



Year 10 - February 2010



TOURISM IN VENETO CHALLENGES THE CRISIS

Year 2009

Last year, despite the difficult economic situation and its international complications, Veneto reacted by relying on the great potential of its resources in tourism, as well as on its flexible system and its ability to promote new quality projects and initiatives. Thanks to well-structured, synergetic promotion, the region stepped forward and with one voice spoke for tourism, culture, wine and cuisine, identity and natural beauty.

In 2009 the flow of tourists who chose Veneto appears to have been similar to that of the previous year, although it declined slightly. The number of arrivals declined by 1.3%, which corresponds to a decrease of about 185,000, while the nights spent in the region remained close to 60 million, a considerable number (-0.3%). The increase in the flow of tourists, which has risen significantly since 2005, stalled in 2008, but the decline was smaller than that recorded by the rest of Italy and by Veneto's European competitors, such as Spain and France, which experienced significant declines.

Thanks to the millions of tourists who choose Veneto as their holiday destination, it has been the leading tourist region in Italy

for a number of years now. This trend continued in 2007, the last year for which national data is available, as Veneto accounted for 14.7% of arrivals and 16.3% of nights spent in the entire country. This survey, however, takes into account only tourists who stay for at least one night, that is visitors who stayed in Veneto for tourism, business, health, religion, etc.. These figures therefore do not take into account same-day visitors drawn by important events and exhibitions. Although they cannot be quantified, they are a significant phenomenon for the region's economy. One example is the circa 80,000 spectators drawn by the "Veneto: Spettacoli di Mistero" festival in November.

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

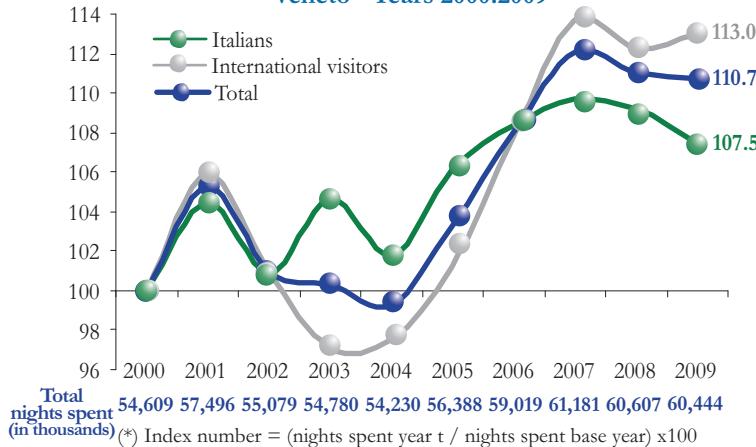
Tourist flows in Veneto by origin and accommodation – Year 2009

	Hotel		Non-hotel		Total	
	Arrivals	Nights spent	Arrivals	Nights spent	Arrivals	Nights spent
Italians	3,833,742	11,109,102	1,729,964	13,431,093	5,563,706	24,540,195
International visitors	5,642,396	16,639,373	2,739,070	19,264,706	8,381,466	35,904,079
Total	9,476,138	27,748,475	4,469,034	32,695,799	13,945,172	60,444,274

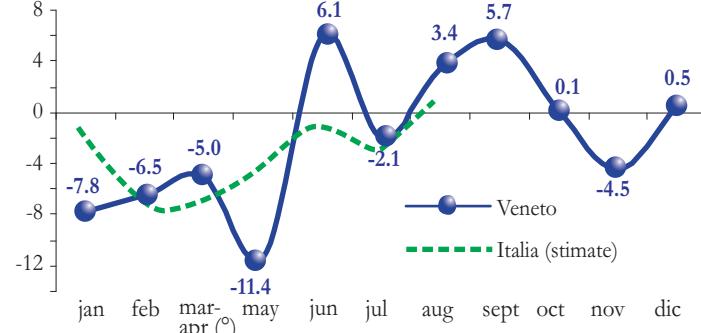
Percentage variation 2009/08

	Hotel		Non-hotel		Total	
	Arrivals	Nights spent	Arrivals	Nights spent	Arrivals	Nights spent
Italians	-0.8	-2.2	0.0	-1.0	-0.5	-1.6
International visitors	-4.7	-3.4	4.7	4.4	-1.8	0.6
Total	-3.1	-3.0	2.8	2.1	-1.3	-0.3

