



CCI MAPPING - VITTORIO VENETO

Final Report

CISET for Municipality of Vittorio Veneto

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1. Introduction

1.1. Purpose of the mapping analysis

The municipality of Vittorio Veneto is one of the partners in the STIMULART project (Interreg Central Europe Programme 2014-2020). The project aims at increasing the competitiveness of small and medium urban cities, characterised by a high-value cultural heritage, through the development and promotion of Culture and Creative Industries (CCIs) and of the related human capital.

The GAP analysis, previously carried out in the field of this project by Alterevo for the municipality of Vittorio Veneto, has already identified the potentials and weaknesses of CCIs in the city of Vittorio Veneto, highlighting challenges and issues for a social and economic development led by Culture. The GAP analysis has clearly shown that Vittorio Veneto is part of a broader system with other 10 surrounding municipalities that already cooperate in several projects, since the shared need for activating common policies. This is particularly true for culture, creative and tourism development, for which the success of actions in these fields depends on the willingness to act together according to a “system” vision.

The GAP analysis has also highlighted that a great discussion about the future of Vittorio Veneto, and in particular a future linked to culture and creativity, has been stimulated since 2015, when the city started to plan the 100-years anniversary of the end of the Great War, occurred in 2018. In that moment, the local community - decision-makers, cultural and creative actors, citizens - developed the awareness that the value and image of the city should be linked not only to its important past related to the First World War but also to its great cultural, environmental, industrial and social heritage, also related to a new creativity and vitality. This awareness is well synthesized in the slogan “Raise the Volume”, that was formulated for the participation of the city to the competition for the Italian Capital of Culture 2018. According to the interviews carried out during the GAP analysis to decision makers and CCIs actors, the “city re-launching” could be based not only on the tangible and intangible Cultural Heritage (still partially unexploited), but also on other values that characterise the city and the whole territory, such as the high quality of life and of the education system, the strong and “resilient” manufacturing sector and emerging attractors, such as the recent UNESCO site “The Prosecco Hills”. Because of this reason, the identification of CCIs for the city of Vittorio Veneto includes not only the sectors that traditionally are recognized as CCIs (such as music, art, film, etc.) but also other activities that more or less directly stimulate and attract creativity and promote culture, such as tourism, traditional and contemporary handcraft and other manufacturing activities. However, the GAP analysis has also shown that the scenario about CCI development in Vittorio Veneto is not so clear and in some sense it is still ambiguous. In other words, a strategic plan (a vision) for CCIs is still missing. Together with a stronger stakeholders’ participation and cooperation and residents’ engagement, the definition of a clear strategic vision is the necessary condition for supporting a cultural-led social and



economic development and create the “enabling” environment for thriving cultural and creative initiatives.

Starting from the findings of the GAP analysis, the mapping analysis here presented aims at improving the knowledge about CCIs and cultural resources in the city of Vittorio Veneto, through the analysis of meaningful statistical data and indicators that can provide a comprehensive picture about the size, features and evolution of CCIs in Vittorio Veneto also in comparison and in relation to other important variables and dynamics that characterise the development of the city.

While the GAP analysis was based mainly on a qualitative approach focussed on interviews with stakeholders, the mapping analysis relies on a more quantitative and statistical approach aimed at establishing objective and sound facts so that the city can better position its CCI sectors in the market and in relation to the economic system. In this sense, the comparison among the dynamics of CCIs and other aspects such as demographic, social and economic indicators are important to assess the role and economic value of CCIs in the urban development of the city. This is particularly relevant for small and medium urban places, where, although there is the awareness about the potential of culture and CCIs, a sound assessment of their value is often missing.

1.2. Methodological approach for the mapping analysis

The mapping analysis here presented is based on the CCI Mapping Analysis Methodology and the relative template developed by Dr. Olaf Kraz - University Regensburg in the field of the STIMULART project, in order to provide to partner cities a common and comparable format for building CCI mapping.

As explained by Dr. Kraz, this methodology allows to monitor progresses and changes happening to CCI features via statistical indicators and it is the result of a combination of different sources¹, including the contents of the GAP analyses reports and the outputs from stakeholder group activities in each partner city. The mapping methodology should contribute to identify and describe the profile of the traditional and non-traditional CCI sectors in the city and to allow comparison over time and among similar cities, in order to increase awareness, improve knowledge and support decision making.

The methodology is based on the collection and analysis of data about five dimensions, i.e.:

1. General information about the City
2. Demographic information
3. Labour market
4. Housing market

¹ Sources used for developing the mapping methodology are for example the mapping reports for CCIs on country level (i.e. Germany), the mapping reports for CCIs in global cities (i.e. London), Creative Cities Indizes, EU Cultural and Creative Cities Monitor (C3 Monitor), etc.



5. CCI & Cultural resources

The first four dimensions allow to build a holistic picture about the social and economic context of the city in order to better understand and explain the features and evolution of CCIs, that are in detail described in the fifth dimension.

The report of the mapping analysis here presented consists of two files. The first file is the Excel table including several sheets and the second file is this word document in which data are analysed and critically discussed.

The required data were collected following the data sheets and the required time series until 2018 as much as possible, depending of course on the availability of the different statistical sources. When data were not available, substitutes were provided, when possible. Time series were completed as far as possible and the most "recent" available data were collected and for some data also the value for 2019 was included. In addition, when statistics at municipality level were not available, data at one higher level (the Province one) were provided.

A preliminary desk research of existing statistical data sources was carried out in order to identify the most appropriate sources that can provide the required data. Data sources are clearly specified in the excel file. However, the main official sources are:

- ISTAT (Italian National Institute of Statistics)
- Regional Statistics Office of the Veneto Region (in which the municipality of Vittorio Veneto is located)
- Chamber of Commerce of Treviso and Belluno
- Veneto Lavoro - The Regional bodies for job and employment of the Veneto Region
- National Revenue Agency - Ministry of Economy and Finance
- Ministry of Education

Most of the data were directly available as they are published in the official website of the above mentioned institutions. For the main statistics that were not available, an official request was made to the competent bodies in cooperation with the municipality. This is the case, in particular, of detailed statistics about enterprises, value added and jobs in CCIs, that were required to the local Chamber of Commerce and to Veneto Lavoro.

In addition, other sources were consulted in order to collect data that are not available in the official sources or to integrate them. These sources are:

- Private organisations that make estimations, market and trend analysis, such as Borsino Immobiliare and Immobiliare.it, regarding the real estate market.
- Departments and offices of the municipality of Vittorio Veneto, regarding data about the budget and employees of the municipality and about cultural attractions, facilities and events.



The analysis mainly focuses on the municipality of Vittorio Veneto. However, for the first three dimensions, data are collected also for the other 10 municipalities surrounding Vittorio Veneto, that, as explained in the introduction, are part of the same “system” - the Vittoriese area. By providing the statistics referred to the other cities for the first three sections, it was possible to offer a sounder picture of the territory and of the context in which CCIs can develop. Regarding, instead, the fifth dimension, the decision to focus only on the city of Vittorio Veneto was taken, since the complexity of mapping CCIs and CC resources. However, since Vittorio Veneto is the main city of this area, most of the cultural attractions and CCI activities are here located.

The excel file details all the data collected for the required time series and it specifies which data are not available. **In the following sections of the report, instead, every dimension of the mapping analysis is explained and discussed with reference to the most significant indicators and according to the available data collected.**



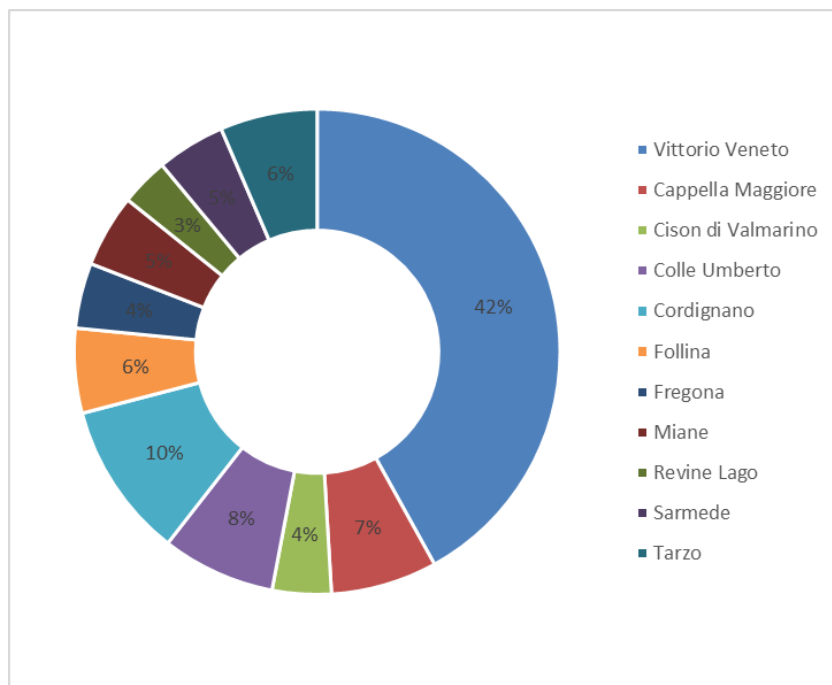
2. General information about the city

The first dimension includes several data that provide basic information about the city at demographic, economic and social level and that allow to build a preliminary picture of the environment in which CCIs can develop. When possible, data are also compared to those ones referred to the other 10 municipalities of the Vittoriese area, of which Vittorio Veneto is the main city.

2.1. Population

The role of “capital city” played by Vittorio Veneto is evident when you consider that the city has a population of **28.148 inhabitants (2018)**, accounting for **42% of the total population of the Vittoriese area** (see Figure 1).

Figure 1 – Share of inhabitants of 11 municipalities of the Vittoriese area, 2018



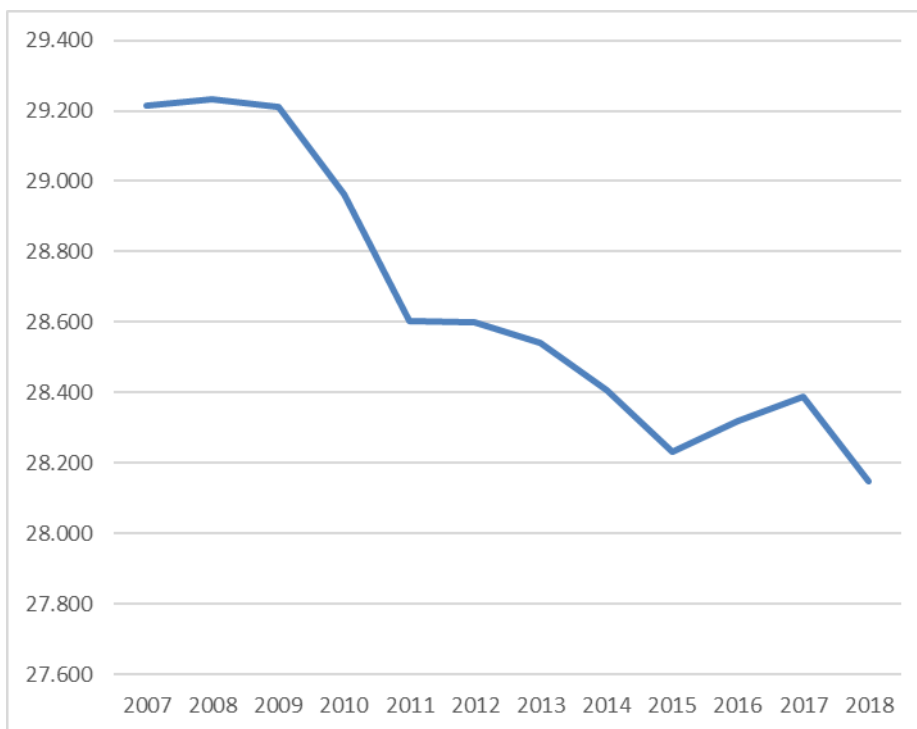
Source: ISTAT

In addition, it has the largest “extension” in comparison with the other surrounding cities (82,8 Km²) and, in relation to the overall Treviso province (in which it is located), it is by far the widest municipality in the Province (the average is 27,86 km²). However, in terms of population, Vittorio Veneto is a medium size city, that accounts for no more than 3% of the total population of the Treviso Province.



