

Italy

Tourism in the economy

Data for 2014 shows a steady and positive tourism trend in Italy. International travel receipts grew at a stronger pace (3.6%) than Italian exports in general (2%), rising from EUR 33.1 billion in 2013 to EUR 34.2 billion in 2014, and confirming the leading role of tourism in the Italian economy. From a medium-term perspective, international travel expenditure has also demonstrated steady growth (from 33% of total tourism expenditure in 2007 to 39.6% in 2014).

Expenditure by Italian outbound tourists increased from EUR 20.3 billion in 2013 to EUR 21.7 billion in 2014. Italy's balance of tourism payments therefore remains positive albeit slightly lower than for 2013.

Total tourism expenditure in Italy amounted to EUR 86.6 billion in 2014, which represented 9.8% of the nation's domestic consumption and generated an added value of EUR 94.8 billion (6.5 % of overall value added) – supporting 3 million jobs (12.4 % of total national employment).

Italy's tourism industry is set to earn an estimated EUR 18.3 billion in 2015. The number of holidaymaking Italians is expected to increase by 8.6% on 2014, with the majority visiting the south of the country. The number of international visitors to Italy is also anticipated to rise by 3.6% compared with 2014.

Tourism governance and funding

The legislative framework for tourism in Italy involves the Ministry of Cultural Heritage, Activities and Tourism, the Permanent Conference for Relations between the State, Regions and Autonomous Provinces of Trento and Bolzano and the Joint Conference of Regions and Municipalities.

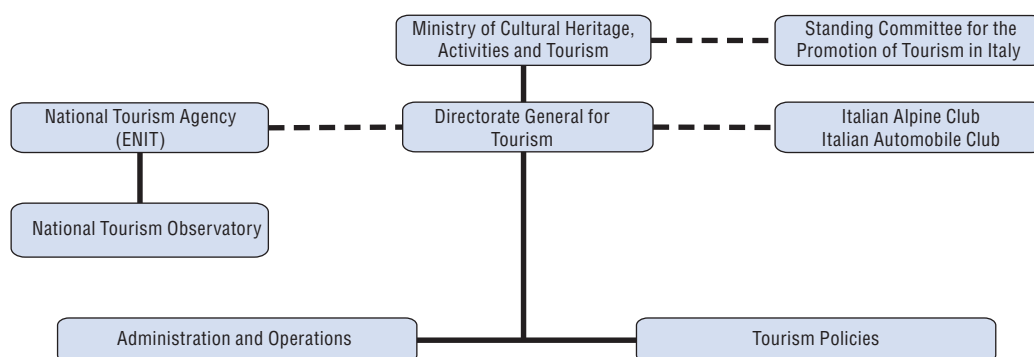
While the Directorate-General (DG) for Tourism in the Ministry of Cultural Heritage, Activities and Tourism sets the strategic policy agenda, the Italian Constitution devolves several key activities to the regions, including regulating tourism businesses, developing strategic marketing activities and managing European Structural Funds. Provinces and municipalities can also issue local regulations for the tourism sector. In 2014, the Minister established a Permanent Committee for the Promotion of Tourism in Italy, tasked with drafting a five-year National Tourism Plan. The Committee is composed of private and public entities.

The DG for Tourism develops and launches national tourism policies in co-ordination with regions and autonomous provinces. It is the supervisory authority for the National Italian Tourism Agency (ENIT), the Italian Automobile Club and the Italian Alpine Club. The DG for Tourism also manages all tourism activities that fall outside the competence of the

regions. It provides aid and incentives to develop tourism demand, delivers certifications and authorisations to foreign professionals, manages relations with international organisations and participates in the development and adoption of European Union legislation.

The role of ENIT is to market and promote Italy as a tourist destination. As of April 2015, ENIT has a new statute, which transformed it from a public body into a public economic entity under the supervision of the Minister of Cultural Heritage, Activities and Tourism. ENIT may also enter into agreements with the regions and autonomous provinces, local authorities and other public bodies. The Board of Directors includes two members appointed by the Minister.

Italy: Organisational chart of the tourism bodies



Source: OECD, adapted from the Ministry of Cultural Heritage, Activities and Tourism, 2016.

