# 2.10 MSINOL



According to the World Tourism Organisation (WTO), international tourism reached record levels in 2007 with 903.2 million tourists, a 6.6% increase on 2006. Tourism income reached 625,000 million euros, 5.6% more than in the previous year. These figures show the continual growth of the last few years despite external problems such as the safety and health situations in some countries, higher fuel prices, inflationary risks and higher interest rates.

Europe remained in first position as a world destination (54% market share) and continued to grow faster than the average, with 484 million tourists arriving, although its growth rate of 4.8% was below the world average. Spain occupied second place in terms of number of arrivals, behind France but ahead of the USA, and was also in second place in terms of income ( $\in$  42,171 million).

In 2007, 59,193,289 foreign tourists chose Spain as their holiday destination. This figure, although a new record, shows a clear slowdown in growth. Although positive, the growth rate with respect to 2006 (1.7%) is lower than that seen in other Mediterranean countries. Total tourist spending increased by 3.5%: thus, if each tourist spent €857 in 2006, the figure for 2007 was €870, an increase of 1.5%. The average stay was nine nights (-2.8%), thus prolonging the downward trend observed in previous years.





More than 60% of international tourists came from three countries: United Kingdom, Germany and France. The number of British tourists dropped slightly with respect to 2006 (16 million arrivals), thus confirming the downward trend observed

INDICATOR	GOAL	TREND
Number of foreign tourists per kilometre of coast	Monitor the number of tourists and their relationship with the host population	The rate of tourists per resident (1.31) remained the same as the previous year despite record numbers of tourists arriving in 2007
Tourist Population	Monitor the stay of foreign tourists on the coast to minimise their impact	Spanish coastal resorts received 88% of foreign tourists, with the number of tourists per km of coast increasing by 0.5% in 2007
Tourist-Equivalent Population (TEP) with respect to resident population	Achieve a balance between the TEP and the host population (at state, regional, local level)	Despite the increase in tourist numbers, the TEP with respect to the resident population fell due to a reduction in the number of overnight stays and an increase in the resident population
Number of visitors to National Parks	Preserve National Parks from excessive tourist pressure	The number of visitors to National Parks dropped slightly (1%)
Rural tourism: accommodation, capacity, tourists and overnight stays	Monitor rural tourism infrastructure and services according to the principles of sustainable rural development	Rural tourism accommodation and capacity increased by almost 10% in 2008, although the number of visitors and overnight stays decreased



Tourist Destination	No. of tourists (million)	Growth 2007/2006	Market share (%)
France	81.9	3.8	9.1
Spain	59.2	1.7	6.6
United States	56.0	9.8	6.2
China	54.7	9.6	6.1
Italy	43.7	6.3	4.2
Other countries	607.7	7.0	67.3
World TOTAL	903.2	6.6	100

#### PRINCIPAL WORLD TOURISM DATA 2007

Source: World Tourism Organisation. "Barómetro OMT del Turismo Mundial". June 2008

in previous years. The number of German tourists also decreased (0.7%) after three successive years of increases, whereas the number of French tourists increased by 1.7% to 24 million. Of the non-European markets, which together make up only 6.9% of the total, the USA was once again the leader, with 1.1 million tourists visiting Spain.

The vast majority of this flow went to six Autonomous Regions: Catalonia, the Balearics, the Canary Islands, Andalusia, Valencia and Madrid, which together accounted for 90.5% of the total. As regards the evolution of the number of tourists visiting other Autonomous Regions, the large drop experienced by the Cantabrian coastal Communities (Galicia, Asturias, Cantabria and the Basque Country) and some inland Communities should be noted. The Canary Islands also experienced a moderate decrease of 1.6%.

Spanish residents also undertook a total of 146.8 million trips within the country (93.58%) and 11.3 million trips abroad (6.42%), with the former falling by 5.0% and the latter rising by about the same amount. The most popular destination for Spanish residents was Andalusia, followed by Catalonia and Valencia. One out of every three trips taken by Spanish residents was taken in either the summer or at Easter, thus highlighting the highly seasonal nature of this sector. As regards trips abroad, the main destinations were European countries (76.8%), chiefly France, Portugal, Italy and Andorra. As would be expected, the majority of these tourists came from the most populated Autonomous Regions, although the Basque Country, La Rioja, Asturias and Castile and Leon exceeded the national average.