Regarding population, the first impressive finding coming from data analysis is the **population dynamics**, that, as shown in Figure 2, unfortunately is characterised by a **slow but continuous decreasing trend**: -0,34% on average every year, from 29.216 inhabitants in 2007 to 28.148 in 2018, versus +0,19% registered in the Treviso Province. In the reference period, the population remained constant over 29.000 inhabitants between 2007 and 2009; then it suffered a significant decline in 2010, falling under 29.000, and again in 2015, when it came down to 28.232 inhabitants. There was a slight recovery in 2016 and 2017, but in 2018 there was a significant new downturn with the lowest number of inhabitants since 2007.

Figure 2 – Population trend in the municipality of Vittorio Veneto, 2007-2018



Source: ISTAT

The tendency monitored in Vittorio Veneto could be partially associated to the more general economic crisis, that may have pushed people to look for job in other areas of the Veneto Region or of Italy or even abroad. Data explained in the next section about demography can help in better understanding the evolution of the population in Vittorio Veneto; as it will be better explained in chapter 3 about demographic information, a low birth rate and the decrease in the proportion of inhabitants aged 20-35 years old could be two important components of the population decline.

However, **this negative trend of the population is common in all the Vittoriese area**, where similar rates of change were registered, except for the municipality of Cappella Maggiore, that has experienced a slight growth (+0,38% the average annual growth rate) and for the municipality of Colle Umberto, where the number of inhabitants has remained



stable over the last twelve years. On the contrary, for Fregona and Miane, the rate of change has reached almost -1% on average every year.

The slow decrease in population afflicting Vittorio Veneto and the surrounding area has of course implications for CCIs and in general for the cultural, social and economic development. On the one hand, the **depopulation can lead to the loss of local traditions and of valuable human capital**. On the other hand, **the activation of effective policies for stimulating creativity and developing CCIs in the city could be a driver for reversing the trend and re-attracting people and in particular talents** that could find new opportunities for living and working in the area.

A measure of the wellbeing of local population in economic terms is the **average disposable annual household income**, that in Vittorio Veneto is **28.328€ by household (2018)**. This value is **the highest in the whole area**, where it is around 22-27 thousand euro (exception for Colle Umberto, where it is 29.623€). Also in comparison to other municipalities of the Treviso Province, this data is particularly impressive and a sign of good wealth for the inhabitants of Vittorio Veneto. In Treviso - the capital city of the province - for example, the disposable annual household income is 17.095€, since the highly diversified structure of the population. In the other most populated cities, the value is similar to that of Vittorio Veneto (Montebelluna 27.911€, Paese 26.553€, Castelfranco Veneto 29.357€; Oderzo 29.530€). Conegliano and Monegliano benefits from a higher income: 31.198€ and 33.512€.

Unfortunately, the time series on the average disposable annual household income is not available, but we can expect that there has been a decline in household wealth during the hardest years of the crisis, as documented by the following economic indicators.

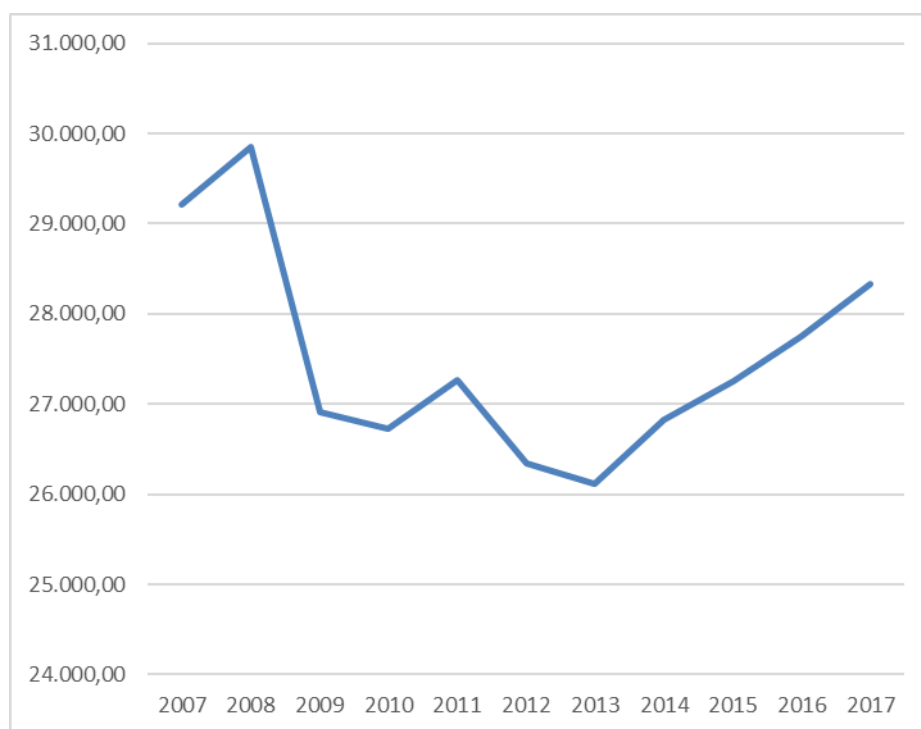
Finally, data about crimes can be useful indicators for the social conditions characterising the city. Indeed, a low level of crime can of course contribute to the development of a peaceful and safe environment in which to live, raise children, work and do business. Although data at municipality level are not available, statistics at province level can provide some interesting information as well. **Vittorio Veneto is located in one of the provinces of the Veneto Region with the lowest number of crimes: 20.884 crimes** registered in the Treviso Province in 2018 in comparison to the provinces of Verona, Venice and Padua with more than 30.000 crimes and to the province of Vicenza with more than 23.000 crimes. In addition, the trend in the last eight years is very encouraging, since the number of crimes has decreased by -8% compared to 2010 (-1% on average per year). The only sore point is the number of crimes linked to drug, that has increased by +9,9% (+1,2% on average per year); in particular, this growth was observed in the last two years (2017 and 2018), while in the past years there had been a decline in this kind of crimes.



2.2. Local economy

One of the most important economic indicators for measuring the economic value of a territory is the gross value added². Unfortunately, this data is not available at local level. However, the gross value added per capita in the **Treviso Province** - that can be applied also to Vittorio Veneto - was 28.300€ in 2017 (last available year) vs 29.208 in 2007, with a decrease of -0,3% on average every year. In particular, as shown in Figure 3, the negative trend occurred between 2009 and 2013, corresponding to the years of the economic crisis; the pre-crisis value has not yet been recovered and it remains lower than the value registered at regional level in the Veneto Region (29.901€). The Treviso Province may have been slightly penalized, since its economic structure is particularly based on manufacture activities, that suffered more during the crisis. However, **gross value added per capita started to grow again in 2014, recovering a positive trend.**

Figure 3 - Trend in the gross value added per capita in the Treviso Province, 2007-2017



Source: ISTAT

The effects of the economic crisis negatively impact also on the vitality of local enterprises, that suffered a decline. Data available since **2012** show that the **number of active enterprises** - including both the legal unit and other local units located in the area under consideration - **decreased in Vittorio Veneto from 2.814 in 2012 to 2.730 in 2018**, with an average annual rate of change of -0,5%, that however is not so high -

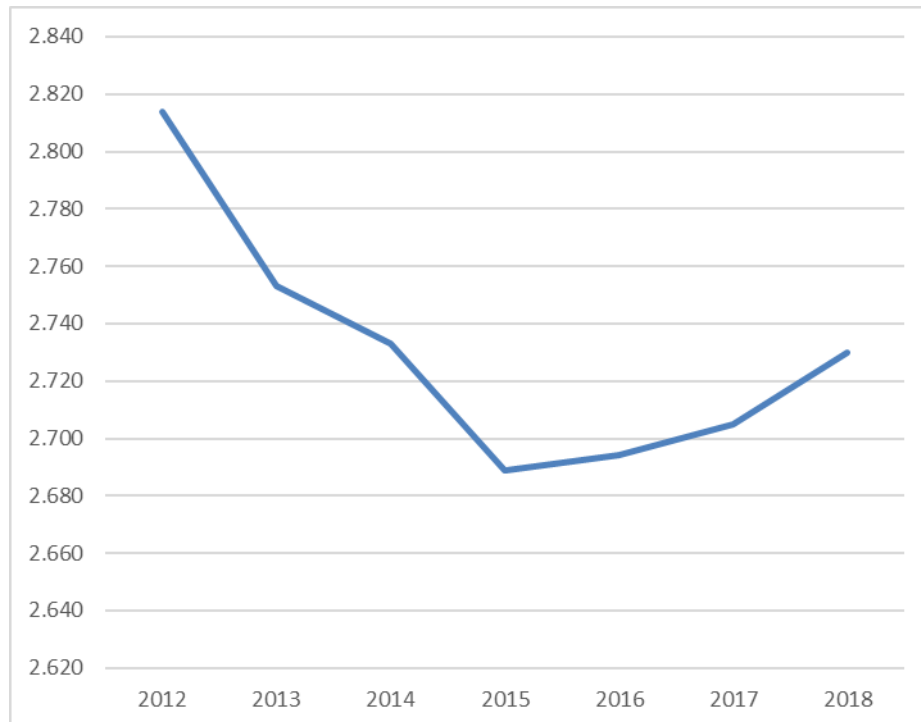
² Gross value added is the output value at basic prices less intermediate consumption valued at purchasers' prices. It refers to the increase in value that occurs in the production and distribution of final goods and services thanks to the intervention of the factors of production (capital and labour) starting from goods and initial primary resources



compared to other areas of the Veneto Region - and it is similar to that registered in the whole Province. The decline has been more significant in some municipalities of the Vittoriese area, for example in Cappella Maggiore (from 428 to 384, -1,8% per year), Cison di Valmarino (from 294 to 2668, -1,5% per year), Fregona (from 280 to 241, -2,5% per year), Revine Lago (from 204 to 179, -2,2% per year), where however the number of enterprises is much lower than in Vittorio Veneto.

The negative trend seems to go hand in hand with the dynamics of the population, showing that the loss of local companies and then of jobs may have contribute to depopulation. However, as shown in Figure 4, **the number of enterprises in Vittorio Veneto has returned to growing in 2016** (although provisional data for 2019 seem to reveal a slowdown again) and this could be a positive sign for the next years in terms of wellbeing and resilience of the economic sectors. This can be an opportunity to create jobs and attract new residents in the city. Among other things, the industrial and commercial areas of Vittorio Veneto (24 zones, for a total of 1,4Km^{2 3}) represent one of the major industrial centres of the Veneto region, not only for the great variety of productions, but also for the presence of high-quality companies, which are well known at national and international level.

