



CALABRIA REGION Tourism Department

FIFTEENTH REPORT ON TOURISM IN CALABRIA*

The report on tourism in Calabria has arrived at the 15th edition and is an appointment awaited by operators of the sector that presents the state of the art of regional tourism in its many aspects, makes assessments and identifies trend lines and development prospects.

The report contains the exposure and the processing of official tourist data collected for the ISTAT surveys under the statistical programme National: Survey on the “capacity of accommodation structures” (Code IST-00138) and detection on the “movement of clients in the receptive structures” (code IST-00139). The data are presented with a historical comparison relative to the last decade and a deepening of the for the last three years.

The report also includes a chapter that develops a comparative analysis of regional performances and national tourism sector by Prof. Emilio Becheri.¹

A chapter was dedicated to return tourism, with an investigation of who came back in search of their roots. In this segment Calabria has a strong potential, which finds its reason to be in the desire to find its origins from the children and grandchildren of those who in the last century have been forced to choose the way of emigration from their own land. The tourist attraction of the location is given by several factors that are considered individually, become economic and infrastructural indicators whose comparison with reference to different tourist destinations, is crucial to understand the perception of a goal and the assessment by the travellers.

Demand

The 2017 did mark, for the tourist movement regional, the record of arrivals and tourist attendances, about 1.8 million of arrivals and 9 million of attendances.

Arrivals and attendances by provenance (Italians foreigners and total). Calabria.

Year	Italians		Foreigns		Total	
	Arrivals	Attendances	Arrivals	Attendances	Arrivals	Attendances
2015	1,234,733	6,491,154	247,202	1,644,724	1,481,935	8,135,878
2016	1,318,400	6,663,085	284,612	1,848,496	1,603,012	8,511,581
2017	1,482,719	7,003,957	317,153	2,020,623	1,799,872	9,024,580

Source: elaborations and data tourist information System-Calabria region.

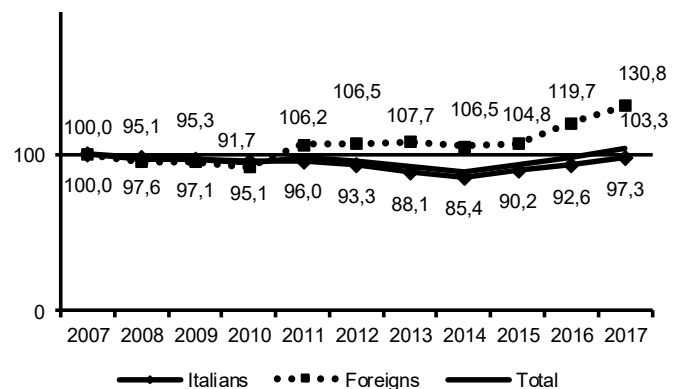
The historical record of attendance has been recorded also about the foreign component of the movement tourist, 317,000 arrivals for about 2 million of nights. This is a sig-

nificant increase given that, in general, Tourism changes are very slow and only take place and become evident over several years.

The last decade has seen an unfavorable trend until 2014, with a negative peak of about -15% compared to 2017, from 2015 the trend it reverses by triggering a substantial recovery.

In 2017 the share of foreign attendances compared total is 22.4%, 4.7% more weight compared to 2007.

Comparison trend of attendances according to the origin (base 2007 = 100). Calabria 2007-2017



Source: elaborations and data tourist information System-Calabria region.

The province that occupies the majority position of the regional tourism demand is Cosenza with 38.3% of arrivals and 37% of attendances. Compared to the territorial areas, the most significant share of the tourist movement is occupied by the Tyrrhenian Sea, 48.9% of arrivals and 51.6% of attendances, follow Ionian Sea resorts, arrivals 33.4%, attendances and finally the mountain resorts with a 39.8 marginal quota, arrivals 5.6%, attendances 2.7%. Basically 91.4% of nights are recorded in a location washed by the sea.

In 2017 on the Tyrrhenian Sea we reach performance levels, for foreigners, never reached before:

arrivals 220,000, attendances 1,444,000. These values determine the primacy of the year 2017 also relatively to the overall movement (arrivals 879,000, attendances 4,659,000).

The average stay of tourists in the structures Regional receptive in 2017 was 5 days while in 2007 it was 5.6 days. The provinces where it is absolutely predominant the tourism “bathing” as Vibo Valentia and of Crotona have a more average stay 6.3 days and 6.5 days respectively.

¹One of the leading experts in national and international tourism. Director of tourism, quarterly economics, management and marketing, founded in 1992. Teacher in various Italian universities. Has theorized categories that have changed the way thinking about tourism: from H. Hesse syndrome to differentiation and the conception of thermal wellbeing. He is coordinator of the Italian tourism report since the First edition (1984). Co-ordinated the volume the tourism industry in the Mezzogiorno (Svimez), together with Piero Barucci.

