Project number: DE/09/LLP-LdV/TOI/147 248

BENCHTOUR:

Benchlearning in the Tourism Sector

ANALYSIS OF THE SITUATION OF THE SMEs IN THE TOURISM SECTOR IN "TUSCANY" REGION

I N T R O D U C T I O N

a. BRIEF INTRODUCTION TO THE COUNTRY

Italy is a Mediterranean country in the south of Europe. Its west coast is the Mediterranean Sea and the east coast is the Adriatic. France, Switzerland, Austria, and Slovenia form its northern border. Its highest point, in Monte Bianco, is 4748 meters. The mainland is a peninsula and Italy also includes the two large islands of Sicily and Sardinia.

Italy is located in Southern Europe and comprises the long, boot-shaped Italian Peninsula, the land between the peninsula and the Alps, and a number of islands including Sicily and Sardinia. Its total area is 301,230 km², of which 294,020 km² is land and 7,210 km² is water.

Italy enjoys a predominantly Mediterranean (mild) climate with a colder Alpine climate in the mountains to the north and a hot and dry climate in the south. Italy's coast are pleasant almost all year. Much of Italy is very hot in summer and summer is the height of vacation season. Probably the best seasons to visit Italy are late spring and early fall.

Italy did not exist as a state until the country's unification in 1861. Due to this comparatively late unification, and the historical autonomy of the regions that comprise the Italian Peninsula, many traditions and customs that are now recognized as distinctly Italian can be identified by their regions of origin.

Despite the political and social distinction of these regions, Italy's contributions to the cultural and historical heritage of Europe and the world remain immense. Italy is home to the greatest number of UNESCO World Heritage Sites (44) to date, and has rich collections of world art, culture and literature from many different periods.

Italy is divided into 20 regions with 18 on the mainland and two islands, Sardinia and Sicily. Although they are all Italian, each region still holds some of their own customs and traditions and there are many regional food specialties.

Modern Italy is a democratic republic and a developed country with the eighth-highest quality of life index rating in the world. Italy enjoys a high standard of living, and is the world's 18th most developed country. It is a founding member of what is now the European Union, having signed the Treaty of Rome in 1957, and it is a founding member of the North Atlantic Treaty Organization (NATO).

It is a member of the G8 and G20, having the world's seventh-largest nominal GDP, and is also a member state of the Organisation for Economic Co-operation and Development (OECD), the World Trade Organization (WTO), the Council of Europe, and the Western European Union. It has the world's eight-largest defence budget and shares NATO's nuclear weapons.

b. INTRODUCTION TO THE REGION

(Geography, economy, demographics, government, infrastructures, main resources…)

Tuscany is one of the most important Italian region known for its beautiful landscapes, its rich artistic legacy and vast influence on high culture. Tuscany is widely regarded as the true birthplace of the Italian Renaissance, and has been home to some of the most influential people in history. Due to this, the region has several museums, most of which are found in Florence, but others in towns and smaller villages. Tuscany has a unique culinary tradition, and is famous for its wines (most famous of which are Chianti, Morellino di Scansano and Brunello di Montalcino).

Six Tuscan localities have been designated World Heritage Sites: the historical center of Florence (1982), the historical center of Siena (1995), the square of the Cathedral of Pisa (1987), the historical center of San Gimignano (1990), the historical center of Pienza (1996) and the Val d'Orcia (2004). Furthermore, Tuscany has over 120 protected nature reserves. This makes Tuscany and its capital city Florence very popular tourist destinations, attracting millions of tourists every year. Florence itself receives an average of 10 million tourists a year by placing the city as one of the most visited in the world (in 2007, the city became the world's 46th most visited city, with over 1.715 million arrivals).

Geography

Roughly triangular in shape and situated between the northern part of the Tyrrhenian Sea and the central Apennines, Tuscany has an area of approximately 22,993 square kilometres (8,877.6 sq mi). Surrounded and crossed by major mountain chains, and with few (but very fertile) plains, the region has a relief that is dominated by hilly country.

Whereas mountains cover 25% of the total area — 5,770 square kilometers (2,227.8 sq mi), and plains a mere 8.4% of the total area, almost all coinciding with the valley of the Arno River, summing for 1,930 square kilometers (745.2 sq mi), — overall hills make up two-thirds (66.5%) of the region's total area, covering 15,292 square kilometers (5,904.3 sq mi).

The climate, which is fairly mild in the coastal areas, is harsher and rainy in the interior, with considerable fluctuations in temperature between winter and summer giving the region a soil building active freeze-thaw cycle in part accounting for the region once having served as a key breadbasket of ancient Rome.

Economy

The subsoil in Tuscany is relatively rich in mineral resources, with iron ore, copper, mercury and lignite mines, the famous soffioni (fumarole) at Larderello and the vast marble mines in Versilia. Although its share is falling all the time, agriculture still contributes to the region's economy. In the region's inland areas cereals, potatoes, olives and grapes (for the world-famous Chianti wines) are grown. The swamplands, which used to be marshy, now produce vegetables, rice, tobacco, beets and sunflowers.

The industrial sector is dominated by mining, given the abundance of underground resources. Also of some note are the textiles, chemicals/pharmaceuticals, metalworking and steel, glass and ceramics, clothing and printing/publishing sectors.

Smaller areas specialising in manufacturing and craft industries are found in the hinterland: the leather and footwear area in the south-west part of the province of Florence, the hot-house plant area in Pistoia, the ceramics and textile industries in the Prato area, scooters and motorcycles in Pontedera, and the processing of timber for the manufacture of wooden furniture in the Cascina area.

The heavy industries (mining, steel and mechanical engineering) are concentrated along the coastal strip (Livorno and Pisa areas), where there are also important chemical industries. Also of note are the marble (Carrara area) and paper industries (Lucca area).

Almost without exception, every town and city in Tuscany has considerable natural and architectural beauty. There is a continuous stream of visitors throughout the year. As a result, the services and distributive activities that are so important to the region's economy are particularly wide-ranging and highly organised.

Demographics

The population density of Tuscany, with 161 inhabitants per km² in 2008, is below the national average (198.8 inhabitants per km²). This is due mainly to the low population density of the provinces of Arezzo, Siena and, above all, Grosseto (50 inhabitants per km²).

The highest density is found in the province of Prato (675 inhabitants per km²) followed by the provinces of Pistoia, Livorno, Florence and Lucca, peaking in the cities of Florence (more than 3,500 per km²), Livorno, Prato, Viareggio, Forte dei Marmi and Montecatini Terme (all with a population density of more than 1,000 inhabitants per km²). The territorial distribution of the population is closely linked to the socio-cultural and, more recently, economic and industrial development of Tuscany.

Accordingly, the least densely populated areas are those where the main activity is agriculture, unlike the others where, despite the presence of a number of large industrial complexes, the main activities are connected with tourism and associated services, alongside a plethora of small firms in the leather, glass, paper and clothing sectors.

Starting from the 1980s, the region attracted an intense flux of immigrants, in particular from China. There is also a significant community of British and American residents. As of 2008, the Italian national institute of statistics ISTAT estimated that 275,149 foreign-born immigrants live in Tuscany, equal to 7.4% of the total regional population.

Government and infrastructure

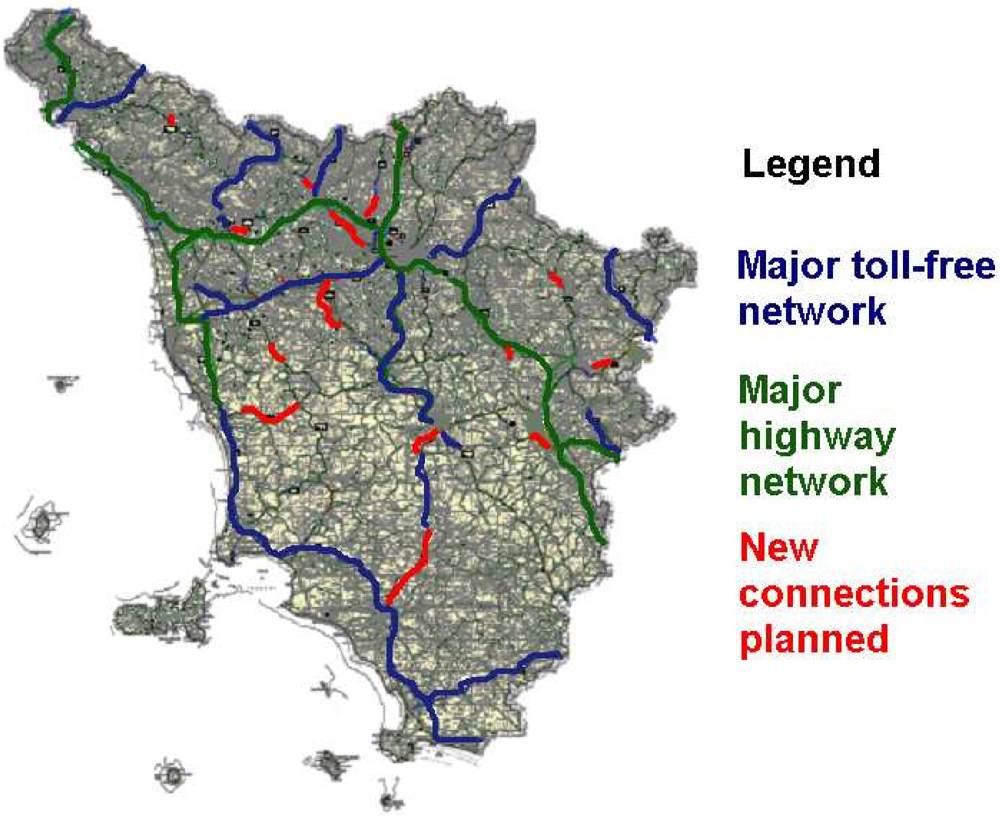
The Politics of Tuscany, Italy takes place in a framework of a presidential representative democracy, whereby the President of Regional Government is the head of government, and of a pluriform multi-party system. Executive power is exercised by the Regional Government. Legislative power is vested in both the government and the Regional Council. The Regional Government (Giunta Regionale) is presided by the President of the Region (Presidente della Regione), who is elected for a five-year term, and is composed by the President and the Ministers (Assessori), who are currently 13, including a Vice President.

