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Travel and Tourism Global Industry Guide 2015-2024

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Abstracts

Travel and Tourism Global Industry Guide 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' 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.

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 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.

SCOPE

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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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Contents

1. EXECUTIVE SUMMARY

1.1. Market value
1.2. Market value forecast
1.3. Category segmentation
1.4. Geography segmentation
1.5. Competitive Landscape

2. INTRODUCTION

2.1. What is this report about?
2.2. Who is the target reader?
2.3. How to use this report
2.4. Definitions

3. GLOBAL TRAVEL & TOURISM

3.1. Market Overview
3.2. Market Data
3.3. Market Segmentation
3.4. Market outlook
3.5. Five forces analysis

4. MACROECONOMIC INDICATORS

4.1. Country data

5. TRAVEL & TOURISM IN ASIA-PACIFIC

5.1. Market Overview
5.2. Market Data
5.3. Market Segmentation
5.4. Market outlook
5.5. Five forces analysis

6. TRAVEL & TOURISM IN EUROPE

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6.1. Market Overview
6.2. Market Data
6.3. Market Segmentation
6.4. Market outlook
6.5. Five forces analysis

7. MACROECONOMIC INDICATORS

7.1. Country data

8. TRAVEL & TOURISM IN FRANCE

8.1. Market Overview
8.2. Market Data
8.3. Market Segmentation
8.4. Market outlook
8.5. Five forces analysis

9. MACROECONOMIC INDICATORS

9.1. Country data

10. TRAVEL & TOURISM IN GERMANY

10.1. Market Overview
10.2. Market Data
10.3. Market Segmentation
10.4. Market outlook
10.5. Five forces analysis

11. MACROECONOMIC INDICATORS

11.1. Country data

12. TRAVEL & TOURISM IN ITALY

12.1. Market Overview
12.2. Market Data
12.3. Market Segmentation

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info@marketpublishers.com

12.4. Market outlook
12.5. Five forces analysis

13. MACROECONOMIC INDICATORS

13.1. Country data

14. TRAVEL & TOURISM IN JAPAN

14.1. Market Overview
14.2. Market Data
14.3. Market Segmentation
14.4. Market outlook
14.5. Five forces analysis

15. MACROECONOMIC INDICATORS

15.1. Country data

16. TRAVEL & TOURISM IN AUSTRALIA

16.1. Market Overview
16.2. Market Data
16.3. Market Segmentation
16.4. Market outlook
16.5. Five forces analysis

17. MACROECONOMIC INDICATORS

17.1. Country data

18. TRAVEL & TOURISM IN CANADA

18.1. Market Overview
18.2. Market Data
18.3. Market Segmentation
18.4. Market outlook
18.5. Five forces analysis

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info@marketpublishers.com

19. MACROECONOMIC INDICATORS

19.1. Country data

20. TRAVEL & TOURISM IN CHINA

20.1. Market Overview
20.2. Market Data
20.3. Market Segmentation
20.4. Market outlook
20.5. Five forces analysis

21. MACROECONOMIC INDICATORS

21.1. Country data

22. TRAVEL & TOURISM IN THE NETHERLANDS

22.1. Market Overview
22.2. Market Data
22.3. Market Segmentation
22.4. Market outlook
22.5. Five forces analysis

23. MACROECONOMIC INDICATORS

23.1. Country data

24. TRAVEL & TOURISM IN SPAIN

24.1. Market Overview
24.2. Market Data
24.3. Market Segmentation
24.4. Market outlook
24.5. Five forces analysis

25. MACROECONOMIC INDICATORS

25.1. Country data

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26. TRAVEL & TOURISM IN THE UNITED KINGDOM

26.1. Market Overview
26.2. Market Data
26.3. Market Segmentation
26.4. Market outlook
26.5. Five forces analysis

27. MACROECONOMIC INDICATORS

27.1. Country data

28. TRAVEL & TOURISM IN THE UNITED STATES

28.1. Market Overview
28.2. Market Data
28.3. Market Segmentation
28.4. Market outlook
28.5. Five forces analysis

29. MACROECONOMIC INDICATORS

29.1. Country data

30. COMPANY PROFILES

30.1. Shanghai Jin Jiang International Hotels (Group) Co Ltd
30.2. Groupe Le Duff SA
30.3. SEH United Hoteliers France
30.4. Contact-Hotel Association
30.5. NORDSEE GmbH
30.6. Ringhotels EV
30.7. Deutsche Lufthansa AG
30.8. Cigierre - Compagnia Generale Ristorazione SpA
30.9. Cremonini SpA
30.10. Alitalia - Societa Aerea Italiana S.p.A.
30.11. Skylark Holdings Co Ltd
30.12. Route Inn Japan Co Ltd

