



STATISTICHE

figures and graphs to analyse the Veneto region



As usual, here is a brief analysis of tourism for the year that just ended, the result of the established collaboration between the Regional Statistical System Section, the Tourism Section of the Veneto Region and its seven provinces. Our region's quality tourism offer is unique, varied, and continues to exceed the records set in previous years. In 2013, the flow of visitors was again on the increase (+1.1%) despite the unfavourable times of crisis, reaching almost 16 million arrivals. The length of stays in resorts has been decreasing for several years, and marked a -1.3% for overnight stays, while still maintaining the remarkable figure of 61.5 million admissions. Able to satisfy every request in the best way, Veneto's offer is multi-faceted and speaks with a single voice of tourism, culture, food and wine, identity, the land and its landscape. Therefore, the Veneto region has been maintaining its primacy as a holiday destination in Italy for several years, as confirmed for 2012, the last year available nationwide, adding up to 15.2% of the arrivals and 16.4% of

TOURISM IN 2013: A STRATEGIC SECTOR CONFIRMED

the tourist attendance of the entire country.

Veneto had greater numbers of foreign tourists than most other Italian regions, similar only to Lazio, Trentino Alto Adige, Lombardy and Tuscany, especially when it came to the high number of foreigners staying at places other than hotels. Please note that the analyses found in this publication provide a detailed picture of those who spend at least one night at some accommodation for the purpose of recreation, business, wellbeing, health care, sports, religion, and so on. These analyses do not include day tourism, which is a significant player in the economy of our region even if not fully quantifiable.

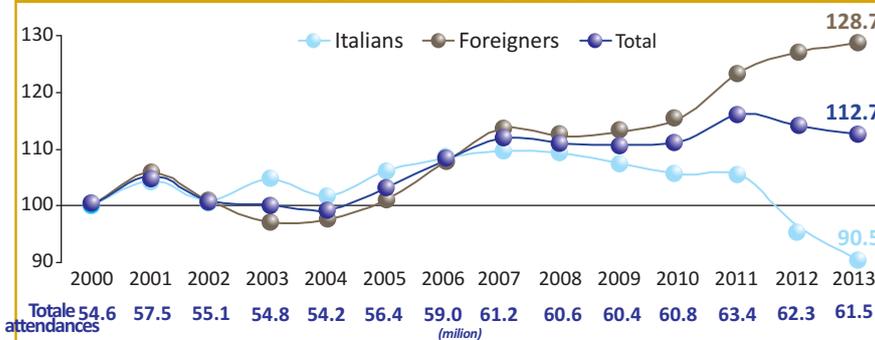
TOURIST FLOW IN VENETO BY PLACE OF ORIGIN AND ACCOMMODATION TYPE - YEAR 2013

	Hotel		Non-hotel		Total accommodations	
	Arrivals	Attendances	Arrivals	Attendances	Arrivals	Attendances
Italians	3,867,050	9,943,706	1,646,888	10,712,846	5,513,938	20,656,552
Foreigners	7,298,288	19,598,441	3,172,746	21,278,288	10,471,034	40,876,729
Total	11,165,388	29,542,147	4,819,634	31,991,134	15,984,972	61,533,281

2013/12 percentage variations

	Hotel		Non-hotel		Total accommodation	
	Arrivals	Attendances	Arrivals	Attendances	Arrivals	Attendances
Italians	-0.8	-4.1	-2.6	-7.6	-1.3	-6.0
Foreigners	+3.0	+2.1	+0.8	+0.4	+2.4	+1.2
Total	+1.7	-0.1	-0.4	-2.4	+1.1	-1.3

