

Spain - Travel & Tourism: A paradise for tourists (Strategy, Performance and Risk Analysis)

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Abstracts

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SUMMARY

Spain is one of the world's leading tourist destinations and an important source of outbound tourism for Europe. Despite a challenging environment, the country recovered from the financial crisis and subsequent European debt crisis. Spain topped the Travel and Tourism Competitiveness Index (TTCI) in 2016 due to its blend of cultural and natural resources, exceptional tourism infrastructure, air transport connectivity, and strong policy support. Spain's travel and tourism industry benefited from the easing of fiscal policy and has absorbed tourism from troubled Middle Eastern destinations.

Spain has one of the most advanced and developed car rental markets in Europe. Its fleet size stood at 228,630 cars in 2016 and will reach 225,779 in 2021. While the number of rental days and occasions did increase, it was at a relatively low pace.

MarketLine Premium's industry reports provides a comprehensive overview and include sections on risk and reward, key industry trends and drivers, SWOT analysis, industry benchmarking, competitive landscape, industry innovation, deals and key developments

KEY HIGHLIGHTS

Introduction of new routes and full-service airlines to fuel airline revenue

Passenger airline revenue recorded a review-period CAGR of 1.3%, rising from

US\$22.5 billion in 2012 to US\$23.7 billion in 2016. It will post a forecast-period CAGR of 5.4%, to reach US\$31.0 billion in 2021 due to an increase in airline capacity and the introduction of more seasonal flights in Spain. Full-service airlines accounted for 56% of the country's total airline revenue in 2016 and will post a forecast-period CAGR of 5.6%. LCCs recorded a marginal revenue growth of 0.9%, rising from US\$8.6 billion in 2012 to US\$8.9 billion in 2016 and will register a CAGR of 5.4% to reach US\$11.6 billion in 2021 due to the expansion of their network of international routes.

Airport and non-airport locations represent a significant proportion of the market

Spain has one of the most advanced and developed car rental markets in Europe, with a fleet size of 228,630 in 2016. This is set to reach 225,779 in 2021. The growth in fleet size is largely fueled by an increase in domestic and international tourists due to the popularity of events such as La Tomatina and San Fermin, as well as music festivals such as Benicassim and sporting events such as the Champion's League. The car rental market has undergone a degree of changes mainly attributed to the rise of e-commerce. The growing demand for online travel intermediaries and the automation of car rental process through technology driven solutions such as apps have had a profound impact.

Online business distribution channel trending in Spain

The Spanish hotel industry is well developed and leading chains such as Marriot and Hyatt have a market presence. Spain's hotel revenue recorded a review-period CAGR of 1.6%, rising from US\$22.6 billion in 2012 to US\$24.1 billion in 2016. It will post a forecast-period CAGR of 5.6% to reach US\$31.3 billion in 2021. Mid and upscale hotels are the most popular categories in the market, with the upscale accounting for 50% of all revenue generated in 2016, followed by midscale with 29.0%; a trend likely to continue over the forecast period.

SCOPE

Risk & Reward Index - The Risk & Reward Index compares the lucrativeness of the Spanish travel and tourism industry with other countries in the region via a set of specific risk and reward parameters.

Industry Snapshot and Industry View - Key travel and tourism industry statistics, including revenue and expenditure in key segments and trends driving market performance.

Industry SWOT Analysis - Discover the strengths, weaknesses, opportunities and threats impacting market performance.

Industry Benchmarking - Benchmarks the Spanish travel and tourism industry's performance against 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, travel intermediary revenue, and tourism expenditure growth.

Competitive Landscape - Overview of players in the Spanish travel and tourism industry, specifically airlines, hotels and car rental companies split by category and compared against their peers across a set 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 Spanish 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 Spanish travel and tourism industry and their overview and product portfolio?

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

What are the Spanish 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 Spanish travel and tourism industry?

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