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Travel and Tourism Global Industry Almanac 2015-2024

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Abstracts

Travel and Tourism Global Industry Almanac 2015-2024

SUMMARY

Global Travel & Tourism industry profile provides top-line qualitative and quantitative summary information including: Industry size (value 2015-19, and forecast to 2024). The profile also contains descriptions of the leading players including key financial metrics and analysis of competitive pressures within the Industry.

KEY HIGHLIGHTS

The travel and tourism industry consists of revenues generated by passenger airlines, passenger rail, foodservice, hotels and motels, travel intermediaries and casinos and gaming.

The airlines industry comprises passenger air transportation, including both scheduled and chartered, but excludes air freight transport. Industry volumes are defined as the total number of revenue passengers carried/enplaned (departures) at all airports within the specified country or region, excluding transit passengers who arrive and depart on the same flight code. For the US and Canada, transborder passengers departing from either country are considered as part of the international segment. Industry value is defined as the total revenue obtained by airlines from transporting these passengers. This avoids the double-counting of passengers.

The passenger rail sector consists of all passenger transport by 'heavy rail'

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services, including international, inter-city, regional, and suburban trains ('Commuter trains' in US terminology are included). However, light rail, tram/streetcar, Metro/Subway, and similar trains are not included.

Sector volumes are given in passenger-kilometers (PKM) and international traffic is counted in the country of origin.

Sector values in the report consist of revenues generated by operating companies through ticket sales, and so exclude state subsidies.

Foodservice is defined as the value of all food and drink, including on-trade drinks not drunk with food, for immediate consumption on the premises or in designated eating areas shared with other foodservice operators, or in the case of takeaway transactions, freshly prepared food for immediate consumption. Foodservice is restricted to the sale of food and drink in specific foodservice channels defined below and excludes vending machines.

The food service industry is valued according to total sales of all food and drink (soft and alcoholic) in or through accommodation outlets, pubs, clubs, and bars, full service restaurants, quick service restaurants and fast food, and other. The accommodation segment includes food and drinks sales in bed and breakfasts, guest houses, holiday parks, hostels, and hotels and motels. The pub, club and bar segment includes food and drink sales at nightclubs, private member and social clubs, and pubs and bars. The other segment includes food and drink sales in leisure venues, such as visitor attractions; mobile operators, such as vans and other mobile operators; retailers, such as bakeries, convenience stores, delicatessens, department stores, garden centers, service station forecourts, supermarkets and hypermarkets, and other retail sales.

Market volume is defined as the total number of transactions.

The hotels & motels industry value consists of all revenues generated by hotels, motels and other accommodation providers through the provision of accommodation and other services. The total value includes room revenue and non-room revenue, including casinos, shops and telecommunication services. The industry is segmented according to the origin of the revenues (leisure consumers and business consumers). Market volumes are classed as the number of hotels in a country or region.

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Travel intermediaries is part of a business that assists in selling travel products and services to customers. The products may include airline tickets, car rentals, hotels, railway tickets and package holidays that may combine several products.

The casinos and gaming market consists of all forms of betting and gaming. All values are stated in terms of gross gaming win. This is the total amount waged by customers minus the total amount paid out to customers as winnings, but before the payment of any applicable taxes, disbursements to charitable or other causes by games established for those purposes, or other expenses.

The casinos segment covers all gambling activities carried out within casino establishments, such as card games, roulette, and slot machines located in casinos. Tips and admission fees are included, but additional revenues such as sales of food, drink, and accommodation are excluded.

The lotteries segment covers all state, private, and charitable lotteries, and includes traditional draws, scratchcard games, and similar products offered by lottery operators.

The sports betting and related segment covers gambling on the outcome of horse races, football matches, and other events, and includes gambling services offered by bookmakers and also pari-mutuel/totalisator operators.

The other segment covers bingo, slot machines located outside casinos, pachinko, etc. In North America, so-called 'Indian casinos' are covered in this segment, not the casino segment.

Online casino and gaming activity, with the exception of online purchases of lottery entry, is not included. Recreation-only slot machines that do not pay out any form of prize are excluded.

The report only includes gaming activities that are legal in the country where they are offered.

All currency conversions were calculated using constant average annual 2019 exchange rates. Figures presented in this report are calculated applying the 'middle path' scenario - this is based on the current situation in countries where the epidemic burst first, like China as a model countries and the announcements made by governments, stating that the abnormal situation may last up to six

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months.

The assumption has been made that after this time the economy will gradually go back to the levels recorded before the pandemics by the end of the year. It is also assumed that there is no widespread economic crisis as seen back in 2008 due to announced pay-outs across countries.

At the moment of preparation of this report in April 2020 the economic implications of the lock downs of many economics are still very difficult to predict as there is no indication how long the pandemics could last, the number of sectors forced to stay closed and the scale of the governmental' aid involved. At the same time the weight of the pandemic seriousness is applied on the individual countries in this report based on death to population ratio recorded in countries.

Majority of the industries will see the decline in volume of the goods and services offered by companies. Usually the lower demand would cause the decrease the prices level. However, amid many governments' ordered for many industries to lock down and so the supply chain is distorted that in great pictures mitigate the results of lower demand.

Applied scenarios differ depending on the individual sector, however generally sectors which involves intensive manual labor and face to face interaction seem to be hit the most by present situation. On the other hand the internet based businesses as well as the producers of the vital, subsisted products and services seems to take advantages of the current events.

The global travel & tourism industry had total revenues of $7,154.8bn in 2019, representing a compound annual growth rate (CAGR) of 3.5% between 2015 and 2019.

The foodservice segment was the industry's most lucrative in 2019, with total revenues of $3,313.2bn, equivalent to 46.3% of the industry's overall value.

The US is the country with the largest travel & tourism industry, and is expected to account for 26.4% of the global value, meaning that its performance weighs heavily on the global industry.

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SCOPE

Save time carrying out entry-level research by identifying the size, growth, major segments, and leading players in the global travel & tourism Industry

Use the Five Forces analysis to determine the competitive intensity and therefore attractiveness of the global travel & tourism Industry

Leading company profiles reveal details of key travel & tourism Industry players' global operations and financial performance

Add weight to presentations and pitches by understanding the future growth prospects of the global travel & tourism Industry with five year forecasts

REASONS TO BUY

What was the size of the global travel & tourism Industry by value in 2019?

What will be the size of the global travel & tourism Industry in 2024?

What factors are affecting the strength of competition in the global travel & tourism Industry?

How has the Industry performed over the last five years?

What are the main segments that make up the global travel & tourism Industry?

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