As far as the social benefits of tourism-related activities are concerned, the Ministry of Employment and Social Affairs estimates that 1,937,209 people were employed in such activities, i.e. hotels and catering, and travel agencies, a 4.9% increase on the previous year. Of these, 924,511 were employed in catering and 279,446 in hotels and other accommodation.



European policy on sustainable tourism has been explained in various communications from the Commission, including "A renewed EU tourism policy" [COM (2006) 134 final] and, more recently, the "Agenda for a sustainable and competitive European tourism" [COM (2007) 621 final]. These communications emphasise that tourism is a transversal sector which covers numerous economic activities and accounts for 4% of the EU's GDP, but also warn that tourism can easily become a victim of its own success if not developed sustainably.

The above-mentioned Agenda proposes a response strategy to current challenges involving reducing the seasonal nature of demand, reducing the impact of tourist transport (emissions in the EU-15 reached 8% of  $CO_2$ -equivalent emissions), minimising resource use and waste production, limiting energy consumption, maintaining the prosperity of local communities, conserving natural and cultural heritage, improving the quality of tourism-related jobs and making holidays more accessible for all.

The *Spanish Tourism Plan 2020*, approved by the Council of Ministers on November 8 2007, which aims to ensure that the Spanish tourism system becomes more competitive and sustainable, thereby providing maximum social wellbeing, continues to be implemented. The strengths detected in the system include the EU's political stability and the proximity of the markets of origin, whereas the weaknesses include reduced competitiveness due to recent price increases. The trends detected include greater environmental demands by consumers, with the report highlighting that "the sector's future will depend on a good conservation of the environment and an efficient use of resources".

Joint planning of the reforms by all parties involved is key to make progress towards the sustainable development of the sector. The largest investments are being made in the framework of the so-called *Infrastructure Renewal Plan* (approved by the Council of Ministers on November 21, 2008), followed by actions in more mature sun and beach resorts. Significant investment is also being made in market studies and promotional campaigns abroad.



## Number of foreign tourists per resident

Despite the higher number of tourists in 2007, this rate is the same as the previous year (1.31 tourists per resident) due to the increase in population



This indicator shows the number of foreign tourists who visit Spain every year. The number of tourists per resident in 2007 (1.31) was the same as in the previous year, despite the record number of arrivals, due to the increase in the Spanish population.

Tourist arrivals during the period shown in the graph show a continual upward trend except for 2003, increasing from 34.9 million in 1995 to 59.2 million in 2007. This process parallels that of population growth, with the Spanish population increasing from 39.6 million to 45.2 million in the same period. These two phenomena— population growth and increasing numbers of foreign tourists—are closely related due to the need to hire foreign workers to perform services related directly or indirectly with tourism, such as construction of infrastructures and facilities.

Three Autonomous Regions exceed the national average in terms of number of tourists per resident: the Balearics (9.93 foreign tourists per resident), the Canary Islands (4.67) and Catalonia (2.11). Valencia (1.15) and Andalusia (1.07) also exceed the ratio of one tourist per resident, whereas the rest do not.



The most frequently used access route for foreign tourists arriving in Spain was by air, which accounted for 75% of all arrivals. This was the only transport method which increased with respect to 2006 (4.4%). Cars accounted for 22.1% of arrivals, trains 2.6% and the remaining 0.4% arrived by sea. It should be noted that almost 24 million passengers flew with one of the 29 low-cost airlines (LCA), whose combined passenger figures increased by 33.9% with respect to 2006 and which made more than 177,000 flights.

Airline use grew by 28.92% with respect to 2006 and road transport grew by 22.66%, whereas boat and train use continued their severe downward trend (decreases of 36.25% and 43.81%, respectively). This decrease in train access to Spain should be considered a negative trend as it is considered to be the most efficient method of transport from an environmental point of view.