The Regional Council of Tuscany (Consiglio Regionale della Toscana) is composed of 65 members and is elected with proportional representation plus a majority premium for the winning coalition. The Council is elected for a five-year term, but, if the President suffers a vote of no confidence, resigns or dies, under the simul stabunt vel simul cadent prevision (introduced in 1999), also the Council will be dissolved and there will be a fresh election.

As far as the infrastructure system is concerned, we can look at the following elements: road network, transports by train, airports and connections by bus.

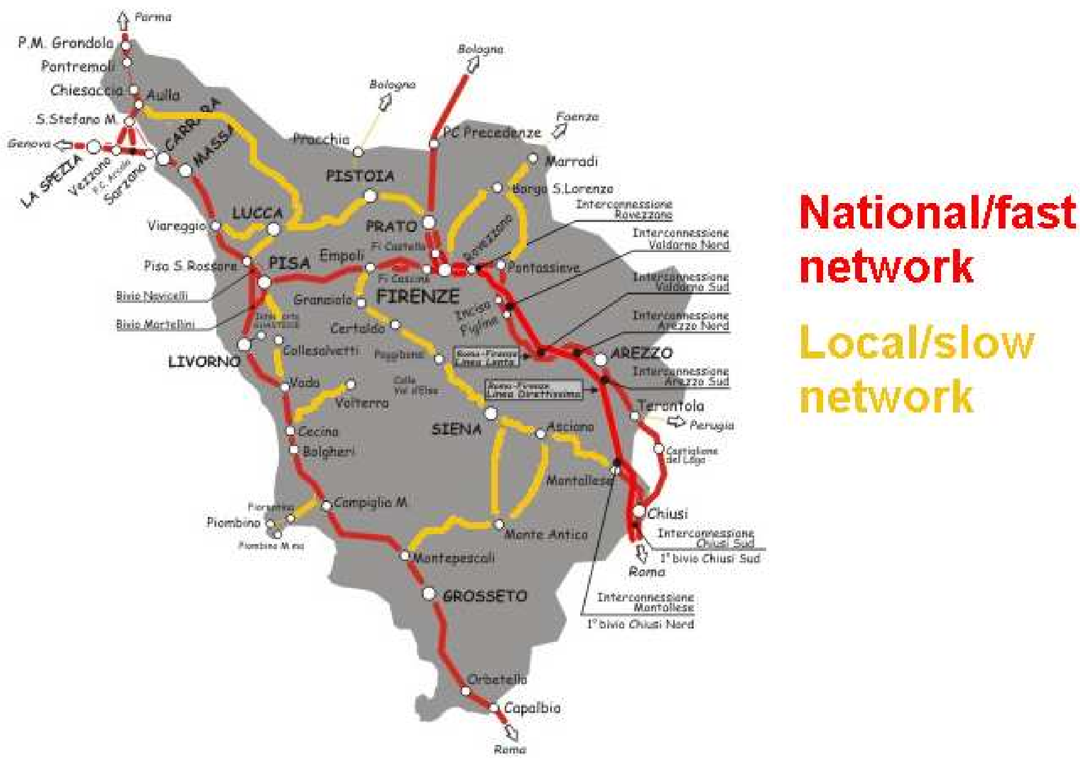
Road network

As can be seen in the picture below, the Tuscan region has a well developed road network, especially along the coastline and around the area of Florence. The Italian major highway A1 connecting Northern Italy with Southern Italy also crosses Tuscany, nearby Florence and Arezzo. The other major highway is A11 connecting Florence to the coast, including the towns of Pisa, Lucca and Livorno. The road network in Tuscany also includes toll-free highways, such as the road connecting Livorno with Rome. There are plans for further development of the road network in Tuscany, especially in the area near Florence, with the A1 becoming soon a 3-lane highway.
What can be noticed though, is the absence of connections with the central and southern parts of the region, which turn out to be a little isolated from the rest of the major centres.



Trains

Trains remain as one of the easiest ways to travel within Tuscany from city center to city center. Florence's main train station, Firenze Santa Maria Novella, sits astride the main Rome-Milan line (with connections in Bologna and Arezzo) and is the terminus for two lines to the west - one to Livorno via Pisa and Empoli and one to Viareggio via Prato, Pistoia and Lucca. Direct lines run to Siena (sometimes with changes at Empoli) and Faenza in Emilia-Romagna (a scenic ride through the Apennines). Italy's main west coast line route runs through Tuscany linking Orbetello in the south to Livorno, Pisa, Viareggio and Massa in the north. To proceed to smaller towns near these main towns, you will often need to make a bus connection.
An inconvenience of numerous Tuscan towns to keep in mind is that many are located on a hilltop. This is the case for Siena, Cortona and Volterra so the train station is at the bottom on the hilltown and you will need to get a local bus to take you up to the town or prepare to walk a bit uphill to reach your destination.
High speed trains (TAV) are already available between Florence-Rome (travel time: 1h30 min) and Florence-Bologna (travel time: 35 min).



Education and Training
Education and Culture DG
Lifelong Learning Programme

Airports

The two major airports in Tuscany are the Galilei Airport in Pisa, and Vespucci Airport in Florence. The first one is by far the most important in terms of number of flights and passengers transported. Galilei airport connects the Tuscan region with the major European capitals, as well as with other destinations in the world, like New York (USA). Airline companies like Ryanair and Easyjet fly from and into Pisa airport. Florence airport is much smaller and not well connected with other airports in Europe; therefore plans have been made to develop the latter one.

Bus lines

There are several bus companies which regularly connect the major cities in Tuscany and also other major towns across Europe with the Tuscan region. The services offered by most of these companies have high quality standards. The main companies are: Sita, Lazzi, Copit and Eurolines.

TOURISM INITIATIVES, STRATEGIES AND POLICIES IN THE REGION

You can find here a list of initiatives that have taken place in the course of 2009, related to tourism promotion of Florence and its province, carried out by APT in collaboration with the Chamber of Commerce or Toscana Promozione.

Born from an agreement between Tuscany Region, Unioncamere Toscana - the regional organization of the Chambers of Commerce -, the National Institute for the Foreign Commerce (ICE) and the National Body for the Tourism (ENIT), **Toscana Promozione** is an Agency that has the main purpose to **support the undertaking of Tuscan businesses** to compete on the different world markets.

A task that the Agency carries out through the organization of events, seminars, workshops, pointing on the image and supporting the Tuscan businesses that participate to national and international trade fairs, but not only. Toscana Promozione implements initiatives of international cooperation; it financially and technically supports projects of economic promotion proposed by private subjects; it provides a service of assistance and first approach to foreign businesses that want to establish themselves in Tuscany, and through the Counter for Internationalization (Sprint Toscana), it offers to Tuscan businessmen insurance, financial, promotional services and consultancy.

The Agency activity sectors are three: Agriculture and Food Industry; small and average industrial businesses and quality craftsmanship; tourism. Toscana Promozione has offices in Florence, New York, Shanghai, Moscow and Frankfurt. Toscana Promozione supports businesses and business ideas, and creates business opportunities for Tuscan companies operating in every sector.

Agriculture and Food

Toscana Promozione carries out an important promotional action in the agriculture and food sector. Toscana Promozione carries out an important promotional action in the agriculture and food sector aiming at:

- Safeguarding and increasing the value, in Italy and abroad, of the quality products of our land that, linked to the traditions and typicality of the Region, have determined a concept of "Tuscanity" in the world;
- Promoting the winemaking and agricultural/food sector of Tuscany, with special attention to certified, typical and traditional products;
- Coordinating and harmonizing the sector's economic promotion initiatives;
- Managing the participation of consortiums, cooperatives, local bodies, agricultural estates and operators to the most important international and

national Trade Fairs for agriculture and food, designing shared exhibition spaces to coordinate and support their presence.

- Organizing seminars, workshops and round tables on specific issues of the agriculture and food sector, training stages and exchanges with the operators of other European Countries and Latin America in the view of future partnerships;

- Supporting agritourism and the wine tracks for the safeguard and valorization of the territory within the scope of an integrated rural development;

- Educating the youth to respect the environment through a teaching activity within the scope "School in the Country";

- Carrying out a coordinated and articulated communication strategy also through publishing and multimedia initiatives.

Small and Average Businesses and Craftsmanship

Supporting craftsmanship and small and average businesses is more and more important to face the challenges of the global market.

Supporting craftsmanship and small and average businesses is more and more important to face the challenges of the global market.
The promotional activity for industrial PMI's and craftsmanship of Toscana Promozione aims to:

- Increase the competitiveness of Tuscan businesses by developing initiatives in support of the internationalization process;

- Promote the export of small and average businesses by participating to international trade fairs, organizing economic missions, seminars and workshops abroad, strengthening the "philosophy" of the promotional activity as provision of qualified services to businesses;

- Guarantee an effective activity of promotion of the "Tuscany of excellence" image favoring cross-sector promotional actions that create fruitful synergies among the various sectors;

- Seek for an increasing integration between promotion and cooperation, in order to make the Tuscan production sectors communicate with those of developing Countries or Countries with transition economies also in relation to specific area projects (Mercosur Project);

- Support trade fairs of the sector in Tuscany with the objective to develop the territory trade fair poles;

- Increase the value of Tuscan productions with particular reference to the artistic and quality craftsmanship products through specific projects.