Figure 4 – Trend in the number of enterprises* in Vittorio Veneto, 2012-2018



* Both legal and local units

Source: Chamber of Commerce of Treviso and Belluno

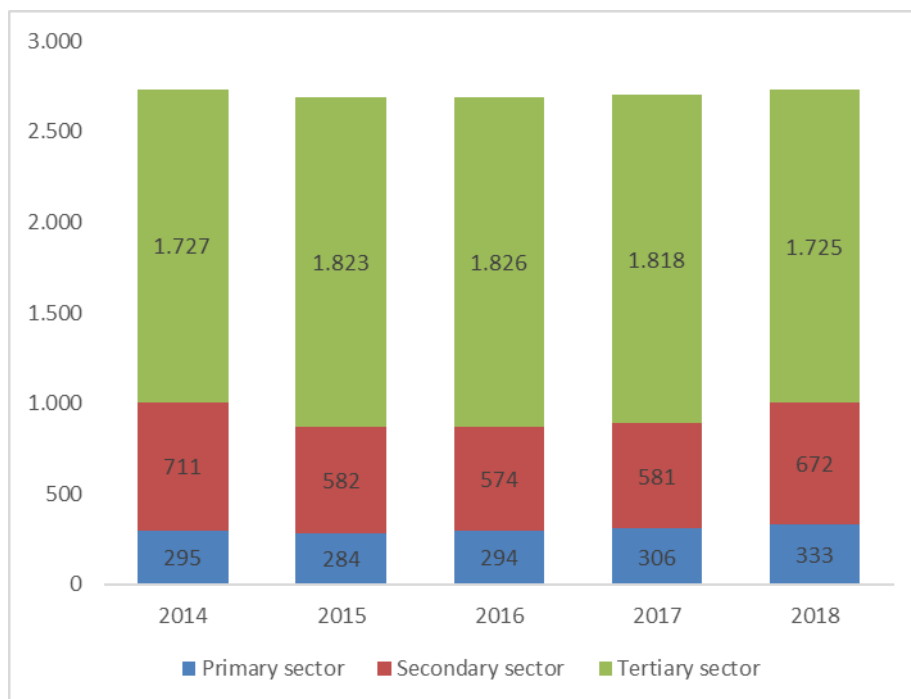
³ Source: Municipality of Vittorio Veneto (Urban development and private building office). The industrial and commercial areas have been counted according to the city's urban plan.



Most enterprises, i.e. 63,2% (2018), refers to the tertiary sector, while the secondary sector accounts for 24,6% and the primary one for 12,2%. However, these data have to be compared and integrated with those about the labour market discussed in chapter 4, that show that most jobs are concentrated in the manufacturing sector, which is based on larger consolidated firms.

Considering the period 2014-2018 (available data), the sector that suffers most from the crisis was the secondary sector, whose share lost about 2 percentage points (from 26% in 2014 to 24,6% in 2018), since the number of businesses dropped from 711 to 672 (-1,4% on average per year). In the tertiary sector, the number increased between 2015 and 2017 but in 2018 it came back to the value registered in 2014 (1.727 in 2014 and 1.725 in 2018), while the most dynamic sector was the primary one, whose enterprises increased from 295 to 333 (+3,1% on average per year) and its share from 10,8% to 12%.

Figure 5 - Number of enterprises by sector in Vittorio Veneto, 2014-2018



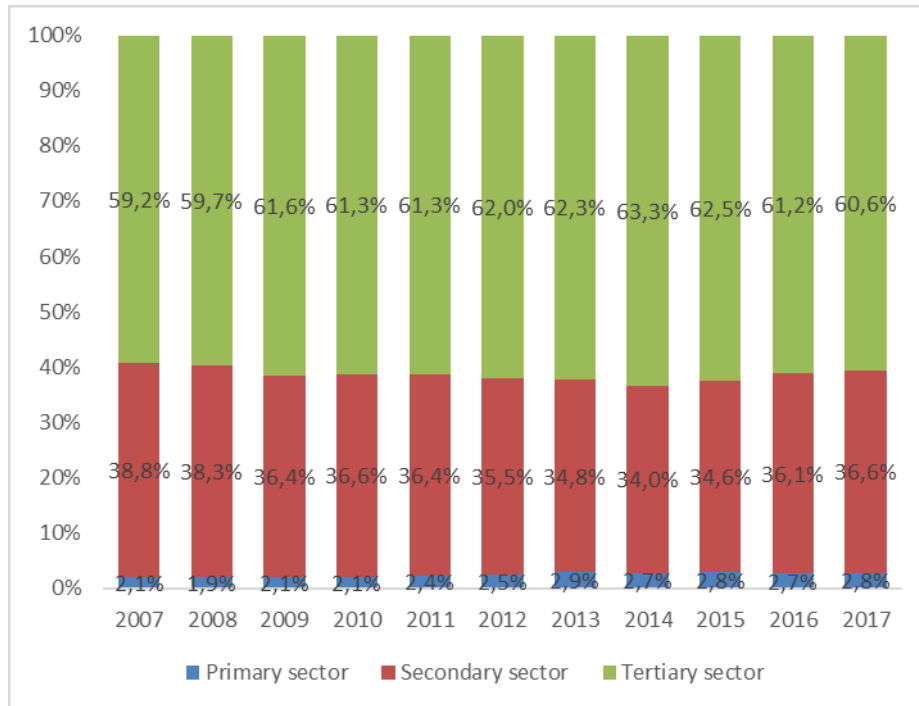
Source: Chamber of Commerce of Treviso and Belluno

A more representative data for the structure of the local economy and its dynamics would be the **gross value added by sector**, that unfortunately is not available at municipality level. However, statistics at provincial level show that the **share of the service sector in terms of gross value added has remained stable compared to 2007** (59,2% in 2007 and 60,6% in 2017 - last available data), although it reached 63,3% in 2014. The **secondary sector assisted to a decline of its share in the past ten years** (from 38,8% in 2017 to 36,6%), **although it is recovering** from the minium value reached in 2013-2015 (about 34%). The primary sector, instead, benefited from a slight increase, since its contribution to the gross value added went from 2,1% in 2007 to 2,8% in 2017. These data, that could be



applied also for the city of Vittorio Veneto, highlight that the manufacture activities were the most penalised during the economic crisis.

Figure 6 – Size of each sector by ist share on the gross value added in the Treviso Province, 2007-2017



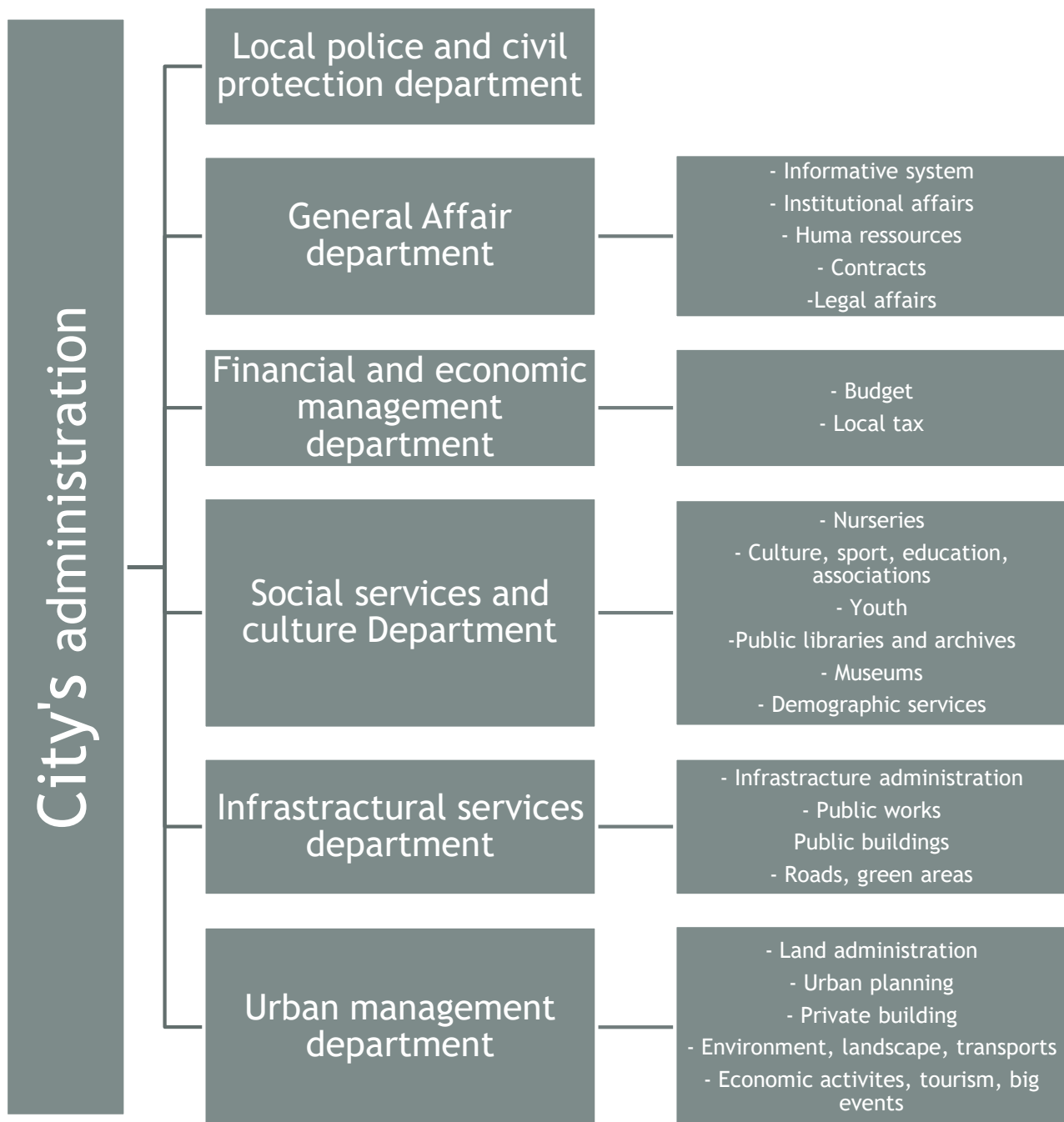
Source: ISTAT

2.3. Information about the city's administration

The following chart shows the actual organigram of the city's administration, which based on 6 main Departments, divided into several offices, for a total of 23 offices.



Figure 7 – Organigram of the city’s administration in Vittorio Veneto



Source: City’s administration website:

https://www.comuneweb.it/egov/Vittorio/ammTrasparente/Organizzazione/Articolazione_degli_uffici.html

Regarding the staff, human resources employed in the municipal administration of Vittorio Veneto are 142, including 2 employees dealing with urban development, 2 dealing with economic development and 8 with cultural activities (including public libraries and local museums). Since 2007, when employees were 188, the number has gradually decreased. In particular, the offices referred to urban development and culture lost 2 resources and that of economic development 1 person. It is interesting to note that the cultural office



is the area that benefits from a higher number of employees (5,6% of the whole staff) and that, in relative terms, has suffered less than the others from the drop in the number of employees. This could be considered a positive factor for the development of the culture and creative sector in the city.

Figure 8 - Number of employees of the city's administration in Vittorio Veneto, 2007-2018



Source: Municipality of Vittorio Veneto - Human Resource Office



3. Demographic information

The second dimension of the mapping analysis refers to the structural features of the population, with particular reference to youth dynamics. Indeed, it is important to analyse the characteristics of the younger population, since the future development of the city depends on it, not only in demographic terms but also from the socio-cultural and economic point of view.

In the city of Vittorio Veneto, the **average age among population is 47,5 years old (2018)**. This is **higher than the average age registered in the whole Treviso Province and in the Veneto Region**, where it is 44,1 and 44,8 years old. As a consequence, the city of Vittorio Veneto is characterized by a slightly older population; even older than that of the other municipalities of the Vittoriese area. Indeed, except for Tarzo, where inhabitants are on average 47,7 years old, in the other cities the average age ranges from 44,8 (in Cordignano) to 46,4 (in Fregona) years old.

