

Tourism Development in FVG: a SWOT analysis

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Strengths

The importance of the tourism sector in FVG

The increase in tourist accommodation facilities

Geographical location and transport connections

Landscape variety

Wide range of products and services offered:

- Cultural tourism
- Food and wine tourism
- Natural tourism
- Sport tourism

Events

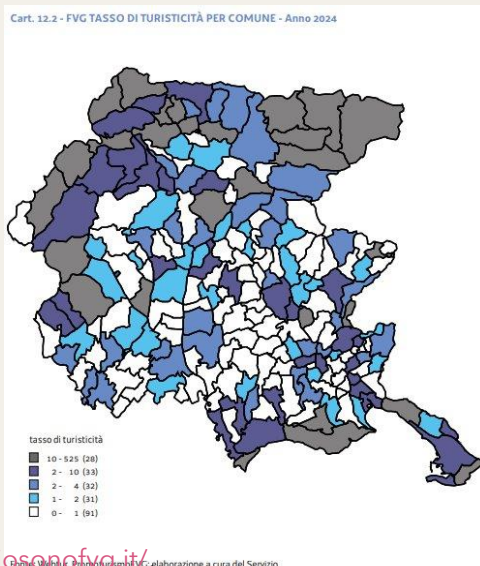
Initiatives

Tourist satisfaction

The tourism sector

The regional tourism system includes 11,972 tourism-related enterprises and 63,148 employees, making the sector crucial for the local economy.

FVG has increased the number of tourist accommodation facilities.



Sources: <https://www.iconofvg.it/>, [https://www.sistan.it/index.php?id=88&tx_ttnews\[tt_news\]=11217](https://www.sistan.it/index.php?id=88&tx_ttnews[tt_news]=11217) & <https://www.ilfriuli.it/economia/il-patrimonio-culturale-fvg-convince-i-vacanzieri-soddisfazione-altissima-e-buone-prospettive-per-le-imprese-del-settore/>

Location and transport links

FVG is in a strategic position thanks to its geographical location on the border with Austria and Slovenia and the many transport facilities it has:

- Trieste Airport
- Trains
- Harbor
- Highways



Source: https://www.regione.fvg.it/rafv/export/sites/default/RAFGV/economia-imprese/turismo/FOGLIA80/allegati/23122024_PTFVG_Linee_indirizzo_2025.pdf

Landscape variety

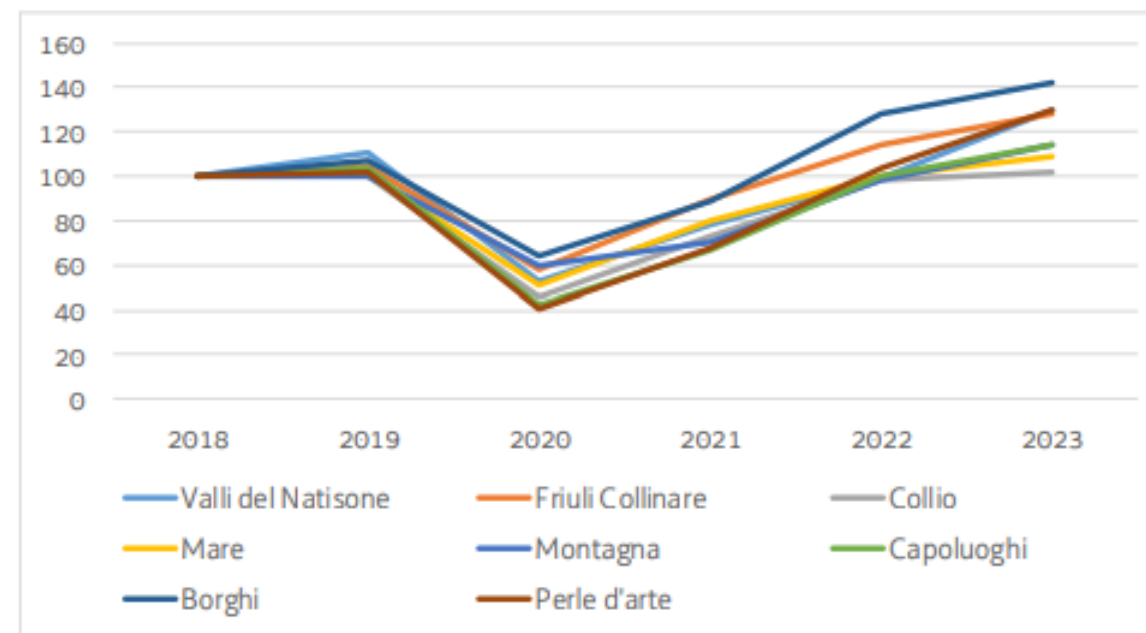
Tourist arrivals in FVG in the period 2018-2023 grew by 12.6%:

