



TOURISM IN VENETO: its success continues

Year 2007

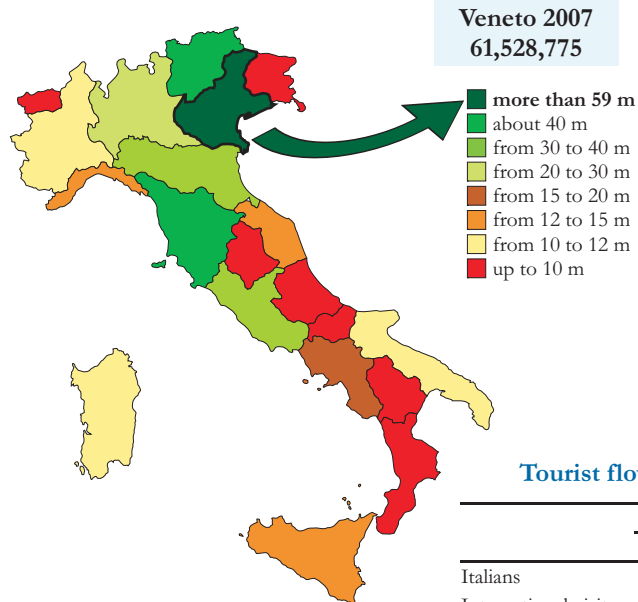
“Great potential that has not yet been fully tapped”. This would be a fair description of the figures for 2007, which saw the Veneto region surpass the 60-million-visitor mark despite clear problems of the international economy. Veneto offers its visitors everything they could wish for. The cornerstone of this success lies in the uniqueness, variety and quality of local tourism. Furthermore value has been added to these features by well-organised promotion, highly professional tour operators and the region's famed business acumen. In addition to the many cultural, theatrical and sporting events which take place all over the region, visitors can also enjoy the pleasures of good food and wine as offered by traditional Veneto cuisine.

Last year was the best Veneto has had in a decade: arrivals were up by +36.7% on 1997 and nights spent by +18.8%. Figures were also up on 2006: +5.3% and +3.7% respectively. A holiday in Veneto is synonymous with quality and variety, and figures for 2007 confirm that demand is moving increasingly towards top-end accommodation (nights spent in 5-star hotels increased by +21.9% and in 4-star hotels by +8.5%). Demand for holidays in agrotourism establishments continued to grow steadily (arrivals were up by +39.3% and nights spent by 17.7%), a clear sign that natural and environmentally friendly tourism is becoming ever more popular.

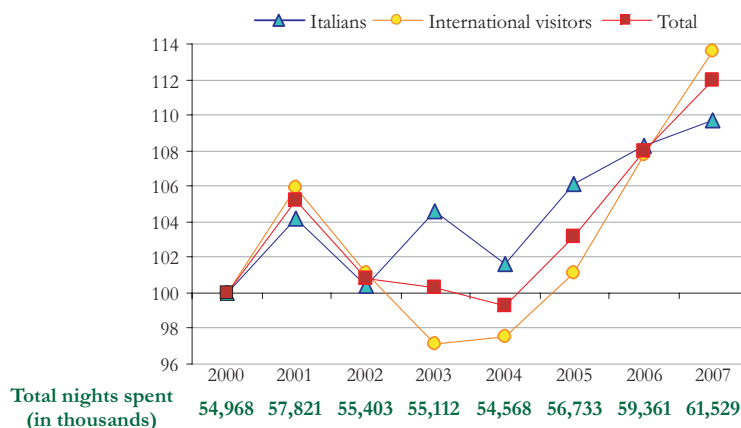
This initial analysis affords a brief insight into tourism in Veneto, the single most important industry for the local economy, both in terms of directly produced wealth and in terms of the economy upstream and downstream of tourism. This survey, however, takes into account only tourists who stay for at least one night, namely visitors staying in accommodation for tourism, business, wellbeing or religion, etc.. The calculations therefore do not take into account same-day visitors drawn by important events and exhibitions. Although they cannot be quantified, they are a significant presence for the region.

Thanks to the millions of tourists who chose the region as their holiday destination, Veneto has for several years remained the most popular Italian region for tourists, as proved also in 2006, the last year for which data is available on a national level, accounting for 14.1% of the arrivals and 16% of the nights spent on the whole peninsula. This record is maintained above all by inbound tourism with over 32 million nights spent, which clearly distinguishes Veneto from other regions. Furthermore, Italian tourists account for more than 25 million nights spent, placing Veneto at second place in the national table.

