

Italy

Tourism in the economy

Tourism continues to make an important contribution to the Italian economy. Including indirect effects, in 2017 it accounted for 13.0% of GDP and employed 14.7% of the workforce. Tourism industries directly employed 2.0 million people in 2018, accounting for 8.3% of employment. An estimated 216 100 businesses were operating in the accommodation sector in 2018. Travel exports represented 39.9% of total service exports in 2018.

In line with global trends, arrivals data for 2018 shows steady and positive growth. According to accommodation statistics, the number of inbound visitors totalled 63.2 million up from 60.5 million, (growth of 4.4%). International overnight stays rose by 33.2% between 2011 and 2018. The top inbound markets were Germany (19.3% of tourists), United States (9.0%), France (7.5%), United Kingdom (6.0%) and China, with the United States exhibiting strong growth, up 15.7% over 2017. The number of German visitors on the other hand was flat over the same period. Almost 60% of international arrivals head to just four regions: Veneto, Lombardy, Lazio and Tuscany. A total of 62.9 million domestic overnight trips were made in 2018.

Tourism governance and funding

The legislative framework for tourism in Italy has seen recent change as tourism was transferred from the Ministry of Culture to the Ministry of Agriculture in 2018/19 coinciding with the post-electoral Government of 2018. Further changes in 2019 has seen tourism return to the Ministry of Cultural Heritage, Activities and Tourism. It is expected that the Directorate-General for Tourism will be reinstalled with competence including agritourism, food and wine tourism, agricultural fairs and forestry policies.

The Directorate-General for Tourism in the Ministry sets the strategic policy agenda in co-ordination with regions and autonomous provinces, and supervises the National Italian Tourism Agency (ENIT) and the Italian Alpine Club. It provides aid and incentives to develop the tourism sector, certifies foreign professionals, manages relations with international organisations, and participates in the development of EU legislation. The role of ENIT is to market and promote Italy as a tourist destination. A 2015 statute transformed ENIT from a public body into a public economic entity.

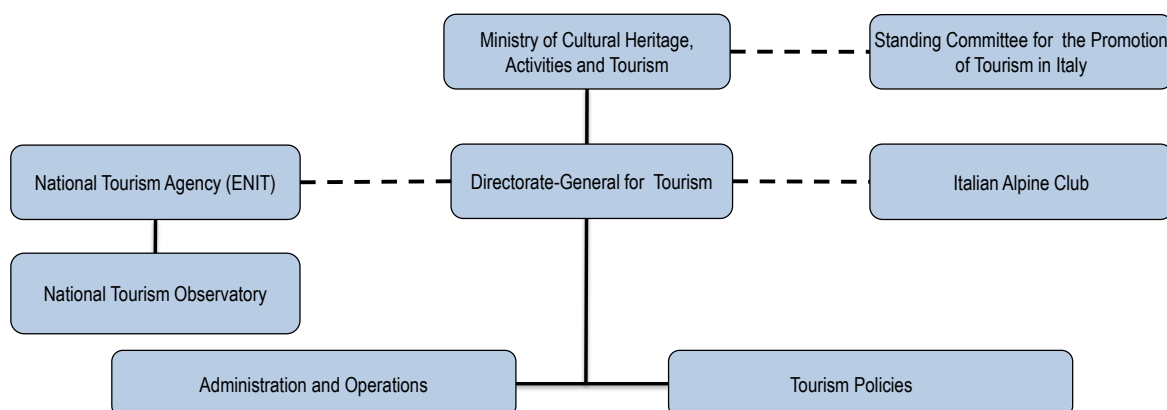
The Italian Constitution devolves several key activities to the regions, including regulating tourism businesses, developing strategic marketing activities and managing the EU Structural Funds. Provinces and municipalities can also issue local regulations relating to the tourism sector.

Tourism receives support from the 2014-20 Culture and Innovation programme financed by EU Structural Funds. Of the total budget of EUR 490 million, a large proportion is allocated to the development of 60 cultural centres in five southern regions: Campania, Apulia, Basilicata, Calabria and Sicily.

The government-controlled Tourism Investment Fund, launched in 2014, and managed by the National Investment *Bank Cassa Depositi e Prestiti*, has an increased ceiling of EUR 250 million, of which EUR 100

million had been invested by 2016. The fund operates as a bridge between public assets in need of development and the private real estate market.

Italy: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of Cultural Heritage, Activities and Tourism, 2020.

Tourism policies and programmes

The current policy framework is the National Strategic Plan for Tourism 2017-2022, which is based around four themes:

- Culture and heritage: cultural and natural heritage should be enhanced through sustainable management practices and the innovative use of assets.
- Competitiveness and employment: tourism competitiveness should be boosted to generate added value and increase the quantity and quality of employment.
- Putting the tourist at the centre: the Italian tourism experience should respond to the demands and expectations of the market.
- Integration and interoperability: the system of tourism associations and operators should be fully integrated, encouraging interoperability and partnership working.

Three strategic principles cut across all of the Plan's targets and measures:

- Sustainability: a key element of competitiveness in tourism, which must conserve natural resources and landscapes and attract investment for their protection. A sustainable vision for tourism is geared towards sharing opportunities throughout the country and throughout the year, and bringing employment to new as well as established destinations.
- Innovation: in relation to tourist destinations, business models, professional profiles, marketing, and the quality of services and products. Digitalisation is at the forefront of innovation, relating to the distribution of information, decision making by travellers and the expansion of information tools,
- Accessibility: includes widening access to less-visited areas and giving all types of visitor the chance to benefit from tourism and fully appreciate the uniqueness of the destinations visited.

In 2016, the Ministry signed protocols with the Ministry of Economic Development and AGID, the Government's digital agency, for the creation of new digital services for tourism, including Wi-Fi and large bandwidth networks. In a new commitment to tourism mobility, the Ministry has agreed a Special Plan for Tourist Mobility with the Ministry of Infrastructure and Transport, with EUR 372 million available over the period 2016-2024, including EUR 90 million for investment in a 'soft mobility' network (e.g. cycle tracks,

tourist rail services) and EUR 60 million for touring routes (Cammini), such as the Via Francigena and the Via Appia. This further develops the work begun during the 2016 Year of the Italian Routes, which had the objective to enhance the value of cultural routes.

The Tax Credit system for the tourism sector, namely the 'Art Bonus Decree', approved in 2014 and refinanced with EUR 460 million until 2020 aims to refurbish and modernise tourism establishments, is due to expire in 2020. It is hoped that this will continue into the future. A new hotel classification system with a special focus on sustainability and accessibility is in the process of being approved.

Greater emphasis has recently been placed from a promotional perspective on extending the national offer away from major attractions towards lesser known destinations. The objective is to diversify away from the popular iconic destinations and spread the economic benefits of tourism in both time and space by drawing on the inherent resources, history and uniqueness of places right across Italy. This strategy will develop products to meet niche interests, such as wine, sport, adventure and well-being, with new experiences offering local communities the opportunity to develop smaller scale tourism offers rooted in the place. This reflects market trends that see many visitors motivated to travel for a more personal experience centred around personal growth and self-actualisation as well as contributing positively to the places they visit.

ENIT's 2020 marketing plan, therefore, draws on sustainable tourism principles to show the breadth of the offer. Some product strategies have been particularly successful such as cultural tourism linked to small Italian centres and smaller cities of art.

Value Growth to enhance the sustainability of tourism

The future vision for Italian tourism development for the next few years focuses on value growth. This aims to generate sustainability in economic, social and cultural terms by drawing on the value of the wider tourism offer underpinned by local businesses. The vision sees the following as important:

- An underpinning requirement for environmental sustainability.
- Well co-ordinated promotion (national / regional / local level) based on common objectives,
- Enhancement of local products and brands through "brand positioning" to fit the national system.
- Respect for local communities and social responsibility.
- Increasing the use of local airports and other transport hubs.
- Building economic value by attracting events.
- Supporting the competitiveness of the tourism offer with investment and product development.
- Improving the quality of the service and product and the identification of segments / countries with the greatest potential.

This vision sees a broader definition of cultural tourism to be of potential value. In Italy, there are 5 568 municipalities with a population of less than 5 000, the so-called Borghi villages. These places offer 51 000 accommodation businesses with 1.4 million bed spaces and attract over 21 million arrivals staying 90 million nights. Moreover, 64% of the 55 UNESCO sites in Italy are represented in these locations and the seasonality of cultural tourism does not coincide with times of peak demand but rather encourages shoulder and off-season demand.

Statistical Profile

Italy: Domestic, inbound and outbound tourism

	2014	2015	2016	2017	2018
TOURISM FLOWS, THOUSAND					
Domestic tourism					
Total domestic trips	126 515	112 860	127 858	121 851	145 307
Overnight visitors (tourists)	50 155	47 093	54 714	53 647	62 861
Same-day visitors (excursionists)	76 359	65 767	73 143	68 203	82 446
Nights in all types of accommodation	182 349	150 993	167 453	192 808	194 501
Hotels and similar establishments	..	..	..	..	..
Other collective establishments	..	..	..	..	..
Private accommodation	182 349	150 993	167 453	192 808	194 501
Inbound tourism					
Total international arrivals	77 694	81 068	84 925	89 931	93 229
Overnight visitors (tourists)	48 576	50 732	52 372	58 253	61 567
Same-day visitors (excursionists)	29 118	30 336	32 552	31 678	31 661
Top markets					
Germany	9 451	10 016	11 161	12 451	13 518
France	5 358	6 483	6 394	7 202	7 641
United Kingdom	3 768	4 153	4 356	4 932	5 659
Austria	3 244	3 417	3 513	3 690	4 020
United States	2 961	3 159	2 928	3 361	3 694
Nights in all types of accommodation	322 696	331 997	345 837	365 939	384 426
Hotels and similar establishments	141 331	146 744	160 438	170 412	177 738
Other collective establishments	49 762	50 390	52 058	56 659	66 547
Private accommodation	131 604	134 863	133 341	138 868	140 141
Outbound tourism					
Total international departures	55 169	57 418	57 480	60 042	61 195
Overnight visitors (tourists)	26 862	27 494	29 067	31 805	33 347
Same-day visitors (excursionists)	28 307	29 925	28 413	28 237	27 848
Top destinations					
France	5 411	5 769	5 532	5 525	5 787
Spain	2 365	2 526	2 703	3 120	3 567
Germany	2 287	2 281	2 587	2 769	3 048
Austria	1 420	1 551	2 192	2 219	2 191
United Kingdom	1 459	1 526	1 777	1 739	1 606
TOURISM RECEIPTS AND EXPENDITURE, MILLION EUR					
Inbound tourism					
Total international receipts	35 964	37 437	38 250	41 038	43 860
International travel receipts	34 241	35 556	36 359	39 155	41 712
International passenger transport receipts	1 723	1 881	1 890	1 884	2 148
Outbound tourism					
Total international expenditure	26 781	27 346	27 613	30 649	31 972
International travel expenditure	21 713	22 012	22 546	24 557	25 485
International passenger transport expenditure	5 068	5 334	5 067	6 091	6 487

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Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888934077141>

Italy: Enterprises and employment in tourism

	Number of establishments	Number of persons employed				
	2018	2014	2015	2016	2017	2018
Total
Tourism industries	1 953 792	..	..	..
Accommodation services for visitors	216 141	..	488 785	..	..	..
Hotels and similar establishments	213 529	..	287 740	..	..	..
Food and beverage serving industry	994 580	..	..	..
Passenger transport	160 823	..	..	..
Air passenger transport	13 774	..	..	..
Railways passenger transport	33 664	..	..	..
Road passenger transport	95 823	..	..	..
Water passenger transport	17 562	..	..	..
Passenger transport supporting services
Transport equipment rental	8 746	..	..	..
Travel agencies and other reservation services industry	46 172	..	..	..
Cultural industry	121 454	..	..	..
Sports and recreation industry	133 232	..	..	..
Retail trade of country-specific tourism characteristic goods
Other country-specific tourism industries
Other industries

.. Not available

Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888934077160>

Italy: Internal tourism consumption

Million EUR

	2015		
	Domestic tourism expenditure	Inbound tourism expenditure	Internal tourism consumption
Total	..	..	..
Consumption products	64 230	48 148	146 334
Tourism characteristic products	38 190	28 833	100 463
Accommodation services for visitors	14 134	14 880	52 460
Food and beverage serving services	10 116	8 429	19 470
Passenger transport services	9 250	2 999	17 462
Air passenger transport services	3 910	1 632	10 133
Railways passenger transport services	1 455	370	2 242
Road passenger transport services	2 021	683	2 909
Water passenger transport services	1 864	314	2 178
Passenger transport supporting services	..	..	..
Transport equipment rental services	291	379	1 011
Travel agencies and other reservation services industry	2 976	298	5 332
Cultural services	257	334	1 357
Sports and recreation services	1 166	1 514	3 371
Country-specific tourism characteristic goods	10 632	7 117	18 265
Country-specific tourism characteristic services	..	..	..
Other consumption products	15 408	12 198	27 607
Tourism connected products	..	..	..
Non-tourism related consumption products	..	..	..
Non-consumption products	..	..	..

.. Not available

Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888934077179>



From:
OECD Tourism Trends and Policies 2020

Access the complete publication at:
<https://doi.org/10.1787/6b47b985-en>

Please cite this chapter as:

OECD (2020), “Italy”, in *OECD Tourism Trends and Policies 2020*, OECD Publishing, Paris.

DOI: <https://doi.org/10.1787/3d4192c2-en>

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