- Municipalities of the Natisone and Torre Valleys -0,9%
- Seaside destinations +9.1%
- Municipalities belonging to the «Borghi»* cluster +41.9%
- Municipalities in the Friuli hills +19.4%
- Mountain destinations +14%
- Municipalities belonging to the «Perle d'arte»* cluster +29.4%
- Collio municipalities +10.4%
- Cities +14.3%

In summary, tourist growth exceeded the regional average for most of the clusters considered.

Source:
https://www.regione.fvg.it/rafv/export/sites/default/RAFVG/GEN/statistica/FOGLIA108/allegati/Turismo_2023_Ufficio_statistica_Region_FVG_Dicembre_2024.pdf

Figura 1 FVG Arrivi per cluster turistico. Anni 2018-2023. Numeri indice, anno 2018=100.



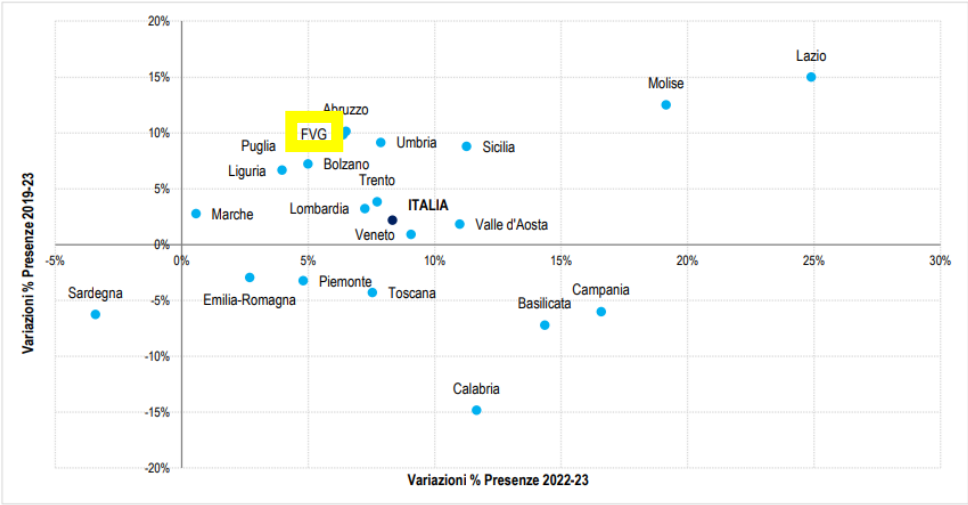
Fonte: elaborazione del Servizio SPPS RAFVG su dati WebTur

*«Perle d'arte» cluster includes: Municipalities of Cividale, Gemona, Codroipo, Sacile, Spilimbergo.

*«Borghi» cluster includes: Clauiano, Cordovado, Fagagna, Gradisca, Palmanova, Poffabro, Polcenigo, Sappada, Sesto al Reghena, Strassoldo, Toppo (Travesio) Valvasone Arzene, Venzone.

