its smells, conquered consumers from every corner of the world. Its production has old origins⁶ and boomed in the second half of the 800's on the Treviso hills. Nowadays, Prosecco is produced exclusively in controlled designation of origin zones (DOC) comprising five Veneto provinces (Treviso, Vicenza, Padua and Belluno) and four in Friuli Venezia Giulia. The designation as DOC Prosecco and DOGC⁷ Conegliano Valdobbiadene

⁶ Prosecco was first cited in a written document dating back to 1754.

⁷ Denominazione di Origine Controllata e Garantita (controlled and quality-guaranteed designation of origin)

and Colli Ascolani, for the related historic zones, assured the EU and international protection of this high-quality wine, the symbol of Made in Italy. The Valdobbiadene and Conegliano hill areas, with their hamlets, abbeys and castles that rise up out of the middle of an over the centuries almost completely man-made mosaic modifying the morphology of the landscape through a 'heroic' transformation from brambles into productive vineyards, have been designated as a UNESCO World Heritage Site.

Furthermore, the Conegliano Valdobbiadene Prosecco Superiore DOCG area was designed⁸ as the Capital of European Winemaking 2016, thanks to a project which "was best representing the continuation of an event which wants to be at the heart of Europe and the world by promoting culture, identity, landscapes and wineries". The whole year has seen a rich programme of events that have lived up the 15 territorial municipalities, distributed across the hill areas at the foot of the Treviso Prealps⁹. The idea is to start a journey to show the Italian wine cities, and increase the capacities of wine and food tourism.

Some production figures: in 2014 about 80 million bottles of Conegliano Valdobbiadene DOCG were produced, twice as much as 10 years before (+9.3% growth compared to last year); it didn't grow just in

⁸ The announcement was given by Recevin, the EU network of 1,000 Cities of Wine, which joined together at the headquarters of the EU Parliament in Brussels.

⁹ Conegliano, San Vendemiano, Colle Umberto, Vittorio Veneto, Tarzo, Cison di Valmarino, Follina, Miane, Valdobbiadene, Vidor, Farra di Soligo, Pieve di Soligo, San Pietro di Feletto, Refrontolo, Susegana.

Tab. 8.1.4 - Accomodation offer. Conegliano Valdobbiadene area, province of Treviso, Veneto - Year 2014

	Total accommodation establishments	Hotels		Farms			
		n.	% of high category (*)	Accommodation establishments	%	Places to stay (*)	%
Conegliano Valdobbiadene area	306	37	24.3	60	6.5	3,355	8.0
Treviso Province	1,166	165	30.3	170	18.4	11,897	28.2
Veneto region	52,766	3,055	18.6	923	100.0	42,128	100.0

(*) 4 or 5 stars out of the total accommodation offer

(**) Places to stay in farms authorised for restaurant service, not necessarily for accommodation (accommodation establishments)

Source: Veneto Region Processing - Regional Statistics System on Istat data - Veneto region

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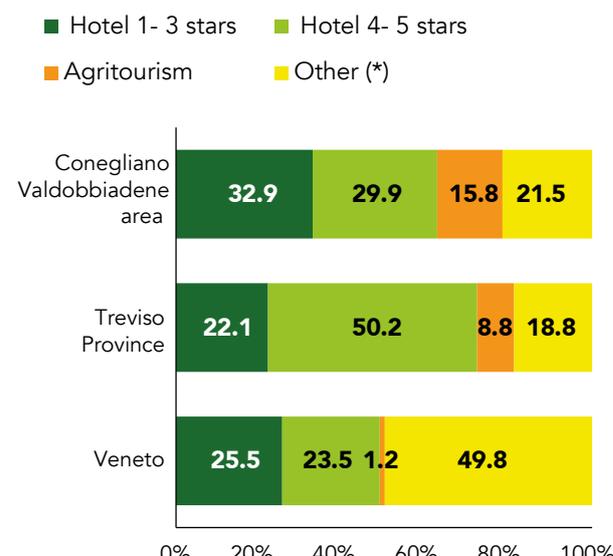
terms of volume but also in terms of quality recognition (+11.5%); the interest in it is increasing both in the national and international markets.