The DG for Tourism's budget in 2015 was EUR 30 million. Tourism stands to benefit from the Culture and Innovation 2014-20 programme financed by the European Union Structural Funds. From a total budgetary envelope of EUR 490 million, a large proportion is allocated to the development of 60 cultural attractors in five southern regions: Campania, Puglia, Basilicata, Calabria and Sicilia. The big cultural attractors include potentially interesting regional heritage sites which, suitably supported and promoted, could help diversify the regional tourism flow.

A government-controlled Tourism Investment Fund was launched in 2014 with the mission to invest in the Italian tourism industry in primary locations. The fund operates as a bridge between public assets in need of development and the private real estate market.

Tourism policies and programmes

In recent years, the Ministry has developed policies to strengthen the relationship between tourism and culture: the major drivers of Italian destinations' attractiveness and competitiveness.

A policy challenge and priority in Italy is the distribution of tourism across the country. Two thirds (67%) of the wealth produced by tourism comes from five Italian regions: Latium, Lombardy, Veneto, Emilia-Romagna, and Tuscany. The south of Italy contributes 18% of the tourism wealth.

While Rome, Venice, Florence and Naples attract large numbers of tourists, often causing congestion, cultural heritage sites elsewhere in the country attract fewer international tourists and are located in areas difficult to access by public transport. Italy has to optimise these cultural heritage assets and work more closely with its stakeholders to identify common policy objectives and develop more efficient and sustainable mobility.

In policy terms, Italy will support the development of sustainable tourism by promoting new cultural attractors and by encouraging tourism enterprises to upgrade their services and adapt to the changing needs of travellers. Recent legislation has established measures for the protection and restoration of cultural heritage, the development of Italian culture and the re-launching of tourism. To further help tourism businesses to stay competitive, the Ministry published the *Law decree No. 83 of May 31, 2014*, the so-called “Art Bonus Decree” which provided for urgent measures and incentives to help fund the restoration of public cultural patrimony, including digital tourism activities. It included a tax credit measure to support the restoration and upgrading of tourism structures to create more efficient and sustainable buildings as well as a tax credit to support digital tourism activities.

In April 2014, the Ministry of Culture and Tourism launched a strategy to help bridge the digital divide within the Italian tourism industry. It consisted of three key interventions. These included the launch of a think-tank namely the Laboratory for Digital Tourism with the aim of developing a digital strategy for the tourism sector together with key stakeholders; setting up a tax credit measure for supporting investments in digital tourism; and development by ENIT of national digital communication and marketing plans to promote Italian tourism (Box 1.13).

The Ministry is also focussed on improving intermodal transport and fostering tourism projects prioritising new cultural routes including bike tourism as well as other types of slow, experiential and local tourism. Measures to improve transport and mobility in the southern regions include the development of a national plan for tourism mobility as part of the Art Bonus Decree. An ad hoc committee with members from the Ministry of Culture and Tourism and Ministry of Transport has been set up recently for that purpose. The Ministry of Culture and Tourism has also recently joined the Board of the Italian State Railways Foundation to contribute to promoting heritage railways.

Furthermore, in 2015, in order to increase the attractiveness of Italy as tourist destination, the Government approved the National Airports Plan. The Plan establishes the Government’s investment strategy for its national airports, pinpointing 11 airports of strategic interest and a further 26 of national interest. The Plan also calls for additional measures including expansion strategies for airport infrastructure and intermodal accessibility.

Statistical profile

Table 1. Italy: Domestic, inbound and outbound tourism

	2010	2011	2012	2013	2014
TOURISM FLOWS, THOUSAND					
Domestic tourism					
Total domestic trips	..	..	..	..	126 515
Overnight visitors (tourists)	80 597	67 059	61 594	49 809	50 155
Same-day visitors (excursionists)	..	..	..	..	76 359
Nights in all types of accommodation	521 179	469 887	450 088	391 852	373 653 p
Hotels and similar establishments	139 547	139 897	132 910	128 429	127 812 p
Specialised establishments	..	..	..	..	..
Other collective establishments	70 793	70 524	67 207	63 563	63 492 p
Private accommodation	310 839	259 466	249 971	199 860	182 349 p
Inbound tourism					
Total international arrivals	73 225	75 866	76 293	76 762	77 694
Overnight visitors (tourists)	29 599	29 747	29 933	29 058	29 118
Same-day visitors (excursionists)	43 626	46 119	46 360	47 704	48 576
Top markets					
Switzerland	13 297	13 565	13 145	12 985	13 412
France	9 976	10 165	10 246	10 361	11 260
Germany	10 857	11 682	11 679	10 971	10 675
Austria	7 660	6 503	6 930	6 607	6 584
United Kingdom	3 348	3 480	3 647	3 639	3 972
Nights in all types of accommodation	303 260	320 813	321 918	317 963	322 696
Hotels and similar establishments	118 989	131 530	132 978	138 119	141 331
Specialised establishments	..	..	..	..	..
Other collective establishments	18 088	17 389	18 793	20 359	22 126
Private accommodation	..	..	..	..	..
Outbound tourism					
Total international departures	55 304	52 617	53 338	52 633	55 169
Overnight visitors (tourists)	27 117	24 786	25 963	26 328	28 307
Same-day visitors (excursionists)	28 188	27 831	27 376	26 305	26 862
Top destinations					
France	5 471	5 014	5 325	4 796	5 281
Spain	2 496	2 809	2 479	2 201	2 312
Germany	2 368	2 226	2 324	2 071	2 146
Switzerland	1 822	1 779	1 880	1 581	1 706
United Kingdom	1 162	1 332	1 441	1 425	1 423
TOURISM RECEIPTS AND EXPENDITURE, MILLION EUR					
Inbound tourism					
Total international receipts	30 485	32 411	33 678	34 839	35 963
International travel receipts	29 257	30 891	32 056	33 063	34 240
International passenger transport receipts	1 228	1 520	1 622	1 776	1 723
Outbound tourism					
Total international expenditure	25 072	25 601	25 624	25 251	26 781
International travel expenditure	20 416	20 583	20 511	20 309	21 713
International passenger transport expenditure	4 656	5 018	5 113	4 942	5 068

.. Not available; p Provisional data

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Source: OECD Tourism Statistics (Database).


StatLink  <http://dx.doi.org/10.1787/888933320139>


Table 2. **Italy: Enterprises and employment in tourism**

	Number of establishments	Number of persons employed				
	2014	2010	2011	2012	2013	2014
Total
Tourism industries	..	2 019 687	..	..	..	..
Accommodation services for visitors	158 412	516 875	..	..	..	..
Hotels and similar establishments	33 290	375 216	..	..	..	..
Food and beverage serving industry	..	988 024	..	..	..	..
Passenger transport	..	192 613	..	..	..	..
Air passenger transport	..	17 366	..	..	..	..
Railways passenger transport	..	43 389	..	..	..	..
Road passenger transport	..	116 191	..	..	..	..
Water passenger transport	..	15 667	..	..	..	..
Passenger transport supporting services
Transport equipment rental	..	21 435	..	..	..	..
Travel agencies and other reservation services industry	..	44 106	..	..	..	..
Cultural industry	..	148 353	..	..	..	..
Sports and recreation industry	..	108 281	..	..	..	..
Retail trade of country-specific tourism characteristic goods
Other country-specific tourism industries
Other industries

.. Not available

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Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888933320142>Table 3. **Italy: Internal tourism consumption**


Million EUR

	2010		
	Domestic tourism consumption	Inbound tourism consumption	Internal tourism consumption
Total	..	..	..
Consumption products	..	..	..
Tourism characteristic products	83 176	29 403	112 580
Accommodation services for visitors	36 275	12 180	48 454
Food and beverage serving services	10 346	6 554	16 899
Passenger transport services	13 166	2 127	15 293
Air passenger transport services	6 648	1 138	7 786
Railways passenger transport services	2 213	216	2 428
Road passenger transport services	2 428	732	3 160
Water passenger transport services	1 877	42	1 919
Passenger transport supporting services	..	..	..
Transport equipment rental services	679	204	883
Travel agencies and other reservation services industry	6 674	188	6 862
Cultural services	1 256	258	1 513
Sports and recreation services	3 239	896	4 135
Country-specific tourism characteristic goods	11 543	6 997	18 540
Country-specific tourism characteristic services	..	..	..
Other consumption products	..	..	..
Tourism connected products	..	..	..
Non-tourism related consumption products
Non-consumption products

.. Not available

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Source: OECD Tourism Statistics (Database).

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