In 2017, in the complex of accommodations compared to the previous year, the arrivals an overall increase of 12.3%, the foreign arrivals of 11.4% and nationals of 12.5%.

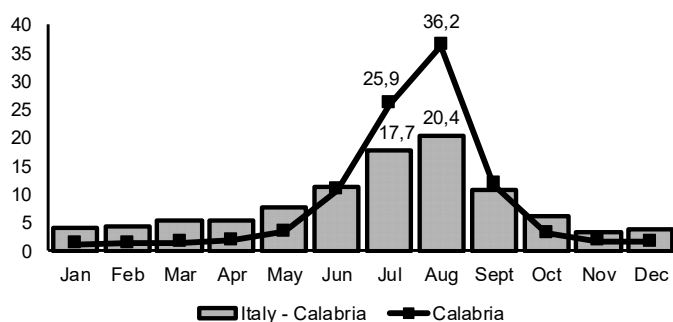
The overall attendances, however, in the last year increase by 6%, with an intensity, lower to the one recorded in the arrivals, the situation is explained with the decrease in the average duration of living room.

The best performances are recorded on the Tyrrhenian Sea and concern both domestic tourists (attendance + 8.6%) and international ones (attendances + 12.7%) although it should be stressed that the intensity of growth is significantly higher for foreigners. Also In the Ionian sea locations the changes in the movement of tourists are positive (Italian presences + 3.9%; Foreign attendances + 2.6%).

The share of the hotel sector for tourist demand exceeds 80% (for arrivals and presences).

The seasonality continues and is among the highest in Italy, with the highest peak in the months of July and August, less pronounced for foreigners who from June to October are distributed over a wider period of time, but are identified in 2017 signals positive compared to the previous year, the concentration of August goes from 36% to 33%, in fact, the concentration of the presence of Italians from about 40% in 2016 to 37% in 2017.

Distribution of attendances between the various months of the year in Calabria and Italy. Year 2016.



Source: NMTC processing on ISTAT data

The tourist movement of Calabria can be analyzed also according to the Bank of Italy source, through the sample survey on the movement of International tourists at the borders with regard to customers from abroad and through the survey on holidays and the travels of Italians in Italy and abroad led by Istat itself.

The data resulting from these two surveys, which, respectively, estimate arrivals and attendances of foreigners and those of the residents within the beautiful country, they appear much greater than those found by Istat at the receptive exercises because they also take into account of

movement in homes for holidays in property or rent. It follows that the presence total are 25,873,000, with a multiplier of 3.04. The overall tourist movement of the Region is, therefore, equal to at least three times that appears from the official statistics.

Offer

The Calabrian receptive system in 2017 is composed from 3,361 establishments and 193,518 beds, an increase is recorded compared to the 2016 the number of exercises (+ 7.8%) that of the beds (+ 2.6%). The fact that the exercises increase in a proportionally more accentuated than the places bed is direct consequence of the size of the new accommodation structures, which generally they are small structures; Compared to 2006, the number of Bed & Breakfasts increased by 373%, contributing in the same period to the growth of number of total accommodations (+ 112%) but does not result in a proportional increase of the beds that only increase the 1.2%.

Composition of the accommodation offer by type. Calabria .

	2015		2017	
	Exercises	beds	Exercises	beds
Hotels				
1-star hotels	39	1,037	37	1,444
2-star hotels	88	3,75	87	3,578
3-star Hotels	335	33,158	338	31,069
4-star hotels	218	43,386	240	46,265
5-star Hotels	16	1,339	16	1,317
R. T. A.	114	19,538	122	20,661
Total Hotels	810	102,208	840	104,334
Complementary and B&B				
Agro-tourist accommodations	466	6,570	469	6,711
Accommodations for rent	249	4,076	353	5,465
Campsites and villages	137	65,470	139	65,736
Holiday Homes	17	960	15	864
Youth Hostels	11	301	14	410
Lee	7	105	7	105
Other exercises	27	1,519	42	1,794
Bed & breakfast	1,207	6,555	1,482	8,099
Total complementary	2,121	85,556	2,521	89,184
Total	2,931	187,764	3,361	193,518

Source: elaborations and data tourist information System-Calabria region

In the two years 2015-2017, the average size of the others accommodation sector decreases by 12.3%: from 40.3 average beds per exercise at 35.4 seats bed for exercises. In the hotel industry, on the contrary, the size average of the structures increases by 10.3%: in period 2006-2017 going from 113 to mid-beds for exercise at 124, increase due mainly to Hotel tourist residences (RTA), category where you go from 142 to mid-beds for exercise at 170 (+ 19%).

*Traduzione in inglese dell'abstract del Quindicesimo Rapporto sul Turismo in Calabria a cura di Maria Victoria Di Chiro (Osservatorio sul Turismo Regione Calabria).

TOURIST INFORMATION SYSTEM

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The report will be published on the sites: www.turiscalabria.it; www.ontit.it; www.sistan.it;