However, how is the accommodation system in the area and how is the tourist demand characterized? The hospitality is of very high quality: a quarter of the lodgings in the Conegliano Valdobbiadene area are 4 or 5 star hotels, a higher percentage than the regional average and lower than the offer of the Marca characterised by even higher standards. In the area under exam farms are becoming more relevant, both in terms of supply and demand. As well as being in contact with nature, and a long way from the chaos of large urban centres, farms lure their guests with unique offers that reflect the territory, history and traditions; in farms aside from staying overnight in a very welcoming environment, you can taste typical products which reflect the local food and wine traditions. Overall farm offer in Veneto comprises 1,459 businesses offering, with various combinations, lodging, restaurant service, tasting. In terms of restaurant service and tasting, it was the province of Treviso which accounted for the highest number of farm activities which totalled up to around 11,900 places of stay. Out of these, over 3,000 were offered in the Conegliano Valdobbiadene area. In terms of accommodation, 60 farms in this area showed a strong attractiveness, adding up to 15.8% of the annual tourism presences, as opposed to 1.2%, the regional average.

In 2015, the accommodation establishments of the 15 municipalities in the Conegliano Valdobbiadene region hosted almost 130,000 tourists, an outright record, who generally only stayed on a short-term basis (2.1 nights on average). The growth in presences slowed down in conjunction with the start of

the global economic crisis and now boasts 272,000 annual overnight stays.

Fig. 8.1.6 – Percentage distribution of tourist presences by type of accommodation establishment. Conegliano Valdobbiadene area, province of Treviso, Year 2015



(*) Campings, guesthouse, hostels, holiday homes, mountain huts, B&Bs.

Source: Veneto Region Processing - Regional Statistics System on Istat data - Veneto region

The flow of tourists into the Prosecco area seems fairly well distributed throughout the year, similarly to what happens in the Marca territory. You can note, however, an increased flow in the season much waited for by good wine lovers: when Prosecco spring begins – 3 months in which the Treviso hil-

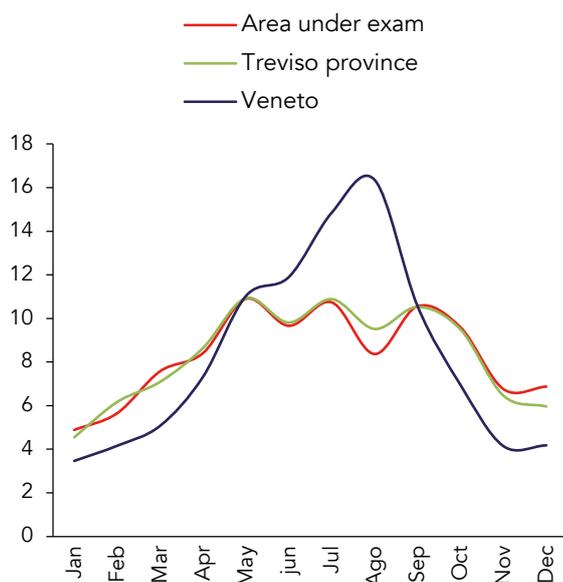
Tab. 8.1.5 - Arrivals and tourist presences. Conegliano Valdobbiadene. Treviso province. Veneto – Year 2015

	Arrivals			Arrivals			Average stay (nights)
	n.	% foreigners	% variation 2015/14	n.	% share	% variation 2015/14	
Conegliano Valdobbiadene	129.340	42.0	7.5	272.152	0.4	3.2	2.1
Treviso province	865.364	54.8	7.2	1.701.976	2.7	3.9	2.0
Veneto region	17.256.892	65.0	6.1	63.257.147	100.0	2.3	3.7

Source: Veneto Region Processing - Regional Statistics System on Istat data - Veneto Region

Is host 17 wine shows traditionally known as Mostre ... del Vino – with a following peak in May with “Open wineries” thanks to which it is possible to discover the secrets of wine making, up to autumn in conjunction with “Welcome wine harvest”, during which wine lovers are involved in the harvest and the first phases in the grape process.

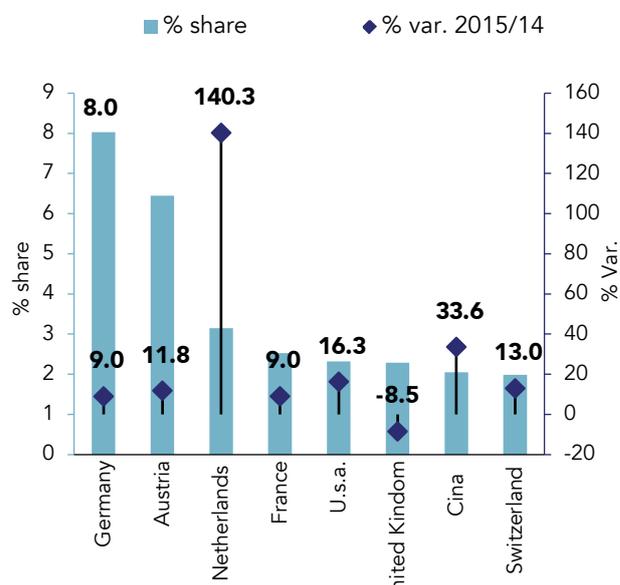
Fig. 8.1.7 – Percentage distribution of tourist arrivals per month. Conegliano Valdobbiadene and Veneto areas. Year 2015



Source: Veneto Region Processing - Regional Statistics System on Istat data - Veneto riRegion

If most of tourists visiting Veneto are foreign (65% of arrivals), in the Treviso province there is a substantial parity between foreigners and Italians, whilst the hosts of the accommodation establishments in the Conegliano Valdobbiadene area are mainly Italians (58%). It can be observed an analogy with the exports of DOCG sparkling wine, since 56.5% of the bottles are destined for the national market. Foreign countries where the most bottles of DOCG sparkling wine are distributed to, are, in order of importance, Germany (over 7 million in 2014), Switzerland (6.5), the UK (5.4) and the USA (2.6). Germany is also first in the ranking in terms of where foreign tourists come from, but in this case it is followed by Austria, the Netherlands and France, then come USA, UK, China and Switzerland. In the last year we have noted in particular, a strongly growing attractiveness for the Chinese and the Dutch.

Fig. 8.1.8 – Foreign tourist presences by country of origin. Conegliano-Valdobbiadene area. % share of the 2015 total and % variations 2015/14



Source: Veneto Region Processing - Regional Statistics System on Istat data - Veneto Region

8.2 Veneto travellers

Holidays represent not only a moment for relax and amusement necessary to find the own dimension away from the day-to-day tasks, but also a chance to experience new emotions, new cultures, different worlds to what one is used to, and thanks to a trace only indicated in the posts and which has to be filled in with content, an occasion to meet new people and to strengthen ties.

Italians that arrive in Veneto are mainly head straight to our cities of art (45.7%), whilst the local seaside towns have the highest total in terms of overnight stays (39.4%). What are the destinations of choice for residents of Veneto? In the most recent years the number of people who spent a holiday abroad or in Italy for 4 nights or more has gone down¹⁰: for Veneto people this decline between 2007 and 2013 was 7%, whereas it was 9% for Italy generally.

The Veneto situation is very similar to that of the other Northern regions, with about 52 travellers per 100 residents. For the remaining 48% of Veneto people, the reasons for not going on a trip of four or more days are numerous: primarily, for economical

¹⁰ Information taken from the Istat survey “Aspetti della vita quotidiana”

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reasons, secondly, family reasons, then in this order: lack of routine, work or study reasons, health issues, age issues, or because they already live in a holiday destination.

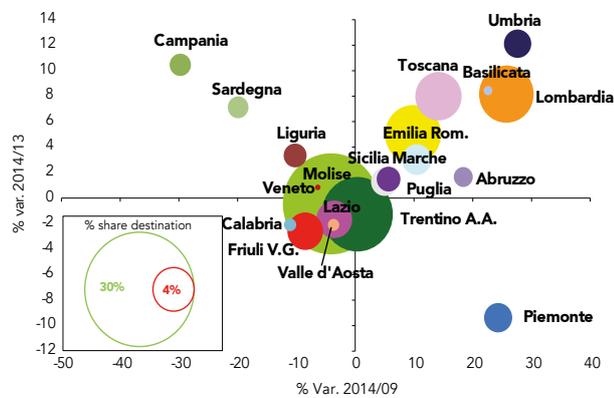
Veneto people prefer trips in Italy

The most favoured destination for Veneto people is Italy, which is the destination for some 80% of travels, and the most favoured destinations on a national scale are our region's holiday resorts which in 2014 accounted for 30% of arrivals. The second destination for Veneto people was Trentino Alto Adige (16.3%). Veneto people seem to be interested in much visited regions, such as Lombardy (+8.2% in comparison to the previous year, and +25.7% compared to the previous 5 year period), Tuscany (+8% and +14.2% respectively), Emilia-Romagna (+5% and +9.8%), but among the most looked-after destinations there is Umbria (+12.1% and +27.6%), whilst Campania and Sardinia are only recently starting to recover the losses of Veneto tourists recorded in the previous years.

Considering also the relevance of the phenomenon, it is also interesting to observe the movements of the residents on the territory.

Veneto people chose their region generally to spend a seaside holiday, the destination of choice for 46.3% of travellers. The second most favoured destination for a stay in paid-for accommodations is represented by art cities, which in 2011, even though only by little, overtook the mountains, resulting in a total of 22.8% of Veneto people in 2015. In order to appreciate the atmosphere and the unique summer and winter opportunities offered by the Dolomites, many Veneto people go on day-trips or use another house, or they are guests at their parents or friends' homes, phenomena which aren't completely quantifiable, but which are without doubt of considerable importance for the Veneto mountains. Over the years, thermal holidays have also seen an increase in interest from local people, given that between 2007 and 2015 the number of Veneto clients has almost doubled. In 2015, all Veneto mountain resorts recorded an increase of Veneto tourists.

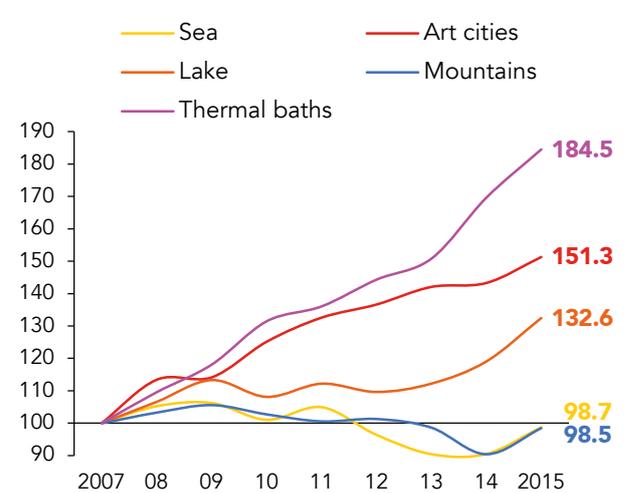
Fig. 8.2.1 – Italian regions visited by Veneto people. % 2014 share (bubble dimension), % variations of arrivals in 2014/09 and 2014/13



Source: Veneto Region Processing - Regional Statistics System on Istat data

The most recent available information for our region indicates that in 2015 Veneto tourists that stayed in Veneto exceeded 1.6 million, resulting in a strong growth compared to 2014 (+8.4% arrivals and +1.7% presences). The local market is of fundamental importance for Veneto tourism, since it represents 9.3% of arrivals and 12.2% of presences, percentages which are lower only compared to that of the Germans (14.4% and 23% respectively). Con-