The **birth rate in Vittorio Veneto is 6,5 live births per 1.000 inhabitants**, vs 7,4 in the Treviso Province and 7,2 in the Veneto Region. Again, the data is **a little bit worse than those registered in the whole territory and partially in the Vittoriese area**. Here some municipalities register a more encouraging birth rate, for example Revine Lago (8,8), (Follina (8,7), Cison di Valmarino (8,3), Colle Umberto (7,5), although their number of inhabitants is significantly lower than in Vittorio Veneto. In the last position of the ranking there is Tarzo, where there are only 4,1 births per 1.000 inhabitants.

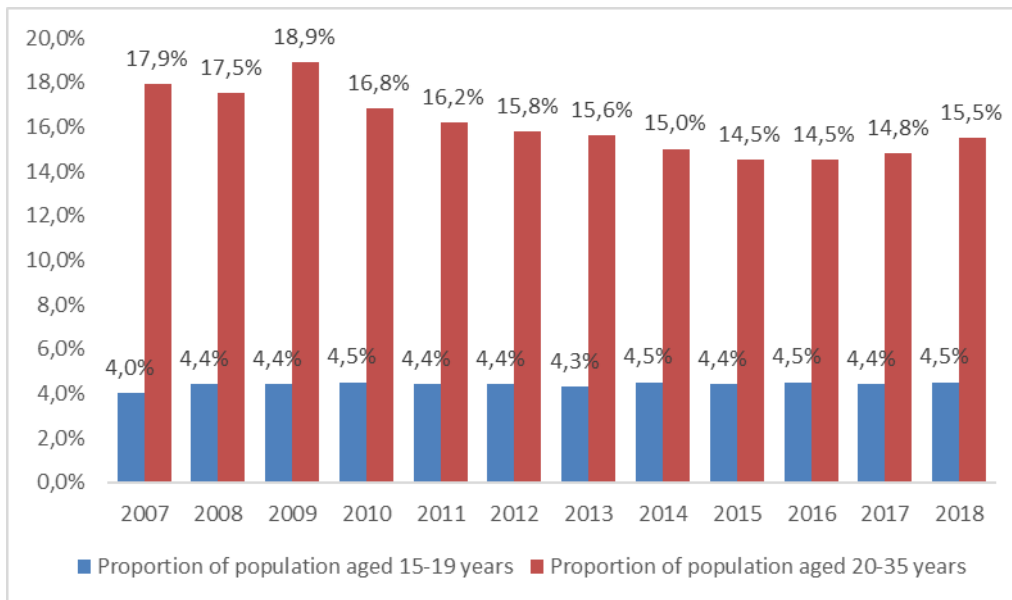
In Vittorio Veneto the **proportion of inhabitants aged 15-19 years old accounts for 4,5%** of the population, vs 5% in the Treviso Province, while the **proportion of inhabitants aged 20-35 years old accounts for 15,5%**, vs 16,3% in the province. Data are almost similar to those registered in the other municipalities of the Vittoriese area, where the first indicator ranges from 4,3% (in Colle Umberto and Tarzo) to 5,1% (in Miane and Cordignano) and the second one to 13,4% (Tarzo) to 15,9% (Cordignano).

Figure 9 describes the trend of these two variables in Vittorio Veneto, showing that the proportion of inhabitants aged 15-19 years old increased from 4% in 2007 to 4,5% in 2018 and this could be considered a good sign, maybe a consequence of a favourable period for births in the late 90s and early 2000s; however, **the proportion of inhabitants aged 20-35 years old dropped** from 17,9% in 2007 to 15,5% in 2018. Both trends are common to the whole Vittoriese area and also for the whole Province. Regarding the indicator referred to the 20-35 age group, the negative dynamics could be partially caused by the economic crisis that led young people to go away from Vittorio Veneto to look for better study and job opportunities in other cities, also outside the Veneto Region and even abroad. This phenomenon is observed in all Italy and it has been well documented by ISTAT and several studies, that highlighted that in the last ten years Italy has lost almost



250.000⁴ Italian young people aged 15-34 years old who have emigrated abroad, generating a new “wave of migration” for Italy after those of decades ago⁵.

Figure 9 - Proportion of population aged 15-19 and 20-35 years in Vittorio Veneto , 2007-2018



Source: ISTAT

The demographic structure, and in particular that one referring to youth, seems to be not so encouraging for Vittorio Veneto and for the surrounding area. In this sense, **socio-cultural and economic policies aimed at generating new opportunities for people and attracting new “lymph” and talents, such as those related to CCI development, could support positive demographic dynamics.** However, data in Vittorio Veneto describe a situation that it is not so different from the provincial and even regional one and that is a sign of a more generalized trend.

⁴ As difference between departure and return of Italian citizens.

⁵- ISTAT, Rapporto Annuale 2019

- Fondazione Leone Moressa, Rapporto 2019 sull’economia dell’immigrazione

- Il Sole 24 Ore, 2019 <https://www.ilsole24ore.com/art/in-10-anni-l-italia-ha-perso-250mila-giovani-fuga-all-estero-costa-16-miliardi-AC0kqkq>



4. Labour market

The dynamics of the labour market is of course an important indicator for the level of wellbeing and vitality in a city, together with the evolution of the population and of the other economic variables, such as the number of enterprises.

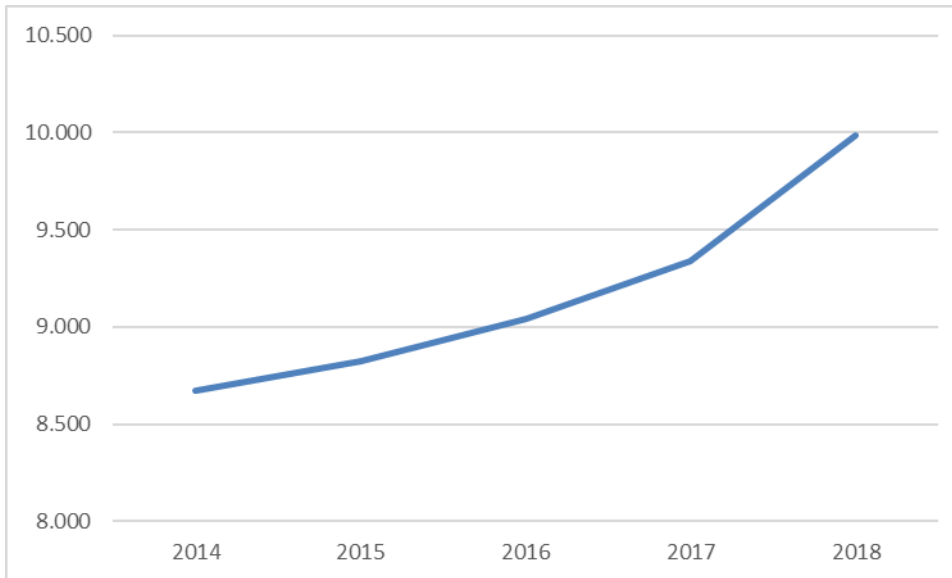
The data available at municipality level about the labour market refers only to the **number of human resources employed⁶ in the active enterprises located in the city**. This data does not include inhabitants who work in other cities or self-employed persons, such as freelancers, consultants, etc. are not included. In addition, it includes people who have a job in the local enterprises but who live in other towns. As a consequence, the available data, i.e. the number of employees in the active enterprises located in the city, does not correspond to the statistics referred to the total number of employees among the population of the city, that is available at province level. However, if we compare the two data for the Province of Treviso, the values are not so different: the total number of employees in the territory under consideration is 387.199 (2018), while the number of persons employed in the active enterprises located in the province are 321.803. Then, we can state that this last data could be the same a valid indicator for the size and dynamics of jobs in the city.

In the 2.730 enterprises located in the city of Vittorio Veneto, the number of employees are **9.987 (2018)**. Considering the period 2014-2018 (available data), the trend is positive, since the number of employees has increased by +3,6% on average per year (8.673 employees in 2014). The growth rate is slightly higher than that registered at province level and it is significantly better than the growth rate observed in the other municipalities of the Vittoriese area. As a consequence, the **dynamics in Vittorio Veneto is encouraging since it seems that the labour market is recovering after the economic crisis**. This trend goes hand in hand with the evolution of the number of enterprises, that, as described before, after a decline in the period 2012-2016, has returned to growth. Regarding provisional statistics referred to 2019, while the data about the number of enterprises shows a slowdown again, the data about the number of employees remained constant.

⁶ Both employees and entrepreneurs.



Figure 10 - Trend in the number of employees in the active enterprises located in Vittorio Veneto, 2014-2018



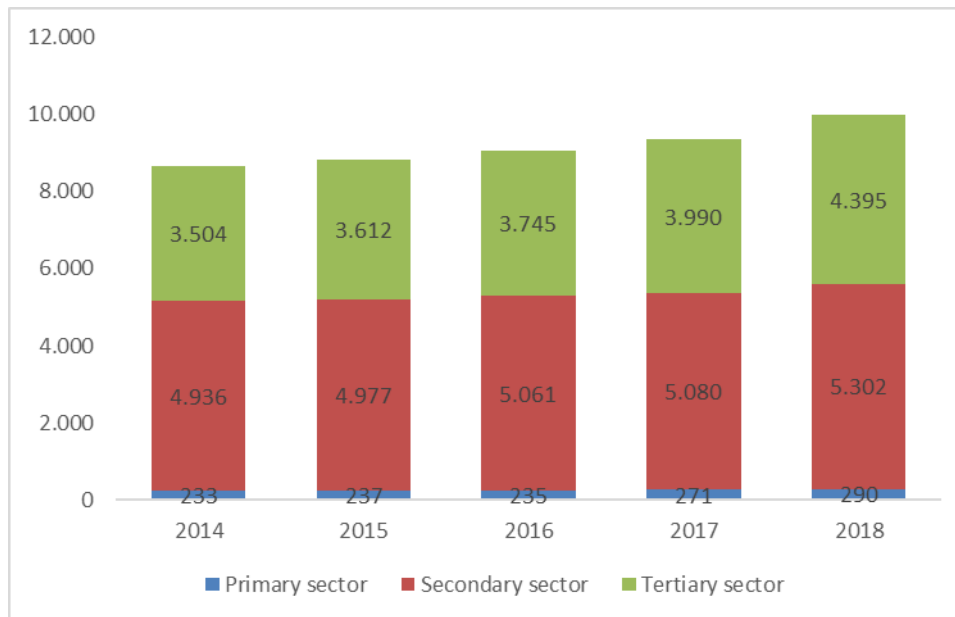
Source: Chamber of Commerce of Treviso and Belluno

While the tertiary sector is the largest one in terms of number of enterprises, it is the **secondary sector that absorbs most jobs: 5.302 people are here employed, 53,1% of the total.** This is due to the fact that **manufacturing companies tend to be larger than businesses in the service and agriculture sectors.** The tertiary sector, instead, accounts for 44% of total jobs, while the primary one for 2,9%. However, these two sectors are driving the labour market, since they registered the best trend between 2014 and 2018: the number of employees increased by +5,6% on average per year in agriculture and by +5,8% in services, vs +1,8% in the industry.

Regarding in particular the **tertiary sector**, it is interesting to highlight that, **while the number of enterprises remained stable in the past 5 years, the number of people employed in these businesses significantly augmented.** This means that the service sector, that includes also most of the culture and creative activities, may be interested by the need for new emerging professional skills and/or by a dimensional growth of the companies.



Figure 11 - Number of employees in the active enterprises located in Vittorio Veneto by sector, 2014-2018



Source: Chamber of Commerce of Treviso and Belluno

Regarding the indices about employment and unemployment, statistics are available at province level only. However, they can give a reference number also for the city of Vittorio Veneto.

Data show first of all a significant difference in the employment rate between man and women, that however is observed also at regional level and that, unfortunately, is indicative of a more general gender gap present in all Italy. In the Treviso Province, 57,4% of women are employed vs 75,8% of men. However, it increased compared to 2007 (54,6%) and to the years of the economic crisis (52,7% in 2011 and 54,9% in 2013).