Index number (*) of nights spent by tourists (base year = 2000). Veneto - Years 2000:2009



Nights spent - variation 2009/08 (*). Veneto and Italy



(*) % variation on the same month of the previous year

(**) March and April are analysed together to avoid emphasising the fact that Easter was in March in 2008 and in April in 2009

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

also available

- Internationalization of enterprises
- Sport in the Veneto: censuses of sports facilities, companies and licensed
- Foreign trade: scenarios interactive graphics

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


Origin and destination

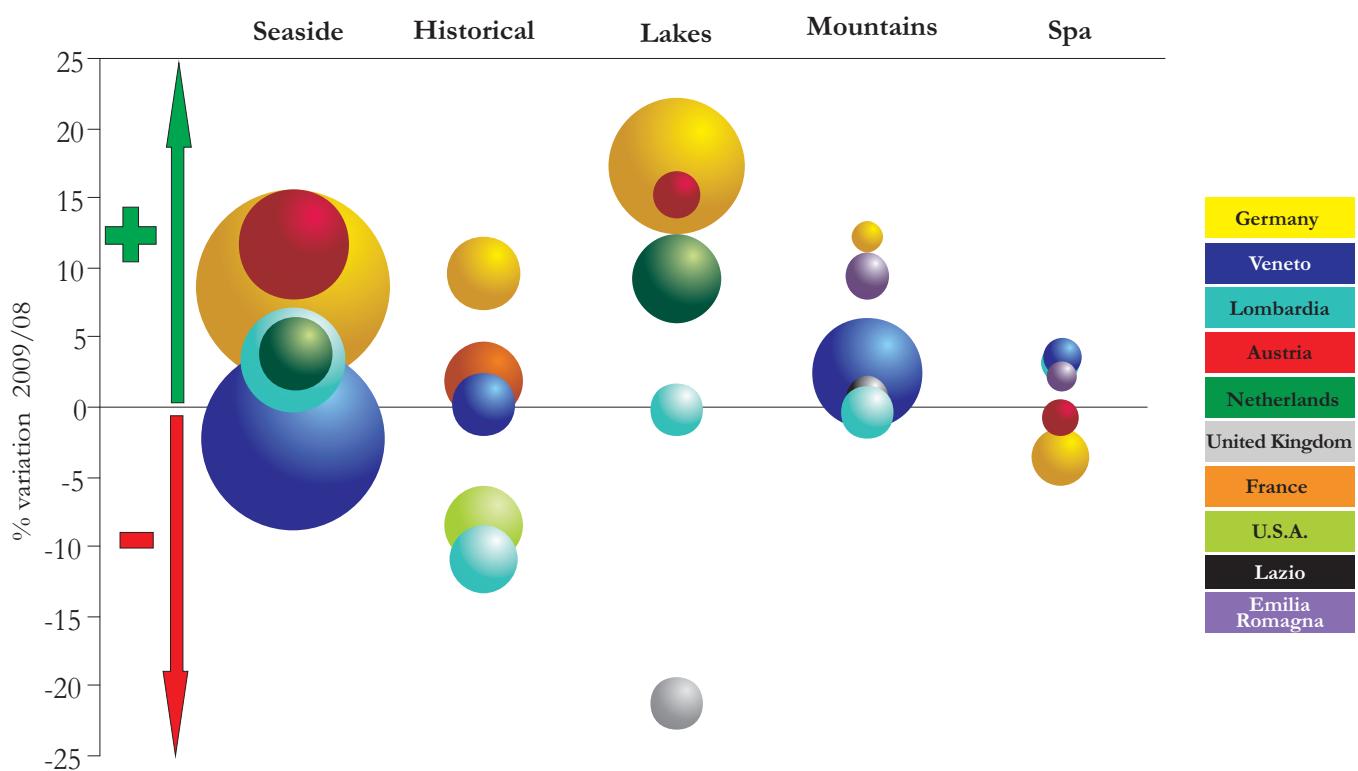
International visitors' countries of origin
Ranking of nights spent 2009