Tourism

Having a good reputation is not enough. Tourism has an ever-increasing need of specific services, qualified operators and promotion. Having a good reputation is not enough. Tourism has an ever-increasing need of specific services, qualified operators and promotion. The program of Toscana Promozione's Tourism sector is articulated in a coordination activity and in promotional initiatives carried out in collaboration with Enit, with the following objectives:

- To promote, in Italy and abroad, the whole of the tourism offer to favor tourism in the country, at the seaside, on the mountains, in the cities of art and at the spas of a quality Tuscany;
- To regain internal tourism, also through the valorization of an alternative tourism and of the environmental resources of the territory;
- To draw attention on complementary and innovative tourism sectors such as health and wellness, eco-tourism, school tourism and outdoor tourism;
- To support through direct interventions the relaunching of tourism shows (Show of Sport Tourism, Show of Associated Tourism, Show of Convention Tourism of Florence) and coordinate the participation of Tuscan businesses to the most important sector shows in Italy and abroad;
- To realize specific projects supporting mountain and sea tourism: Toscana Verde and Toscana Blu;
- To coordinate educational programs for journalists and tour operators in order to promote specific areas of the territory;

Toscana Promozione has also signed an agreement protocol with Tuscany's Apt's that governs the sector activities and defines an integrated strategic communication plan of the tourism offer. Together with the Apt's, the Agency also takes care of the publication of a promotional booklet on Tuscany, a directory on hospitality and accommodation and a list of cultural events.

Internationalization of the enterprises

The Internationalization Counter, **Sprint Toscana**, is a tool available to Tuscan and foreign businessmen who want to start an activity in Tuscany. The Counter has its headquarters in Florence c/o Toscana Promozione and operates on the territory through a network of counters located in the Chambers of Commerce and Category

Associations premises. The Sprint network is a national and international network of Development Agencies that gathers information on all the tools supporting internationalization. Sprint offers to businesses consultants from **Ice** (Institute for the Foreign Commerce), **Sace** (Italian insurance company for export credits), **Simest** (Italian company for businesses abroad), **Toscana Promozione** and **Gruppo MPS**. The services offered by Sprint Toscana are the following:

Financial Services (Simest): borrowing facilities for export, easy term financing for programs of market penetration, participation to international tenders, feasibility studies and technical assistance, participation in the capital stock of foreign businesses;

Insurance Services (Sace): credit risk, production risk, foreign investment risk, individual policies, Global Policies;

Promotional Services (Ice): knowledge of foreign markets, assistance in market penetration, promotion of the presence abroad, training for businesses.

Investments in Tuscany

Invest in Tuscany is a network formed by the Region's main local public institutions, to which foreign companies can turn to start up a new business in Tuscany. The head office is within Toscana Promozione, while the Tuscan Provinces, highlight the available investment opportunities in their geographical area. Its mission is: to promote the attraction of direct foreign investment in the region of Tuscany through marketing and communications activities; To provide comprehensive support to foreign investors establishing businesses or planning equity investments in Tuscany. Invest in Tuscany guarantees maximum confidentiality on inquiring companies, projects and specific requests for information.

Invest in Tuscany's key areas of responsibility are the following**:**

- general image promotion of Tuscany as a business destination;
- promotion of specific investment opportunities identified by our local institutional partners.

A SLICE OF TUSCANY COMES TO NEW YORK CITY
"Toscana in New York" Celebrates Tuscan Lifestyle from May 26-31

As to promotional events in 2009, we would like to remind the one which took place from May 26 through May 31 in New York. The event celebrated the different aspects (cultural, artistic, lifestyle) of this beloved Italian region. Sponsored by The Region of Tuscany and Toscana Promozione, Toscana in New York included an exhibit at the Time Warner Center featuring dozens of original costumes from Romeo and Juliet, the 1968 film by Tuscan Franco Zeffirelli as well as a unique and contemporary display of artist books and art works shaped as books called "Italian Art Codex." There were numerous other events throughout the week which were by invitation only, including a conference on the success of Tuscan healthcare system and a B to B workshop to promote Tuscan tourist destinations. All of the events were hosted by the Tuscan Ministers of Health, Tourism and Economic Development. During the workshop, the region's new tourism web site were showcased, www.turismo.intoscana.it, which offers travel tips, recommended activities, lodging, dining and shopping options, maps, blogging opportunities to share travel experiences and an extraordinary amount of additional information critical to any visit to Tuscany.

TUSCANY : THE SENSE OF A REGION

From November 21st through the 25th 2009 , Tuscany was the main actor in Moscow

Already present in Moscow with its economic system headquarters – established in 2005 – Tuscany returned to Russia as a protagonist in the Grand Event: *Tuscany: The Sense of a Region*, conceived to spread the knowledge of our region as the land that hinges on excellence, able to respond to the ever growing demand for know-how, advanced technology, culture, high and very high level consumer goods that are expressed by Russian society .

In the course of this event, organized by the Economic Promotion Agency of Tuscany (Toscana Promozione) in partnership with the Italian Institute for Foreign Trade (ICE) the Russian audience was given an opportunity to get familiar with Tuscan tourism, culture, wines and design.

SITUATION OF THE TOURISM SECTOR IN THE REGION

MAIN TYPES OF TOURISM DEVELOPMENT

1. *Tourism of art and culture*

The demand of cultural tourism is in constant increase - like confirmed from all market researches - and bands more and more wide and diversified of population they turn to varied forms of cultural product. The expansion of the number of tourists interested in the cultural aspects of Tuscany involved a higher and more articulated demand by the public, which also considers art tourism a form of vacation: the offer in terms of entertainment and socialization, beyond the satisfaction of intellectual needs and cultural knowledge. **The identification of the profiles of cultural visitors** is a fundamental step in creation of artistic and cultural products that are placed effectively on the market and that they are at the same time respectful of the cultural atmosphere in which they belong. In particular, we can distinguish several segments of cultural visitors:

- the cultural tourist type staying in the Tuscan towns
- the visitor who arrives from a nearby tourism location
- the visitor interested in art exhibitions or the cultural manifestations of miscellaneous kind
- the tourist searching for small villages, agricultural tourism, older traditions, etc.

All kinds of visitors “consumes” a product consisting of various elements, which are placed transversally among the different areas and which allow to distribute the different tourist flows on the territory and to integrate the greater resources with the less known ones. Having this said, more information is required in terms of tourist information, public transportation, accommodation facilities, beyond that of promotion and valorisation. The cultural tourism is a wide and diversified phenomenon, both on the tourists habits side as well as in the variety of the offer available: this can be hardly explained through a rigid definition as it embraces a different range of goals, contents, execution methods generating models of tourist consumption extremely articulated. In recent years there has been a progressive extension of the demand on art and culture, with a coherent growth of cultural production offer and diversified methods of enjoyment. However its quantitative dimension is not easy identifiable because of the overlap of many cultural elements that characterize this typology. The “cultural” tourist is not only who visits archaeological sites, museums, parks or monuments; the cultural tourist is interested both in the bigger towns as well as in the smaller centres, with interconnections of motivations that go from the cultural visits to the entertainment, from gastronomy to fairs, from the local traditions to the folklore. Based on these elements, the promotion of a cultural destination involves one mix of acceptance, hospitality, structures, events and services, without ignoring the fact that the application of marketing models needs to make reference in the first instance to characteristics of the cultural product of reference.

On the various markets and even with the most traditional tourist destinations, the tour agents nowadays offer tour packages with stronger cultural features. A deeper attention is given to the number of events, shows, the artistic and cultural exhibitions happening every year in a particular area.

2. *Food and wine tourism*

In the latest years the speed of social changes in the Italian society at some point seemed to undermine long-lasting traditions for the sake of homologation of the consumption behaviours. Fortunately some studies about the evolution in the habits of the Tuscan population carried out during the last few years showed an increasing awareness of old traditions and a strengthening conviction that **the knowledge and the valorisation of the traditions can translate into a broadening of peoples' minds**.

Unlike other regions, the cultural liveliness of our territory certainly represents a stimulus towards a deeper knowledge of the various territorial cultures, which altogether represent a unique patrimony of history and products for a public looking for genuine products and traditions. As a result of the innovation produced by a more and more diversified demand, many tour operators have understood the hidden potential of some emerging segments (rural tourism, green tourism, ecological tourism, food and wine tourism, etc) and the necessity to propose an adequate tourist offer, through the defence of the environment, a diversified offer of products, the valorisation and the qualification of the local productions, a recovery of a hotel and restaurant industry closely connected with the territory.

The enogastronomy is not considered a complementary service any longer; on the contrary, it gradually became "an objective" for tourists, a moment in order to live an experience and in order to consolidate a relationship between the typical tourist, products, hotels, restaurant industry and territory. It is not any longer a niche phenomenon, but rather a cultural trend. Certainly the development of the farm holidays, the food, oil and wine tasting, and also the development of manifestations allowed a strong promotion of the offer and valorisation of the region. It is a segment that contributes to the elevation of a quality, by attracting a growing flow of tourists with a good financial position and great motivations. The rationale of this market segment is to know better the product and the territory of production. This sector especially develops in spring and autumn and therefore the role it can have is obviously fundamental in terms of seasonal adjustment of the presences.

3. *Nature and Sport*

This segment of the tourism sector offers great possibilities of development, as it can be deduced from the tourist demand and from motivational surveys carried out in the past years and, above all from the presence of many nature reserves. Among the new values which turned out to have a greater importance on the international markets, the climate and ecological issues connected to it seem to have acquired the priority in wide segments of the tourism market. In addition to this, a higher level of "ecological" awareness nowadays appears to be able to have an influence on the memory of consumers and their ability **to associate produce and the territory where it comes from**. The conclusions of the 4^ the Ecotour conference on the relation between tourism and nature which was presented on the occasion of the third National Conference on the tourism showed the impact of this phenomenon in Italy:

- over 76 million presences out of which 65% were Italians and 35% foreigners with a turnover of 8,14 billions of euros
- the turnover is estimated to represent around 2% of the global tourism sector, with perspectives of a 20% annual growth.

After saying all this, tourism operators acquired a greater level of awareness with respect to the fact that the number of the visitors cannot be considered the one and only reference factor to measure the success of a particular region in terms of tourism market. On the contrary the sustainability of tourism has become a critical element for many areas: this new approach considers the development of the tourism like an important instrument for local development, as far as it has both a positive impact on the economy and the local community as well as it ensures that the natural resources and cultural heritage.