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30.13. Toyoko Inn Co Ltd
30.14. Akindo Sushiro Co Ltd
30.15. Central Japan Railway Company
30.16. Australian Leisure and Hospitality Group
30.17. Flight Centre Travel Group Ltd
30.18. WestJet Airlines Ltd
30.19. Air Canada
30.20. Best Western International Inc
30.21. Huazhu Group Ltd
30.22. China Southern Airlines Company Limited
30.23. GreenTree Hospitality Group Ltd
30.24. China Eastern Airlines Corp Ltd
30.25. Sligro Food Group NV
30.26. Fletcher Hotel Group
30.27. Van der Valk Hotels & Restaurants
30.28. Domino's Pizza, Inc.
30.29. AccorHotels
30.30. Air France-KLM SA
30.31. TUI Group
30.32. Restaurant Brands International Inc
30.33. Melia Hotels International SA
30.34. Restalia Grupo de Eurorestauracion SL
30.35. NH Hotel Group SA
30.36. easyJet Plc
30.37. International Consolidated Airlines Group SA
30.38. Barcelo Hotels and Resorts
30.39. Ryanair Holdings plc
30.40. Greene King PLC
30.41. InterContinental Hotels Group Plc
30.42. Travelodge Hotels Ltd.
30.43. Ei Group plc
30.44. Whitbread PLC
30.45. Booking Holdings Inc
30.46. Expedia Group Inc
30.47. Travelport Worldwide Ltd
30.48. Thomas Cook Group plc
30.49. McDonald's Corp
30.50. Yum! Brands, Inc.
30.51. Choice Hotels International Inc

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30.52. Wyndham Hotels and Resorts LLC
30.53. Doctor's Associates Inc
30.54. Starbucks Corporation
30.55. Delta Air Lines Inc
30.56. Southwest Airlines Co
30.57. United Airlines Holdings Inc
30.58. Marriott International Inc
30.59. Hilton Worldwide Holdings Inc
30.60. American Airlines Group Inc.

31. APPENDIX

31.1. Methodology
31.2. About MarketLine

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List Of Tables

LIST OF TABLES

Table 1: Global travel & tourism industry value: $ billion, 2015-19
Table 2: Global travel & tourism industry category segmentation: $ billion, 2019
Table 3: Global travel & tourism industry geography segmentation: $ billion, 2019
Table 4: Global travel & tourism industry value forecast: $ billion, 2019-24
Table 5: Global size of population (million), 2015-19
Table 6: Global gdp (constant 2005 prices, $ billion), 2015-19
Table 7: Global gdp (current prices, $ billion), 2015-19
Table 8: Global inflation, 2015-19
Table 9: Global consumer price index (absolute), 2015-19
Table 10: Global exchange rate, 2015-19
Table 11: Asia-Pacific travel & tourism industry value: $ billion, 2015-19
Table 12: Asia-Pacific travel & tourism industry category segmentation: $ billion, 2019
Table 13: Asia-Pacific travel & tourism industry geography segmentation: $ billion, 2019
Table 14: Asia-Pacific travel & tourism industry value forecast: $ billion, 2019-24
Table 15: Europe travel & tourism industry value: $ billion, 2015-19
Table 16: Europe travel & tourism industry category segmentation: $ billion, 2019
Table 17: Europe travel & tourism industry geography segmentation: $ billion, 2019
Table 18: Europe travel & tourism industry value forecast: $ billion, 2019-24
Table 19: Europe size of population (million), 2015-19
Table 20: Europe gdp (constant 2005 prices, $ billion), 2015-19
Table 21: Europe gdp (current prices, $ billion), 2015-19
Table 22: Europe inflation, 2015-19
Table 23: Europe consumer price index (absolute), 2015-19
Table 24: Europe exchange rate, 2015-19
Table 25: France travel & tourism industry value: $ billion, 2015-19
Table 26: France travel & tourism industry category segmentation: $ billion, 2019
Table 27: France travel & tourism industry geography segmentation: $ billion, 2019
Table 28: France travel & tourism industry value forecast: $ billion, 2019-24
Table 29: France size of population (million), 2015-19
Table 30: France gdp (constant 2005 prices, $ billion), 2015-19
Table 31: France gdp (current prices, $ billion), 2015-19
Table 32: France inflation, 2015-19
Table 33: France consumer price index (absolute), 2015-19
Table 34: France exchange rate, 2015-19
Table 35: Germany travel & tourism industry value: $ billion, 2015-19

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Table 36: Germany travel & tourism industry category segmentation: $ billion, 2019
Table 37: Germany travel & tourism industry geography segmentation: $ billion, 2019
Table 38: Germany travel & tourism industry value forecast: $ billion, 2019-24
Table 39: Germany size of population (million), 2015-19
Table 40: Germany gdp (constant 2005 prices, $ billion), 2015-19
Table 41: Germany gdp (current prices, $ billion), 2015-19
Table 42: Germany inflation, 2015-19
Table 43: Germany consumer price index (absolute), 2015-19
Table 44: Germany exchange rate, 2015-19
Table 45: Italy travel & tourism industry value: $ billion, 2015-19
Table 46: Italy travel & tourism industry category segmentation: $ billion, 2019
Table 47: Italy travel & tourism industry geography segmentation: $ billion, 2019
Table 48: Italy travel & tourism industry value forecast: $ billion, 2019-24
Table 49: Italy size of population (million), 2015-19
Table 50: Italy gdp (constant 2005 prices, $ billion), 2015-19
Table 51: Italy gdp (current prices, $ billion), 2015-19
Table 52: Italy inflation, 2015-19