Regarding the unemployment rate in the Treviso Province, it is 8%, that is unfortunately higher than that registered at regional level (6,4%) and even the highest one among all provinces of the Veneto Region. The unemployment rate was affected by the economic crisis, since it has doubled since 2007, when it was 4%, and it has not yet recovered (since 2012 it ranges between 6-8%). The youth unemployment rate (15-24 years old) is even higher - 19,7% - but lower than that measured in the Veneto Region (21%). In addition, the situation about youth unemployment in the province is now better than in the crisis years (in 2014 and 2015 it was 26%).



5. Housing market

Regarding the housing market, statistics are unfortunately very fragmented and not so reliable. Some data about the prices of houses and apartments are provided by the National Revenue Agency but not for all territorial levels and there are some gaps and “anomalies” in the time series (in some consecutive years, prices are exactly the same). As a consequence, these data have been compared with the information provided by some private organisations - BorsinoImmobiliare and Immobiliare.it - and professionals dealing with the real estate market, although this information is available for the most recent years only.

First of all, statistics from the last population census show that 74,2% of household in Vittorio Veneto own their flat or house. This is a high share that is consistent with the all-Italian trend that people prefer to buy the house they live in rather than rent it. However, the share observed in Vittorio Veneto is slightly lower than that measured at province level (77,9%) and in all other municipalities of the Vittoriese area, where it is about 81-84%. This is a very curious phenomenon that would need further study in order to explain the reason; one possible cause to be verified may be the fact that inhabitants of Vittorio Veneto are not “permanent residents” but people who temporally moved to the city for work reasons and who prefer to rent. However, data referred to the last population census occurred in 2011 and the situation may have changed since then.

The prices of the housing market underline that buying houses in the area is particularly convenient. The average purchasing price for private housing property in Vittorio Veneto is about 1.388€/m², vs 1.417 in the Treviso province and 1.662 at national level. In addition, prices have fallen over the years, from 1.575€/m² in 2011. Also fees for rental apartment are lower: 6,3€/m² a month vs 8,1€/m² in the province and 9,5€/m² in Italy. The values have remained almost stable over the years.

Fee for commercial rent is instead about 7,3€/m² a month, up on 2011.

The availability of convenient prices both for houses and apartment, as well as for commercial rent, is of course a positive factor that can support the housing market, by making inhabitants stay in the city and even attracting people from outside. In addition, a favourable real estate market can contribute to the **openness of new activities**, also in the cultural and creative sectors.

Regarding building land, the prices in residential areas range between 150-250€/m², since there is great difference depending on the location (city centre, countryside, etc.), while the prices in industrial/commercial areas ranges between 80-100€/m². In particular for building land in industrial areas, there seems to be a great request in Vittorio Veneto, since the large sizes of the lots, the location close to the connecting roads and for good urbanization⁷. This trend can be seen as sign of the recovery and dynamism of the

⁷ Information from some local professionals of the real estate market in Vittorio Veneto.



economic and manufacturing activities in Vittorio Veneto, that may look at new openings or expansions.



6. CCI & Cultural and Creative Resources

6.1. Introduction: CCI & Cultural and Creative Resources in Italy

Before discussing the data coming from the mapping analysis of CCIs specifically carried out in the city of Vittorio Veneto, it is useful to contextualize CCI sectors in the Italian and European framework. Indeed, defining, identifying and measuring CCIs is still an open question, since the boundaries of cultural and creative enterprises are constantly evolving.

It is useful first all to consider the definition provided by the Europe Union. It defines cultural and creative sectors as “all sectors whose activities are based on cultural values or artistic and other individual or collective creative expressions. The activities may include the development, the creation, the production, the dissemination and the preservation of goods and services which embody cultural, artistic or other creative expressions, as well as related functions such as education or management. They will have a potential to generate innovation and jobs in particular from intellectual property. The sectors include architecture, archives, libraries and museums, artistic crafts, audio-visual (including film, television, video games and multimedia), tangible and intangible cultural heritage, design (including fashion design), festivals, music, literature, performing arts, books and publishing, radio, and visual arts”⁸.

This definition clearly highlights the great variety and complexity that characterise CCIs and that led to the development of different approaches towards CCI definition and measurement, also depending on the specificities of these activities in a certain territorial area. For example, there seems to be some differences between the perspective adopted by countries from northern Europe, that seem to be more “technology-driven” and focused on more contemporary and less “traditional” aspects of culture; and the perspective developed by the countries from southern and central Europe, that seem to be more “heritage-driven”, i.e. based on tangible and intangible cultural heritage⁹.

However, despite the existence of different approaches, some common attributes can be identified in CCIs: the great multidisciplinary and variety in the application fields; the high knowledge content, also due to professionals with a very high training; a high rate of technological, non-technological and social innovation linked to a great content of creativity; the prevalence of small and medium enterprises and self-employed persons¹⁰.

⁸ Regulation (EU) No 1295/2013

⁹ Lazzaretto. (2013). *Creative Industries and Innovation in Europe*”. Routledge

¹⁰ Lazzaretto. (2013). *Creative Industries and Innovation in Europe*”. Routledge



Regarding in particular Italy, several studies have been made for defining and mapping Cultural and Creative Industries, from, for example, the Bodo-Spada's Report on the economy of culture in Italy 1990-2000 (2004)¹¹, to other most recent researches developed by the Tagliacarne Institute (2009)¹², Walter Santagata for the Commission on Creativity and Cultural Production in Italy - Italian Ministry of Culture (MiBAC) (2009)¹³, Unioncamere and Symbola for the annual reports "Io sono cultura" (since 2011)¹⁴, Pietro Valentino for Civita (2013)¹⁵.

One important reference for CCIs mapping is the document "Libro Bianco sulla Creatività" (White Paper on Creativity) published in 2009 by the Commission on Creativity and Cultural Production in Italy -. This white paper proposed a definition of CCIs particularly suitable for describing the Italian context. This definition¹⁶ focuses on:

- Historical and artistic heritage (cultural goods and activities), including cultural heritage, architecture, music, contemporary art and performing arts;
- Content, information and communication industry - where high-tech is increasingly important for service production - including publishing, cinema, advertising, TV and radio, software sciences;
- Material culture, based on the production of goods and services, including fashion, designs and flavour industry.

Another important definition is that one provided by Fondazione Symbola and Unioncamere, who since 2011 publish the annual report "Io sono cultura" (I am culture), that has now become a reference point and the best-known approach in Italy for the identification and assessment of CCIs in relation to the national economy. The report focuses on all those activities that contribute to generating economic value and employment and that are in part attributable to the "more traditional" cultural and creative component (**Core activities**) and in part to activities that, although not part of the cultural and creative supply chain, employ cultural content and skills to increase the value of their products (**Creative-driven activities**).

Core activities include:

- Those activities linked to Cultural heritage conservation and promotion (museums, libraries, monuments, archives);
- Those not-reproducible activities of cultural goods and services, i.e. performing and visual arts;

¹¹ Bodo C., Spada C. (ed.). (2004). "Rapporto sull'economia della Cultura in Italia 1990- 2000". Bologna, Ed. Il Mulino

¹² "Il sistema economico integrato dei beni cultural". (2009). Istituto Tagliacarne, Unioncamere, Ministero per i beni e le attività culturali. Rotoform, Roma.

¹³ Santagata W. (ed). (2009). "Libro Bianco sulla Creatività". Milano, Università Bocconi Editore.

¹⁴ "Io sono cultura" I-IX editions. (2011-2019). Fondazione Symbola and Unioncamere.

¹⁵ Valentino P. (ed.). (2014). "L'arte di produrre Arte. Imprese italiane del design a lavoro". Venezia, Marsilio Editori.

¹⁶ Santagata W. (ed). (2009). "Libro Bianco sulla Creatività". Milano, Università Bocconi Editore.



- Those activities related to the production of cultural services and goods, based on an industrial logic of replicability, i.e. cinema, radio-tv, video games and software, publishing and printing and music;
- Those creative activities linked to the service sector, i.e. communication, design and architecture.

In addition, there are the creative-driven dimension, that includes all those activities that are interested by “culturalization” processes, such as handicrafts and other manufacturing activities. The inclusion of this second area is to be considered strategic because it allows to better understand the contribution of culture and creativity in the process of value creation in the country, thus highlighting the interconnections between Italian culture and manufacturing and craft specializations¹⁷.

Regarding the size and dynamics of this sector, the report “Io sono cultura - IX edition” estimates that the whole CCI system, thus defined, generated 95,7 billion euro in Italy in 2018, i.e. 6,1% of Italian GDP, and employed 1,55 million people (6,1%). About a third of this value (37,4%) is generated by non-cultural sectors, but by manufacturing and services activities (the so-called creative-driven), in which almost 600.000 cultural professionals (designers, communicators, art directors, etc.) are employed to raise quality and value of goods and services. Compared to 2017, CCIs observed a growth both in terms of value added (+2,9%) and in terms of employees (+1,5%), doing better than the whole national economy (+1,8%). In addition, CCIs generated 265,4 billion euro in the economy as multiplier effect (16,9% of GDP)¹⁸.

In the Veneto Region, where the municipality of Vittorio Veneto is located, CCIs generated 7,8 billion euro (8,2% on the national CCI value added) in 2018 and 138,3 thousand employees (8,9% on the national CCI employment). The contribution of CCIs to the regional economy is slightly lower than the national average in terms of GDP (5,3% on the regional GDP) and similar in terms of number of employees (6,1% on regional employment)¹⁹. An interesting aspect is **the role of the Creative-driven activities, that in the Veneto Region is particularly significant in comparison to the core cultural component**. Indeed, they account for almost half of the whole regional value added created by CCIs: 45,3% vs 37,4% at national level. This is due to the **specificity of the regional manufacturing system**, where most businesses base their value proposition on the relation with local traditions and know-how (think for example of traditional and artistic handcraft). This shows how these businesses contribute, on the one hand, to preserve this intangible heritage, and on the other hand, to continuously elaborating it and producing new culture, through innovation.

¹⁷ “Io sono cultura - IX edition”, Fondazione Symbola and Unioncamere (2009)

¹⁸ “Io sono cultura - IX edition”, Fondazione Symbola and Unioncamere (2009)

¹⁹ “Io sono cultura - IX edition”, Fondazione Symbola and Unioncamere (2009)



6.2. Methodological approach for mapping CCIs in Vittorio Veneto

The CCI mapping analysis carried out for the city of Vittorio Veneto was developed starting from the classification provided by the project partner University Regensburg, who, according to the international, European and German framework²⁰, identified 12 main CCI fields, that are of course consistent also with the Italian definitions of CCIs. However, on the basis of the Italian approach, that considers the activities linked to Cultural heritage conservation and promotion as a separate aggregate, the decision was taken to highlight these activities with their own specific group. As a consequence, 13 industries have been considered.

1. Music industry
2. Book industry
3. Art industry
4. Film industry
5. Broadcasting industry
6. Performing arts industry
7. Design industry
8. Architecture industry
9. Press industry
10. Advertising industry
11. Software and games industry
12. Heritage, libraries and archives
13. Other industries belonging to culture and creative sectors

In addition, following again the Italian approach described in the previous paragraph²¹ - in particular the classification proposed in the report “Io sono Cultura”, the decision was

²⁰ In addition, also the following sources at European level have been considered:

- Power. D (2011). “The European Cluster Observatory Priority Sector Report: Creative and Cultural Industries”. Europe Innova n.16 - European Commission - Enterprise and Industry.