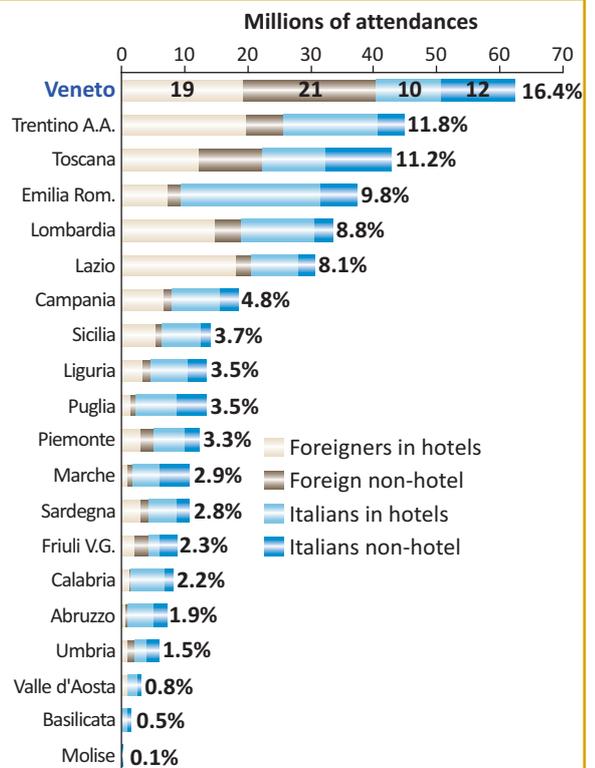
INDEX NUMBER (*) OF TOURIST ATTENDANCES (BASE YEAR = 2000) VENETO - YEARS 2000-2013



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

Source: processing by Veneto Region - Directorate of Regional Statistical System on Istat and Veneto Region data

TOURIST ATTENDANCE BY ITALIAN REGION YEAR 2012



AVAILABLE ON THE WEB:

- 2013 Statistical Report: about Veneto and how it compares with the rest of the world
- 2011 Economic landscape, economic indicators for January 2014
- Tourism: final data for the whole of 2013

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



The economic crisis slowed down travelling for Italians, whether inside Italy or to popular European countries such as Spain and France. Overall in 2013, Italians took 63 million and 154 thousand trips with overnight stay, compared to the 78 million and 703 thousand of the previous year (-19.8%). Tourism in Veneto held up due to the continuous and growing interest coming from foreign customers (+2.4% in arrivals and +1.2% in attendances compared to the previous year)

WHERE TOURISTS COME FROM

making up for the drop in Italian tourists (-1.3% in arrivals and -6% in attendances) and especially tourists from Veneto itself (-2.3% in arrivals and -7.6% in overnight stays). Tourists from Germany, England, French, Switzerland and the US were still the most loyal. However, the number

of tourists from the so called BRIC kept increasing, especially Russia (+17.9% in attendances) and China (+19.1%), which ranked respectively 9th and 13th this year for overnight stays among foreign countries, whereas China jumped all the way to 5th place for number of tourists, surpassing the UK as well. Arrivals in Veneto have grown over the years (compared to 2000, from the +9% of seaside areas to the 59.7% of lagoon areas), while at the same time the backgrounds of customers have also changed. This was more obvious in some areas: for example, foreign customers were 70% in the art cities (63% in 2000), about a third in the mountains. Spas showed an opposite trend, where Italian tourists went from 43% to 65% of all customers, an 86.9% increase since 2000. A common denominator among foreigners and Italians was a reduced average stay, which was more or less evident depending on the case and more so for Italian tourists.

1 Stands for Brazil, Russia, India and China, countries and economies that keep growing despite the global crisis and whose inhabitants increase the potential for income and therefore tourist spending.

