

TOURISM IN PIEDMONT: THE FIGURES

Sources: National Statistics Institute (Istituto Nazionale di Statistica); Italian State Tourist Board - ENIT (Ente Nazionale Italiano per il Turismo - ENIT); Research Centre of the Italian Touring Club (Centro Studi del Touring Club Italiano); Piedmont Regional Tourism Observatory (Osservatorio Turistico Regionale del Piemonte); Department of Tourism, Sport and the Olympics of the Piedmont Region (Assessorato al Turismo, Sport e Olimpiadi della Regione Piemonte); Infocamere System (Sistema Infocamere); ITP – Investments for Turin and Piedmont (ITP – Investimenti Torino Piemonte).

Tourism in Piedmont, the industry of the third millennium

Piedmont has been **an important destination** since the earliest times. The spa town of **Acqui** was famous as far back as two thousand years ago, while in the Middle Ages, the region's shrines and abbeys attracted flows of international religious tourism in pilgrimage along the **Via Francigena**.

In the last few years, however, **tourism in Piedmont** has really risen to the fore. What is behind this?

After unifying **Italy** in the nineteenth century, inventing the **car industry** and being responsible for more than a century of progress and well-being mostly thanks to its industrial activities, the economic and social fabric of Piedmont has changed radically over a very short period of time.

The phenomenon of **globalisation** has spelt the end of **the single industry culture** which characterised Piedmont for the whole of the twentieth century (with the brands that brought it world renown, such as Fiat, Lancia, Olivetti, Giugiaro, Pininfarina and Bertone).

But Piedmont has reacted to this historical development with surprising rapidity. It has discovered an extraordinary talent for capitalising on its heritage of historical, natural, traditional and gastronomic points of excellence and has transformed this into a modern **tourism industry**.

Areas such as the hills of the **Langhe**, which up till a few years ago were poor and isolated, now represent an internationally renowned destination, thanks to two ambassadors *par excellence* like **Barolo** and the **white truffle of Alba**: two emblematic symbols of the new **glocal** culture, in view of their inseparable links with the local area and their popularity on dining tables the world over, which also sees them being sold in internet auctions. Another example of this is a product like **Nutella**, which originates from the same area and is now so famous that very few people know that it is **100% Piedmontese**.

Compared to other “historic” tourist areas in Italy, such as its seaside resorts and cities of art, Piedmont is a latecomer to tourism. But this is by no means a disadvantage: it actually represents a positive advantage. In this way Piedmont has avoided the boom in **mass tourism** of the Sixties and Seventies: the **concrete** jungles which have ruined miles of Italian coastline and the period when the quality of **hospitality** was always neglected in favour of numbers.

Piedmont comes to the great market of tourism at a time when the world is populated by a completely different breed of tourist. Today's tourists demand **high standards**, independently of their budget. They might be holidaying for shorter periods, but they want their time to be packed full of exciting and memorable experiences. They want to be able to experience and savour the atmosphere, flavours, colours and culture of a **well-defined area**. They increasingly appreciate the opportunity to combine **sports and nature**, health and well-being, and a holiday packed with opportunities and events.

In short, today's tourists want to be spoilt. They want **quality** and **attention**, and these are the very values that the tourist industry in Piedmont can offer better than any other.

And this is why Piedmont's **big moment** is here. Piedmont has become a **fashionable destination**, as shown by the increasing attention from the press, magazines and TV networks from all over the world.

Its landscapes, colours and aromas are rapidly regaining the attention they deserve in the public eye as one of the best loved "**postcards from Italy**".

To ensure that Piedmont wins **the bet on tourism**, capturing these developments and preparing the right tools to direct and support them was vital. And the **Piedmont Region** has risen to the challenge. The challenge of helping **the companies of the tourist industry** invest to innovate, grow, become more competitive and promote themselves on the new markets. The challenge of working alongside the towns, villages and mountain communities to enhance, beautify and develop their areas with structures and infrastructures for tourism. The aim is to transform the global event of the **Torino 2006 Winter Olympics** not only into a worldwide celebration of snow and ice sports, but above all into a unique opportunity to enable the entire system of tourism in Piedmont to take a giant leap forward.

The boom in figures

All the public policies implemented by the **Piedmont Region** have been directed at this end, and in the last few years have enabled great progress to be made by tourism in Piedmont.