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List Of Figures

LIST OF FIGURES

Figure 1: Global travel & tourism industry value: $ billion, 2015-19
Figure 2: Global travel & tourism industry category segmentation: % share, by value, 2019
Figure 3: Global travel & tourism industry geography segmentation: % share, by value, 2019
Figure 4: Global travel & tourism industry value forecast: $ billion, 2019-24
Figure 5: Forces driving competition in the global travel & tourism industry, 2019
Figure 6: Drivers of buyer power in the global travel & tourism industry, 2019
Figure 7: Drivers of supplier power in the global travel & tourism industry, 2019
Figure 8: Factors influencing the likelihood of new entrants in the global travel & tourism industry, 201
Figure 9: Factors influencing the threat of substitutes in the global travel & tourism industry, 2019
Figure 10: Drivers of degree of rivalry in the global travel & tourism industry, 2019
Figure 11: Asia-Pacific travel & tourism industry value: $ billion, 2015-19
Figure 12: Asia-Pacific travel & tourism industry category segmentation: % share, by value, 2019
Figure 13: Asia-Pacific travel & tourism industry geography segmentation: % share, by value, 2019
Figure 14: Asia-Pacific travel & tourism industry value forecast: $ billion, 2019-24
Figure 15: Forces driving competition in the travel & tourism industry in Asia-Pacific, 2019
Figure 16: Drivers of buyer power in the travel & tourism industry in Asia-Pacific, 2019
Figure 17: Drivers of supplier power in the travel & tourism industry in Asia-Pacific, 2019
Figure 18: Factors influencing the likelihood of new entrants in the travel & tourism industry in Asia-Pacific, 2019
Figure 19: Factors influencing the threat of substitutes in the travel & tourism industry in Asia-Pacific, 2019
Figure 20: Drivers of degree of rivalry in the travel & tourism industry in Asia-Pacific, 2019
Figure 21: Europe travel & tourism industry value: $ billion, 2015-19
Figure 22: Europe travel & tourism industry category segmentation: % share, by value, 2019
Figure 23: Europe travel & tourism industry geography segmentation: % share, by value, 2019

Figure 24: Europe travel & tourism industry value forecast: $ billion, 2019-24
Figure 25: Forces driving competition in the travel & tourism industry in Europe, 2019
Figure 26: Drivers of buyer power in the travel & tourism industry in Europe, 2019
Figure 27: Drivers of supplier power in the travel & tourism industry in Europe, 2019
Figure 28: Factors influencing the likelihood of new entrants in the travel & tourism industry in Europe, 2019
Figure 29: Factors influencing the threat of substitutes in the travel & tourism industry in Europe, 2019
Figure 30: Drivers of degree of rivalry in the travel & tourism industry in Europe, 2019
Figure 31: France travel & tourism industry value: $ billion, 2015-19
Figure 32: France travel & tourism industry category segmentation: % share, by value, 2019
Figure 33: France travel & tourism industry geography segmentation: % share, by value, 2019
Figure 34: France travel & tourism industry value forecast: $ billion, 2019-24
Figure 35: Forces driving competition in the travel & tourism industry in France, 2019
Figure 36: Drivers of buyer power in the travel & tourism industry in France, 2019
Figure 37: Drivers of supplier power in the travel & tourism industry in France, 2019
Figure 38: Factors influencing the likelihood of new entrants in the travel & tourism industry in France, 2019
Figure 39: Factors influencing the threat of substitutes in the travel & tourism industry in France, 2019
Figure 40: Drivers of degree of rivalry in the travel & tourism industry in France, 2019
Figure 41: Germany travel & tourism industry value: $ billion, 2015-19
Figure 42: Germany travel & tourism industry category segmentation: % share, by value, 2019
Figure 43: Germany travel & tourism industry geography segmentation: % share, by value, 2019
Figure 44: Germany travel & tourism industry value forecast: $ billion, 2019-24
Figure 45: Forces driving competition in the travel & tourism industry in Germany, 2019
Figure 46: Drivers of buyer power in the travel & tourism industry in Germany, 2019
Figure 47: Drivers of supplier power in the travel & tourism industry in Germany, 2019
Figure 48: Factors influencing the likelihood of new entrants in the travel & tourism industry in Germany, 2019
Figure 49: Factors influencing the threat of substitutes in the travel & tourism industry in Germany, 2019
Figure 50: Drivers of degree of rivalry in the travel & tourism industry in Germany, 2019
Figure 51: Italy travel & tourism industry value: $ billion, 2015-19

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