Nights spent by tourists in Italian regions - Year 2006



Nights spent by tourists in Veneto (year 2000=100) - Years 2000 – 2007



Tourist flows to Veneto by origin and accommodation establishment – Year 2007

	Hotel accommodation		Non-hotel accommodation		Total	
	Arrivals	Nights spent	Arrivals	Nights spent	Arrivals	Nights spent
Italians	3,831,483	11,684,247	1,593,515	13,730,198	5,424,998	25,414,445
International visitors	6,137,729	18,103,839	2,590,503	18,010,491	8,728,232	36,114,330
Total	9,969,212	29,788,086	4,184,018	31,740,689	14,153,230	61,528,775

In 2006, Veneto accounted for 16.2% of nights spent in Italy (59,359,084 out of 366,764,778).

Percentage variation 2007– 2006

	Hotel accommodation		Non-hotel accommodation		Total	
	Arrivals	Nights spent	Arrivals	Nights spent	Arrivals	Nights spent
Italians	2.3	1.2	5.2	1.3	3.1	1.3
International visitors	7.0	8.3	5.9	2.7	6.7	5.4
Total	5.2	5.4	5.7	2.1	5.3	3.7

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

Tourists' countries of origin

International visitors' countries of origin. Nights spent 2007

	Nights spent	% variation 2007/06	% share of Veneto total	% share of Italian total (*)
Germany	11,759,597	2.0	19.1	24.9
Austria	3,264,826	3.8	5.3	40.6
Great Britain	2,487,297	5.6	4.0	18.5
Netherlands	2,386,048	6.8	3.9	25.0
U.S.A.	1,870,904	2.4	3.0	15.1
France	1,825,086	9.2	3.0	17.0
Switzerland-Liech.	1,318,992	-2.3	2.1	18.7
Denmark	1,200,594	-6.2	2.0	42.3
Spain	998,171	16.5	1.6	19.1
Czech Republic	754,260	15.1	1.2	30.2
Hungary	680,880	0.9	1.1	42.7
Belgium	611,799	3.4	1.0	14.8
Poland	605,733	19.8	1.0	20.3
Russia	424,373	31.8	0.7	12.6
Japan	419,992	0.7	0.7	13.0
Romania	367,189	32.3	0.6	n.d.
Ireland	362,891	18.9	0.6	17.8
Australia	329,632	11.6	0.5	18.8
Sweden	326,599	8.2	0.5	16.5
China	324,399	4.6	0.5	23.4
Canada	311,356	21.1	0.5	15.0
Norway	217,195	2.1	0.4	17.4
... Total of intern. visitors	36,114,330	5.4	58.7	21.8