	Nights spent	% variation 2009/08	% share of Veneto total
Germany	12,653,172	10.4	20.9
Austria	3,340,821	10.4	5.5
Netherlands	2,859,909	6.5	4.7
France	1,825,633	-0.4	3.0
United Kingdom	1,824,891	-21.4	3.0
USA	1,373,016	-9.8	2.3
Switzerland-Liechtenstein	1,344,157	5.6	2.2
Denmark	1,307,733	-6.4	2.2
Czech Republic	884,313	2.9	1.5
Spain	814,844	-8.7	1.3
Poland	687,189	-6.8	1.1
Belgium	646,704	5.7	1.1
Hungary	518,231	-22.3	0.9
Russia	419,596	-16.2	0.7
Japan	360,300	-0.7	0.6
Sweden	311,713	-13.7	0.5
Romania	300,325	-14.8	0.5
Ireland	294,218	-14.6	0.5
Australia	292,443	-15.5	0.5
China	279,056	-0.9	0.5
Canada	271,893	-6.5	0.4
Slovakia	230,299	7.0	0.4
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Total of international visitors	35,904,079	0.6	59.4

Provenienza dei turisti italiani
Graduatoria delle presenze 2009

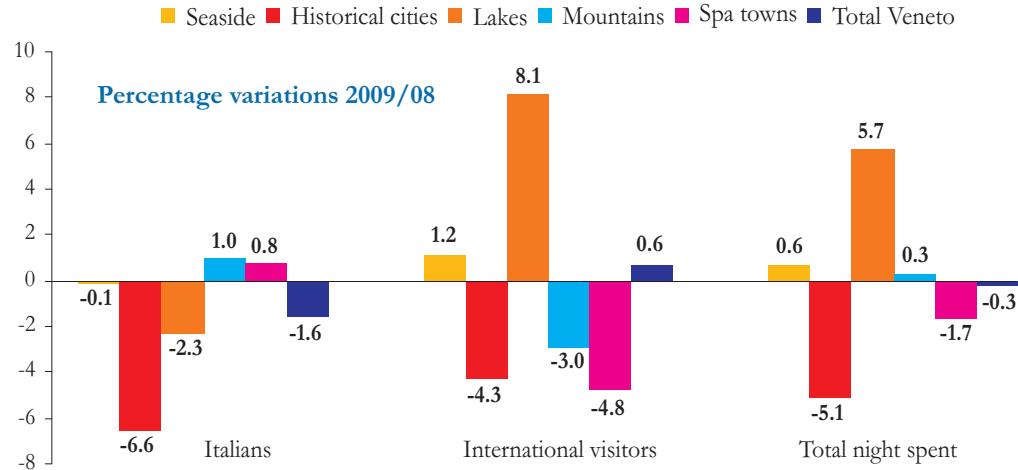
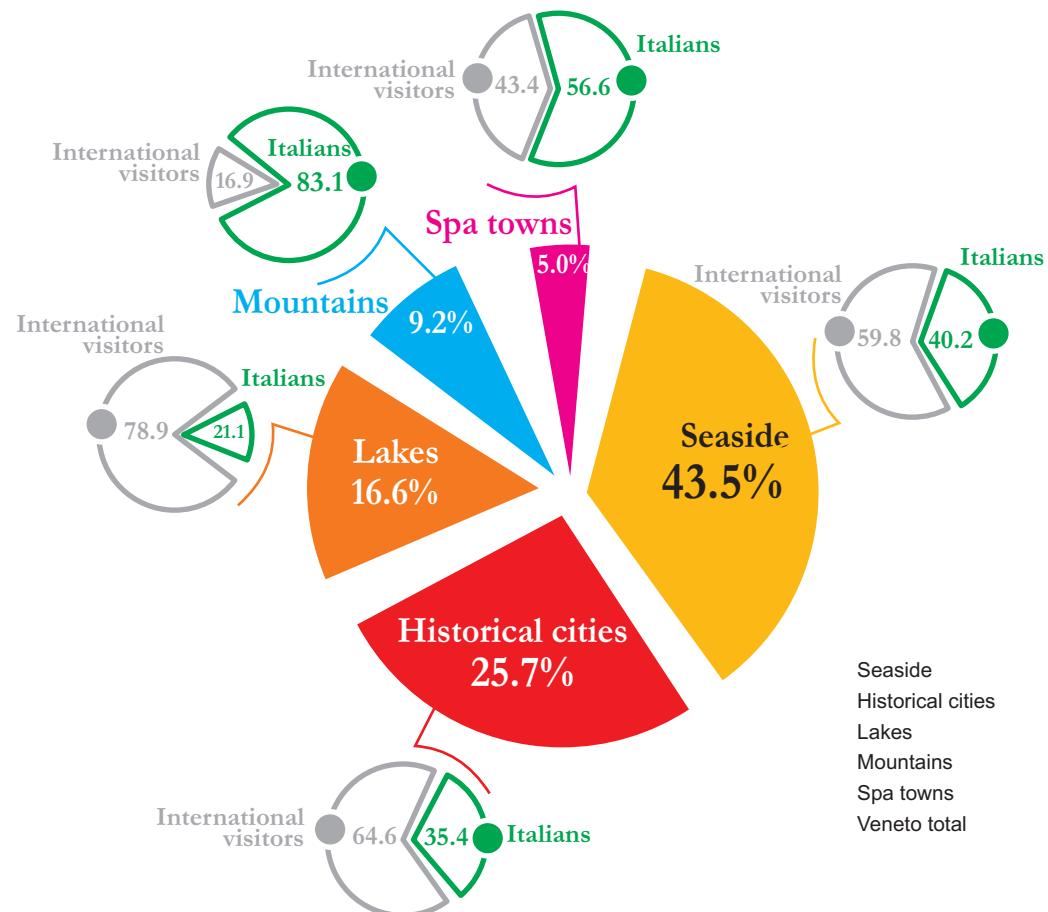
	Nights spent	% variation 2009/08	% share of Veneto total
Veneto	10,046,025	-0.7	16.6
Lombardia	4,477,556	-0.8	7.4
Lazio	1,348,212	-5.7	2.2
Emilia Rom.	1,297,874	2.1	2.1
Trentino A.A.	1,273,061	4.8	2.1
Piemonte	1,175,131	-4.7	1.9
Friuli V.G.	971,743	0.3	1.6
Toscana	746,979	-3.8	1.2
Campania	620,465	-6.3	1.0
Puglia	568,310	-8.1	0.9
Sicilia	502,118	-5.5	0.8
Liguria	338,780	-7.5	0.6
Marche	292,469	-1.7	0.5
Abruzzo	206,933	-7.0	0.3
Sardegna	186,963	-0.6	0.3
Calabria	174,347	-8.8	0.3
Umbria	168,075	-6.4	0.3
Basilicata	65,969	-4.4	0.1
Molise	40,198	-2.8	0.1
Valle d'Aosta	38,987	-4.6	0.1
Total of Italian visitors	24,540,195	-1.6	40.6

Major origins of tourists by type of destination.
% variation 2009/08 of nights spent and % share of total (bubble size)