With the expression **"naturalistic and environmental" offer** we mean a series of tourism products tied to the search and discovery of authentic habits and acquaintance with the atmosphere that can be experienced in the provincial territory. On the one hand this means a sustainable development in the areas of high environmental interest as well as in the nature preserves and the parks; this requires an adequate promotion of tourism offers and the activities which can be carried out (environment education laboratories, ecological museums, etc); on the other hand the expansion of the tourist flows in rural areas, where the man modelled the landscape in an original and harmonic way. A new typology of product which is target-specific is thus emerging.

The key "environmental tourism" will include both the products of the tourism and the activities connected to the sport (trekking, mountain bike, horse riding), as well as the valorisation of traditional products such as typical food and wines, parks and nature reserves. Up until recent years the sports tourism has been considered a niche market, whereas it became one of the most promising segments of the market over the last decade. If we take the total figures into consideration, the number of Italians practicing sports (including professionals and amateurs) is approximately 27 million people1. 9 million people out of them generated a volume of transactions of 3,8 billions of euros in 2004, and approximately 30 million overnight stays in hotels.

Taking all of this into consideration, we can easily understand that the vacation place is not the only factor to be taken into consideration, but also all the activities that can be carried out during the vacation period; indeed the opportunities related to an active vacation are several. The sports tourism represents therefore a new opportunity for local development in the view of broadening the tourist offer within a certain region and consequently to attract investments, to reduce unemployment, and to favour both economic and environment prosperity with a reassessment of different areas of the territory.

The valorisation of the offer and the existing infrastructures, together with the development of new facilities would represent a good strategy in order to develop this segment of the market. The choice of a determined destination for motivations tied to the sport is more and more frequent; in these cases, the most common activity is the skiing. Sports which are usually practiced by Italians, such as football and swimming play a marginal role at the moment of the choice; on the contrary a more direct contact with the nature which includes sports activities such as trekking, horse riding, bike riding, diving, sailing and surfing are pivotal.

4. Spas and Wellbeing

The evolution and trends of consumers' needs becomes more and more apparent particularly in the bodycare and the management of free time, with a continuous increase in investments; this is a result of the rapid transformations of consumers' values and behaviours. On a strictly individual level, the search for wellbeing seems to be a dominant element, together with an increase request for healthier ways of living which involves all the population, regardless of age and income. Health Centres, Fitness clubs, hotels with sports facilities and dietary centres are the witness for this evolution, which involves new ways of tourism.

A new way of tourism which is connected with wellbeing, the nature and rural atmospheres has developed. Especially tourists from big cities wish to look for a higher quality of life, away from the traffic, the pollution and degradation of the city life. They wish to get more in contact with the nature, to be able to enjoy traditional food and healthy ways of life. In general terms general the main criteria which inspire the managerial activity of our thermal localities and the well-being is the search for high and structural qualitative standards, secondly the organization principles of the quality total; the purpose of this is not only to optimize the economic management of the company but also in order to favour the quality of this new type of tourism. Indeed this segment of the market would be debased from a poor quality of the service, with a disappointment of the expectations.

5. Beach tourism

This segment is still considered the main occurrence of mass tourism. However, under the respect of the competitiveness, Italy has lost the leadership in this field some years ago, mainly for two reasons:

- the difficulty to adapt the tourism offer to an ever changing demand, by insisting on partially outdated models;
- the insufficient ability to fully open up to the market due to the individual character of many small enterprises, together with the difficulty to create any kind of cooperation, which has led the enterprises to address the general public.

The **current market situation** consists of mostly familiar owned companies, for many of which the restructuring costs have a great impact; this typology of tourism is characterized by a progressive reduction of the average time spent on vacation and by a growing competition on the international markets.

On this scene the predominant behaviours of the demand are:
- the reference to less and less exclusive trilogy “sun, beach and sea”;
- a more and more explicit search for a personalized offer;
- the demand for multiple accommodation solutions, with adapted qualitative standards;
- the greater sensibility towards services and infrastructures, in addition to the channel of the tourist intermediation for the foreign demand.

The competitive development of a new form of beach tourism requires an action plan which focuses particularly on:

- the tourist products connected to the seaside element;
- the tourist products connected to the inland, in particular to the cultural resources and the environment which require to be coherently integrated with the beach tourism;
- the products which can contribute to diversify the market offer, so as to avoid the risk to lose market shares;
- the diversification and the enhancement of the accommodation solutions, with a particular attention to the accommodation system of the second houses;
- the adoption of appropriate price policies;
- the creation of opportunities for sports and free time;
- the activation of new nets of cooperation between operators of various productive fields.

6. Business Travel

According to the Italian National Institute of Statistics (ISTAT) data, the business travels are predominant between the autumn and the spring: the quota of the work-related trips/conferences reaches its peak between October and December with nearly 22%. The incidence of the business tourism on the total Italian tourism turnover is of 21.1%, which places it 3rd in the ranking after the beach and cultural tourism (Istat data). This segment of the tourism has its own peculiar characters: the congress tourism market consists of a series of various events such as conferences, seminars, business and political conventions, meetings. The **demand and the requirements** of the congress tourism, which we need to address properly, are:

- adequate accommodation and conference facilities;
- easy accessibility;
- efficient connections with other regions;
- other tourist assets (sport and culture)

It is necessary therefore to put much attention on different moments in the organization process such as the promotion and commercialization of the tourist product like the congress destination. It is fundamental to this purpose to have a correct and adaptable planning of the relationships and the connections between the conference centres available in the area, tour operators (hotel managers, structures of service) and all those resources that directly or indirectly contribute to the creation of the product on the market.

I N D I C A T O R S

1) BASIC INFORMATION ABOUT REGIONAL TOURIST DENSITY:

In 2007 tourists visiting Tuscany were 11.486.778, the population was 3.667.048, the number of overnight stays in hotels and other accommodation was 41.930.123. The number of average overnight stays per tourist can be calculated as follows: 41.930.123 : 11.486.778 = 3,65
The number of tourists per 100 inhabitants are therefore calculated as follows:
11.486.778 : 3.667.048 = x : 100   x = 313,24
As to the Defert Index, in 2007 tourists visiting Tuscany were 11.486.778, the total area of the Tuscan region is 22.990 sq. km. Therefore the defert index can be calculated as follows: 11.486.778 : 22.990 = 499,64
As to the Charvad Index In 2007 the number of bed places available in Tuscany were 486.351
Therefore the charvad index can be calculated as follows: 486.351 : 22.990 = 21,16

Tourist accommodation establishments:

1. Number and category of hotels

Hotels 3187
5 * 46
4* 465
3* 1525
2* 691
1* 362

2. Types of accommodation

FarmHouses: 4427
B&B 1629
Hotels 3187
Room rental 3387
Camping 269
Holiday houses 1603
Holiday apartments 226
Residence 197
Hotel Residence 270
Historic Houses 108
Villages 19
Camper areas 13
Alpin refuges 45

OUTDOOR TOURISM IN TUSCANY

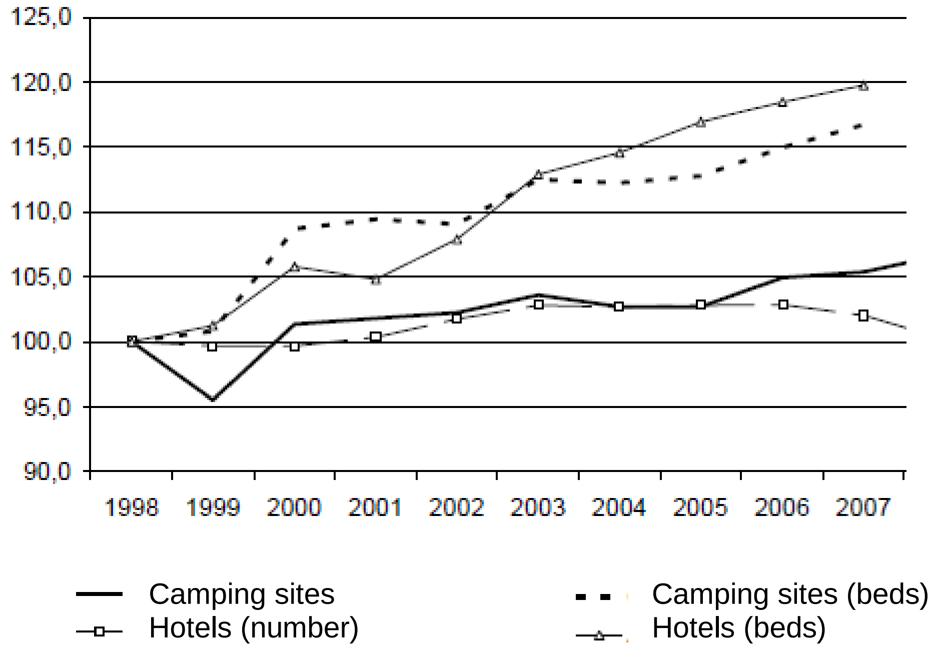
1. Accomodation capacity in camping sites in Tuscany

The evolution of the accommodation capacity in outdoor tourism in Tuscany, shows evidence of a trend of a long positive period, in particular from year 2000, where an increase of nearly 1% per year in terms of number of sleeping accommodation and of 0.6% in terms of infrastructures is recorded. In the 2007 there are 237 Tuscan camping and tourist villages (1.3% % regarding 2006) whereas the sleeping accommodation sums up to 175,062 (1.5% regarding 2006); a slight increase compared with the previous year which goes along with an increment of the hotel sleeping accommodation (1%) and a nearly analogous reduction of structures (- 0.8%), which reduced to 2.979.