As regards accommodation type, foreign visitors to Spain stayed above all in hotels, followed by their own residences or those of family members. Although the number of tourists staying in hotels has increased in absolute terms from 33.7 million in 2000 to 37.9 million in 2007, there is a clear trend in favour of staying in their own residence (or that of a family member), with an increase from 7.5 million in 2000 to 13 million in 2007. In percentage terms, hotel stays dropped by 6.3% between 2000 and 2007, the same percentage by which accommodation in private residences increased. It is logical to equate this increase with the purchase of a second residence, a phenomenon which has grown strongly due to a series of factors which have affected the market (land-use laws, low interest loans, devalued countryside land, permissiveness of local authorities, etc.).

Outside the summer season, international tourism increased by 5.3% in the first quarter of the year with respect to the same quarter of the previous year. This suggests that the sector is becoming less seasonal, which is a key factor in achieving sustainability.

Despite the financial benefits arising from an increase in tourist numbers (estimated at 11% of GDP), their arrival also leads to greater resource and energy consumption, more waste generation, a need for more infrastructure to provide services, greater land cover, more pollutant gas emissions, etc. The above is heightened by the distinctly seasonal nature of tourism in Spain, which concentrates environmental pressures during a short period of time, thereby exacerbating the situation and, at times, exceeding the environment's carrying capacity.



	2000 (no. tourists)	2007 (no. tourists)	Variation 200 – 2007 (%)
Airport	34,379,930	44,324,017	28.92
Road	10,669,405	13,086,851	22.66
Port	24,03,175	1,532,129	-36.25
Railway	445,405	250,292	-43.81
TOTAL	47,897,915	59,193,289	23.58

#### ACCESS ROUTE USED BY FOREIGN TOURISTS 2000-2007

#### NOTES

- Tourist: any person travelling to a place other than his/her usual place of residence, who stays at least one night for a purpose other than the exercise of paid activity.
- Carrying capacity of an area: concept used with reference to the sustainability of tourism, defined as the maximum number of tourists that can visit a tourist destination at the same time, without this causing economic, socio-cultural or environmental damage and without a decrease in the visitors' satisfaction (UNEP). The carrying capacity should be established for each destination on the basis of desirable quality of life standards.

#### SOURCES

- Institute of Tourism Studies. Balance of Tourism in Spain 2007.
- Institute of Tourism Studies. Spanish Border Survey of Inbound Tourism (FRONTUR). Annual report 2007.
- National Institute of Statistics. Inbound Tourism. 2005-2007.

- http://www.iet.tourspain.es
- http://www.tourspain.es/es/Home/ListadoMenu
- http://www.ine.es

## Number of foreign tourists per kilometre of coast

The number of tourists per kilometre of coast remained essentially the same in 2007 with respect to the previous year, with a slight increase of 0.5%.



In 2007, 52.5 million foreign tourists (88.2% of the total) visited the Spanish coast. This represents an average of 6665 tourists per kilometre of coast, an increase of 0.5% on the previous year but less than the increase in overall tourist numbers (1.7%). By Autonomous Region, Catalonia was the most popular (21,807 tourists per km), followed by Valencia (10,809), Andalusia (9,115) and the Balearics (7,166), all of which were above the average. Five Communities experienced decreases with respect to the previous year (Asturias decreasing by a massive 20.7%), whereas all the others showed increases, most notably Murcia, with an increase of 16.9%.

On the Bay of Biscay, the Basque Country had the highest figure (4024 tourists per km), whilst Asturias (408 tourists per km), Cantabria (1328) and Galicia (761) had lower levels. The latter's long coastline (1498 km) partially explains this figure, which nevertheless increased between 2004 and 2006, although it decreased in 2007. The Mediterranean (including the Balearics) and Andalusian coasts together attract more than 40 million tourists (76.9% of the total), which represents 10,446 tourists



per km of coast. In contrast, the Cantabrian and Galician coasts only attract 5% of foreign tourists, which gives a figure of 1099 tourists per km of coast.

The growth rate for Spanish coasts as a whole was 8.9% in the period 2004-2007. This increase was noted in all Autonomous Regions except the Canary Islands, which experienced a 9.8% decrease. Cantabria (97.6%), Galicia (50%), Catalonia (30.5%) and Murcia (30.1%) saw the greatest increases over this period. However, with the exception of Catalonia, it should be noted that overall tourist numbers in these Communities are relatively low, with a maximum of 1,255,148 tourists visiting Galicia in 2006.

