

2.12

TOURISM



This chapter provides data on tourism in 2008 and 2009, a period that coincided with the end of a cycle of economic growth. According to the World Tourism Organization (WTO), international tourism increased in the first half of 2008 before declining in the second. Nevertheless, the annual growth rate stood at 2%. In absolute figures, international arrivals totalled almost 925 million, 16 million more than in 2007.

Although definitive figures for 2009 are not yet available, the WTO estimates tourism worldwide contracted due to the ongoing economic recession and the fall in confidence among both consumers and businesses. Europe and the Americas are expected to have been the regions most badly affected. Nevertheless, the WTO stresses that the slowdown in international tourism's growth comes after four years of historic expansion (average growth of 7% between 2004 and 2007) and that the figures show that the tourism sector has withstood the economic downturn better than many others, such as real estate or the motor industry.

In this context of receding tourist flows, in 2008 Spain received 57.3 million tourists, 1.3 million fewer than the previous year, representing a drop of 2.3%. In the first half of the year, tourism rose in Spain by



INDICATOR	GOAL	TREND
Number of foreign tourists per inhabitant	Monitor the number of tourists and their relationship with the host population	In 2009, the number of foreign tourists per inhabitant fell in comparison with the previous year to 1.12 tourists/inhab
Number of foreign tourists per kilometre of coast	Monitor the presence of foreign tourists on the coast to minimise their impact	The number of foreign tourists per kilometre of coast stood at 5,182, 13.6% fewer than in 2007, the year the highest-ever figure was recorded
Tourist Population Equivalent (TPE) in the areas with the highest number of overnight stays	Monitor the trend in the 10 well-established tourist destinations selected	Despite the fall in tourism in the last two years, the 10 destinations selected recorded an overall 8.4% rise between 2000 and 2009
Number of visitors to National Parks	Safeguard National Parks against excessive tourist pressure	In 2009, the number of visitors to National Parks fell by 2.6% to 9.9 million
Rural tourism: accommodation, capacity, tourists and overnight stays	Monitor trends in rural tourism infrastructure and services against the principles of sustainable rural development	In 2008, rural tourism accommodation and capacity increased by almost 10%, although the number of visitors and overnight stays fell
Trends in the main variables affecting tourism in Spain	Achieve sustainable tourism and decouple its economic growth from the pressure it exerts on the environment, particularly the coast	The influx of foreign tourists decreased in the second half of 2008 and this downturn continued into 2009, although it was offset by the sustained volume of domestic tourism

3%, but in the second it was affected by the widespread crisis and arrivals dropped to 6.5% below the 2007 level.

KEY DATA ON WORLDWIDE INBOUND TOURISM (2008)

Tourist destination	No. of tourists (million)	Increase 2008–2007	(%) Market share
Europe	489	0,1	53
Asia and the Pacific	188	2	20
The Americas (North and South)	148	3,6	16
Middle East	53	11,3	6
Africa	47	4,6	5
World total	925	2	100

Source: WTO. World Tourism Barometer. January 2009.

Three main markets, the United Kingdom, Germany and France, accounted for 60% of tourists. The number of visitors from almost every country worldwide (except the United States and Ireland) declined, with the sharpest downturns being recorded among those originating from France (9%), Italy (8%) and England (3.1%). Despite these figures, in 2008 tourist expenditure totalled 51.89 billion, slightly more (0.8%) than in 2007.