Tab.1 - Evolution of the accommodation capacity in Tuscan outdoor tourism structures in comparison with the hotel offer, total data and percentages, years 1998 – 2007

Year	Camping sites		Hotels		Camping sites		Hotels	
	Companies	Beds	Companies	Beds	Companies	Beds	Companies	Beds
1998	223	149.775	2.920	155.583	-	-	-	-
1999	213	150.998	2.910	157.504	-4,5	0,8	-0,3	1,2
2000	226	162.801	2.910	164.586	6,1	7,8	0,0	4,5
2001	227	163.919	2.930	163.068	0,4	0,7	0,7	-0,9
2002	228	163.348	2.971	167.881	0,4	-0,3	1,4	3,0
2003	231	168.504	3.002	175.660	1,3	3,2	1,0	4,6
2004	229	168.123	2.998	178.268	-0,9	-0,2	-0,1	1,5
2005	229	168.917	3.002	181.961	0,0	0,5	0,1	2,1
2006	234	172.205	3.003	184.288	2,2	1,9	0,0	1,3
2007	237	175.062	2.979	186.309	1,3	1,7	-0,8	1,1

Diagram 1 - Evolution of the accommodation capacity in Tuscan outdoor tourism structures in comparison with the hotel offer, base Index 1998 = 100, years 1998-2007

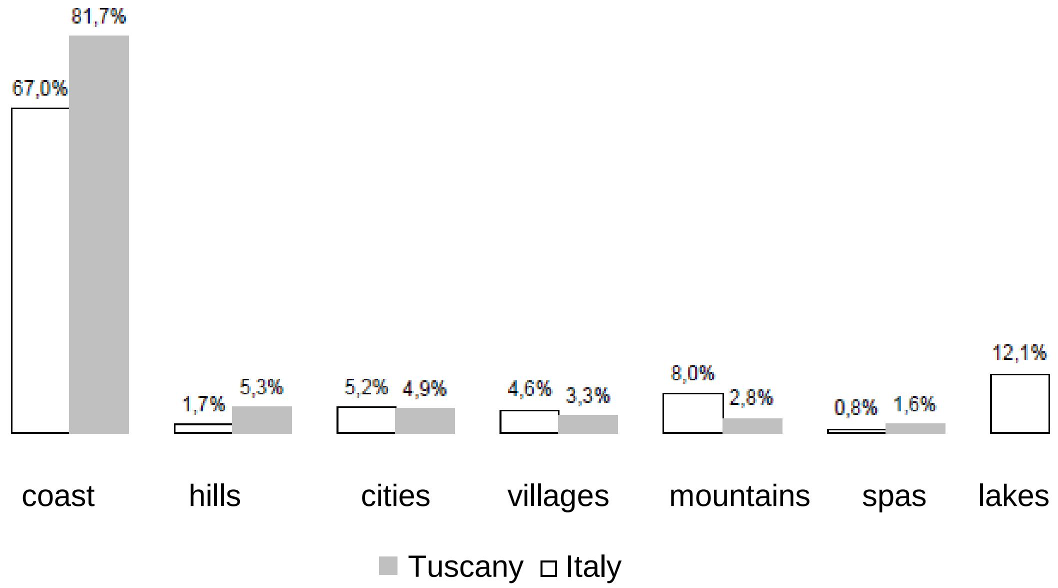


A slight increase, which contributes to the success of this market segment however, above all in terms of sleeping accommodation where a positive trend of development is recorded, like shown also from diagram 1; the rates of growth of the outdoor tourism offer. The development of the Tuscany outdoor tourism offer shows that during the last 10 years an increment of the average dimension (from 671 sleeping accommodation for camping/tourist villages to 744 in 2007) of the open air structures, analogous with what happened regarding hotels and the hotel residences (which in the 2007 they have offered an average of 62 sleeping accommodation for each structure).

2. The ranking of the outdoor Tuscan tourism in comparison to the national tourism offer

The number of sleeping accommodation in the outdoor tourism characterizes the offer of Tuscan camping and tourist villages above all in the beach tourism. The sleeping accommodation in the camping sites and tourist villages situated in the coast localities represent over 81% of the total of the regional offer. A much higher value than the national average that reaches only 67% of the sleeping accommodation in the outdoor tourism in the other Italian coast localities. The other important regional quotas for sleeping accommodation are concentrated in “hillside” municipalities (5.3%) and in those considered of “historical and artistic interest” (5% in the villages and cities of art), whereas an important importance is given to sleeping accommodation in the thermal localities although only with reference to the national data, that turns out to be 1.7% whereas the national is 0.8%.

Diagram 2 - Subdivision of the offer of camping sites in Italy vs Tuscany according to predominant tourist resource

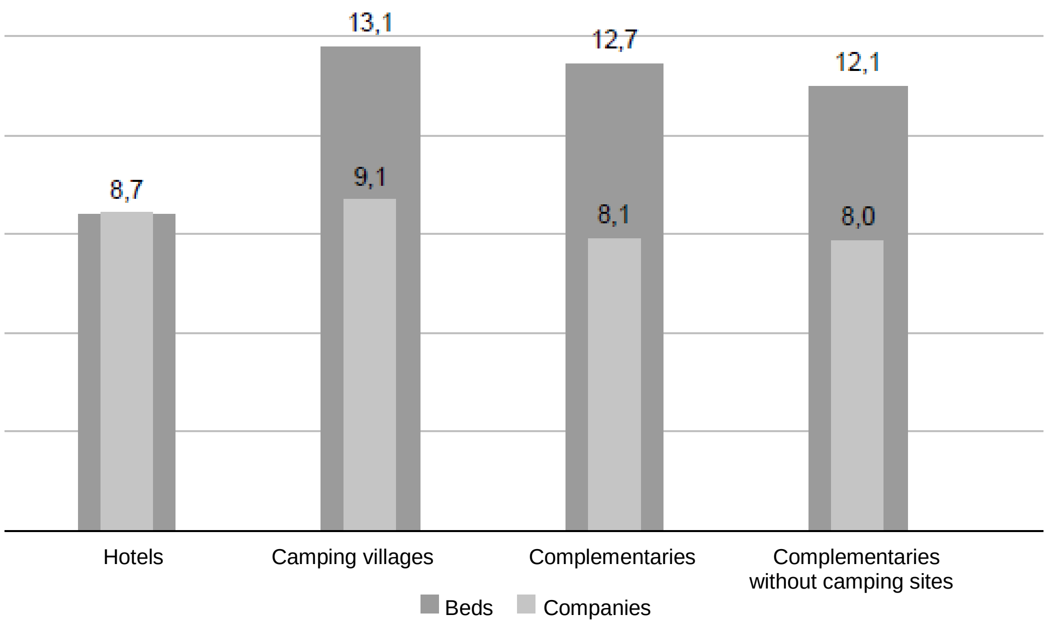


Independently from the predominant "tourist" position of Tuscan sleeping accommodation if compared with the national ones, also in 2007, like for the past, the number of the regional sleeping accommodation of camping sites and tourist villages still represent an important quota of the Italian total offer. In particular camping sites in Tuscany represent 9.1% of the total of camping sites and tourist villages on the national territory and 13.9% of the sleeping accommodation. On the contrary the open air tourism has a greater weight than sleeping accommodation in hotel structures, where the regional incidence (8.1% of the national total) and more in general terms the sleeping accommodation in complementary structures (12% of national complementary sleeping accommodation and 8% of the other structures).

Tab.2 - Consistency of the outdoor structures in Tuscany according to data available from the Tourism promotional agency (Apt), absolute values and annual medium rate increase, years 2007, 2006 and 2000

Tourism promotional agency (APT)	2007		2006		2000		aygr 07/'00	
	Companies	Beds	Companies	Beds	Companies	Beds		
Abetone	5	1.352	5	1.352	6	1.332	-2,6	0,2
Amiata	2	774	2	772	2	772	0,0	0,0
Arcipelago Toscano	29	14.468	29	14.487	31	14.258	-0,9	0,2
Arezzo	15	2.699	14	2.635	13	2.144	2,6	3,3
Chianciano T. V.di Chiana	3	1.902	3	1.902	3	1.806	0,0	0,7
Firenze	19	8.406	18	8.229	19	7.565	-0,1	1,5
Grosseto	49	50.221	49	49.624	44	45.098	1,6	1,5
Livorno	41	45.035	40	43.811	37	41.933	1,6	1,0
Lucca	3	600	3	617	3	680	0,0	-1,8
Massa-Carrara	40	22.582	40	22.656	40	22.624	0,0	0,0
Montecatini Terme	2	1.508	2	1.508	2	1.094	-0,6	4,7
Pisa	12	8.921	12	7.950	10	7.015	2,6	3,5
Siena	5	2.265	5	2.332	5	2.064	0,5	1,3
Versilia	12	14.329	12	14.330	12	14.912	0,0	-0,6
Toscana	237	175.062	234	172.205	226	163.298	0,7	1,0

Diagram.3 - Incidence of accommodation capacity Italy vs Tuscany

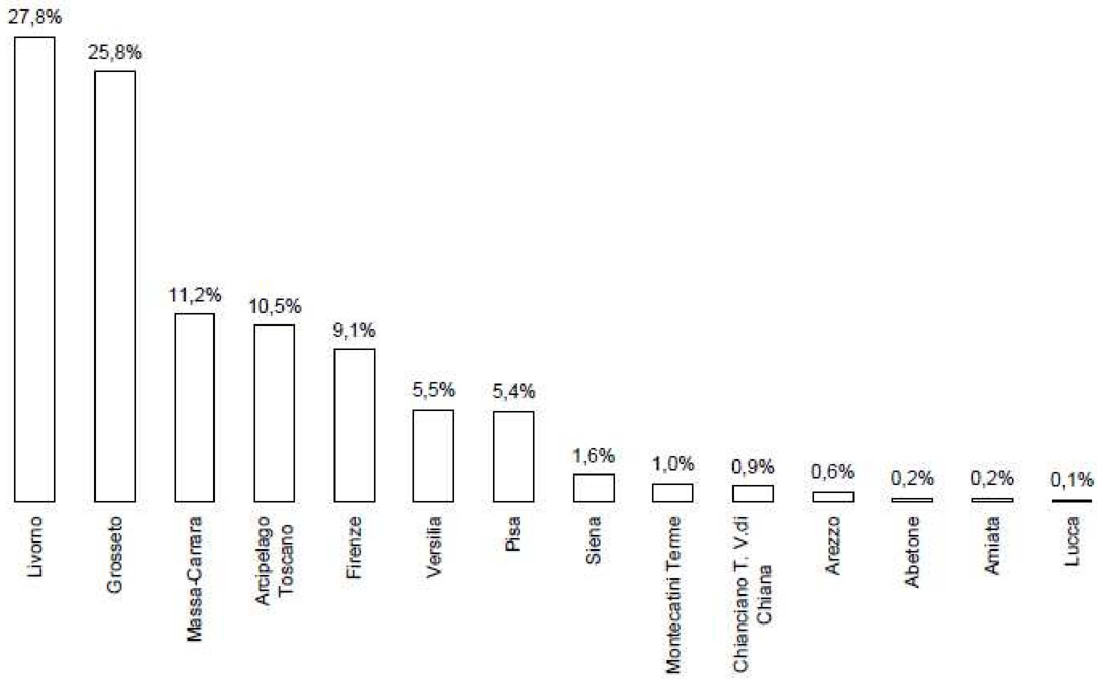


There are not the many meaningful yearly variations in terms of structures and sleeping accommodation of the camping sites and tourist villages according to data given by the local Tourism Promotion Agencies (Apt) from Tuscany. Regarding 2006, the tourist villages recorded more camping sites in Arezzo, Florence and Livorno. With reference to the average annual variation of the sleeping accommodation, it is possible to notice that these increased of nearly 5% in the Apt di Massa Carrara, of 3.3% in the Apt of Arezzo and of 3.5% in that one of Pisa. The average annual rates variation are negative only regarding the sleeping accommodation of the Apt of Lucca (- 1.6%) and of the Versilia (- 0.6%).