- ESSnet-CULTURE. “European Statistical System Network on Culture. Final report”. (2012). Ministry of Culture Finances and cultural statistics department (CoStaC) Luxembourg, European Commission, Eurostat.

- “Guide to Eurostat culture statistics. 2018 edition”. (2018). Eurostat.

- “Market analysis of the cultural and creative sectors in Europe. A sector to invest in”. (2019). European Investment Fund.

²¹ In addition to the above mentioned studies, other researchers carried out about Italian CCIs at different territorial levels have been considered:

- Tamma M., Calcagno M., Panozzo F., Battistoni F., Bergamini M., Santoro G. (2014). “Impatti delle produzioni culturali e della neo-imprenditorialità creativa per la crescita sostenibile dell’economia veneziana”. M.A.C.LAB. Dipartimento di Management, Università Ca’ Foscari Venezia.

- Orlandi A., Santagati M. (2014). “Le industrie culturali e creative: una mappatura quantitativa”. Agenzia Umbria Ricerche.



taken to include also other activities in the mapping analysis, and in particular the so-called creative-driven activities, with reference to those that are most pertinent with the territorial specificities of Vittorio Veneto and of its socio-cultural and economic system. These are activities that, although not strictly based on the culture sector, may employ creative and cultural skills - for example for communication, brand development, product design - and contribute to activate creativity, to promote and “feed” tangible and intangible cultural heritage. In particular, the following activities have been included in the analysis:

- Activities that are pertinent with artistic and traditional handcrafts (jewellery, furniture, etc.)
- Tourism services (accommodation, tour operators and travel agencies, tourist guides)
- Restaurants (with particular reference to restaurants based on local traditional products and/or high-culinary proposal)
- Other activities linked to traditional local products (for example wine, with particular reference to “Prosecco wine”, since the recent inclusion of the “Prosecco Hills” near Vittorio Veneto in the World Heritage List) and/or to cultural contents and professionals.

Starting from these premises, for each of the 13 CCI fields and for each of these creative-driven activities, the set of all pertinent ATECO codes (the Italian version corresponding to the European NACE codes Rev-2) was identified (see Annex 1)²², in order to trace the number of enterprises and employees activated by CCIs in the city of Vittorio Veneto.

A clarification is necessary. For the 13 core CCI industries, all (or almost all) the enterprises falling under the corresponding ATECO codes can be considered as cultural and creative activities, since their core business is based on this. On the contrary, with reference to the creative-driven companies, it is expected that not all of them are real creative-driven activities. Indeed, a more in-depth analysis, through ad-hoc interviews with the companies involved, would be needed, in order to verify the extent to which the core business of these firms is based on or contribute to generate cultural and creative contents and/or employ cultural professionals for their activities, such as product development and innovation, brand image, etc. In addition, with reference to handcrafts, it should be verified if all mapped enterprises linked to craft productions are real craft firms. Indeed, the ATECO codes doesn't allow to distinguish craft activities from the other manufacturing firms. As a consequence, the mapping of the creative-driven enterprises

- Della Lucia M., Segre G. (2017). “Il perimetro di industrie culturali, creative e turismo: specializzazioni e implicazioni di policy in Italia”. *Sinergie - Italian Journal of Management*, 35(104).

- Panozzo F., Cacciato S. (2018). “Lo spirito imprenditoriale tra il centro e la periferia delle industrie culturali e creative. Il caso della Regione Veneto”. XXXIX Conferenza Italiana di Scienze Regionali - AISRE

²² The identification of the pertinent ATECO code for the 13 core CCI industries has been carried out starting from the list of the NACE codes identified in the references mentioned in notes n.20 and n.21.



through the ATECO codes will give a potential figure, that can be a starting base for further analysis.

Finally, CCI mapping was integrated with the analysis of the cultural offer of the city, in terms of cultural resources, facilities and initiatives, and of cultural participation, in order to provide a more complete framework of CCIs and cultural positioning and potentials.

6.3. Cultural venues, facilities and events and cultural participation

As already explained in the GAP analysis, Vittorio Veneto has a very rich, diversified and high-value cultural heritage (although partially unexploited), in particular if compared to the medium size of the city. Indeed, the museum offer, that is based on **9 museums**, ranges from arts (5 museums) to science (2), from history (1) to the ethnographic field (1). In particular, **4 museums** are part of the **Civic Museum system**:

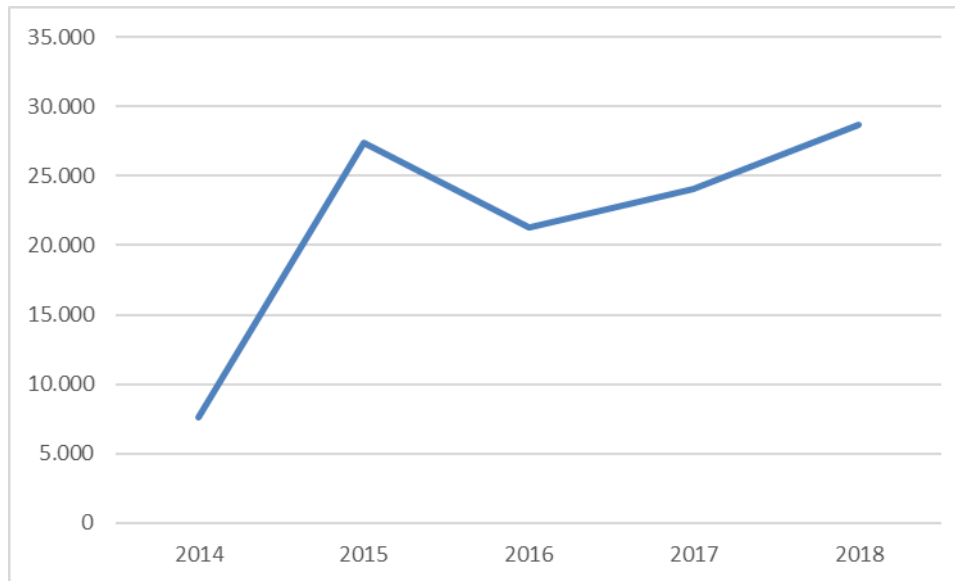
- Museum of Cenedese and the Oratory of the Battuti, with archaeological and historical finds and artistic works covering a time span from the fifteenth to the twentieth century of the ancient "Cenedese" territory;
- Museum of the Battle, collecting the memories of the I World War and of the strategic battle of "Vittorio Veneto", that was fought from 24 October to 3 November 1918 near Vittorio Veneto on the Italian Front between Italy and Austria-Hungary and that marked the Italian victory and the end of the war on the Italian Front with the Armistice;
- Civic Gallery of Modern and Contemporary Art "Vittorio Emanuele II", with a large and varied collection including paintings, prints, drawings, sculptures and furnishings from the fourteenth to the twentieth century.
- Silkworm Museum that is located in a former spinning mill and tells of one of the main economic resources and avant-garde activities in Vittorio Veneto from the end of the eighteenth century to the first decades of the twentieth.

The Civic Museum system has a total of more than 20.000 visitors each year. In particular, there were 28.708 visitors in 2018 (up from 24.083 in 2017 and 21.297 in 2016), also due to the programme of events and commemorations for the 100-years anniversary of the end of the I World War. **The museum contributing most to the number of visitors is the Museum of the Battle that is open 24 hours a week, from Tuesday to Sunday, while the other museums are open only 8 hours a week, on Saturday and Monday.** Also, the low number of visitors registered in 2014 (7.649) and the peak reached in 2015 (27.431) are due to the Museum in the Battle, that was closed in 2014 for important renovation and rearrangement works and then open to the public again in 2015, generating a great interest and audience flow.

The opening hours of the museums of the city represent of course a strategic element for better promoting the cultural heritage and stimulating cultural participation from citizens and non-resident visitors.



Figure 12 – Trend in the total number of visitors in the whole Civic Museums system of Vittorio Veneto, 2014-2018



Source: Municipality of Vittorio Veneto (Culture Department)

In addition, there are **5 private museums**:

- Minucci - De Carlo Palace, built starting from 1596 and where it is possible to visit the interiors and a large collection of works of all kinds (antique furniture and oriental rugs, tapestries and embroideries, ceramics and porcelain, glass and crystals, silverware and precious stones);
- Museum of Sacred Art "A. Luciani", with a collection of sacred art works and paintings of important Venetian artists from the fifteenth to twentieth centuries, such as Cima da Conegliano, Tiziano Vecellio and Palma il Giovane.
- Museum of Natural Sciences "A. De Nardi", which particularly focussed on the local natural heritage;
- Museum of Geology, particularly focussed on the geological history of Dolomites and of the local territory;
- Museum of the Cathedral, about the long ecclesiastical, cultural and artistic history of the city's cathedral, dating back to the seventh century.

In addition to the above mentioned museums, Vittorio Veneto benefits from the presence of other significant cultural resources, which contribute not only to the local cultural heritage but also to the tourism offer. According to the information provided by the cultural office of the city's administration, there are almost **20 main sights and landmarks**, ranging from churches to venetian villas and palace, from villages to the ancient walls.

The cultural system is enriched by the presence of:



- **4 libraries**, belonging to the Libraries system of the Treviso Province: the main library in Ceneda, 2 libraries/archives located one in the Museum of Cenedese and the other one in the Museum of the Battle and 1 church library (Biblioteca Diocesana).
- **1 theatre** (Lorenzo da Ponte Theatre), with 390 seats;
- **1 multiplex cinema**, with 4 rooms for a total of 842 seats (on average 210 seats per room).
- **1 art gallery / exhibition space** (Palazzo Todesco), hosting important artistic exhibitions and other significant cultural projects.

The cultural panorama of Vittorio Veneto includes also a rich program of events during the year. In particular, it is important to mention:

- The **international festival “Sulle vie del Prosecco”** - a four-day classic music itinerant festival, that stops in Vittorio Veneto for one day, and that every year since 2013 involves internationally renowned musicians and soloists;
- The **national choral singing contest “Trofei città di Vittorio Veneto”**, that takes place for two days in the city since 1966;
- The music festival **Rock 4 AIL**, taking place for three days in Vittorio Veneto in favour of an NGO that raises funds against leukemia, and that attracts hundreds people and international and national artists.

In addition, concerts, dance and theatre shows and temporary art exhibitions usually animate the city every year. In particular, considering the main regular events, in 2018 there were **26 concerts**, 2 dance shows and **4 theatre shows** (“Rassegna Teatro Veneto”, “Serravalle Festival”, “Piccolo Teatro Dante”, “Vivi a teatro”).

It is important to remind that 2018 was a special year for the city, since the commemorations for the 100-years anniversary of the end of the I World War have contributed to enrich the annual events agenda with initiatives designed only for this occasion. Indeed, a special program, called “1918. When peace breaks out”, collects music events, exhibitions, talks and conferences, tourist itineraries, gatherings of thematic associations, sporting events and an international public-art project curated by the Head of the Contemporary Art Department of the Hermitage Museum in St. Petersburg. In particular, 10 artists under 40 from several European countries were invited to visit the city, for knowing its people and history, and then creating site specific art works, to be positioned in different rooms and places in the city and donated to Vittorio Veneto, by creating a permanent widespread exhibition.

Although the events organised for the 100-years anniversary were limited to that year, they have contributed to animate the cultural life of the city, leaving legacies in terms of cultural awareness and participation, creativity and new cultural production (see the above mentioned artistic project), that can have great potential for cultural development in the near future.



Unfortunately, data about visitors in museums and during events are not available, except for the above mentioned data about the number of visitors in the Civic Museums system. As a consequence, it is difficult to make evaluations about the cultural participation in the city, both from locals and non-inhabitant visitors.

The only available information refers to the number of tourist arrivals and overnights, that can give a measure on how many tourists visit and stay for at least one night in Vittorio Veneto, although their travel motivation is not known. They may come for leisure, for example for cultural holidays, or for other reasons, such as business, etc.

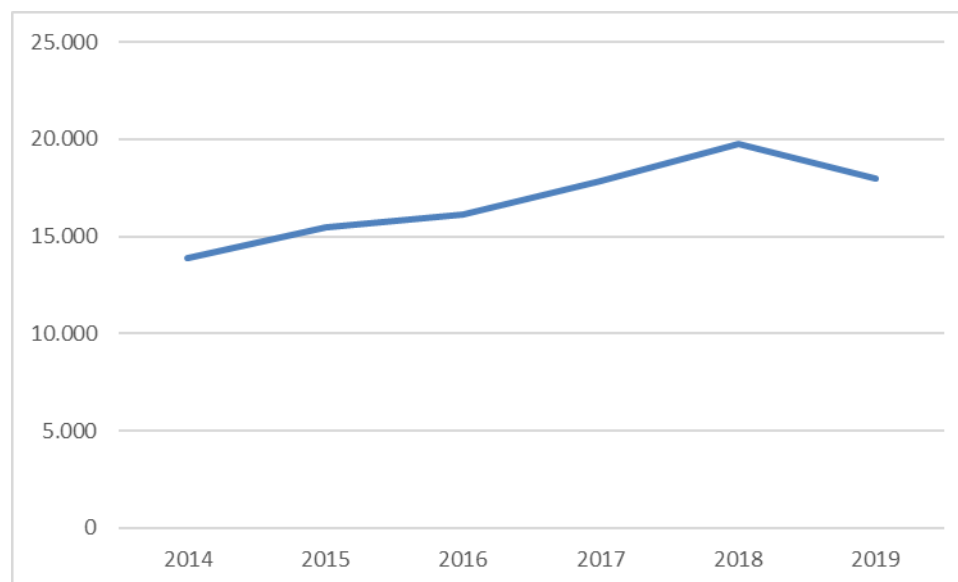
In Vittorio Veneto in 2019 there were 17.960 tourist arrivals and 62.197 overnight stays. The trend is absolutely positive, since between 2014 and 2019 the city observed a significant growth both of **tourist arrivals (+5,3% on average per year)** and **overnights (+6,5% on average per year)**. **The commemorations for the 100-years anniversary surely contributed to this trend**, since in 2018 the maximum peak was registered (19.728 arrivals and 62.979 overnights), with a significant increase compared to 2017 and also to the past years. In 2019 there was a slightly decrease of tourist flows, but this is normal. Indeed, it is usual that the year after a big event there is a drop. The challenge is of course to **capitalize in the following years on the results achieved through the event** in terms of visibility and visitors' awareness for gradually developing tourism in the city.

International tourists account for almost 35% of arrivals and overnights. Although the internationalisation rate is lower than the average at provincial level (around 50%), it is relevant and can have room for improvement.

Vittorio Veneto has a leading role on the whole Vittoriese area also in terms of tourist flows, since the city hosts almost 32% of tourist arrivals and 40% of overnight stays. Another important municipality in the area in terms of tourism development is Cison di Valmarino with about 12.000 arrivals and 23.000 overnights. Considering the whole Vittoriese area, there area around 61.000 arrivals and 161.000 overnights, i.e. almost 7% of tourist flows in the whole Treviso province.

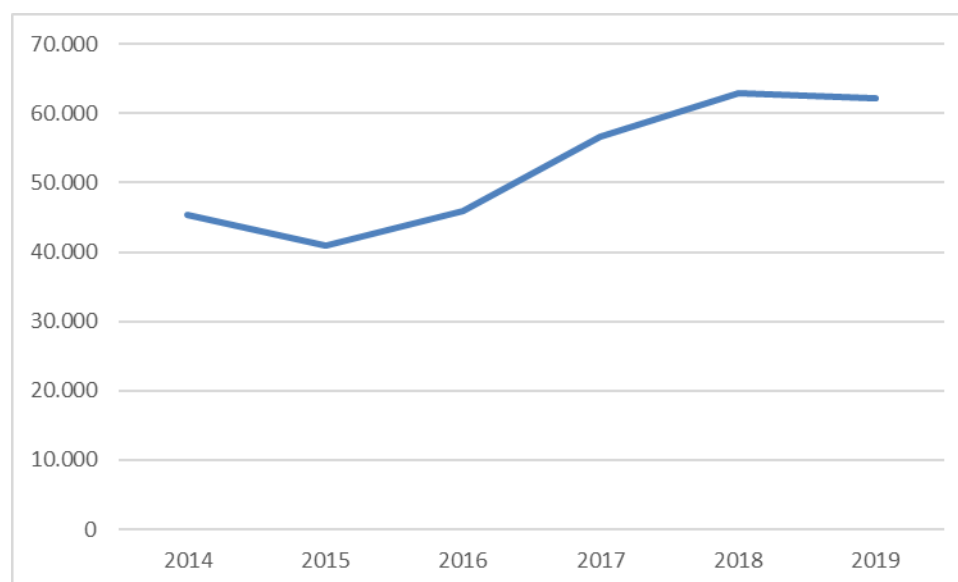


Figure 13 - Trend in the number of tourist arrivals in Vittorio Veneto, 2014-2019



Source: Veneto Region Statistic Office

Figure 14 - Trend in the number of tourist overnight stays in Vittorio Veneto, 2014-2019



Source: Veneto Region Statistic Office

6.4. Cultural and Creative economy

The following sections provide a picture of the structure and evolution of the Cultural and Creative economy in Vittorio Veneto and in the whole Vittoriese area, starting above all from the 13 industries mentioned above, that represent the “core component” of CCIs.

It is important to remind that the image provided below is however partial, since available data refer only to enterprises active in these sectors and to the people here employed.



The analysis doesn't take into account those cultural professionals who are self-employer persons, since, although they represent a considerable and very important component of CCI workforce, unfortunately there are not available statistics about them.

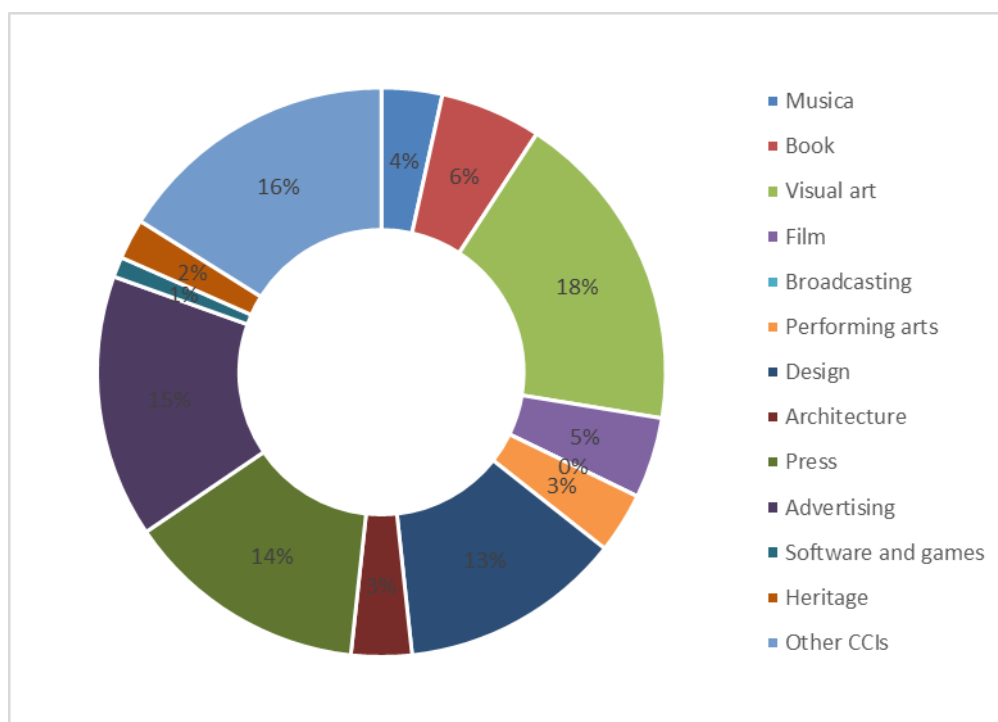
6.4.1. The core CCI industries

In Vittorio Veneto there are **87 active enterprises in the core sectors of Cultural and Creative Industries**, i.e. **3% of all the active enterprises located in the city**. This number is higher than in 2018 (80) but slightly lower than the value registered in 2014 when there were 92 companies. Indeed, the dynamics in the last years was characterised by a decrease from 2015, that seems to have been stopped with the recovery just in 2019.

In terms of jobs, **these enterprises employ 172 people (158 in 2018)**, nearly **2% of total employment**. Core CCIs are based on very small firms employing on average 2 people.

As shown in graph 15, CCIs in Vittorio Veneto are mainly based on the activities associated to **arts** (in particular photographic activities and conservation and restoration of art works), **advertising** (advertising agencies and media representation services), **press** (in particular specialised stores of newspapers and publishers of journals and periodicals) and **design**. However, as shown in graph 16, press and advertising are the CCI sectors that employ most people, since the larger size of enterprises active in these two industries. Indeed, press and advertising companies have on average 4 and 3 employees.

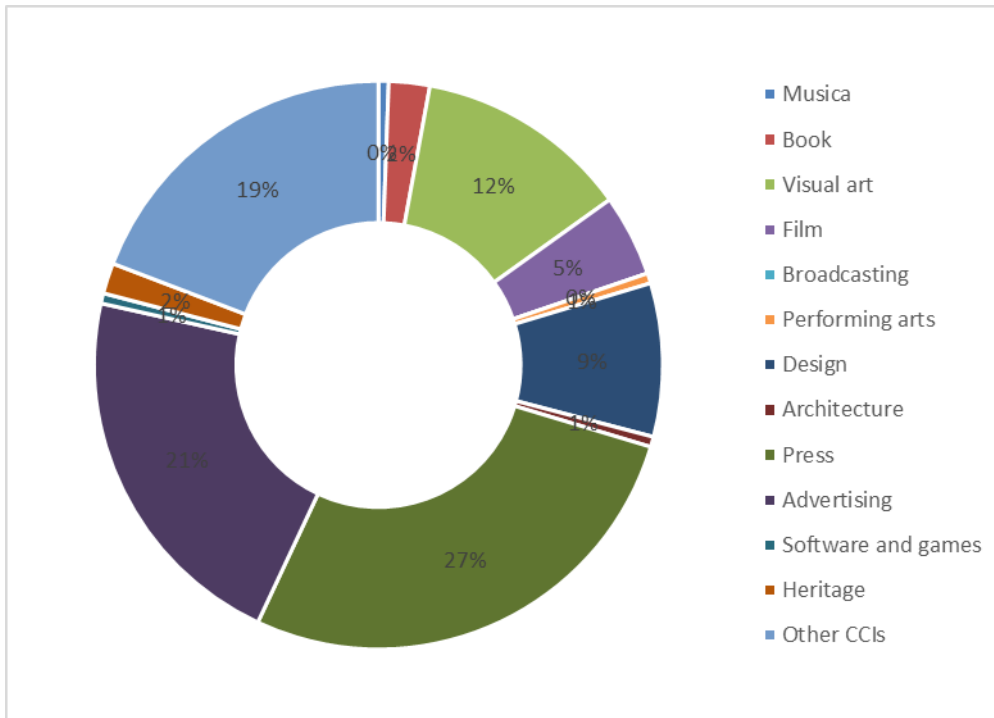
Figure 15 – Core CCI enterprises in Vittorio Veneto by industry, 2019



Source: Chamber of Commerce of Treviso and Belluno



Figure 16 – Employees in core CCI enterprises in Vittorio Veneto by industry, 2019



Source: Chamber of Commerce of Treviso and Belluno

If we consider the whole **Vittoriese** area, the number of core CCI enterprises goes up to **150** (142 in 2018) for a total of **232 employees**. It is then evident that **Vittorio Veneto is the city with the most developed CCIs**. The other municipalities that stand out for a significant number of CCI activities are Colle Umberto (10 companies and 15 employees), Tarzo (11 and 11), Follina (9 and 6) and Cison di Valmarino (7 and 3).

Focussing on the economic value generated by core CCIs, specific data about gross value added and turnover are not available at local level. However, it is possible to calculate an estimate for CCI turnover, starting from the number of enterprises located in the area and from the average turnover referred to small businesses, that is available at national level²³. Of course it is important to remind that the statistic on national average turnover is the result of a great variety that characterise CCIs in Italy; for example, we could expect that the turnover of CCIs in some strategic and big Italian cities such as Milan, Rome, etc. is higher than the turnover registered in small and more peripheral towns. As a consequence, the estimation here provided has to be considered as a first attempt to give an idea of the value that CCIs can have in the area, in the absence of more relevant data.

Core CCIs are estimated to generate a **turnover of nearly 10 million euro in Vittorio Veneto**, that accounts for around 1% of the total economy in the city. Advertising,

²³ Data on total turnover and on the average turnover by kind of activity and size class of enterprises (in terms of number of employees) are available at national level only (ISTAT). The estimate for CCIs in Vittorio Veneto was calculated considering the national average turnover referred to each of the kinds of activities included in the analysis and to the size class of “0-1 employee” or “0-9 employees”, depending on the average number of employees of each CCI industry in Vittorio Veneto.



followed by press, is the industry contributing the most to this turnover. This value goes up to around 17 million considering the whole Vittoriese area.

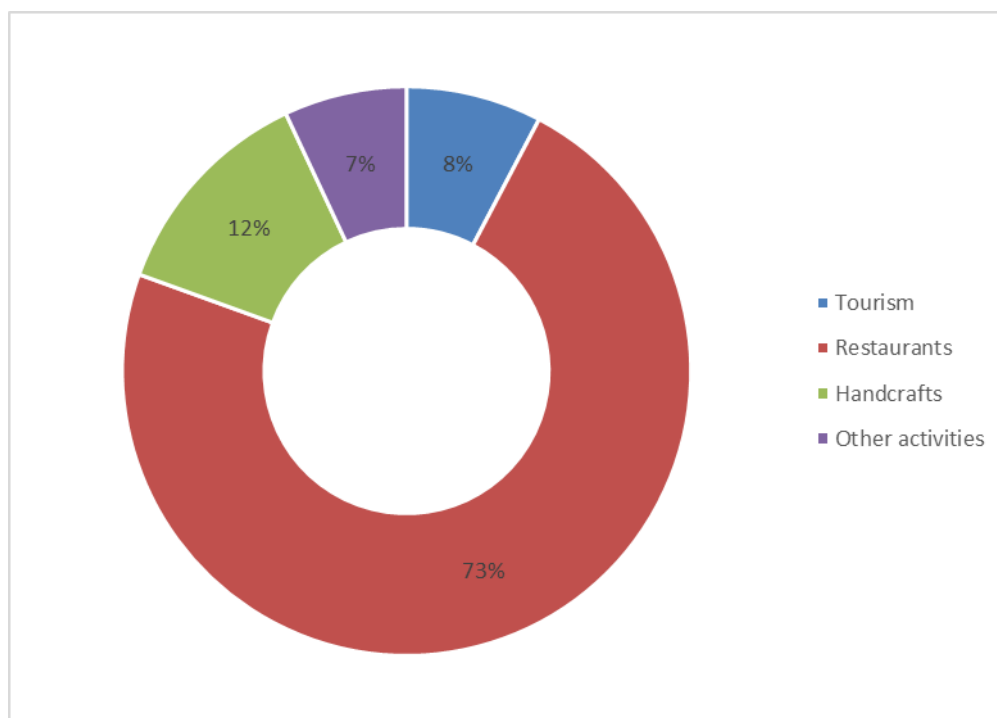
6.4.2. The creative-driven activities

In addition to the 13 core industries described above, the cultural and creative economy is supported by other activities, that, to a greater or lesser extent, employ cultural professionals and or contribute to cultural promotion, valorisation and production. This is the case for example of incoming travel agencies and accommodations that sell and/or promote travel packages and guided visits for discovering the local cultural and natural heritage; or of restaurants that propose typical dishes, by preserving local traditions; or of artisans who produce artistic and traditional craft products, based on a long know-how, handed down from generation to generation and combined with innovative techniques.

By considering the tourism sector (accommodations and travel agencies), restaurants, activities related to handcrafts, and other relevant activities linked to traditional local productions and cultural contents, **the potential base of creative-driven activities in Vittorio Veneto has 272 enterprises (mainly restaurants) for a total of around 1.000 employees.** In the whole Vittoriese area there are 737 firms and 3.650 employees.

However, as already explained in the methodological section, this figure is a starting base for further analysis, since it is expected that not all these enterprises are real creative-driven activities.

Figure 17 – Potential creative-driven enterprises in Vittorio Veneto by industry, 2019



Source: Chamber of Commerce Treviso Belluno



6.5. Other final information connected to culture and creativity

This section provides some final information that can contribute to complete the picture about the “cultural and creative potential” of the city. This information refers to human capital and education, to intellectual property and innovation, to openness and tolerance and to internet access.

First of all, according to the statistics coming from the last population census (2011), **Vittorio Veneto inhabitants with a bachelor, master or doctoral degree account for 12,2% of the population, higher than the provincial average (9,7%) and of the data registered in the other surrounding municipalities (around 5-9%).** This is a good information, that can be associated with the high level of the education system already described in the GAP analysis. Despite the lack of Universities, Vittorio Veneto benefits from the presence of some excellences in terms of high schools, that can contribute to motivate students to continue their studies at universities and that give them a solid education to face the academic path.

Secondly, 21 patent applications were issued between 2008 and 2015 in Vittorio Veneto (and other 9 patents in the other towns of the area), showing the commitment and investment in innovation by local companies.

Thirdly, regarding social openness, the share of foreigners out of the total population is 5,8% for EU-foreigners (mainly from Eastern Europe) and 4,5% for non-EU people (mainly from Africa and Asia), in line with the figure at province level.

Finally, 79,2% of households have fast internet connections. This is a statistic available at regional level only, that however can be applied also to Vittorio Veneto and that is higher than the national average.



7. Some final considerations

The figures described in the previous chapters have highlighted that Vittorio Veneto not only has a leading role on the whole Vittoriese area from the socio-cultural and economic point of view, but also it should not be underestimated compared to the provincial territory.

Indeed, despite being a medium-sized town, Vittorio Veneto has one of the major industrial centres of the Veneto region that is recognised not only for the great variety of productions, but also for the presence of high-quality companies. The economic system of course suffered the last financial crisis but it showed a good resilience (also in comparison to other areas of the Veneto Region), since the number of enterprises and employees has returned to growing in 2016. In addition, from the socio-cultural point of view, Vittorio Veneto has a very rich, diversified and high-value cultural heritage, that the 100-years anniversary of the end of the I World War - occurred in 2018 - have contributed to enrich and promote. This heritage, in addition to the cultural and natural resources of the whole Vittoriese area, also contributes to tourism flows. Although tourism is not so developed in comparison to other areas of the Treviso province, the trend in recent years is very positive, with a significant growth both of tourist arrivals and overnights.

Regarding in particular CCIs in Vittorio Veneto, the system seems to be currently marginal (no more than 3% of companies) compared to other most consolidated sectors such as manufacturing activities, retails, etc. However, it can rely on a base of 87 core CCI enterprises and 172 employees, that go up to 150 firms and 232 employees, considering also the other municipalities. This figure may be higher if we include also the so-called creative-driven activities, linked for example to artistic handcrafts, typical productions, tourism, etc.

If supported with effective policies, addressed to promote human capital, strengthen existing businesses (their size is currently very small) and stimulate the opening of new ones, the CCI system could be better develop and gradually grow. Investing on CCIs could be a driver also for the economy in general and for the socio-cultural fabric. Indeed, creativity and the production of new culture stimulate innovation and keep the community alive. In addition, given the trend of population decline and aging that affects Vittorio Veneto and the whole area, the development of CCIs and of new jobs could re-attract people and in particular talents that could find new opportunities for living and working in the area.



8. Annex 1 - List of ATECO codes by kind of core CCI activities and creative-driven activities

Cultural domain	ATECO code	Description of ATECO code
Core CCI industries		
Music	18.20	Reproduction of recorded media
	32.20	Manufacture of music instruments
	33.19.09	Repair of other equipment
	47.63	Retail sale of music and video recordings in specialised stores
	59.20	Sound recording and music publishing activities
Book	47.61	Retail sale of books in specialised stores
	58.11	Book publishing
Visual arts	47.78.31	Sale of art works (including art galleries)
	58.19	Other publishing activities
	74.20	Photographic activities
	90.03.02	Restoration of art works
	90.03.09	Artistic creation
Film	59.11	Motion picture, video and television programme production activities
	59.12	Motion picture, video and television programme post-production activities
	59.13	Motion picture, video and television programme distribution activities
	59.14	Motion picture projection activities
Broadcasting	60.10	Radio broadcasting
	60.20	TV programming and broadcasting activities
Performing arts	74.90.94	Agencies and agents for shows and sports
	90.01	Performing arts
	90.02	Support activities to performing arts
	90.04	Operation of arts facilities
Design	74.10	Specialised design activities
Architecture	71.11	Architectural activities
Press	47.62.10	Retail sale of newspapers and stationery in specialised stores
	58.13	Publishing of newspaper
	58.14	Publishing of journals and periodicals
	63.91	News agencies activities
	90.03.01	Independent journalists
Advertising	73.11	Advertising agencies
	73.12	Media representation
Software and games	58.21	Publishing of computer games
	63.12	Web portals
Heritage, archives and libraries	91.01	Library and archives activities
	91.02	Museums activities
	91.03	Operation of historical sites and buildings and similar visitor attractions
	91.04	Botanical and zoological gardens and nature reserves activities
Other	18.11	Printing of newspapers
	18.12	Other printing
	18.13	Pre-press and pre-media services



	18.14	Binding and related services
	74.30	Translation and interpretation activities
	85.52	Cultural education
	94.99.20	Activities of cultural membership organisations
Other industries lined to culture and creativity		
Tourism	55	Accommodation
	79	Travel agency, tour operator and other reservation service and related activities
Food and beverage services	56	Food and beverage service activities
Activities linked to traditional and artistic handcrafts	13.92.10	Manufacture of bed linen, table linen and furnishings
	13.99	Manufacture of embroidery, tulle and lace
	15.12	Manufacture of luggage, handbags and the like, saddlery and harness
	16	Manufacture of wood and of products of wood and cork, except furniture; manufacture of articles of straw and plaiting materials
	17.29	Manufacture of other articles of paper and paperboard
	25.99.30	Manufacture of iron, copper and other metal objects
	26.52	Manufacture of watches and clocks
	32.11	Minting of coins
	32.12	Manufacture of jewellery and related articles
	32.13	Manufacture of imitation jewellery and related articles
	32.40.20	Manufacture of games and toys
32.99.30	Manufacture of stationery items	
Other activities linked to local traditional products, cultural and creative contents	11.01	Distilling, rectifying and blending of spirits
	11.02	Manufacture of wine from grape
	11.03	Manufacture of cider and other fruit wines
	11.04	Manufacture of other non-distilled fermented beverages
	11.05	Manufacture of beer
	24.41	Precious metals production
	31	Manufacture of furniture