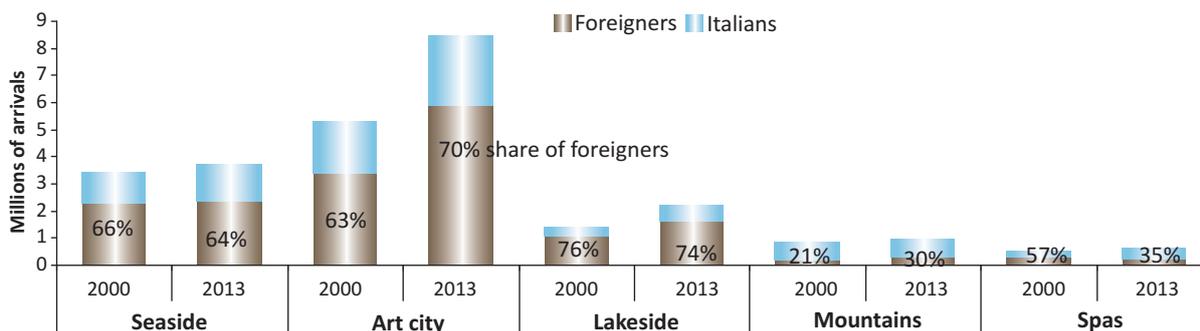
WHERE FOREIGN TOURISTS COME FROM ATTENDANCE RANKING - YEAR 2013

	Attendances			Arrivals
	Attendances	% share of total Veneto	2013/12 % Var.	2013/12 % Var.
Germania	13,985,645	22.7	0.1	0.0
Austria	3,355,675	5.5	-3.1	-0.4
Paesi Bassi	2,890,616	4.7	-4.7	-4.4
Regno Unito	2,029,153	3.3	4.6	4.7
Francia	1,978,303	3.2	0.1	-0.1
Svizzera-Liecht.	1,692,818	2.8	6.8	9.5
U.S.A.	1,589,069	2.6	2.1	2.9
Danimarca	1,358,995	2.2	-0.9	-5.6
Russia	1,018,995	1.7	17.9	11.9
Repubblica Ceca	978,314	1.6	-2.2	-3.4
Polonia	885,614	1.4	9.0	6.3
Belgio	717,392	1.2	4.3	3.2
Cina	699,750	1.1	19.1	18.5
Spagna	568,360	0.9	-16.7	-17.3
Ungheria	515,847	0.8	6.7	6.6
Australia	467,948	0.8	14.4	7.0
Giappone	405,120	0.7	-4.1	-3.4
Brasile	366,637	0.6	-3.0	-3.5
Canada	338,858	0.6	2.0	0.6
Romania	328,273	0.5	-1.6	2.8
Svezia	317,230	0.5	7.2	3.8
Irlanda	284,476	0.5	7.1	-0.3
...				
Total foreigners	40,876,729	66.4	1.2	2.4

WHERE ITALIAN TOURISTS COME FROM ATTENDANCE RANKING - YEAR 2013

	Attendances			Arrivals
	Attendances	% share of total Veneto	2013/12 % Var.	2013/12 % Var.
Veneto	7,892,016	12.8	-7.6	-2.3
Lombardia	3,972,295	6.5	-6.3	-1.1
Trentino A.A.	1,225,645	2.0	-6.3	-3.0
Emilia Rom.	1,199,353	1.9	-3.1	2.6
Lazio	1,084,017	1.8	-2.7	-0.2
Piemonte	1,035,069	1.7	-5.4	-1.8
Friuli V.G.	861,926	1.4	-4.3	-0.3
Toscana	657,160	1.1	-4.9	-1.2
Campania	514,145	0.8	-2.7	0.3
Puglia	459,323	0.7	-7.0	-5.8
Sicilia	428,206	0.7	-3.0	-2.1
Liguria	311,662	0.5	-1.8	0.5
Marche	275,443	0.4	-1.0	2.0
Abruzzo	167,320	0.3	-7.7	-5.9
Calabria	157,014	0.3	0.1	-3.8
Sardegna	151,258	0.2	-8.0	-5.0
Umbria	143,112	0.2	-3.1	-2.8
Basilicata	55,935	0.1	-4.2	-0.5
Valle d'Aosta	35,448	0.1	-1.6	2.8
Molise	30,205	0.0	-4.0	0.2
Total italians	20,656,552	33.6	-6.0	-1.3