#### NOTES

 This indicator establishes the ratio between the number of foreign tourists visiting the Spanish coast and the length of coastline. When broken down by Autonomous Region, it is once again clear that there is a great imbalance between tourist destinations in northern Spain and those on the Mediterranean, although it should be remembered that the figures are not calculated on the basis of tourist numbers alone, but also in terms of length of coastline, which for three Autonomous Regions (Galicia, the Balearic Islands and the Canary Islands) exceeds 4500 kilometres.

#### SOURCES

- Spanish Border Survey of Inbound Tourism (FRONTUR). Annual report 2007. Institute of Tourism Studies.
- INS. Inbound Tourism. Series 1995-2007.
- INS. Physical surroundings. Length of coastlines and borders (data from the National Geographical Institute).

- http://www.marm.es
- http://www.iet.tourspain.es

## Tourist-Equivalent Population (TEP) with respect to the host population (%)

Despite the higher number of foreign visitors, overnight stays, and therefore tourism pressure on the local population, decreased in 2006



Calculation of this indicator allows us to determine how many people resident in Spain all year would be equivalent to the number of overnight stays recorded in tourism-related statistics. More than one billion overnight stays (1,189,199,850) were recorded in 2007, which is equivalent to a population of 3,258,082 people living in Spain for a whole year.

This concept allows us to form a more accurate picture of the pressure resulting from tourism activities. The most widely reported indicator in the media is the total number of foreign tourists per year. Despite the increase in the number of tourists, which reached a record high of 59,193,289 in 2007, one million more than in 2006, both the average stay (5.8 days) and the number of overnight stays decreased, which means that tourism-related pressure on the country also decreased.



The Tourist-Equivalent Population, as a percentage of the resident population (of Spain or, where applicable, of each Autonomous Region), provides a means of assessing tourist pressure on destination regions. High values (of 10% or more) indicate that the tourism sector is equivalent to an average annual population increase of this size, with the concomitant effect on resource consumption, management of urban and environmental services, and land-use planning and land consumption. As can be seen from the table below, the national average does not reach this critical figure of 10% and has even decreased from 7.29% to 7.21%. Seven Autonomous Regions comfortably surpass the national average, notably the Balearics (27.36%) and Canary Islands (16.26%), although both have experienced a slight fall with respect to 2006.

The absolute figures for the chosen variables are presented in the following table. By reducing the data to index form it is possible to see the changes over the period 2003-2007.

	2003	2004	2005	2006	2007
No. of overnight stays	1,068,411,997	1,092,106,446	1,243,032,947	1,189,285,167	1,189,199,850
Tourist equivalent population (TEP)	2,927,156	2,992,072	3,405,570	3,258,316	3,258,082
TEP index	100	102	116	111	111
Resident population	42,717,064	43,197,684	44,108,530	44,708,964	45,200,737
Resident population index	100	101	103	105	106
TEP with respect to resident population (%)	6.85 %	6.93 %	7.72 %	7.29 %	7.21
Foreign tourists	50,853,815	52,429,832	55,913,778	58,451,141	59,193,289
Foreign tourists index	100	103	110	115	116

SPAIN: EVOLUTION OF THE PRINCIPAL VARIABLES IN THE TOURISM SECTOR (2003-2007)

Source: National Institute for Tourism Studies, INS and own data

#### NOTES

- 365. This figure therefore indicates how many people living in Spain all year round would be equivalent to the number of overnight stays recorded in tourism-related statistics.
- The number of overnight stays is taken from the report published by the Spanish Institute of Tourism Studies (EIT) "Domestic Tourism" 2003-2007. This survey covers overnight stays in the following types of accommodation: hotels and similar, own property, home of family and friends, rented property, other types of accommodation. The data refer to residents and non-residents (Spanish and foreign citizens). The sources of information used were the FRONTUR and FAMILITUR surveys. The Spanish National Institute of Statistics (INS) also publishes these figures under the sections relating to "Domestic Tourism" and "Inbound Tourism".
- Resident population: the population data refer to the population recorded in the municipal population register as of 1 January of each year (INS).