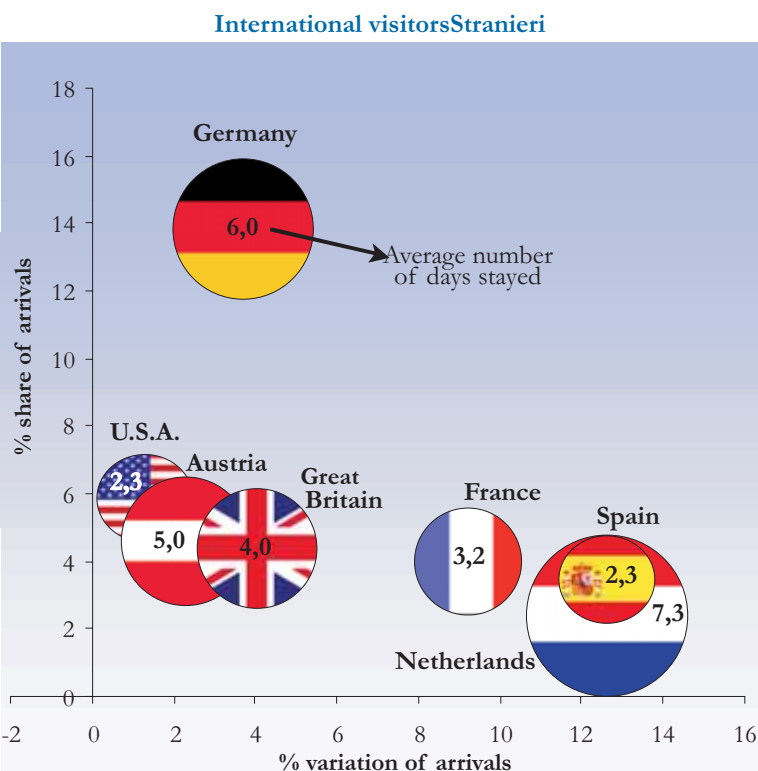
(*) data from 2006

Veneto was Italy's most visited region for the countries highlighted in red

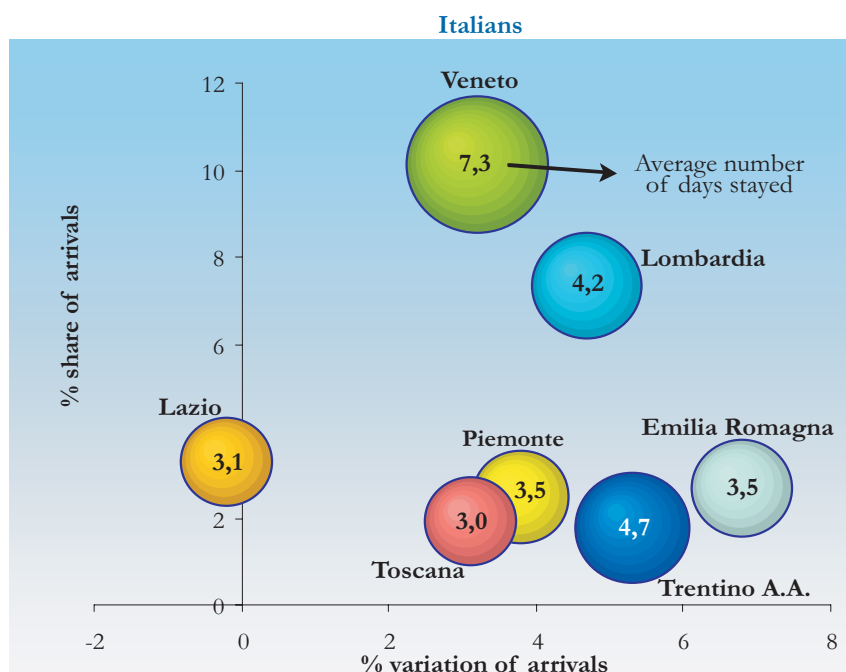
Origin of Italian visitors. Nights spent 2007

	Nights spent	% variation 2007 /06	% share of Veneto total
Veneto	10,436,761	0.7	17.0
Lombardia	4,426,732	4.0	7.2
Lazio	1,419,354	-3.0	2.3
Emilia Romagna	1,354,668	3.8	2.2
Piemonte	1,236,437	1.5	2.0
Trentino A.A.	1,193,975	3.1	1.9
Friuli V.G.	974,010	1.6	1.6
Toscana	800,453	1.9	1.3
Campania	705,211	1.2	1.1
Puglia	634,382	-3.9	1.0
Sicilia	550,689	0.6	0.9
Liguria	373,148	0.3	0.6
Marche	319,166	2.7	0.5
Abruzzo	224,940	6.7	0.4
Calabria	208,618	-5.1	0.3
Sardegna	203,244	-2.6	0.3
Umbria	190,298	4.3	0.3
Basilicata	79,391	-8.6	0.1
Molise	44,681	-7.1	0.1
Valle d'Aosta	38,287	-0.6	0.1
Total of Italian visitors	25,414,445	1.3	41.3

% share 2007 and % variation 2007-2006 of tourist arrivals from the main countries of origin (bubble size = average stay)