Comparison with the national situation

FIGURA 7. PRESENZE NEGLI ESERCIZI RICETTIVI PER REGIONE DI DESTINAZIONE. Variazione percentuale 2022-23 e 2019-23



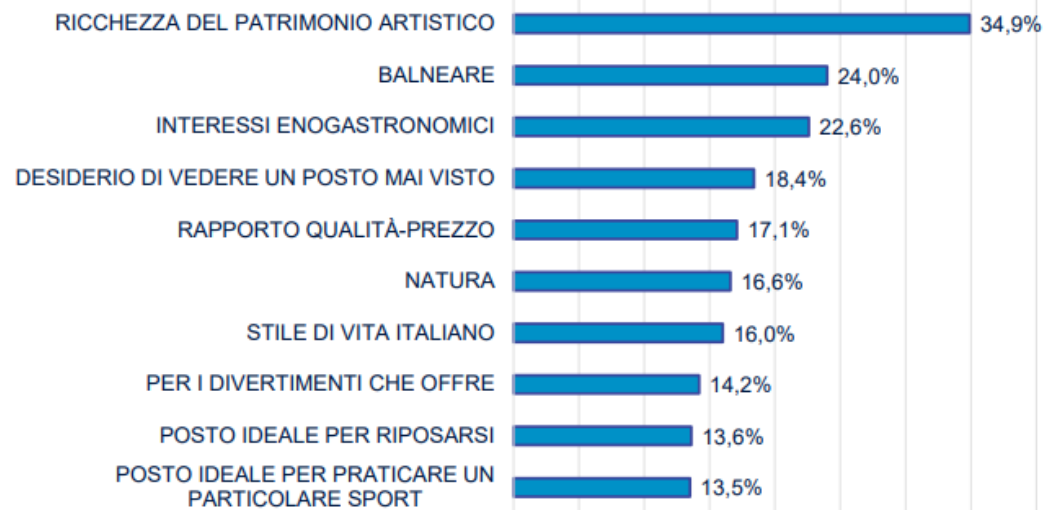
Fonte: Istat, Movimento dei clienti negli esercizi ricettivi

PROSPETTO 2. PRESENZE PER REGIONE DI DESTINAZIONE E RESIDENZA DEI CLIENTI. Anno 2023, valori assoluti; quota percentuale sul totale nazionale; variazioni percentuali 2022-23 e 2019-23

REGIONI E RIPARTIZIONI	VALORI ASSOLUTI			QUOTA % su Totale Italia	VARIAZIONI %	
	Residenti	Non residenti	Totale		2022-23	2019-23
Nord-ovest	33.823.021	42.159.588	75.982.609	17,0%	6,2%	2,6%
Piemonte	7.229.845	7.180.603	14.410.448	3,2%	4,8%	-3,2%
Valle d'Aosta/Vallée d'Aoste	2.253.209	1.439.669	3.692.878	0,8%	11,0%	1,9%
Liguria	8.845.282	7.238.928	16.084.210	3,6%	4,0%	6,7%
Lombardia	15.494.685	26.300.388	41.795.073	9,3%	7,2%	3,2%
Nord-est	76.018.664	100.228.342	176.247.006	39,4%	6,5%	2,0%
Trentino-Alto Adige/Südtirol	21.682.327	33.544.804	55.227.131	12,4%	5,9%	6,1%
- Bolzano/Bozen	10.649.009	25.436.178	36.085.187	8,1%	5,0%	7,3%
- Trento	11.033.318	8.108.626	19.141.944	4,3%	7,7%	3,9%
Veneto	22.097.826	49.799.037	71.896.863	16,1%	9,1%	0,9%
Friuli-Venezia Giulia	4.149.828	5.797.047	9.946.875	2,2%	6,4%	9,9%
Emilia-Romagna	28.088.683	11.087.454	39.176.137	8,8%	2,7%	-2,9%
Centro	50.531.672	58.304.432	108.836.104	24,3%	14,2%	5,3%
Toscana	20.722.001	25.297.309	46.019.310	10,3%	7,5%	-4,3%
Umbria	4.261.852	2.167.096	6.428.948	1,4%	7,9%	9,2%
Marche	8.931.093	1.729.584	10.660.677	2,4%	0,6%	2,8%
Lazio	16.616.726	29.110.443	45.727.169	10,2%	27,2%	17,2%
Sud	36.804.503	18.651.007	55.455.510	12,4%	10,6%	-1,5%
Abruzzo	5.825.896	978.924	6.804.820	1,5%	6,5%	10,2%
Molise	447.289	47.497	494.786	0,1%	19,2%	12,5%
Campania	10.093.962	10.601.880	20.695.842	4,6%	16,6%	-6,0%
Puglia	11.714.009	5.108.135	16.822.144	3,8%	4,4%	8,9%
Basilicata	2.109.144	428.180	2.537.324	0,6%	14,4%	-7,2%
Calabria	6.614.203	1.486.391	8.100.594	1,8%	11,7%	-14,8%
Isole	15.809.934	14.838.886	30.648.820	6,9%	4,0%	1,3%
Sicilia	8.427.343	8.020.941	16.448.284	3,7%	11,3%	8,8%
Sardegna	7.382.591	6.817.945	14.200.536	3,2%	-3,4%	-6,2%
TOTALE ITALIA	212.987.794	234.182.255	447.170.049	100,0%	8,5%	2,4%