In just **three years**, from **2000** to **2003**, investments for tourism in Piedmont with the backing of the Region have reached the unprecedented figure of **1,768,662,222 Euros**: the **biggest ever growth** ever recorded in Italy in this sector.

The Region supported this directly with financing to the record value of **594,931,394 Euros**.

This was possible thanks to innovative tools such as the **laws on tourism** passed by the Region in the last few years, transforming the old policy of scattered incentives into policies capable of encouraging **investments** and stimulating competition and innovation.

The first tool was the **regional law 18**, passed in **1999**. Law 18 covers public funding for private companies generating new supply and hospitality by means of **annual calls** for tenders. Thanks to this law **1,216 projects** have been funded in three years: from the five star hotel to the bed and breakfast, from the traditional restaurant to the family-run hotel, in **472** Piedmontese communes, with record investments to the value of **956 million Euros** and regional funding to the value of **183 million Euros**.

Thanks to Law 18, investments on tourism in Piedmont rose from **174,305,955 Euros** in 2000 to **408,700,000 Euros** in 2002, for a record total of **956,156,400 Euros**, which represents an impressive average growth of **448.6%** in just three years.

There are **26,099** beds, **10,198** rooms, **171** brand new hotels, and **76** new or completely renovated **4** and **5** star hotels. Special attention has been dedicated to the **Olympic area**: with **12,544** new beds, **5,596** new rooms, **156** new companies and **93** **4** and **5** star hotels. There has also been a boom in the number of new businesses, with **502** new tourism-based companies.

This means that there are now **172,381 beds** available in Piedmont, an unprecedented increase of **20%** from the **140,037** beds available in **1999**. In addition to this there are over **400,000** beds available in the so-called **second homes**, which thanks to a law passed by the Region, are about to be made available to tourists by means of a system of short term lets similar to that already in function in other European countries.

Also operative is **regional law 4**, passed in **2000**. This law provides financing for projects put forward in the public sector (Communes, Provinces and mountain communities) and by non-profit associations, with the aim of enhancing and promoting **tourist areas** and investments made there: from the restoration of historical town centres to urban decor, from conference centres to important sports and events facilities, from cycle tracks to folklore museums. So far Law 4 has financed **370 projects** with **196 million Euros** of investments and **104 million Euros** of funding.

The third great achievement of the Piedmont Region has been hooking up the entire Piedmontese tourist industry to the catalyst for development represented by the **2006 Winter Olympics**. The **Schedule of Works Accompanying the Olympics** entails the completion of **around a hundred** big tourism and sports projects throughout all areas of Piedmont which will not be hosting competitions, in time for 2006. Without these projects these areas would have been put out of the market by the huge investments made on the Olympic Valleys around Turin.

With total investments to the value of **219 million Euros**, the big skiing areas in Limone Piemonte and the Monregalese Valleys, a stone's throw from Liguria and the coast, will be renovated and expanded. As will the new ski resorts in Alagna and Macugnaga on the slopes of Monte Rosa in northern Piedmont. And the network of castles and wine tourism routes in the Asti area. Not to mention the huge project designed by the Japanese architect Kenzo Tange which is destined to transform **the spa town of Acqui** into Italy's finest beauty farm, with **25 million Euros** from the Region alone.

But the strength of the tourist industry in any area is based on more than just the hospitality, services and infrastructures it offers. Piedmont also offers thousands of **tourist events** throughout the region: a rich mosaic of events and tourist attractions which make a stay in the region pleasurable and interesting.

From concerts starring the big names of jazz against the enchanting backdrop of sunset over Lake Maggiore, to the historic reconstruction of the Napoleonic Battle of Marengo, from the Alba Truffle Fair to the triumphs of "rice cuisine" in the Vercelli area. From 2000 to 2003 the Region has backed **1,029 tourist events** throughout the entire area, with funding to the tune of over **6 million Euros**.

The tourist industry in Piedmont: the figures

The tourism industry in Piedmont currently comprises **17,367** companies operating in the hospitality and catering sector, up **5.45%** on the **16,456** companies in **2000**. **3,162** of these are in the hospitality sector, with **1,473** hotels and tourist accommodation.

The sector generates a **turnover** of **2,671 million Euros**, **3.3%** of the **80,196 million Euros** which represents the total estimated spending on tourism in Italy. The figure for **2003** is up **0.3%** compared to the previous year.

The **tourist industry** in Piedmont employs **75,534** people ¹.