% SHARE OF FOREIGN TOURISTS BY DESTINATION AREA IN VENETO. YEARS 2000 AND 2013



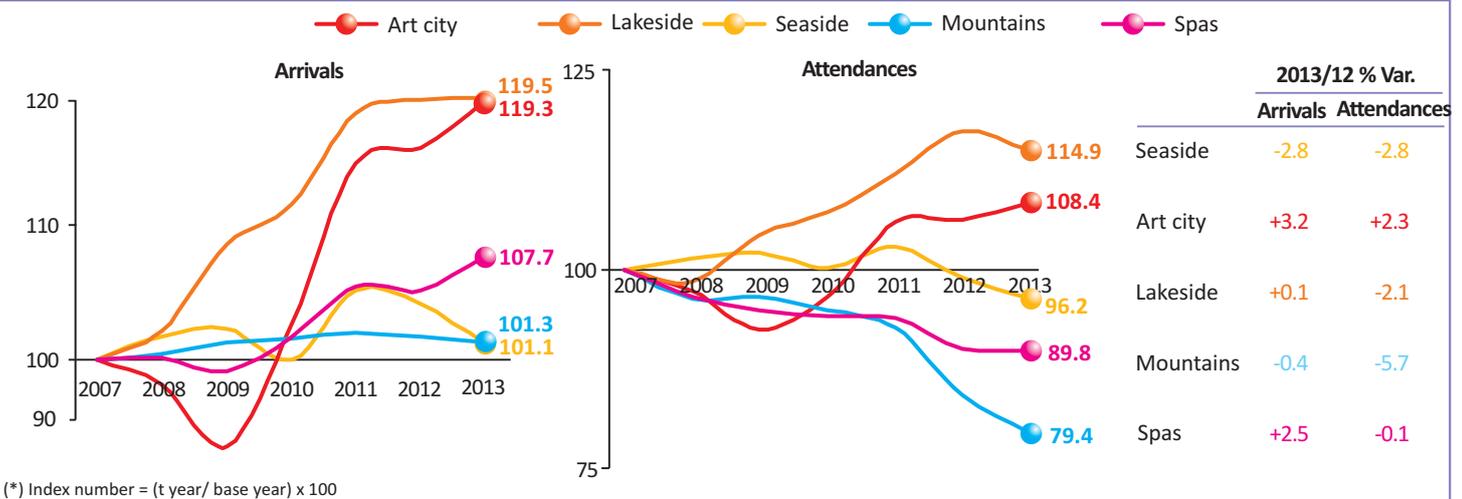
Any type of vacation is available to those who come to Veneto: not just traditional tourism but also a wealth of natural assets and landscapes, historic towns and walled cities, the Venetian villas, as well as the opportunity to practice sports such as golf, horse riding, and bike riding, not to mention additional offers such as wellness, congress tourism, religious routes, fish tourism; all of it made even better by the flavours of our food and wine culture.

DESTINATIONS

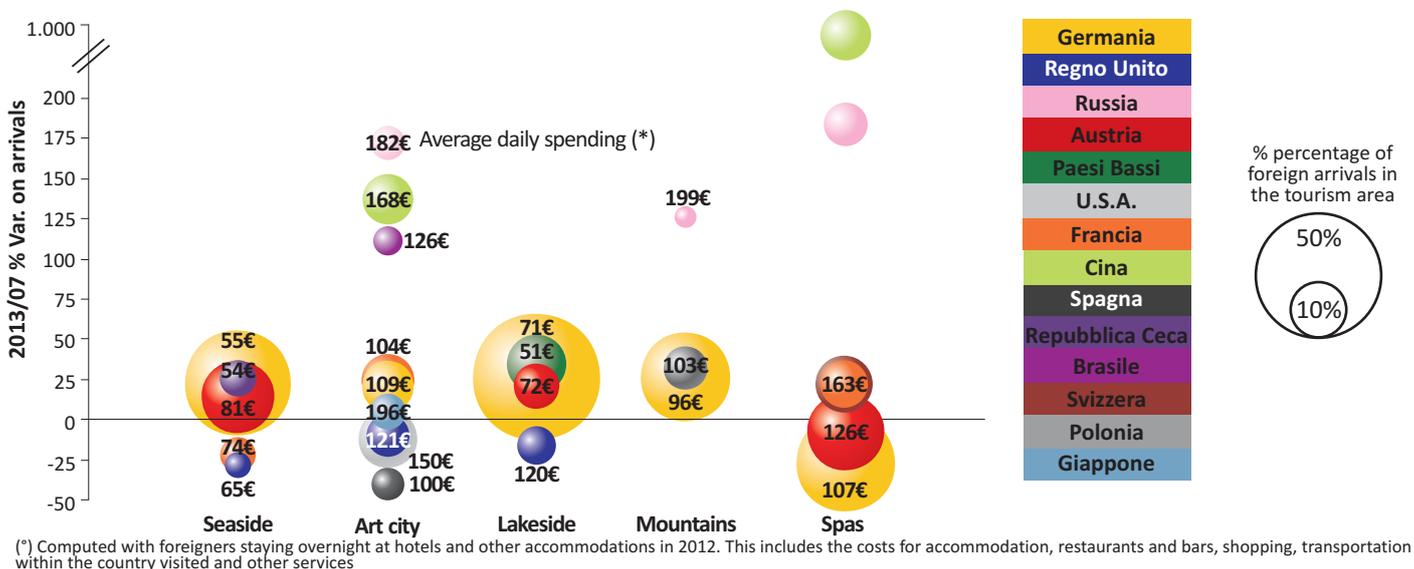
Summing up for 2013, our famous art cities did well for the fourth year in a row with increased tourist flow (+3.2%) and number of overnight stays (+2.3%). Along with the traditional markets, BRIC countries were also fully taken with the attraction exerted by cultural destinations. BRIC