3. The subdivision for APT

Like previously indicated, in Tuscany, the sleeping accommodation in the outdoor tourism mainly are concentrated between the APT (and municipalities) with strong “beach tourism” connotation. With 28% of the regional sleeping accommodation, that of Livorno represents the Apt with the greatest concentration of sleeping accommodation in the outdoor tourism, followed by Grosseto (26%), whereas a lower percentage incidence is found for the Apt of Massa Carrara (11%), the Tuscany Archipelago (10%), Florence (9%) and Versilia (5.5%). They are mainly to two and three stars the regional camping sites, and they are found in prevalence in the province of Arezzo, Florence, Pistoia Mass Carrara and Lucca. The more meaningful provincial quota regarding the total of camping sites regarding the segment “luxury”, is placed, instead, to Siena (14.3%), followed by Pistoia and Pisa (12.5%). An express comparison of the subdivision for category of the camping sites in Veneto region, first region for performance in the segment to the outdoor tourism shows instead, a greater concentration of the structures regarding the segment luxury around the Province of Venice-Mestre and Vicenza, whereas in more general terms the Veneto regional offer is characterized by a greater presence of the total of camping sites to three and four stars.

Diagram.4 - Ranking of the accommodation capacity among the Apt of the Tuscany (values percentages)



Tab.3 – Camping sites in Tuscany and Veneto, percent distribution of the infrastructures year 2008

Province/ category	1 star	2 stars	3 stars	4 stars
Arezzo	20,0	60,0	20,0	-
Firenze	6,3	50,0	37,5	6,3
Grosseto	25,7	42,9	22,9	8,6
Livorno	4,2	41,7	45,8	8,3
Lucca	50,0	50,0	-	-
Massa Carrara	4,2	29,2	66,7	-
Pisa	50,0	25,0	12,5	12,5
Pistoia	25,0	50,0	12,5	12,5
Siena	-	42,9	42,9	14,3
Toscana	16,1	42,3	35,1	6,5

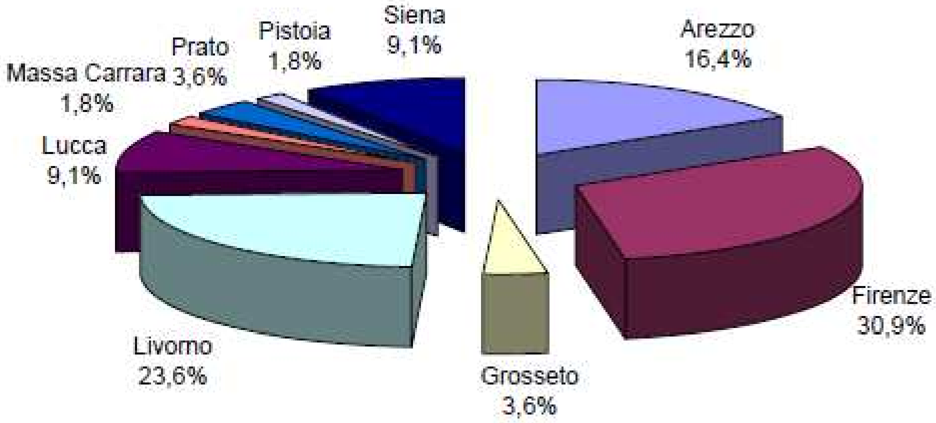
Tab.4 – Camping sites in Tuscany and Veneto, percent distribution of the infrastructures year 2008

Province/ category	1 star	2 stars	3 stars	4 stars
Belluno	37,5	20,8	37,5	4,2
Padova	100,0	-	-	
Rovigo	20,0	-	80,0	
Treviso	-		100,0	
Venezia	16,9	20,0	32,3	30,8
Vicenza	50,0	0,0	25,0	25,0
Verona	41,2	17,6	31,4	9,8
Veneto	29,8	17,9	34,4	17,9

4. Parking areas, a constant growth

The parking areas for motor caravan characterized as areas equipped to accommodate a remarkable number of campers often represent, above all for the villages and Tuscany smaller localities, an occasion of overnight stay and seasonal adjustment of the demand, in areas thought “marginal” in comparison with the main tourist routes. There are currently 55 parking areas recognized from Tuscany agencies. The percentage of spaces equipped for the overnight stay is concentrated in the Province of Florence (30%), in that of Livorno (23.6%), in Siena and Lucca (9.2%).

Diagram.5 - Percentage distribution of the parking areas in Tuscany, year 2008



5. The Tuscany demand for outdoor tourism, short and long period dynamics

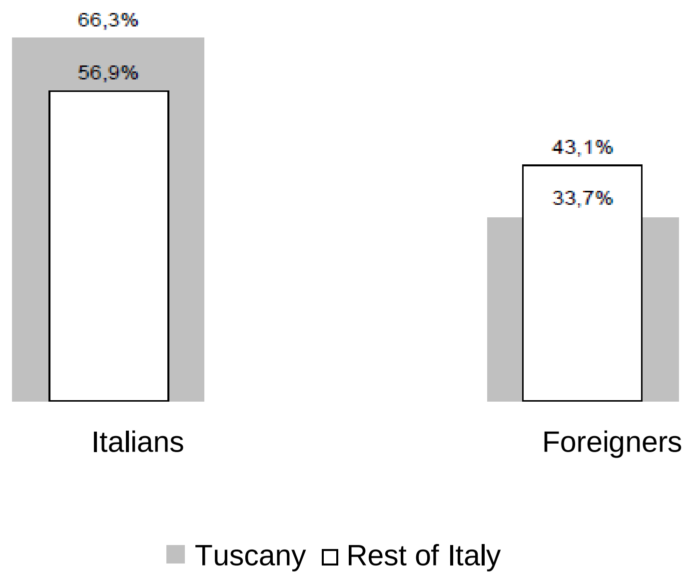
There are the 9,2 million overnight stays recorded in 2007 in Tuscany outdoor tourism structure. The average stay of the tourists in the tourist camping sites and villages turns out to be in average a little more than 7 days. The Italians, than in the 2007 have spent approximately 6 mln nights represent the predominant customers, staying an average of approximately 8 nights; the foreign tourist “en plein air”, instead, has topped 3.1 million overnight stays, with an average stay of 6 nights. The greater quota of Italian tourists concentrates in the Apt of Grosseto (2 mln, where the tourist spends an average of 7 days), followed by Livorno (1,8 mln of overnight stays with an average permanence of nearly 9 days). Interesting to notice like the Versilia shows the highest average of overnight stays for Italian tourists which equals nearly 16 days, the highest average in the region. The foreign tourists, instead, prefer to once again stop in the camping sites in the area of Livorno (0,9 mln of presences with an average permanence of 8 days), Florence (0,6 mln of foreign overnight stays with an average stay of “single” 4 days) and Grosseto (0,55 mln and in average for approximately 8 days).

Tab. 5 - The movement for outdoor tourism in Tuscany according to their origins, data in absolute values and medium permanence, year 2007

	Italians		Foreigners		Totale		Ital.	Foreign	Total
Arrivi	Visitors	Arrivals	Visitors	Arrivals	Visitors	Arrivals	Average stay		
Abetone	5.645	19.937	468	1.211	6.113	21.148	3,5	2,6	3,5
Amiata	1.787	6.087	2.546	10.707	4.333	16.794	3,4	4,2	3,9
Arcipelago Toscano	62.068	492.490	42.923	365.078	104.991	857.568	7,9	8,5	8,2
Arezzo	6.120	21.996	9.886	41.340	16.006	63.336	3,6	4,2	4,0
Chianciano T. V.di Chiana	5.210	22.924	6.567	46.456	11.777	69.380	4,4	7,1	5,9
Firenze	30.003	97.342	158.433	621.627	188.436	718.969	3,2	3,9	3,8
Grosseto	304.252	2.179.336	66.480	547.770	370.732	2.727.106	7,2	8,2	7,4
Livorno	207.848	1.787.031	105.919	894.689	313.767	2.681.720	8,6	8,4	8,5
Lucca	1.865	5.444	1.406	6.303	3.271	11.747	2,9	4,5	3,6
Massa-Carrara	71.022	657.648	10.431	59.713	81.453	717.361	9,3	5,7	8,8
Montecatini Terme	1.055	2.693	14.150	102.410	15.205	105.103	2,6	7,2	6,9
Pisa	17.397	182.232	64.487	225.256	81.884	407.488	10,5	3,5	5,0
Siena	4.068	8.788	22.427	67.348	26.495	76.136	2,2	3,0	2,9
Versilia	39.579	622.741	17.771	108.953	57.350	731.694	15,7	6,1	12,8
Toscana	757.919	6.106.689	523.894	3.098.861	1.281.813	9.205.550	8,1	5,9	7,2

As shown in the diagram also in 2007, the section of Tuscany outdoor tourism confirms itself as the market with the most domestic character: regarding the total of tourists of the structures in the open air, on a national level the importance of this segment equals 57%, whereas in Tuscany the same segment represents 66% of the tourists who spend the night in the structures. The Tuscan outdoor tourism sector recorded a remarkable decrease in the presences of foreigners in the same period in 2006 (- 5%) and a slight increment of Italians (0.3%). In the long run we can record an average yearly increase of 2.5% for the Italian overnight stays and a average lessening of 1% of the foreigners.