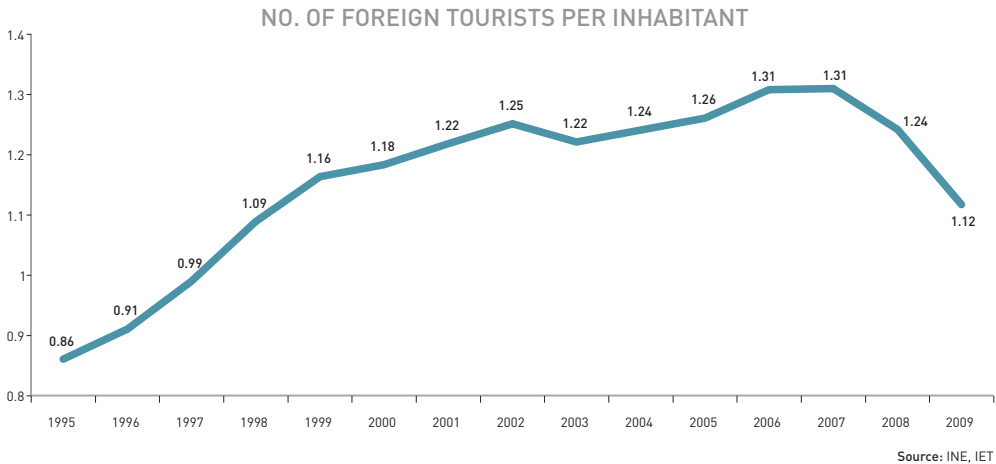
Following the trend of previous years, the main destinations chosen by international tourists were the autonomous communities of Catalonia, the Balearic Islands, the Canary Islands, Andalusia, Valencia and Madrid. The latter received 4.6 million tourists, an increase of 5%, which is evidence of growing business and cultural tourism in the autonomous community, in which, moreover, the number of hotels rose from 401 in 2008 to 428 in 2009.

In 2009, 52.2 million tourists arrived in Spain, 8.7% fewer than the year before. Tourist expenditure fell by 6.8 million to 48.2 billion. Although there was a sharp fall in 2009, it was still Spain's third best-ever year in terms of revenue from tourism, confirming that the sector has survived the crisis relatively well. The United Kingdom, Germany and France were once again the main source countries.

The indicators presented in this chapter cover some of the aspects of tourism that exert pressure on the environment (number of foreign tourists per kilometre of coast and tourist population equivalent). They also present the responses to these pressures, such as the diversification represented by rural and nature tourism in Spain's National Parks, which are managed to ensure recreation is compatible with protection of the sites' fauna and flora.

Number of foreign tourists per inhabitant

In 2009, the number of foreign tourists per inhabitant stood at 1.12 after a fall in tourist numbers and an increase in population



The indicator measures the relationship between the number of foreign tourists and the resident population. Its value lies in its capacity to show the burden borne by tourist destinations, as in order to ensure the sector's sustainability it is desirable to maintain an appropriate ratio between the number of visitors and the resident population. Nationally, the rate is lower than in neighbouring countries, such as France and Italy, but it rises significantly on the Mediterranean coast.

The graph shows a trend of continual growth from 1995 until 2007 punctuated by minor rises and falls. However, the trend was reversed in 2008 and the downturn accelerated in 2009, when the ratio dropped back to the 1998 level.

In 2008, the number of tourists per inhabitant fell by 5% on the previous year and in 2009 the figure dropped by a further 10%. This change was due not only to the reduction in the number of tourists in the last two years, but also to the continued increase in population.

Three autonomous communities exceeded the national rate in both 2008 and 2009, while the rest were well below it. In 2009, the Balearic Islands received 8.3 foreign tourists per inhabitant, while the Canary Islands received 3.9 and Catalonia 1.7.

To reach Spain, tourists still preferred to travel by air, followed by road, sea and rail. All modes of transport recorded decreases in 2009 in comparison with 2008. However, over the period 2000–2009, air traffic increased by 17.16%, while sea, and particularly rail traffic, fell significantly, the latter plummeting by 68.21%.

From an environmental point of view, the increase in the number of tourists leads to greater resource and energy consumption, more waste generation, expansion of infrastructure to provide services, greater land cover, and more pollutant gas emissions, to name but a few of the pressures exerted. These are exacerbated by the distinctly seasonal nature of tourism in Spain, which concentrates environmental pressure in a short period of time and often exceeds the environment's carrying capacity. The crisis in the sector could present an opportunity to mitigate negative trends, prevent many impacts, minimise damage and evolve towards sustainable tourism.

NUMBER OF NON-RESIDENT TOURISTS BY MODE OF ENTRY (2000–2009)

	2000	2009	Variation 2000–2009 (%)
Air	34,379,930	40,278,364	17.16
Road	10,669,405	10,413,948	-2.39
Sea	2,403,175	1,397,180	-4.86
Rail	445,405	141,606	-68.1
TOTAL	47,897,915	52,231,098	9.05

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). Carrying capacity is established for a destination in accordance with a desirable quality of life.

SOURCES

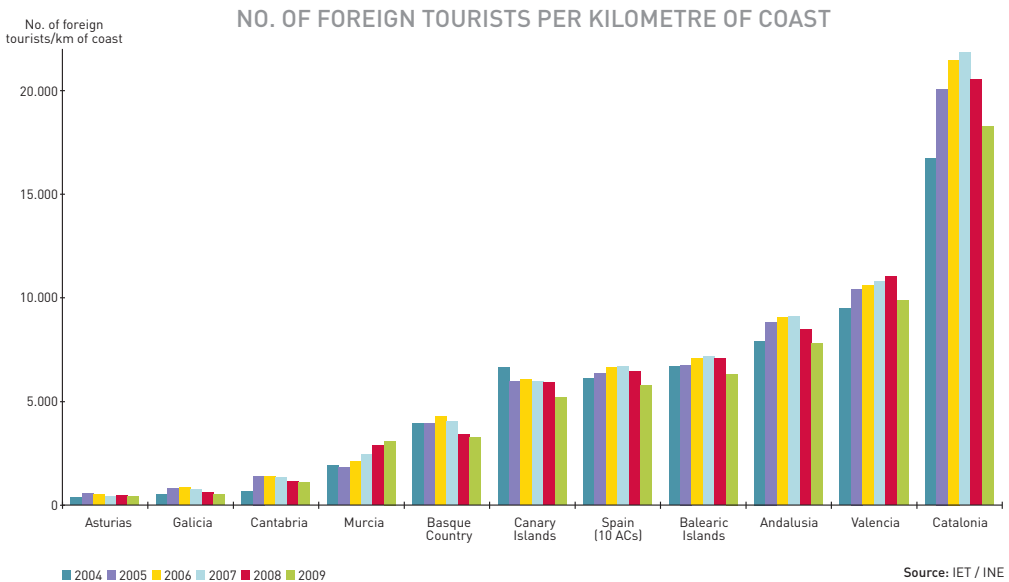
- IET. Spanish Border Survey of Inbound Tourism (FRONTUR). 2009 (provisional figures).

FURTHER INFORMATION

- <http://www.iet.tourspain.es>
- <http://www.ine.es>

Number of foreign tourists per kilometre of coast

In 2009, the number of non-resident tourists per kilometre of coast stood at 5,759, 13.6% below 2007, the year the highest-ever figure was recorded



In 2009, a total of 45.4 million foreign tourists visited the Spanish coast, accounting for 86.8% of inbound tourism. These figures produced an average of 5,759 tourists per kilometre of coast, a drop of 10.3% in relation to the previous year. Except for Murcia, which recorded a 6.6% increase, all of Spain's autonomous communities registered falls ranging from 18.4% in Galicia to 4.3% in the Basque Country.

In absolute terms, Catalonia was the most popular destination with 18,868 tourists per kilometre of coast, followed by Valencia (9,863), Andalusia (7,049), the Balearic Islands (6,329) and the Canary Islands (5,180). At the other end of the scale, Galicia and Asturias were well below these figures.

Overall, the Bay of Biscay and Spain's north-west coast received 2,048,961 million tourists in 2009 (4.5% of the total), which is equivalent to 844 tourists per kilometre of coast. For their part, the Mediterranean (including the Balearic

Islands) and Andalusian coasts, attracted 35,108,533 tourists (77.4% of the total), which puts the number of tourists per kilometre of coast at 9,086. In the case of the Canary Islands, the pressure per kilometre of coast stood at 5,182 foreign tourists, a figure slightly below the national average.

Over the period 2004–2009, the number of foreign tourists visiting Spain's coasts fell by 3.7%. This was due to significant decreases in four autonomous communities (the Canary Islands, Basque Country, Andalusia and the Balearic Islands), as the rest recorded increases ranging from 27.5% in Murcia to 1.9% in Galicia. In the case of Asturias, where numbers peaked in 2005, the figure settled at the same level as in 2004.

NOTES

- This indicator establishes the ratio between the number of foreign tourists who visit the Spanish coast and the length of coastline. Once again, when broken down by autonomous community, it is clear that there is a great imbalance between tourist destinations in northern Spain and those on the Mediterranean. However, it should be remembered that the figures are not calculated solely on the basis of number of tourists, but also in terms of length of coastline, which, in three autonomous communities (Galicia, the Balearic Islands and the Canary Islands) stands at over 4,500 kilometres.

SOURCES

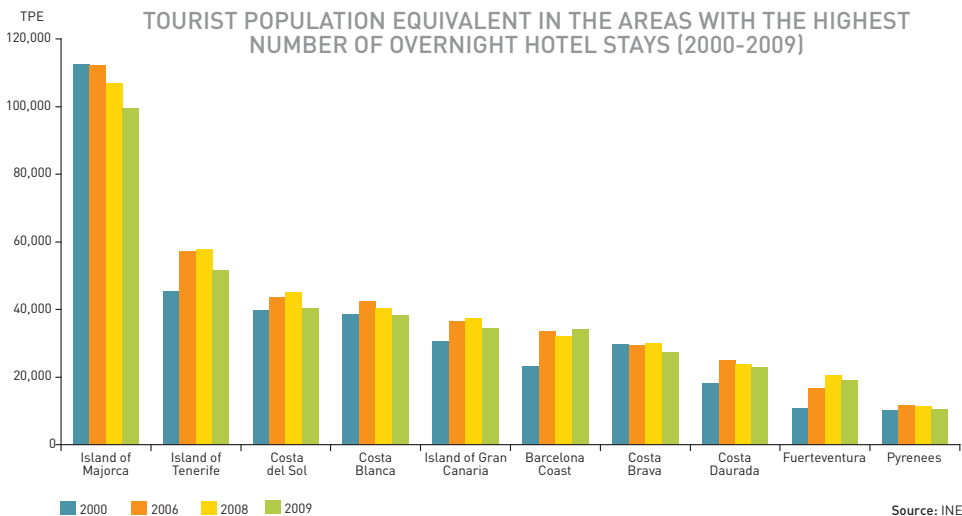
- IET. Spanish Border Survey of Inbound Tourism (FRONTUR), 2009 (provisional figures).
- INE. Physical variables. Length of coasts and borders. Length of the Spanish coast by provinces, 2010 (data from the IGN).

FURTHER INFORMATION

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

Tourist Population Equivalent (TPE) in the areas with the highest number of overnight stays

Despite the downturn in the number of foreign tourists in 2008 and 2009, the destinations with the highest number of overnight hotel stays still recorded an increase over 2000–2009



The Tourist Population Equivalent (TPE) measures the number of overnight stays recorded in tourism surveys against the number of people living in a location all year round and thereby provides a clear view of the pressure exerted by the sector. From an environmental point of view, the indicator's value lies in its ability to highlight the areas whose hotels receive the greatest numbers of tourists (both residents and non-residents) and to monitor these trends over time. The indicator is calculated by dividing the number of overnight stays by 365 days.

The Hotel Occupancy Survey (HOS) carried out by the National Statistics Institute (INE) monitors 38 tourist destinations, of which number 10 have been selected to calculate this indicator. The number of overnight stays in the 10 selected areas represents 55.0% of all overnight hotel stays between 2000 and 2009. In absolute figures, overnight stays totalled more than 1.35 billion, which when translated into TPE works out as 3,709,530 people living permanently in Spain during that period. Except for the destinations in the Pyrenees (mountain tourism), all the areas included in the survey are coastal (sun-and-sea tourism).

The area with the highest number of overnight stays was the island of Majorca, which had an equivalent population of over one million permanent residents (1,061,525) over the period 2000–2009. It was followed at some distance by the island of Tenerife and the Costa del Sol (in the province of Malaga). Notably, the Palma-Calvià area accounted for 44.4% of overnight hotel stays in Majorca.

Not all the areas surveyed followed the same trend. For example, there were major increases between 2000 and 2009 in the islands of Fuerteventura (74.9%), Tenerife (13.7%) and Gran Canaria (12.3%) and in two areas of Catalonia — the Barcelona coast (47.9%) and the Costa Daurada (25.9%). Meanwhile, the volume remained largely stable on the Costa del Sol (1.1%) and there were decreases on the Costa Brava (8.0%), the island of Majorca (1.5%) and, to a lesser extent, on the Costa Blanca (0.9%).

The 10 tourist destinations monitored recorded an overall increase in the number of overnight stays and, therefore, in the TPE, which in 2009 was 8.4% above the

**TOURIST POPULATION EQUIVALENT (TPE)
IN THE 10 AREAS WITH THE HIGHEST NUMBER OF OVERNIGHT HOTEL STAYS (2001–2009)**

	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	TOTAL TPE
TPE	349,060	350,611	333,589	355,210	353,884	369,773	408,297	405,509	405,322	378,274	3,709,170
Index	100.0	100.4	95.6	101.8	101.4	105.9	117.0	116.2	116.0	108.4	

NOTES

- It should be noted that the indicator only shows the quantitative aspects of the pressure exerted by tourism and does not necessarily indicate greater or lesser unsustainability, as this would also depend on policies carried out locally in connection with land use, waste collection, wastewater treatment, energy efficiency, environmental conservation, etc.
- For the purpose of calculating the indicator, Pyrenean destinations in Catalonia, Aragon, Navarre and the Basque Country have been grouped together as a single area. To calculate the entire series, data for 2000, 2001 and 2002 have been estimated, as figures are only available from 2003 onwards.
- The Tourist Population Equivalent index (2000=100) peaked in 2006 (117.0) and remained fairly stable over the next two years, despite the start of the crisis in international tourism, before dropping to 108.4 in 2009. However, viewing the 10 tourist areas as a whole over the entire period reveals an 8.4% increase in the number of overnight stays and, therefore, in the TPE.
- Spain's principal tourist destinations are, in general, well-established and include the 10 areas selected for this indicator. These well-established destinations need to receive special treatment from stakeholders and government to guide them towards sustainability. In this regard, the Ministry of Industry, Tourism and Trade is promoting actions to upgrade well-established tourist destinations and has set up a specific line of credit (FOMIT), implemented several projects (such as those in Playa de Palma, the western end of the Costa del Sol and San Bartolomé de Tirajana), and is carrying out the Tourist Facility Renewal Plan approved by the Council of Ministers of 21 November 2008.