tourists have been increasing considerably from year to year and in 2012, tourists from Brazil spent € 126 on average daily, from Russia € 182, from China € 168. Arrivals increased also for spas (+2.5%) along with steady attendance. BRIC countries increased their presence here too, with the Chinese ranking 4th among foreign countries for arrivals and the Russians sixth. The Lake Garda area, after years of always positive variations, had steady arrivals (+0.1%) but decreased attendance (-2.1%). Here the German component was essential, representing over half of the foreign customers and showing considerable increases from the very beginning of the crisis. Russians started showing a presence here too although still quite limited (0.9% of foreign arrivals in 2013). Steady arrivals and rapidly decreasing attendance have been experienced in the mountains for several years, which showed 0.4% and -5.7% for this year. The seaside, easily affected by weather conditions, has fluctuated over the years, and showed a close to 3% decrease in the tourist flow in 2013

INDEX NUMBER (*) OF TOURISTS BY AREA (BASE YEAR = 2007). VENETO - YEARS 2007-2013



TOURISM AREAS: HOW MUCH FOREIGN TOURISTS SPEND AND WHERE THEY COME FROM - YEAR 2013



Source: processing by Veneto Region - Directorate of Regional Statistical System on Istat and Veneto Region data

STATISTICHE *Flash*

We saw how foreign tourism has become increasingly more relevant for Veneto over the years, hauling the economy during slowed domestic demand. It is therefore interesting to try and find out why foreigners travel to Veneto, so as to get some information regarding their spending habits and also to get their opinion on the time they just had. Foreign tourists who spent only a day trip in Veneto without staying overnight spent on average 91 € (57 € for the whole of Italy) for purchases, lunch, transportation and other services.