#### SOURCES

- INE. Inbound Tourism.
- INE. Domestic Tourism
- INE. Taken from the annual municipal register statistics (2003-2007).
- Spanish Institute of Tourism Studies (EIT): Domestic Tourism 2003-2007, with data from the FRONTUR and FAMILITUR surveys.

- http:// www.ine.es
- http:// www.iet.es

### Number of visitors to National Parks

The overall flow of visitors to National Parks fell slightly in 2007, with five parks experiencing large falls and the rest remaining close to 2006 levels

This indicator shows changes in the number of visitors to Spain's National Parks and



the number of visitors in relation to the size of the protected area. In 2007 these protected spaces covered a total of 347,022 ha. It should also be highlighted that, in addition to the protected areas themselves, eight of the Parks are also surrounded by a total of 284,252 ha of land covered by different degrees of protection. The conversion of Monfragüe Natural Park into a National Park in 2007 resulted in a large increase in the surface area.

Spain's National Parks have received an average of 10 million visitors per year since 1996, with visitor numbers peaking in 2004 (11,134,880). The number of visitors in 2007 was 10,864,738, 114,732 (–1%) less than in the previous year, although this fall only affected five parks (Teide, Aigüestortes, Picos de Europa, Timanfaya and Cabañeros). The remaining parks received a similar or higher number of visitors than the previous year, with the Tablas de Daimiel seeing its visitor numbers jump by 22.1%.

As the total number of visitors remained relatively stable at around 10 million and the protected area increased, the indicator measuring the number of visitors per hectare decreased to 31.3 in 2007. The Garajonay, Teide, Timanfaya and Caldera de Taburiente National Parks continue to be the most visited in terms of visitors per hectare. The Canary Islands accounted for more than half of all visits made to National Parks in this year (56.7%).





The Monfragüe National Park joined the National Parks Network in March 2007. The area of this park (18,118 ha) resulted in a 5.22% increase in the network's total area. The large amount of protected land surrounding this park (16,160 ha), which is the largest for any National Park, should be highlighted.

Area (ha) 14,119 10,020 39,015	Protection zone (ha) 26,733 None	Visitors 322,555	Visitors/ha 25
10,020			25
,	None	7/ 5/1	
20.015		76,541	7
37,015	None	72,688	2
4,699	5.956	389,024	79
54,251	13.540	384,638	7
3,986	4.160	884,858	211
8,480	None	238,939	26
18,118	116,160	351,885	40
15,608	19,679	617,950	40
64,660	None	1,774,955	29
86,208	85,750	737,183	8
1,928	5,410	122,955	52
18,990	6,864	3,142,418	188
5,107	None	1,748,149	350
347,022	284,252	10,864,738	31.3
	54,251 3,986 8,480 18,118 15,608 64,660 86,208 1,928 18,990 5,107	54,251       13.540         3,986       4.160         8,480       None         18,118       116,160         15,608       19,679         64,660       None         86,208       85,750         1,928       5,410         18,990       6,864         5,107       None	54,251         13.540         384,638           3,986         4.160         884,858           8,480         None         238,939           18,118         116,160         351,885           15,608         19,679         617,950           64,660         None         1,774,955           86,208         85,750         737,183           1,928         5,410         122,955           18,990         6,864         3,142,418           5,107         None         1,748,149

#### BASIC DATA FOR NATIONAL PARKS - 2007

Notes: Area of the Islas Atlánticas NP: 7282.,2 ha marine and 1194.8 ha land. Area of the La Cabrera NP: 8703 ha marine and 1318 land.



#### NOTES

- The Monfragüe National Park was incorporated into the National Parks Network by Act 1/2007, of March 2, on the declaration of Monfragüe as a National Park (BOE no. 54, of March 3 2007)
- The statistical series for the Sierra Nevada NP was begun in 1999, that for the Islas Atlánticas NP in 2003 and that for the Monfragüe NP in 2007.

#### SOURCES

• National Parks Network. MARM: "First National Parks status report as of January 1st 2007"

- http://www.marm.es
- http://reddeparquesnacionales.mma.es/parques/index.htm

## Rural tourism: accommodation, capacity, tourists and overnight stays

Rural tourism accommodation and capacity increased by almost 10% in 2008, although the number of visitors and overnight stays decreased (1.86% and 2.32% respectively)



Initially, rural tourism came about as an alternative means of income in areas traditionally dependent on farming or fishing that were experiencing a decline in their traditional activities. Rural tourism is no longer an emerging sector and is gradually becoming a consolidated industry with a strong environmental side to it. It contributes to maintaining the rural population, raising income in agricultural areas, conserving natural landscapes and preserving historical and cultural heritage.