Fonte: Istat, Movimento dei clienti negli esercizi ricettivi

MOTIVAZIONI DI SOGGIORNO IN FVG



Fonte: Osservatorio sull'Economia del Turismo delle Camere di Commercio

LE 10 PRINCIPALI ATTIVITÀ SVOLTE IN VACANZA IN FVG



Fonte: Osservatorio sull'Economia del Turismo delle Camere di Commercio

Why is FVG a tourist destination? Products and services offered

➤ Cultural tourism

- 5 UNESCO sites, Nova Gorica/Gorizia
European Capital of Culture 2025

➤ Food and wine tourism

- Wine and Taste Route

➤ Natural tourism

➤ Sport tourism

- Water sports, trekking, rafting, kayaking, bike tours, skiing

Record-breaking FVG: 9.8 million tourists per year

(Source: <https://www.udinetoday.it/economia/turismo-friuli-venezia-giulia-boom-visitatori.html>)

Events

- **Barcolana**

In 2018, the 50th edition officially entered the Guinness Book of Records as the “Largest Sailing Race” in the world, thanks to the 2,689 boats registered.

-> around 25,000 sailors and over 300,000 people

- **Friuli DOC**
- **Pordenonelegge**
- **Gusti di Frontiera**
- **Concerts**

For every €1 invested by the public sector, over €7 was returned to the region.

Sources: https://www.regione.fvg.it/rafv/export/sites/default/RAFVG/GEN/statistica/FOGLIA59/allegati/Grandi_eventi_e_tradizioni_locali_BigData_Luglio_2020.pdf & <https://www.promoturismo.fvg.it/proxyvfs.axd/allegato/r214079?%20%E2%80%8B>