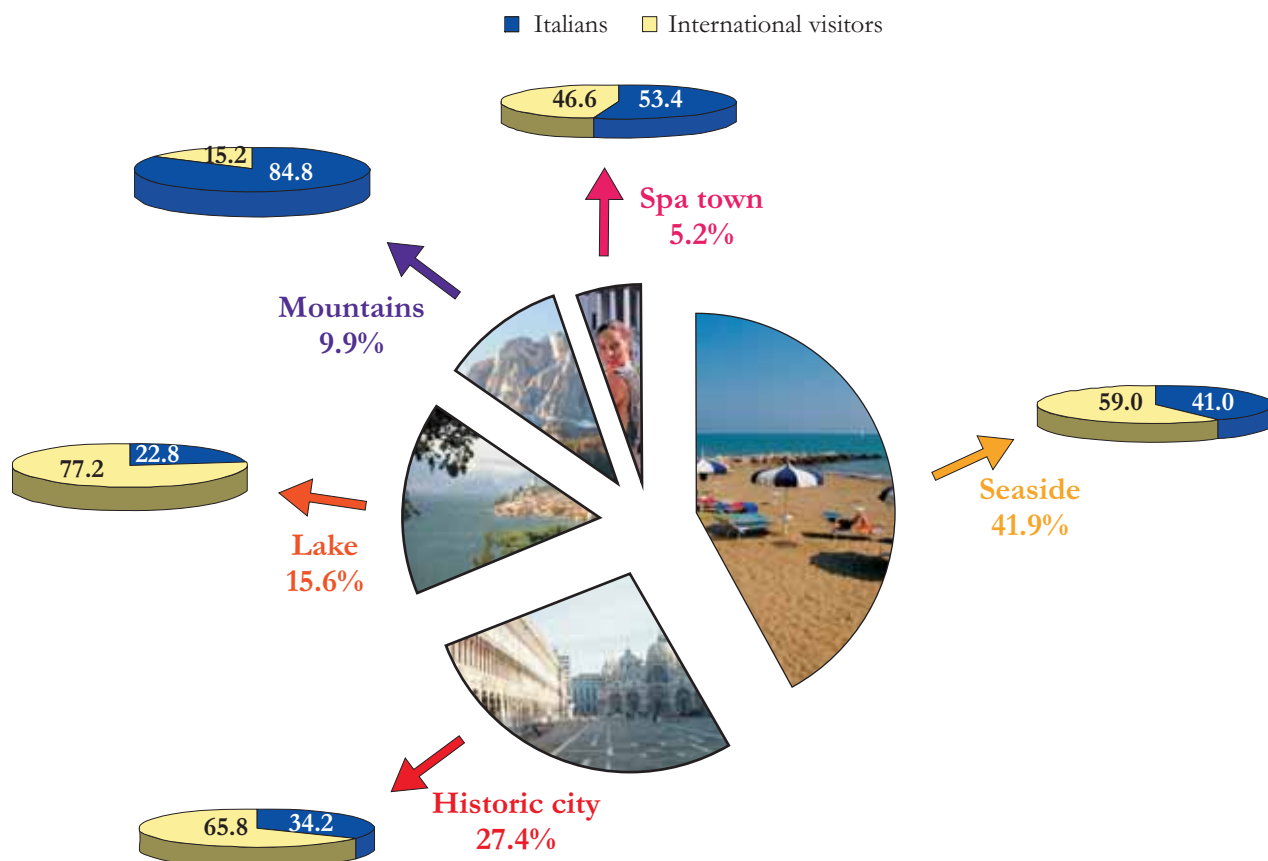


Tourism in Veneto is based mainly on a flow of international visitors: in 2007 international visitors accounted for 58.7% of the overall nights spent. International tourism has recovered since 2004, after a period of uncertainty between 2002 — 2003, and today figures for international visitors are higher than those for Italian visitors (+5.4% compared with +1.3%). The countries of origin table reveals an increase in the nights spent by nationalities who have been the main visitors for many years: Germans (+2%), Austrians (+3.8%), English (+5.6%) and Danes (+6.8%), not to mention Americans (+2.4%), French (+9.2%) and Spanish (+16.5%); figures for Russian visitors (+31.8%) continue to soar, reaching 14th place last year, as did those for Irish visitors (+18.9%) who reached 17th place. The table of Italian visitors remained largely unchanged with a 10% difference between the number of visitors resident in Veneto and those resident in Lombardia; after which came Lazio, Emilia Romagna, Piemonte, Trentino Alto Adige, etc..



Types of tourist destination

Nights spent in 2007 per type of tourist destination



Veneto caters for any type of holiday requirement: visitors can see some of the world's most beautiful and famous historic cities; spend their summer in one of many beach resorts that stretch along more than 100 km of coastline; enjoy the largest and best equipped spa basin in Europe; take part in winter sports, or head off on excursions through the beautiful Dolomites, as well as take in Lake Garda, the Po Delta and many more destinations.