The number of rural accommodations increased by 9.61% with respect to 2007, a similar increase to that seen for capacity (9.88%). This increase contrasts with the -1.93% decrease in visitor numbers and -2.32% decrease in overnight stays with respect to the previous year. The decrease in overnight stays only affected Spanish tourists — overnight stays by foreign tourists increased by 4.08%. The average stay was 2.99 days, a decrease of -0.47% on the previous year.



These figures appear to show a disparity between the accommodation on offer and its occupation, most likely due to a drop in the internal demand which is the lifeblood of this activity.

Rural tourism in Spain grew significantly between 2001 and 2008, with the number of establishments open rising from 5497 to 12,804 (a 133% increase) and the capacity also rising from 42,925 to 114,281 (a 167.5% increase). As regards occupancy, it can be seen that the number of visitors who chose to stay in rural accommodation rose from 1,210,891 in 2001 to 2,626,719 in 2008, an increase of 117%. The number of overnight stays also increased, rising by 114.3% from 3,660,815 in 2001 to 7,846,078 in 2008.

The vast majority of the tourists who stay in rural accommodation are either Spanish or resident in Spain and stay for only a short time (weekends or holidays). In 2001 only 10.25% were foreigners (124,125), with this proportion decreasing slightly in 2008 to 9.95%, although in absolute terms the number actually rose to 261,395. The ratio between resident and non-resident visitors is reversed in two regions: the Balearics, with 68,126 foreign tourists versus 19,378 Spaniards, and the Canary Islands, with 30,360 foreign tourists versus 21,187 Spaniards.

The breakdown by Autonomous Region shows that the largest number of rural establishments are found in Castile and Leon (2543), Catalonia (1516), Asturias (1186), Andalusia (1172) and Castile-La Mancha (1005). Castile and Leon also heads the list in terms of number of tourists (572,193), followed by Catalonia (335,882), Cantabria (178,753) and Castile-La Mancha (163,702).

As regards the average length of stay recorded for the various Autonomous Regions, the Canary Islands and Balearics (traditional holiday destinations) present the highest rates, which vary from around 7 days (Canary Islands) to 5-6 days (Balearics). The highest occupation rate is found in the Balearics (47.37%), followed by the Basque Country (27.71%), the Canary Islands (25.11%) and Navarre (22.84%).

The social benefit of this subsector of the hotel trade can be measured in terms of the number of jobs created: the number of people employed in 2001 was 7973, a figure which has increased steadily to reach 19,828. Employee numbers rose by 3% with respect to 2007.



#### NOTES

- Rural tourism accommodation is classified according to the following types: rural hotel, rural apartment, rural
  house, rural hostel, active tourism facilities, large-scale complexes and others. Rural houses are the most common, with 9221 of them open in August 2006. The next most common are rural apartments (553 open in August).
  The accommodation figures supplied by the National Institute of Statistics (INE) are an estimate of the number
  of establishments open.
- According to the INE, rural tourism accommodation includes establishments or houses that charge for tourist
  accommodation, with or without other complementary services, and are listed in each Autonomous Region's
  Tourist Accommodation Register. These establishments tend to have common features, such as being located in
  buildings typical of the local architectural style or on working farms (agro-tourism). They also offer a limited
  number of guest beds and rooms and meet certain requirements in terms of infrastructure and basic facilities.
- Act 45/2007, of 13 December, regarding sustainable development in the rural environment, promotes rural tourism by managing supply and improving demand for such tourism. Particular attention is paid to sustainable tourism in priority rural areas, agrotourism and farming-related tourism. This measure relating to sustainable development will be promoted within the context of a future National Plan for Agriculture and Livestock Environmental Quality, which will enable application of the provisions of Act 45/2007.

#### SOURCES

• INE Tourist Accommodation Occupancy Survey, 2008.

- http:// www.marm.es
- http:// www.ine.es