and initiatives



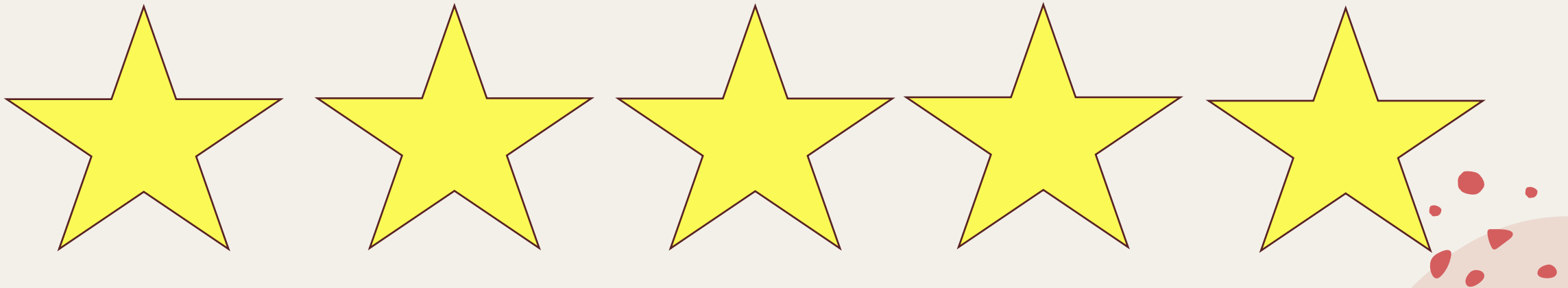
- Online communication and promotional services:
 - **Io sono FVG** -> sustainability
 - **PromoTurismoFVG**
- Agreements:
 - **TUReSTA**
 - **FVGCard**
- Initiatives to promote historical and cross-border heritage:
 - **Nova Gorica - Gorizia European Capital of Culture 2025 - GO!2025**
 - **Walk of Peace**
 - **Interreg Italia-Slovenija**

Source: https://www.regione.fvg.it/rafv/export/sites/default/RAFVG/economia-imprese/turismo/FOGLIA80/allegati/23122024_PTFVG_Linee_indirizzo_2025.pdf

Tourist satisfaction

- ❖ Tourists are highly satisfied, with an average rating of close to 9/10 for their stay in Friuli Venezia Giulia. The restaurants, hospitality, quality of services, and organization of the region received excellent reviews. Notably, over 50% of visitors have already written or intend to write an online review, which helps to strengthen the region's reputation.

(Source: <https://www.udinetoday.it/economia/turismo-friuli-venezia-giulia-boom-visitatori.html>)



Weaknesses

FVG is one of the least touristic regions in Italy, as the Regional Tourism Reputation Index for 2020 affirmed

Overtourism involves irregular and unforeseeable waves of tourists due to cruise ships that block the main attractive spots (mobility and food services)

Cruise ships in Trieste do not ensure a positive economic return due to limited time tourists spend in the city, and there are many environmental consequences

Price increases: in 2025, FVG is third most expensive region in Italy with an annual inflation of 1.8%, compared to the national figure of 1.7%

