

Italy

Tourism in the economy

In line with the global trend, data for 2016 shows steady and positive growth for tourism in Italy. The number of inbound visitors and average length of stay continued to increase steadily in 2016. International arrivals totalled 84.9 million, of which 32.6 million were overnight stays, resulting in 160.4 million nights spent in hotels and similar establishments. International overnight stays rose by 9.4% between 2011 and 2016. The top four inbound markets (including both overnight and same-day visitors) were Switzerland, Germany, France and Austria. More than 60% of international arrivals head to the four regions of Veneto, Lombardy, Tuscany and Lazio.

International travel receipts grew at a stronger pace (3.3%) than Italian exports in general (3%) moving from EUR 35.6 billion in 2015 to EUR 36.7 billion in 2016, and confirming the leading role of tourism in the Italian economy. Travel receipts accounted for 6.3% of total exports in 2016.

Expenditure by Italian outbound tourists increased from EUR 22 billion in 2015 to EUR 22.3 billion in 2016. Italy's balance of tourism payments therefore remains positive and 6.2% higher than for 2015.

A total of 54.7 million domestic overnight trips were made in 2016 (an increase of 16.2% on 2015), with 135.6 million nights spent in commercial accommodation (up 1.7% on 2015).

Tourism makes an important contribution to the Italian economy, accounting overall for 11.8% of national GDP and 12.8% of total national employment in 2015.

Tourism governance and funding

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

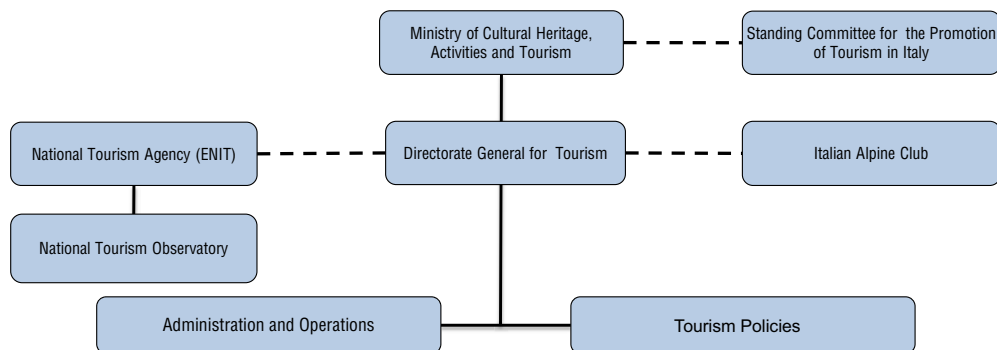
While the Directorate-General (DG) for Tourism in the Ministry sets the strategic policy agenda, the Italian Constitution devolves several key activities to the regions, including regulating tourism businesses, developing strategic marketing activities and managing European Structural Funds. Provinces and municipalities can also issue local regulations for the tourism sector.

The DG for Tourism, beyond its major task to develop and launch national tourism policies in coordination with regions and autonomous provinces, supervises the National Italian Tourism Agency (ENIT) 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, it delivers certifications and authorisations

to foreign professionals, it manages relations with international organisations, and it participates in the development and adoption of European Union 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 Board of Directors includes two members appointed by the Minister. ENIT may enter into agreements with the regions and autonomous provinces, local authorities and other public bodies.

Italy: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of Cultural Heritage, Activities and Tourism, 2018.

Tourism receives support from the Culture and Innovation 2014-20 programme financed by European Union 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.

Tourism policies and programmes

The government is reshaping its plan for the tourism economy, putting it at the heart of national policies. During 2016, the national tourism industry and all its public and private stakeholders came together to generate a new National Strategic Plan for Tourism (*Piano Strategico del Turismo – PST*) for the period 2017-2022. The Plan brings together all tourism operators in Italy with a consistent and coordinated approach, providing a clear framework to improve decision-making in the sector. It is based on key drivers such as technological and organisational innovation, skills development, and quality services. These aspects are integrated with a lasting and sustainable approach to Italy's environmental and cultural heritage.

The Plan's vision is to revive Italy's leadership in the tourism market and boost its contribution to the economic, social and sustainable development of its local areas. It focuses on four major themes, namely, territory and heritage, competitiveness and employment, putting the tourist at the centre, and integration and interoperability, with the strategic principles of sustainability, innovation, and accessibility, cutting across each (Box 1.5).

The Ministry has signed joint protocols with the following authorities:

- The Ministry of Economic Development (MISE) and AGID (Government digital agency) for the creation of new digital services for tourism, including national wifi and large bandwidth networks.
- The Ministry of Infrastructure and Transport, with a Special Plan for Tourist Mobility.