Diagram 6 – Compositions percentages for origin of the tourists in Italy and Tuscany, year 200



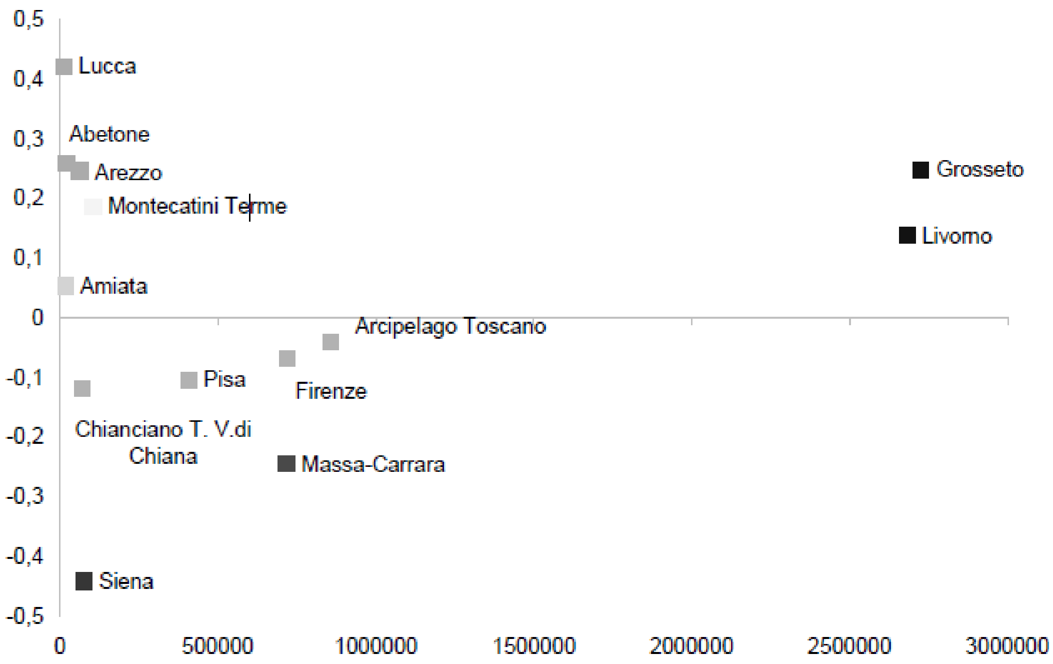
If we take a deeper look at the data, we can notice a meaningful decrease in the visits recorded in the camping sites and tourist villages of the Apt of Siena (- 55% of Italians, although in absolute terms the reduction is related to Tuscany total incomings), in Montecatini (- 32%) and Arezzo (- 22%) regarding the Italians; still a decrease in the Apt of Siena (- 33%) and in that of Lucca (- 26%) for the foreigners have been recorded. The best performance in 2006 have been recorded, instead, in the territory of Abetone (+13% Italians and +14% foreigners) and Chianciano T. Val di Chiana (+9.5% Italians and + 11% foreigners). A remarkable increase of the Italian visits to Lucca (50%), and Livorno (12%) has been recorded.

Tab.6 - Evolution of the presences in the outdoor tourism, variations of short and long period, years 2006-2007 and 2000

Apt/Provenienza	Var. % 07/'06			tcma 07/'00		
	italians	foreigners	total	italians	foreigners	total
Abetone	12,7	14,4	12,8	2,9	14,2	3,3
Amiata	-8,3	-5,1	-6,3	-3,1	3,6	0,7
Arcipelago Toscano	-0,2	-9,5	-4,4	1,1	-2,5	-0,6
Arezzo	-22,0	-2,3	-10,2	-3,6	9,1	3,2
Chianciano T. V.di Chiana	9,5	11,4	10,8	-3,6	-0,8	-1,8
Firenze	-8,8	-2,6	-3,5	-1,8	-0,9	-1,0
Grosseto	-3,2	-10,4	-4,7	4,3	-0,3	3,2
Livorno	12,0	-1,0	7,3	3,8	-1,3	1,9
Lucca	49,6	-26,0	-3,4	7,6	3,3	5,1
Massa-Carrara	2,9	32,7	4,9	-3,8	-5,3	-3,9
Montecatini Terme	-32,7	6,7	5,1	-1,6	2,6	2,5
Pisa	-7,2	-10,4	-9,0	-3,2	0,0	-1,6
Siena	-55,4	-32,7	-36,4	-10,5	-7,6	-8,0
Versilia	-11,4	0,2	-9,8	7,7	2,2	6,7
Toscana	0,3	-5,0	-1,5	2,5	-1,0	1,2

With reference to the long period, the average increase in the presences since 2000 is found in the structures of the outdoor tourism in the province of Lucca (yearly 5.1%, with strong average increment of the Italians, 7.6% and minor increase of foreigners 3.3%), and in Versilia (a total+6.7% which translates into an average increase of 7.7% regarding the Italians and 2.2% as to the foreigners). We can notice a meaningful contraction of the demand for outdoor tourism in relation to the province of Siena (an average yearly reduction of 10% of Italians, and a reduction of 7,6% regarding foreigners which equals a reduction of yearly 8%); we can also record a meaningful reduction in the presences in Massa Carrara (-4% for Italians and -5% for foreigners). The diagram below compares the number of total presences recorded in 2007 in Tuscany Companies of Tourist Promotion with the variation recorded in 2000. It is worth noticing that Livorno and Grosseto still show a high number of overnight stays as well as a total increase in the latest 8 years. The municipalities in the province of Lucca, the Abetone area and Arezzo also show a sensitive increase in the number of visitors and arrivals although their aggregate importance is still not relevant. The strong decrease of the Province of Siena, that has recorded a reduction in the tourist movement over 40%, while Massa Carrara and of Chianciano record a 20% reduction in comparison to 2000. It has also been recorded a remarkable increase of the Italian presences in Lucca (50%) and Livorno (12%).

Diagram 7 - The movement of the tourists in Tuscany camping and tourist villages, percent variations 2007/2000 and presences for Apt, year 2007



6. Seasonal flows in Tuscany, analysis in the short and long run

In 2007, the tourist movement regarding the outdoor tourism was concentrated in the summer months. Altogether the season from June to August has recorded 82% of the overnight stays of Italians and 71% of the foreigners. Increasing the period of reference also considering the lower months tied to offers which are typical of low season (May and September), we get nearly the totality of overnight stays (Italian 95% and foreigners 92%). Moreover the diagram shows the greater monthly distribution of the foreigners and that they represent the predominant segment in the months of May (9% against nearly 5% of the Italians), July (31% against 28% of the Italians), September (13% of the foreign overnight stays recorded in 2007) and October (3.2%). The month that concentrates the greater number of overnight stays of Italians, is the month of August, where the overnight stays in the structures of the outdoor tourism were 40% in 2007.

Diagram 8 – Mean monthly distribution of visitors, according to their origin

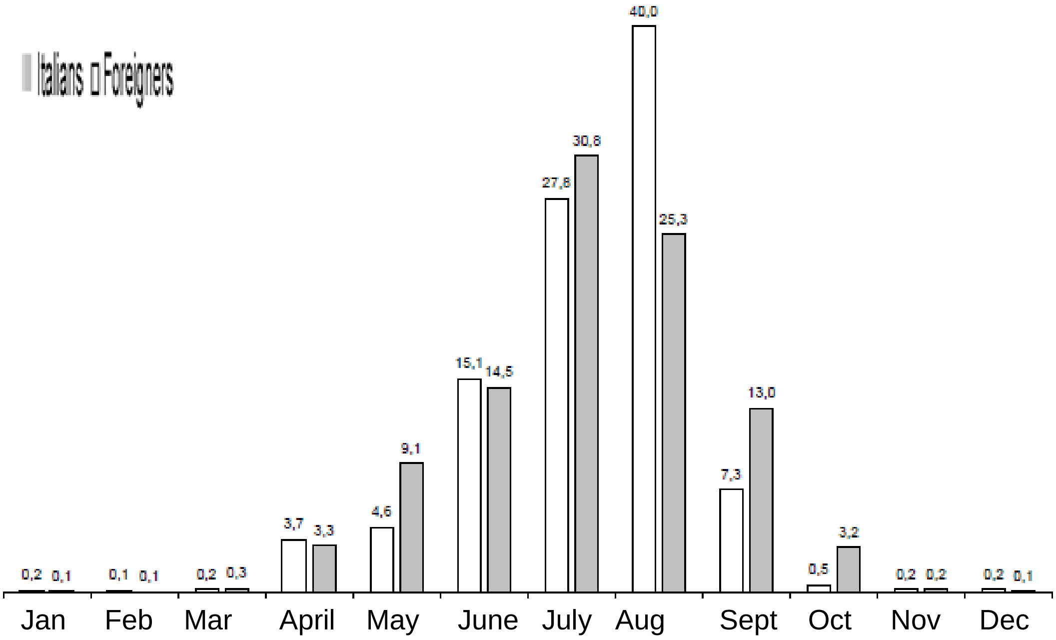


Diagram 17 shows that the segment of the tourists who prefer the outdoor tourism in Tuscany also record the highest rates in terms of overnight stays. Above all during the summer (July and August), the tourist camping sites and villages concentrate respective 29% and 35% of the total overnight stays versus 15% and the remaining 16% of the overnight stays recorded in Tuscan complementary structures. If we carry out a comparison of the 2007 results with the data recorded in 2000 (diagram 18), it is possible to notice that the average overnight stays spent by visitors significantly decreased between 2000 and 2007. If we compare the seasonal index it is but possible to deduce that the presences were however concentrated in 2007 in comparison with 7 years earlier in the period May - September (94% both in 2000 and in 2007), which corresponds to the high season for the greatest part of the Tuscan structures in the outdoor tourism.