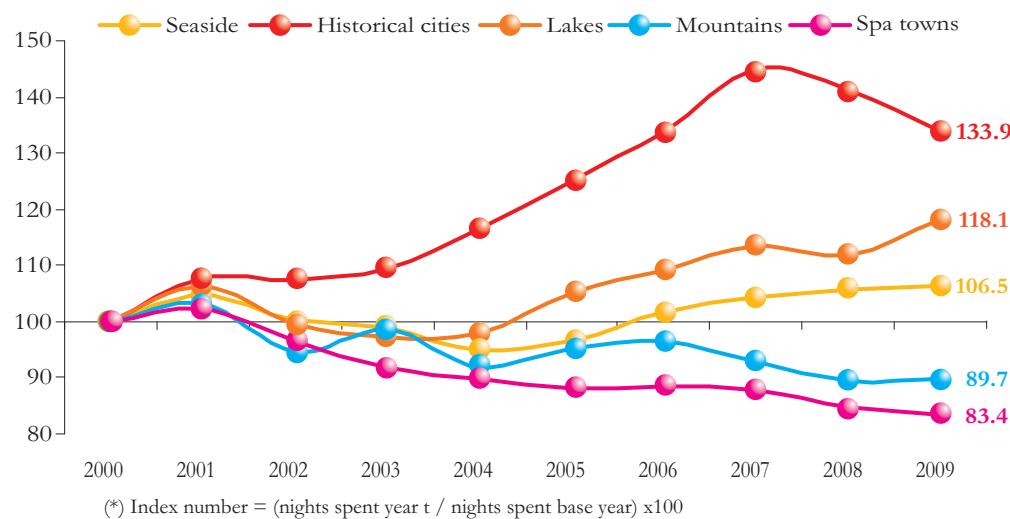


Type of tourist destination- Year 2009

Traditionally the tourists most fond of Veneto's varied attractions are the Germans and Austrians, who recorded a notable increase in both number and nights spent in 2009. This was the result of a persistent and far-reaching promotion of tourism, and the increase—more than 10%—made up for the losses experienced in 2008. The Dutch, Swiss, Czechs and Belgians also showed a growing interest in visits to Veneto. At the same time there was a marked decline in American tourists (-9.8%), which can be attributed to the worldwide financial crisis and to the unfavourable dollar/euro exchange rate. On the domestic front the people of Veneto continue to be regular visitors to the tourist spots of their region: in harmony with the trend to visit nearby places for ever shorter stays, i.e. the classic get-away weekend, the number of arrivals increased (+1.7%), while the number of nights spent decreased (-0.7%). Veneto offers its visitors everything they could wish for. The renowned beaches of Veneto, whose accommodation establishments account for nearly half of the nights spent in the whole region, in 2009 saw a 0.6% increase in flow, with conspicuous increases in international visitors, particularly Germans (+8.6%) and Austrians (+11.4%). The stays of Veneto residents at local seaside resorts seemed to be in slight decline, but they continued to represent a large proportion of the clientele. Historical cities, second to seaside resorts in the number of nights spent, but first in arrivals, in 2009 experienced the greatest difficulties (-5.1% in nights spent). It should be noted, however, that the trend in the previous years was one of marked increase until its peak in 2007. In this case the increase was in German tourists (+9.6%) and French tourists (+1.9%). In 2009, the Lake Garda area experienced a large rise in the nights spent by tourists (+5.7%), sustained by its increasing attractiveness to the Germans (+17.4%), Austrians (+15.2%) and Dutch (+9.3%). Holidays in the mountains in 2009 experienced a slight increase, +0.3% in nights spent and +0.8% in arrivals, while the spa towns experienced losses of 1.7% and 1% respectively.