New commitment to tourism mobility in Italy

The Special Plan for Tourist Mobility has been signed between the Ministry of Culture and Tourism and the Ministry of Infrastructure and Transport. The Plan provides an important framework for commitment and collaboration to improve mobility for tourism by setting common goals with sector operators and key stakeholders. EUR 372 million is available to spend 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 Paths (*Cammini*), such as the *Via Francigena* and the *Via Appia*.

2016 has been the year of The Italian Paths (*I Cammini d'Italia*), with the objective of enhancing the value of cultural routes. Initiatives have taken place throughout the year, including the creation of a directory of paths and a website (www.camminiditalia.it).

A Tax Credit system for the tourism sector (the “Art Bonus Decree”), which was approved in 2014, has been refinanced with EUR 460 million until 2020 with special regard to the refurbishment and modernisation of tourism establishments.

The revived collaboration between the public and private sectors in tourism features a new support system of EUR 12.7 million for businesses and enterprises with a special focus on networks and start-ups.

Great emphasis has been placed from a promotional perspective on extending the national offer away from major attractions (cultural cities like Rome, Florence, Venice, and Milan) towards the diversity and plurality of landscapes and destinations. Among these initiatives, the first mapping of Italian villages (*I Borghi più belli d'Italia*) has been developed.

Finally, a new hotel classification system with a special focus on sustainability and accessibility is currently being approved.

Statistical profile

Table 1. Italy: Domestic, inbound and outbound tourism

	2012	2013	2014	2015	2016
TOURISM FLOWS, THOUSAND					
Domestic tourism					
Total domestic trips	..	..	126 515	112 860	127 858
Overnight visitors (tourists)	61 594	49 809	50 155 |	47 093	54 714
Same-day visitors (excursionists)	..	..	76 359	65 767	73 143
Nights in all types of accommodation	450 088	391 852	373 327	351 149	370 877
Hotels and similar establishments	132 910	128 429	127 568	133 270	135 599 p
Specialised establishments	..	..	..	..	..
Other collective establishments	67 207	63 563	63 411	66 886	67 825 p
Private accommodation	249 971	199 860	182 349 |	150 993	167 453
Inbound tourism					
Total international arrivals	76 293	76 762	77 694	81 068	84 925
Overnight visitors (tourists)	29 933	29 058	29 118	30 336	32 552
Same-day visitors (excursionists)	46 360	47 704	48 576	50 732	52 372
Top markets					
Germany	10 170	9 545	9 451	10 016	11 161
France	4 977	5 252	5 358	6 483	6 394
United Kingdom	3 377	3 443	3 768	4 153	4 356
Austria	3 083	3 333	3 244	3 417	3 513
Switzerland	3 135	3 026	3 261	3 265	3 336
Nights in all types of accommodation	321 918	317 963	322 696	331 997	345 837
Hotels and similar establishments	132 978	138 119	141 331	146 744	160 438
Specialised establishments	..	..	..	..	..
Other collective establishments	18 793	20 359	22 126	26 105	25 918
Private accommodation	137 957	129 512	131 604	134 863	133 341
Outbound tourism					
Total international departures	53 338	52 633	55 169	57 418	57 480
Overnight visitors (tourists)	25 963	26 328	28 307	29 925	28 413
Same-day visitors (excursionists)	27 376	26 305	26 862	27 494	29 067
Top destinations					
France	5 325	4 796	5 281	5 635	5 435
Spain	2 479	2 201	2 312	2 481	2 646
Germany	2 324	2 071	2 146	2 152	2 425
Switzerland	1 880	1 581	1 706	1 594	1 478
United Kingdom	1 441	1 425	1 423	1 483	1 746
TOURISM RECEIPTS AND EXPENDITURE, MILLION EUR					
Inbound tourism					
Total international receipts	33 677	34 840	35 964	37 437	36 716 p
International travel receipts	32 056	33 064	34 241	35 556	36 716 p
International passenger transport receipts	1 622	1 776	1 723	1 881	..
Outbound tourism					
Total international expenditure	25 626	25 251	26 781	27 346	22 335 p
International travel expenditure	20 513	20 309	21 713	22 012	22 335 p
International passenger transport expenditure	5 113	4 942	5 068	5 334	..

.. Not available; | Break in series; p Provisional data
Source: OECD Tourism Statistics (Database).


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

	Number of establishments	Number of persons employed				
	2016	2012	2013	2014	2015	2016
Total
Tourism industries
Accommodation services for visitors	178 443	..	..	..	..	..
Hotels and similar establishments	33 163	..	..	..	..	..
Food and beverage serving industry
Passenger transport
Air passenger transport
Railways passenger transport
Road passenger transport
Water passenger transport
Passenger transport supporting services
Transport equipment rental
Travel agencies and other reservation services industry
Cultural industry
Sports and recreation industry
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/10.1787/888933640462>Table 3. **Italy: Internal tourism consumption**

Million EUR

	2010		
	Domestic tourism expenditure	Inbound tourism expenditure	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

Source: OECD Tourism Statistics (Database).

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