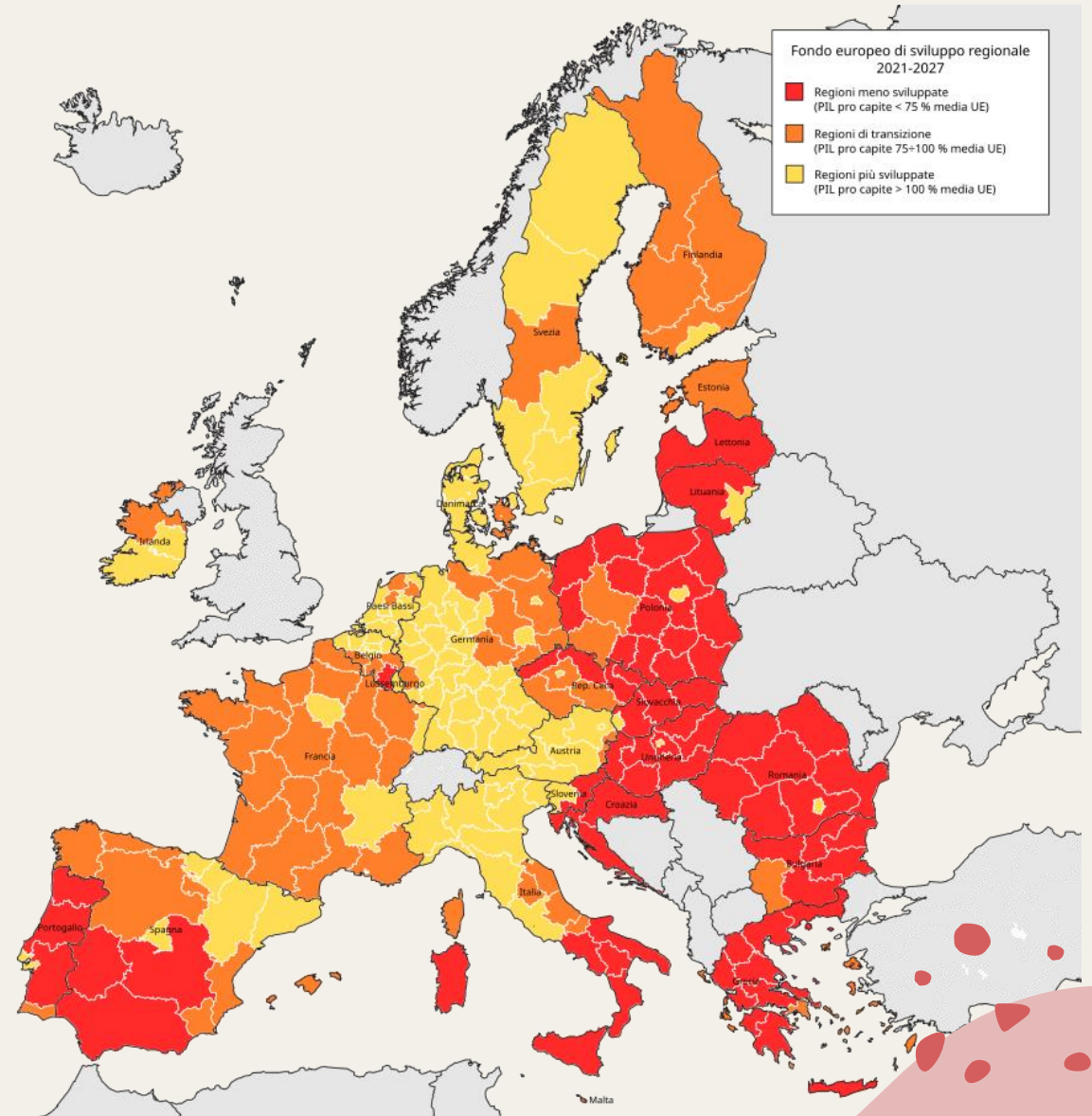
In 2024, **bad weather** damaged the economy of the region, reducing beach tourism

Competition with other nearby coastal areas: in 2023, Lignano and Grado attracted fewer visitors than other locations in Veneto (Jesolo, Caorle, Cavallino Treporti, Bibione).

Opportunities

European Level:

1. ERDF 2021-2027 = non-repayable grants for the implementation of productive investment projects aimed at strengthening the sustainable and digital competitiveness of businesses in the tourism sector
2. On December 1st 2022, the Council of Europe adopted the **2030 European Agenda for Tourism**, which provides guidelines for developing sustainable, innovative, and resilient European tourism by 2050



Opportunities

National level

- In July 2023, the Council of Ministers approved the **Tourism Strategic Plan (2023-2027)**, which is included in Mission 1 of the PNRR and aims to improve the quality of the tourism sector

Regional level:

- The **Film Fund** supports the production of films that promote the region and encourage employment and the development of the tourism economy
- **Nova Gorica and Gorizia European capital of culture 2025**: this will represent a strategic opportunity to enhance the visibility of Gorizia from 2026 onwards

Threats

- CMCC (Centro Euro-Mediterraneo sui Cambiamenti Climatici) published a study in 2024 affirming that the Italian tourism sector will be severely impacted by **climate change** by 2050 in the absence of environmental policies ;

- **Competition** with the other Regions of Northern-East Italy ;

- **Overtourism** will lead to the gentrification of some districts, alterations to the real estate market, pressure on environmental resources, and an impact on people's daily lives .

Sitography

https://www.regione.fvg.it/rafvfg/export/sites/default/RAFGV/GEN/statistica/FOGLIA108/allegati/Turismo_2023_Ufficio_statistica_Regione_FVG_Dicembre_2024.pdf

<https://www.turismofvg.it/en>

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***THANK YOU
FOR YOUR
ATTENTION!***