Fig. 8.2.2 – Index number (*) of Veneto tourists by destination (base year = 2007). Veneto- Years 2007:2015



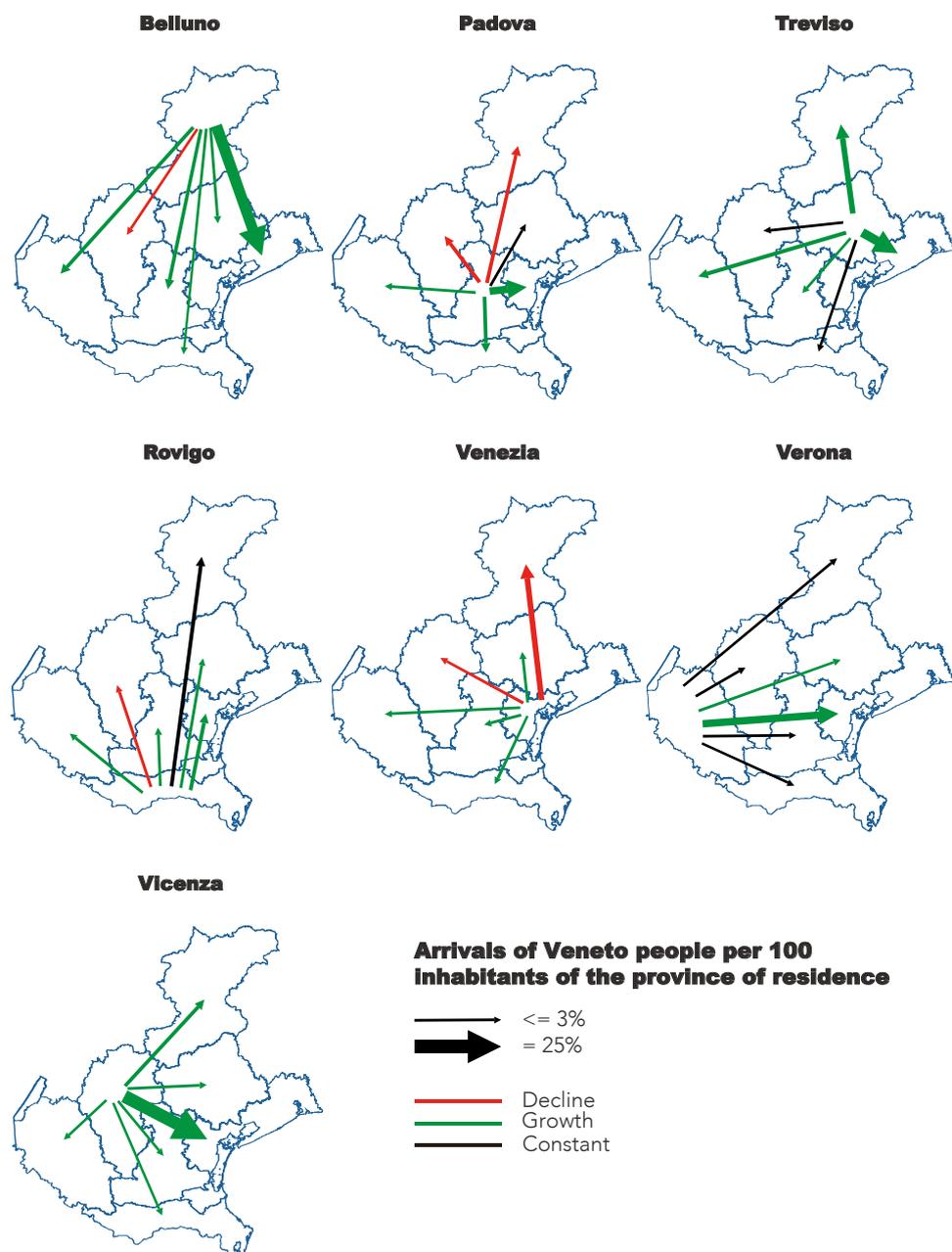
(*) Index = (annual arrivals/arrivals on the base year) x 100
Source: Veneto Region Processing - Regional Statistics System on Istat data - Veneto Region