The **numbers of tourists** in Piedmont have increased considerably in recent years. In **2002** **2,651,068** tourists arrived in Piedmont to spend at least one night, an increase of **7.32%** compared to **1999**. The figure for overnight stays in **2002** was **8,591,889**, up **5.25%** on **1999**.

The international situation (the crises following September 11, the bad weather in the summer of 2002, and the economy and tourism in recession) made its presence felt, with a drop of **178,466** in the number of overnight stays compared to 2001, a real boom year. However the partial figures for **2003** indicate a full recovery: **+5%** in the Lakes area and the revelation of summer tourism in the Olympic mountains: **+15%** compared to 2002.

The traditional leading areas for tourism in Piedmont are *the Lake District* – “*Piedmont’s riviera*”, which accounts for **32.84%** of total overnight stays, and the *metropolitan area of Turin* which accounts for **26.51%**. The revelation of the summer of 2003 was the phenomenon of summer tourism in the **Olympic mountains**.

In the league table of the **20** regions of Italy, Piedmont is in **tenth place for the number of arrivals**, ahead of extremely popular areas such as **Apulia** with its beaches, the art cities of **Umbria**, the mountains of **Alto Adige**, the coast of **Sardinia** and the ski resorts of the **Aosta Valley**.

The region enjoys almost the same level of popularity among Italians and visitors from overseas. In 2002 there were **4,930,796 Italian** tourists, with **1,526,372** arrivals, **58%** of the total. **International** visitors to Piedmont in 2002 accounted for **42%** of the total number of tourists: with **3,661,093** overnight stays and **1,124,696** arrivals.

The **Germans** were the most numerous international visitors (**1,064,262** overnight stays in **2002**, **12.39%** of the total number of tourists in Piedmont), followed some way behind by the British (**441,064**, **5.13%** of the total). The number of **French** tourists increased (**402,147**, **+1.4%** compared to 2001) as did numbers from the **Netherlands**, (**341,334**, **+5.7%** compared to 2001).

¹ It should be noted that the figures supplied **exclude sectors which are not strictly part of the tourism industry**, but which nevertheless play an important role in the sector and the spending concerned. For example personnel working in museums and in transport, agricultural produce, the expenses sustained by tourists for transfers, shopping, souvenirs, entertainment, purchases of food and wine products and so on.

COUNTRY OF ORIGIN	OVERNIGHT STAYS	ARRIVALS
ITALY	4,930,796	1,526,372
GERMANY	1,064,262	282,764
UNITED KINGDOM	441,064	106,974
FRANCE	402,147	178,793
NETHERLANDS	341,334	61,652
SWITZERLAND	237,704	100,356
USA	199,527	80,820

68% of tourists in Piedmont opt for **hotel** accommodation, compared to **32%** who choose another form of accommodation. The hotel is the accommodation of choice for Italian and Swiss visitors (**64%** and **70%** respectively), the French (**84%**), British visitors (**93%**) and Americans (**90%**). German tourists are divided almost equally between hotel and non-hotel accommodation (**52%** and **48%** respectively). There is one curious exception: the **Dutch** showed an overwhelming preference, **82%**, for non-hotel accommodation.

The **total spending** of foreign tourists on holidays in Piedmont has risen considerably. From **317 million Euros** in 2001 it increased to **488 million Euros** in 2002, with a **spending per head** of **433.90 Euros**.

The **average length of stay** for the international tourists who come to Piedmont (thus including business travel and transit) is **3.2** days.

Tourism in Piedmont: international markets and operators

Tourist **Piedmont**, with its products, packages and travel itineraries, features in **601** international **tour operators'** printed catalogues and websites: around **30%** of the **1,959** foreign **tour operators** which sell holidays in Italy throughout the world.

This figure places the region in **11th** place on the league table which is headed by **Tuscany**, with Piedmont once again beating seaside regions such as **Apulia**, **le Marche** and **Calabria** and powerful winter tourism destinations such as **Alto Adige** and the **Aosta Valley**.

The best known international **tour operators** selling tourism in Piedmont on the European and global markets are the German companies **Tui**, **Thomas Cook**, and the **Rewe Group**; the British **My Travel Group** and **First Choice**; the French **Cit Evasion**, **Clio Horizons Culturels**, **Donatello**, **Fram**, **Nouvelles Frontieres** and **Wasteels**; and the Spanish **Davinci Tours**, **El Corte Inglés Tour Mondial**, **Iberrail**, **Italiatour**, **Keytel-Restel**, **Politours** and **Viajeros**.

The most popular destinations offered by the tour operators on the international markets are the treasures of the city of **Turin**, stays by **Lake Maggiore**, food and wine in the **Langhe** area, and skiing holidays in the Olympic mountains of the **Susa Valley** (for the British market in particular).

The 12 **most important markets** in terms of arrivals in Piedmont are, in decreasing order of importance - Germany, France, the United Kingdom, Switzerland, the United States, the Netherlands, Austria, Belgium, Spain, Sweden, Japan and Russia.

The classic countries which Piedmontese tourism draws on are **Germany, Switzerland, the United Kingdom and France**. Emerging areas are the **Scandinavian countries** for the Lake District and Asti area, the **United States** on the Olympic mountains and **Spain** in the Vercelli and Novara areas.

The international markets can be grouped into four main categories with regards to **trends**:

- a) **Emerging** markets, with sizeable increases and development (France, the Netherlands and Switzerland).
- b) **Potential** markets in the medium term, with excellent rates of growth but which require further promotion to raise the profile of tourism in Piedmont with respect to other areas (Japan, Spain, Sweden, the United Kingdom and Austria). Some of these markets have experienced exponential growth, like **Japan**, which has risen by **122%** from 1994 to 2002.
- c) The **traditional** markets, which account for a large share of the market but which are exhibiting symptoms of “maturity” and are therefore in need of new products and promotional initiatives. This is the case of Germany.
- d) Markets in need of **support**. These are countries where Piedmont is not yet firmly established such as Belgium, the United States (suffering from the aftermath of September 11) and Russia, where the liberalisation of the market is leading to an increase in the number of arrivals.

The largest **international hotel chains** are all present in Piedmont: **Best Western** (USA) in Cavaglià (Vercelli), Cuneo and with 8 hotels in Turin; **Intercontinental Hotels Group** (Great Britain) with the *Holiday Inns* in Turin and Moncalieri; **Golden Tulip Worldwide** (Netherlands) with the *Concord* in Turin; **Choice Hotels** (USA) in Borgaro and Settimo (Turin); **Accor Hotels** (France) with the *Novotel* in Turin; **Le Meridien** (Great Britain) in Turin; **Envergure** (France) in Moncalieri and Rivoli; and **AC** (Spain) which is to open in Turin in 2005.

There are also many hotels belonging to **Italian chains** which enjoy great popularity with international visitors: the three **Turin Hotel Internationals** in Turin, including the *Grand Hotel Torino* which will become a *5 star luxury* hotel in 2005; the 4 **Spacehotels** (2 in Turin, one in Novara and one in Cuneo); the 2 **Jolly Hotels** in Turin and the **Starhotel Majestic** in Turin.

Tourism in Piedmont is promoted on foreign markets by the ATR (Regional Tourist Board) in collaboration with the international branches of **ENIT** (the Italian State Tourist Board)

Piedmont features at most of the international **tourism trade fairs and shows**, both general and specialised: the BIT in Milan, where each year its stand is universally acclaimed among those of the other Italian regions; Vakantiebeurs (Utrecht, NL); Ferien (Vienna, A); Holiday World (Dublin, Eire); Fitur (Madrid, E); Ferienmesse (San Gallo, CH); CBR

(Munich, D); World Tourism Fair (Paris, F); the Holiday Show (Bruxelles, B); Tur (Göteborg, S); International Tourism Fair (Berlino, D); MITT (Moscow, RUS); R.D.A. (Cologne, D); Top Resa (Deauville, F); Travel Trade Workshop (Montreux, CH); World Trade Market (London, UK); Daily Mail Ski & Snowboard (London, UK); Reisemarkt (Cologne, D); Tourism Fair (Strasbourg, F); M.O.T. (Frankfurt, D).

There are numerous **educational tours** organised each year for journalists and tour operators from Germany, Austria, Switzerland, the United Kingdom, France, Spain, the Netherlands, Belgium, Sweden, Denmark, Russia, Romania, Norway, Finland, Portugal, Poland, Hungary, Canada, China, and Japan.

International **readers** also have many opportunities to get to know Piedmont, its lands and food and wine thanks to numerous articles, features and special editions in the leading publications and magazines.

Guides to Piedmont are currently being written and prepared by two of the most famous international series, **Lonely Planet** and **Guide du Routard**.