Diagram 9 – Monthly incomings in camping villages vs total incoming in 2007

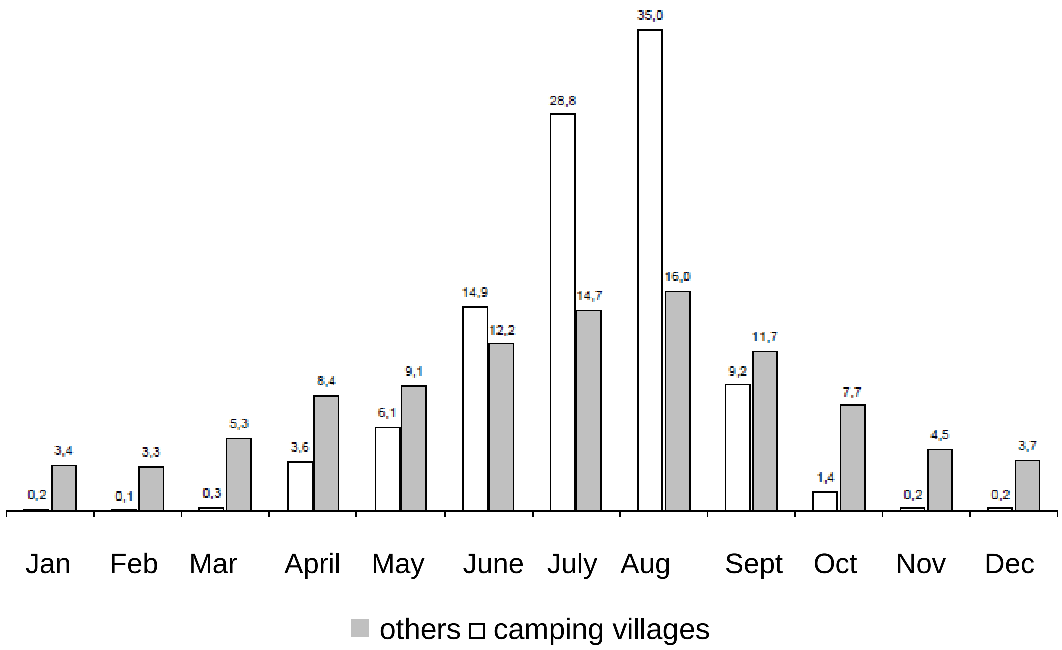
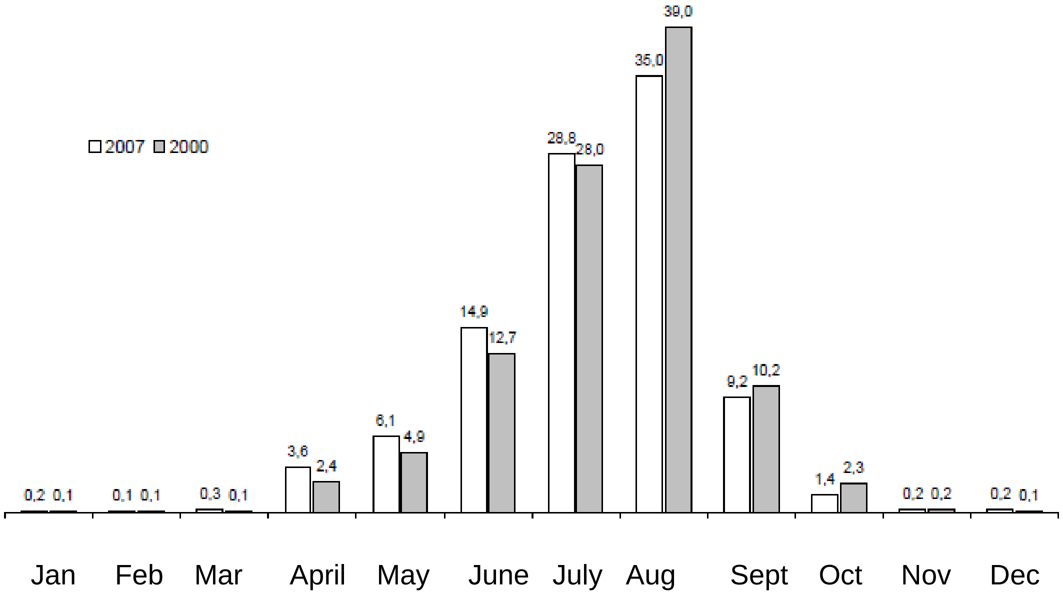


Diagram 10 – Seasonal incomes 2007 vs 2000 in Tuscany



7. Focus 2008

The following paragraph analyzes the data currently available about the consistency and the movement of tourists in the outdoor tourism in 2008. If we take into consideration the province of Florence, there are no data available to date regarding the flow data (arrivals and visits), while the consistency has been estimated on statistical data provided by the Tuscan Statistical Regional System. Also in 2008 in Tuscany a light increase in the structures of outdoor tourism (+0.4%) and related sleeping accommodation available (+0.5%); for the second year in a row, the hotel sector recorded a reduction in the number of regional structures (- 1.8%), with a parallel increase of the sleeping accommodation (2.2%) and its average dimension.

Tab. 7 - Consistency of the structures in outdoor tourism and the hotels in Tuscany, years 2006-2008. Absolute values and percent variations

Year	Camping villages		Hotels		Camping villages		Hotels	
	Companies	Beds	Companies	Beds	Companies	Beds	Companies	Beds
2006	234	172.205	3.003	184.288	2,2	1,9	0,0	1,3
2007	237	175.062	2.979	186.309	1,3	1,7	-0,8	1,1
2008	238	175.941	2.925	190.316	0,4	0,5	-1,8	2,2

Tab.8 - The tourist movement in the camping villages in Tuscany, absolute values, 2008

APT	italians		foreigners		total	
	arrivals	visitors	arrivals	visitors	arrivals	visitors
Versilia	41.143	609.149	17.640	99.013	58.783	708.162
Arcipelago Toscano	56.165	446.128	43.494	372.367	99.659	818.495
Chianciano Terme Val di Chiana	3.708	14.793	5.219	32.298	8.927	47.091
Grosseto	294.662	2.225.860	61.748	572.176	356.410	2.798.036
Livorno	221.853	1.956.421	131.567	1.156.172	353.420	3.112.593
Massa-Carrara	53.772	543.258	8.952	47.606	62.724	590.864
Pisa	16.796	251.498	59.134	266.775	75.930	518.273
Siena	4.385	10.285	24.777	80.719	29.162	91.004
Arezzo	7.428	24.403	10.653	50.650	18.081	75.053
Abetone e Montecatini T.(*)	5.966	26.644	14.644	107.391	20.610	134.035
Lucca	2.243	8.362	1.438	7.083	3.681	15.445
Tuscany excluding Florence	708.121	6.116.801	379.266	2.792.250	1.087.387	8.909.051

Tab.9 - Medium permanence and percent composition according to tourists origin of the in camping villages in Tuscany, year 2008

	Average stay			Composition. %	
	Italians	foreigners	total	Italians	foreigners
Versilia	14,8	5,6	12,0	86,0	14,0
Arcipelago Toscano	7,9	8,6	8,2	54,5	45,5
Chianciano Terme Val di Chiana	4,0	6,2	5,3	31,4	68,6
Grosseto	7,6	9,3	7,9	79,6	20,4
Livorno	8,8	8,8	8,8	62,9	37,1
Massa-Carrara	10,1	5,3	9,4	91,9	8,1
Pisa	15,0	4,5	6,8	48,5	51,5
Siena	2,3	3,3	3,1	11,3	88,7
Arezzo	3,3	4,8	4,2	32,5	67,5
Abetone e Montecatini T.(*)	4,5	7,3	6,5	19,9	80,1
Lucca	3,7	4,9	4,2	54,1	45,9
Toscana without Florence	8,6	7,4	8,2	68,7	31,3

In 2008, making reference to Tuscan regional data and the APT without including Florence, we can notice an increase in the number of incoming visitors. Regarding the average stay of the tourists, we can notice that in Versilia region and Pisa Italian tourists spend the longest time (15 days) whereas the provinces of Grosseto and Livorno are preferred by the foreigners (with 9 days on average). The APT with the highest rate of foreigners in 2008 was Siena (88% of foreigners), while the area with the highest number of Italian tourists is Massa Carrara with a percentage of 92% of the total tourists incoming.

8. Conclusions

After looking at the trends of the latest years in the Tuscan region, we can see that the tourism industry still represents a growing sector under many aspects. The number of tourists visiting Tuscany has recorded an average +1,5% every year since 2000. The tourists are especially interested in a variety of offers which are typical for our region. In particular both Italian and foreign tourists travel to Tuscany because of the rich art heritage, the traditional culture and gastronomy. The average overnight stay of each tourist is about 3 nights and the total number of tourist in 2007 was well above 3,5 millions. The main issues which still need to be addressed in order to develop the opening of new market sectors are:

- the national and international promotion of smaller town centres
- policies which can guarantee the seasonal readjustment of the demand
- developing new models of tourism: hiking, bike tours, guided tours to monasteries, etc.
- policies for an equitable development of the tourist sector

9. Bibliographical References:

"Report data on Tourism in Tuscany" (2009) Osservatorio Nazionale del Turismo, downloadable as pdf file (Italian) on http://www.ontit.it/opencms/opencms/ont/it/documenti/start.html?category=documenti/regioni/toscana

"TOSCANA IN CIFRE" (2009) Sistema Statistico Regionale, downloadable as xls file on http://ius.regione.toscana.it/cif/stat/pubbl-popol.shtml

This project has been funded with support from the European Commission. This publication reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein.