

Italy - Travel & Tourism: Growing market with developed infrastructure (Strategy, Performance and Risk Analysis)

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Abstracts

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SUMMARY

Italy exhibits a strong tourism position in terms of the number of domestic trips and international arrivals. In 2016, it ranked fifth in the world in terms of international arrivals. Some of the country's major attractions include the Colosseum, Venice canals, Pompeii, Leaning Tower of Pisa, Florence Duomo Santa Maria del Fiore, and Vatican City.

The market value for rental cars witnessed growth over 2012-2016, mainly driven by increased demand for leisure activities and an increase in tourist inflows. Car rental revenue increased at a CAGR of 0.9%, from US\$1,273.1 million in 2012 to US\$1,318.9 million in 2016. Further growth in tourism and steps towards financial stability being undertaken by the government are expected to drive car rental revenue at a CAGR of 0.5%, from US\$1,375.4 million in 2017 to US\$1,492.6 million by 2021.

MarketLine Premium's industry reports provide a comprehensive market view including sections on: risk and reward, key industry trends and drivers, industry SWOT analysis, industry benchmarking to compare key performance indicators with regional and global markets, competitive landscape, industry innovation, deals and key developments.

KEY HIGHLIGHTS

Promotional strategies to drive number of international tourists

Total tourist volumes in Italy increased at a CAGR of 0.9%, from 155.0 million in 2012 to 160.3 million in 2016. Tourist volumes are expected to increase further at a CAGR of 2.7%, from 165.7 million in 2017 to 184.5 million in 2021. This growth is predominantly due to an increase in tourist volumes from international arrivals and departures for leisure activities. The total number of domestic tourists witnessed a CAGR of -1.3%, from 78.6 million in 2012 to 74.6 million in 2016, owing to the economic uncertainty that followed the debt crisis in 2009. However, the country's strong recovery following the economic downturn is expected to increase the number of domestic trips at a CAGR of 1.9%, from 76.9 million in 2017 to 82.8 million by 2021. The share of domestic tourists, which constituted 60.0% of the total number of tourists on average over 2012-2016, is expected to decline to an average of 57.7% over 2017-2021.

Demand for air travel to foster revenue growth

Total passenger airlines revenue posted a CAGR of -0.8%, from US\$24.0 billion in 2012 to US\$23.2 billion in 2016. Full service airlines accounted for most of the revenue over 2012-2016 and this is expected to continue over the forecast period.

Leisure travels generate high revenue in the rental cars segment

An increase in utilization rate, rental occasions and rental days have fueled growth in the Italian car rental market. The market value of rental cars increased at a CAGR of 0.9%, from US\$1,273.1 million in 2012 to US\$1,318.9 million in 2016, and this is further expected to increase over 2017-2021 to US\$1,492.6 million.

SCOPE

Risk & Reward Index - The Risk & Reward index compares the lucrativeness of the Italian travel and tourism industry vis-?-vis other countries in the region in terms of specific risk and reward parameters.

Industry Snapshot and Industry View - Key travel and tourism industry statistics, including total revenue and expenditure for key industry segments, a summary of key industry statistics and the trends driving market performance in the Italian travel and tourism market.

Industry SWOT Analysis - Discover the strengths, weaknesses, opportunities

and threats impacting market performance and investment in the Italian travel and tourism market.

Industry Benchmarking - Benchmark how the Italian travel and tourism market is performing compared to regional and global markets in terms of car rental fleet size, car rental revenue, number of hotels, hotel revenue, passenger airline revenue, seats available and seats sold, revenue of travel intermediaries and tourism expenditure growth.

Competitive Landscape - Overview of the relevant players in the Italian travel and tourism industry, such as airlines, hotels and car rental companies, with each player in the relevant category compared with its peers in terms of relevant industry indicators.

REASONS TO BUY

How is the market performing in terms of indicators such as total tourist visits, passenger airline seats sold, seats sold by purpose of visit such as leisure, revenue, room nights available, room nights occupied, hotel revenue, car rental days among others.

How risky is it to invest in the Italian travel and tourism industry compared to other countries in the Europe?

What is driving the performance of key industry segments such as passenger airlines, accommodation and car rentals?

Who are the leading players in the Italian travel and tourism industry and their overview and product portfolio?

What trends are being witnessed within the Italian travel and tourism industry?

What are the Italian travel and tourism industry's Strengths and Weaknesses and what Opportunities and Threats does it face?

What are the recent developments and innovations in the Italian travel and tourism industry?

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