Veneto's seaside resorts, which alone account for more than 40% of the nights spent in the entire region, are becoming increasingly popular (+2.9%) with both Italian and international visitors.

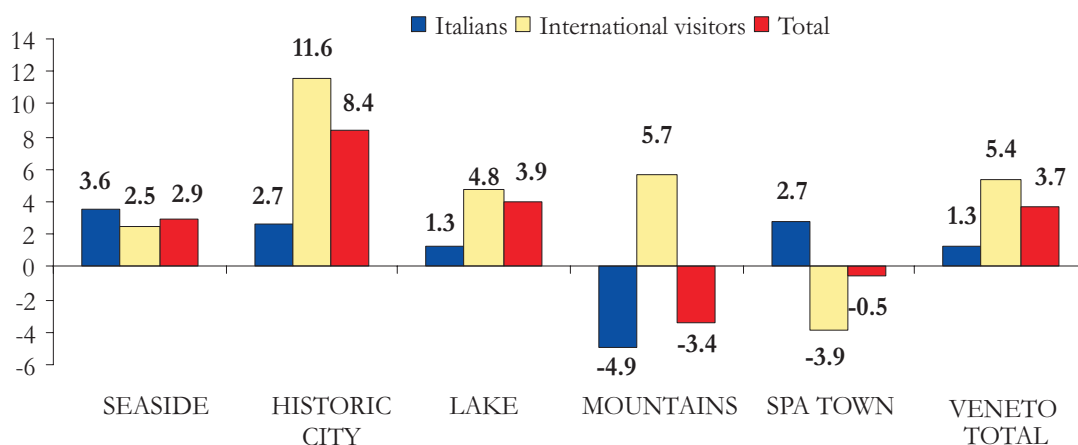
The historic cities owe their excellent result for 2007 (+8.4%) mainly to international visitors; there was a notable increase in French visitors (+14.4%) who overtook the English to claim second place behind the Americans; the number of German visitors increased by +10.9% and Spanish ones by +19%.

The largest increase in visitors to lake resorts came from Austria (+23.4%), which took 4th place behind Germany, the Netherlands and Great Britain.

The downturn in the number of visitors to Veneto's mountain region is mainly due to the peak of nights spent in 2006 in the resorts of Altopiano di Asiago during the national reunion of Italy's Alpine troops, an event which took place outside Veneto in 2007. In the Dolomites, however, the number of nights spent did increase, though only slightly (+0.6% in the area of Cortina and +0.5% in the area of Belluno).

Although the flow of visitors to Veneto's spa towns did not record any major changes on the previous year, it did reveal that international visitors, especially Germans and Austrians, were being slowly replaced by Italian visitors, including ones from Lombardia, Veneto and Emilia Romagna.

Percentage variation 2007/06

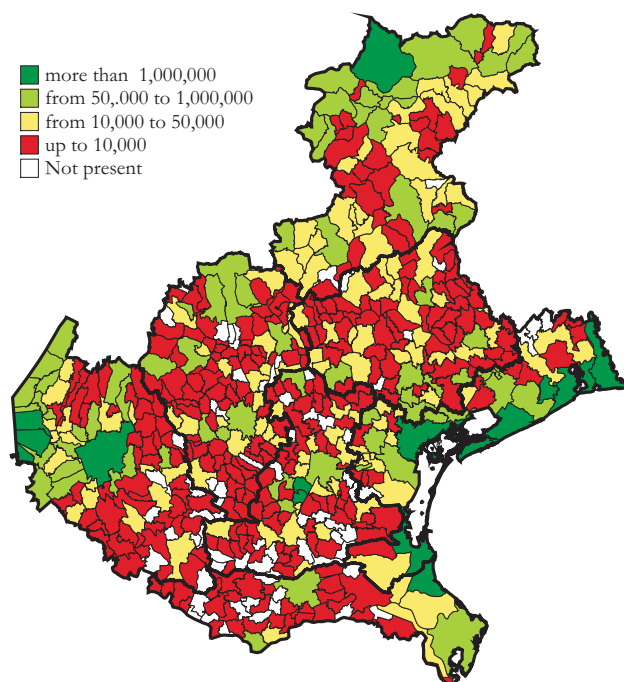


The situation in the provinces and municipalities

Nights spent and average stay in the provinces and in the Local Tourist Networks (STL). Year 2007

Provinces STL	Italiani			International visitors			Total		
	Nights spent	% var. 07/06	Ave. stay	Nights spent	% var. 07/06	Ave. stay	Nights spent	% var. 07/06	Ave. stay
Belluno	4,083,076	-0.7	6.8	904,203	6.4	4.0	4,987,279	0.5	6.1
Dolomiti	2,965,467	-1.5	6.0	793,160	9.2	4.1	3,758,627	0.6	5.5
Belluno	1,117,609	1.6	10.6	111,043	-9.9	3.7	1,228,652	0.5	9.1
Padova	2,466,455	3.6	3.3	2,145,034	3.2	3.7	4,611,489	3.4	3.5
Padova	790,560	6.1	2.1	638,652	24.3	1.9	1,429,212	13.5	2.0
Terme euganee	1,675,895	2.5	4.6	1,506,382	-3.7	6.1	3,182,277	-0.5	5.2
Rovigo	1,017,267	-4.4	6.5	714,488	-0.6	6.0	1,731,755	-2.9	6.3
Rovigo	1,017,267	-4.4	6.5	714,488	-0.6	6.0	1,731,755	-2.9	6.3
Treviso	919,016	1.6	2.8	796,148	11.7	2.5	1,715,164	6.0	2.6
Treviso	919,016	1.6	2.8	796,148	11.7	2.5	1,715,164	6.0	2.6
Venezia	11,433,974	4.1	5.6	22,122,572	5.2	4.1	33,556,546	4.8	4.5
Bibione and Caorle	3,839,332	4.3	7.9	6,215,572	4.2	8.0	10,054,904	4.2	8.0
Jesolo and Eraclea	2,751,489	4.9	5.5	3,344,275	3.6	4.2	6,095,764	4.2	4.7
Venezia	1,716,262	2.5	2.5	7,844,139	9.1	2.4	9,560,401	7.9	2.4
Chioggia	1,663,758	-1.3	8.9	439,619	4.9	6.1	2,103,377	-0.1	8.1
Cavallino-Treporti	1,463,133	10.6	8.4	4,278,967	1.0	9.3	5,742,100	3.3	9.1
Verona	4,206,646	-0.9	3.6	8,830,259	5.8	4.7	13,036,905	3.5	4.3
Garda	2,324,738	0.7	3.7	7,529,684	4.8	5.6	9,854,422	3.8	5.0
Verona	1,881,908	-2.9	3.4	1,300,575	11.9	2.5	3,182,483	2.6	3.0
Vicenza	1,288,011	-8.0	3.4	601,626	15.1	2.7	1,889,637	-1.7	3.1
Vicenza	850,484	4.7	2.7	588,498	15.7	2.6	1,438,982	8.9	2.7
Alt. di Asiago	437,527	-25.4	6.8	13,128	-8.3	3.5	450,655	-25.0	6.6

Nights spent in Veneto's municipalities Year 2007



The province of Venezia had more than 33 million nights spent, 54.5% of Veneto's total. There was an increase in the flows to all of its Local Tourist Networks, which comprise its increasingly popular beach resorts and the unique city of Venice.

For several years, Venice has experienced an annual growth rate of more than 7% and in 2007 the number of nights spent reached almost 9 million. The province of Treviso recorded the most consistent increase (+6%), which gave it 2.8% of the total nights spent in the region. The province of Verona continues to attract a high percentage of the region's total visitors, (21.2%). This increase was mainly due to international visitors both in the municipalities of Lake Garda (+4.8%) and in Verona and its surrounding municipalities (+11.9%). The province of Padova had an increase in visitors to its main city, Padua, and to its surrounding municipalities (+13.5%) rather than to its spa towns. The popularity of the province of Belluno stayed almost unchanged (+0.5%), whereas the provinces of Vicenza and Rovigo suffered slight losses, ones, however, that affected different areas. Although the former saw a solid increase of 8.9% in visitors to the city of Vicenza and its surrounding municipalities, it was not enough to compensate for the drop in nights spent on Altopiano di Asiago. As mentioned above, this drop came the year after the national reunion of Italy's Alpine troops in May 2006, an annual event held in a different city each year. In the province of Rovigo, the number of visitors to Rosolina, a seaside resort which alone accounts for 80% of the province's flow of visitors, dropped by -5.8%.

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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