This reduced stay at the holiday's destinations, which can also be noted for Veneto people in Veneto, highlights the general tendency to substitute long holiday periods with short trips which are repeated.

ted during the year and/or with weekends out of the city. The constant and considerable increase of arrivals (+38.3% in 2000) was accompanied by a gradual reduction in the stay at the holiday destinations, which almost resulted in a halving from 2000 to now (from 8.5 nights on average to 4.8). Only in 19% of cases, the stay was within the own province of residence: holidays in the province, as to be expected, are less widespread (from a minimum of 2 people from Treviso per 100 residents to a maximum of 14 Venetians per 100). The largest

share of travels concerns stays in provinces different to that of residence (81% of cases). The desire to know the other provinces within their own region is shared by all Veneto peoples and in 2015 there was a minimum of 17 people from Rovigo per 100 residents to a maximum of 35 people from Verona per 100. The exploration of their own region, especially enriched by the local specialty culinary, is a growing phenomenon, especially in the most recent period as is shown in the following graphic with the prevalence of green arrows.

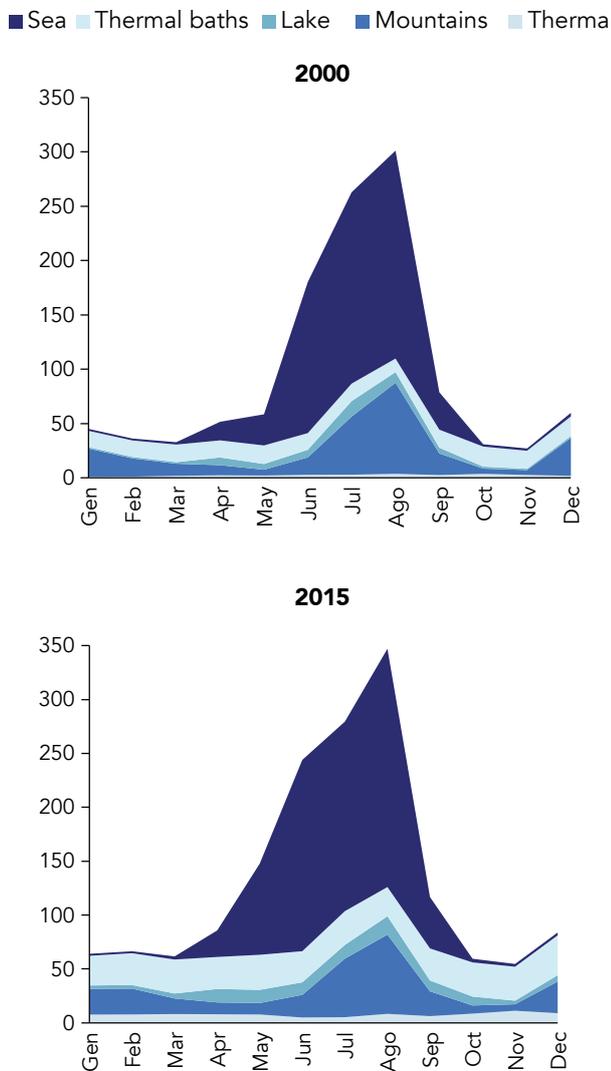
Fig. 8.2.3 - Veneto people who spend their holiday in other Veneto provinces by destination, per 100 inhabitants of the province of residence – Year 2015 and 2015/13 variation



Source : Veneto Region Processing - Regional Statistics System on Istat data – Veneto Region