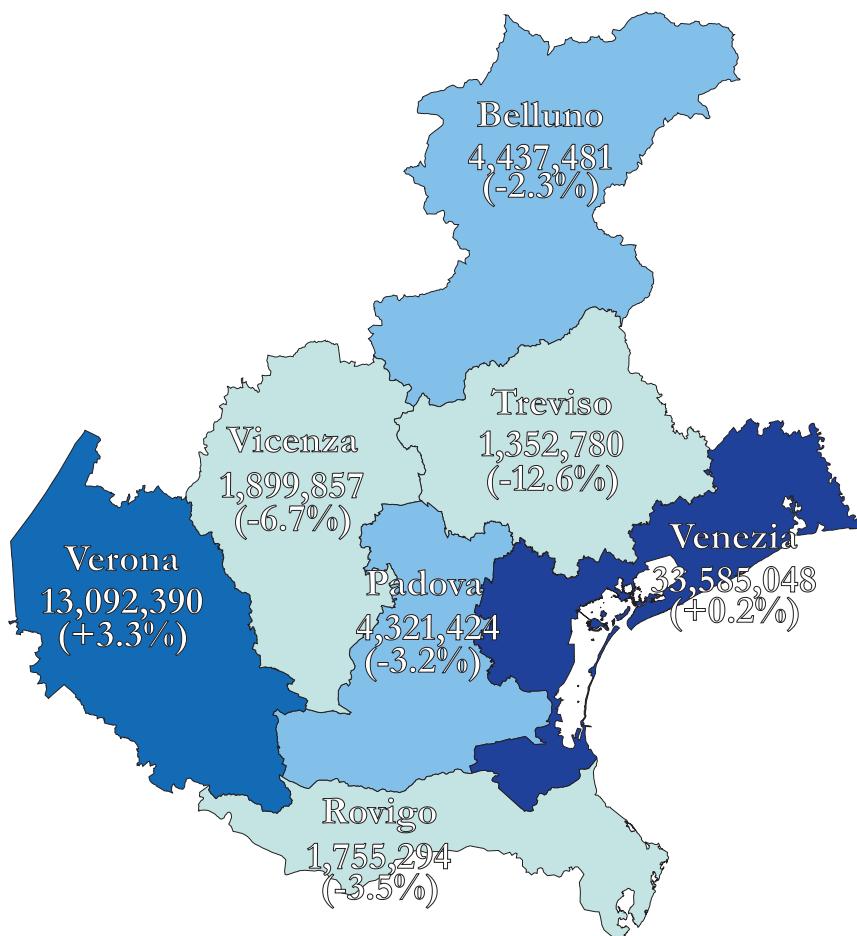


Index number (*) of nights spent by tourists by type of destination (base year = 2000).
Veneto - Years 2000:2009



The provinces

Nights spent by tourists in the Veneto provinces.
Year 2009 and percentage variation 2009/08



The province of Venezia with more than 33 million nights spent, 55% of the total for Veneto, experienced an increase in nights spent of 0.2%, which can be attributed to the success of the seaside resorts of Bibione and Caorle (+1.6%) and of Cavallino-Treporti (+3.5%), which has recorded a trend of constant growth. On the other hand, falls were recorded in the areas of Venezia, Jesolo-Eraclea and Chioggia. The province of Verona had 21.7% of the total nights spent in Veneto in 2009, an increase of 3.3% on 2008. Increases in the flows to both the Lake Garda area and the mountains were also recorded.

Findings for the province of Belluno (-2.3%) should be read together with its number of arrivals, which remained unchanged on the previous year. In 2009, in the area of the Dolomiti-Cortina system, tourists continued to arrive in large numbers, but on average their holidays were shorter. Even better signs were recorded in the area of Belluno-Feltre-Alpago.

A 3.2% drop in the province of Padova reflected the negative trends of historical cities and spa towns. Rovigo and Vicenza paid the price of the economic crisis and retreated to the levels recorded in 2007, while Treviso experienced the greatest loss in nights spent (-12.6%).

Indicators for hotels by province. Veneto - Year 2009

Province	Hotel accommodation (*)				Demand for hotel accommodation (°)		
	Density (hotels per 100 km ²)	Accommodation rate (bed places per 1000 inhabitants)	Average number of bed places per hotel	Quality index (number of 3-, 4- or 5-star hotels for each 1- or 2-star hotel)	Average length of stay (days)	Gross Utilization Index (average daily o ccupancy of 100 bed places)	Tourist Density Index (average nights spent per day per 1000 inhabitants)
Belluno	12.6	95.5	44	1,3	4.0	26.1	24.9
Padova	12.7	30.1	102	3,3	3.4	40.2	12.1
Rovigo	3.7	12.3	45	1,8	2.4	24.6	3.0
Treviso	6.5	9.7	52	2,6	1.9	31.5	3.0
Venezia	51.2	108.5	73	2,5	2.9	39.9	43.2
Verona	23.7	44.6	55	1,1	2.8	39.2	17.5
Vicenza	10.8	16.3	48	0,8	2.5	23.6	3.8
Veneto	17.7	42.3	63	1,7	2.9	36.7	15.6

(*) Density = (hotels / km²) x 100

Accommodation rate = (bed places/inhabitants) x 1000

Average number of bed places per hotel= bed places / hotels

Quality index = 3-, 4-, 5-star hotels / 1- and 2-star hotels

(°) Average length of stay = nights spent / arrivals

Gross Utilization Index = [nights spent/(bed places x 365)]x100

Tourist density index = [(nights spent / 365) / population] x 1000

Source: processing by Regione Veneto - Direzione Sistema Statistico Regionale on Istat and 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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