WHAT FOREIGNERS CHOOSE

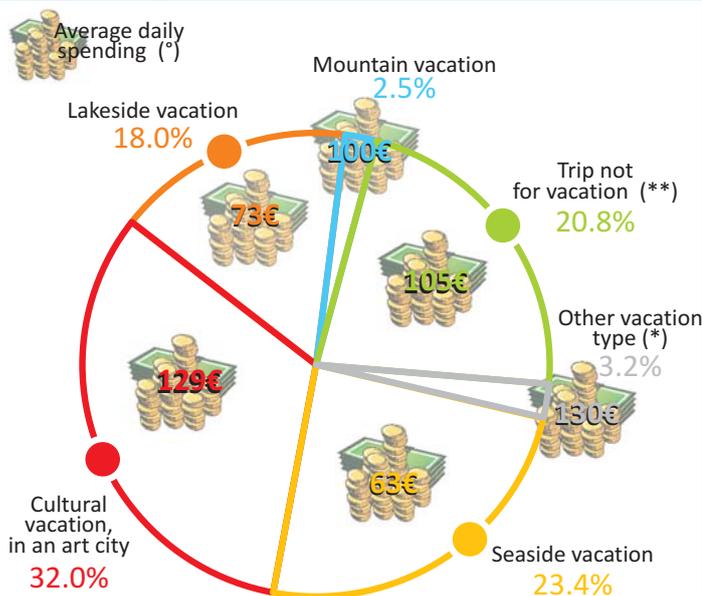
These were mostly people travelling for business, to attend shows or fares, training courses, etc. People who did stay the night, but at friends and relatives or at a second home, and therefore didn't spend anything, spend about 60 € a day for the items above. Those who stayed in some residential accommodation spent differently depending on their

holiday destination: from a minimum of 63 € for a seaside vacation to 129-130 € for a cultural holiday with traditional food and wine. The expenses of foreign travellers were itemized differently according to trip type: for example, accommodations might have an impact ranging from a minimum of 40% in the art cities to a maximum of 70% at spas, restaurants and bars might make up 7% of expenses at spas and up to 24% at Lake Garda and other services (such as museums, shows, guided walks, car rentals, language classes, etc.) from 1% at the seaside to 10% in the mountains. Purchases were steadier and close to 15%. Foreigners who stayed overnight gave very positive opinions for all of the areas they visited. The environment, art, safety and quality of the hotels were most appreciated. Prices were the least appreciated for all the areas (Veneto's average grade was 6.4)

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1 Source: Bank of Italy. Calculations exclude the cost of travel toward a destination. The exclusion of transport costs both ways is set by the definition of tourism expenditure in the balance of payments

FOREIGNERS STAYING IN ACCOMMODATIONS OF THE VENETO REGION: SHARE OF OVERNIGHT STAYS AND DAILY AVERAGE SPENDING (€) ACCORDING TO TRIP REASON. YEAR 2012

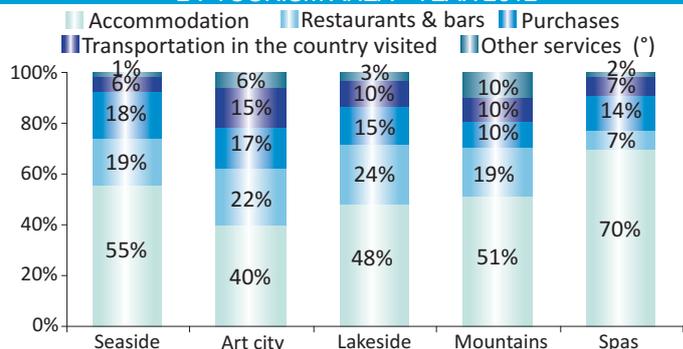


(*) This includes the costs for accommodation, restaurants and bars, shopping, transportation in the country visited and other services

(*) Food and wine, green, sports holiday, for cultural or sporting events

(**) Travel with at least one overnight accommodation for business, study, shopping, seeing relatives or friends, for health, for religious reasons, honeymoon, etc.

ITEMIZED EXPENSES OF FOREIGNERS WHO STAYED IN VENETO'S ACCOMMODATIONS BY TOURISM AREA - YEAR 2012



(*) Other services include spending for museums, shows, guided walks, car rentals, language classes, etc.

OVERNIGHT FOREIGN TOURISTS' OPINIONS BY TOURISM AREA (*)

Tourism Area	Overall average grade	Aspect with highest average grade
Seaside	8.8	Safety (9.0)
Art city	8.3	Art (9.0)
Lakeside	8.4	Environment (9.1)
Mountains	8.6	Environment (9.1)
Spas	8.9	hotels (9.1)
Total for Veneto	8.4	Art (8.9)
Italy	8.3	Art (8.9)

(*) based on a scale from 1 (dreadful) to 10 (excellent)

Source: processing by Veneto Region - Directorate of Regional Statistical System on Bank of Italy data

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