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Fig. 8.2.4 - the Venetian Tourists arrivals by month, and the District (thousands). Veneto - Years 2000 and 2015

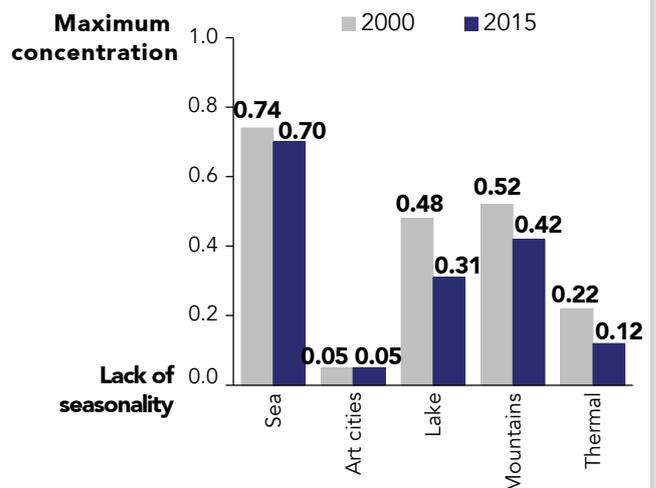


Source: Processing by Veneto Region - Regional Section Statistical System on Istat data - Veneto Region

Another noticeable trend in the most recent years concerns the choice of the period within which to take the holiday: obviously, high season always receives the widest consensus, but the option of travelling at other times of the year is becoming ever more appealing to tourists, in particular Veneto people. A seasonality whose boundaries are becoming less marked, points the finger towards saving money, which one needs to do more of in a period of economic crisis. In this regard, in order to compare the actual situation with that of

2000, the ratio of concentration of tourist arrivals throughout the months of the year was calculated (R). This indicates the distance of the distribution of monthly arrivals from the perfect equal distribution and takes values from 0, the minimum value which indicates lack of seasonality (no concentration of arrivals) to a maximum value of 1, the extreme peak is all visitors were to arrive in the same month (maximum grouping). The flow of Veneto tourists who spend their holiday within their own region is characterized by a strong seasonality, especially for the level of interest shown in the local seaside and mountains, but over 15 years there is an overall, albeit shallow growth. This is due to a lengthening of the sea season and to more equally distributed flows over the course of the year in the mountains, lakes and thermal baths.

Fig. 8.2.5 - Ratio of concentration R of Veneto tourist arrivals by destination (*). Veneto - Years 2000 and 2015



(*) $R = \text{absolute average difference} / (2 \times \text{arithmetic average})$
 Source: Veneto Region Processing - Regional Statistics System on Istat data - Veneto Region

A measure of the inclination of Veneto tourists to travel abroad can be deduced from the Bank of Italy's survey on international tourism. There are some 2.4 million Veneto travellers who, in 2015, spent at least one night in accommodation establishments outside of the national borders. These same people can make various travels also for different reasons (holidays, work, health, etc.). If we transfer this estimate to the residential population, the Veneto people are more inclined to travel abroad compared to

Italians: 49.4 out of 100 inhabitants, as opposed to the national figure of 36.3.

Beyond the national borders Veneto people spend, on average, around €736 per traveller, compared to the average €774 for Italians¹¹.

This lower spending is partly attributable to the length of the trips, which are 8.1 nights on average in the case of Veneto people, and 9.7 for Italians. The average daily spend of Veneto people abroad is €91, and over recent years this has stayed fairly constant. It seems that the most recent international events didn't prevent Veneto people to travel abroad: in 2015, a slightly rise was recorded in the number of travellers (0.7%) and a more steep increase in terms of nights spent (12.1%), which came from increases in the hotel sector (+6.8%), which was the most used, but also from a much more wide reaching use of holiday homes, which thanks to a 15.5% rise in the last year, accounted for 26.8% of Veneto overnight stays abroad.



¹¹ These figures relating to spending include food, overnight stay, purchases, services used and exclude only the round travel cost.