SOURCES

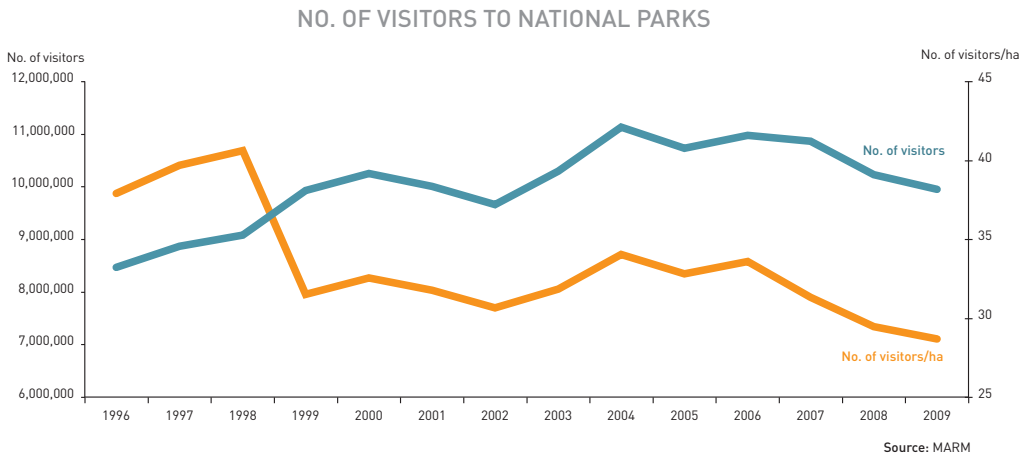
- INE. Hotel Occupancy Survey 2000–2009. Hotels and other lodgings.

FURTHER INFORMATION

- <http://www.ine.es>

Number of visitors to National Parks

The number of visitors to National Parks in 2009 fell by 2.6% on the previous year to 9.9 million, a figure slightly below the average for the period analysed



The indicator shows the number of visitors to National Parks and the number of visitors per hectare. While the first variable reveals an upward trend until 2008, the latter declined as a result of the increase in the area of Spain's National Parks, which now cover 347,030 ha. Moreover, the protected environment around National Parks now stands at 284,252 ha.

In 2008, National Parks received 10,222,818 visitors. This figure dropped by 2.6% in 2009 to 9,952,606. Decreases were recorded in seven National Parks, while the rest witnessed rises in visitor numbers. Particularly large increases were registered in the Islas Atlánticas de Galicia (20.5%), Cabañeros (14.3%), Tablas de Daimiel (11.9%), Teide (6%) and Picos de Europa (6.2%) National Parks.

Since 1996, Spain's National Parks have received an average of approximately 10 million visitors per year, with numbers peaking in 2004 (11,134,880). In this regard, the Teide (3.4 million visitors), Picos de Europa (1.8 million) and Timanfaya (1.7 million) National Parks received the highest numbers of visitors on average throughout the period analysed.

As regards the number of visitors per hectare, this variable peaked in 1998 (40.6 visitors/ha) before decreasing in successive years to stand at an average of 28.7 visitors per hectare in 2009. As mentioned earlier, this trend was due to the

creation of new parks. The Garajonay, Teide, Timanfaya and Caldera de Taburiente National Parks continued to receive the highest number of visitors per hectare.

As in previous years, in 2009 the Canary Islands accounted for over half (54.1%) the total number of visits to National Parks, although only the Teide National Park recorded an increase in visitor numbers. The remaining parks registered downturns attributable to the forest fires affecting the Caldera de Taburiente National Park and the general decline in tourism in the Islands.

VISITORS TO NATIONAL PARKS (2008–2009)

NATIONAL PARK	Area (ha)	2008		2009	
		Visitors	Visitors/ha	Visitors	Visitors/ha
Aigüestortes i Estany de S. Maurici	14,119	304,606	21.6	329,227	23.3
Archipiélago de Cabrera	10,020	60,804	6.1	60,662	6.1
Cabañeros	40,856	78,767	1.9	90,001	2.2
Caldera de Taburiente	4,699	408,088	86.8	337,649	71.9
Doñana	54,251	350,055	6.5	288,897	5.3
Garajonay	3,986	860,000	215.8	625,801	157.0
Islas Atlánticas de Galicia	8,480	254,000	30.0	274,716	32.4
Monfragüe	18,118	331,788	18.3	306,041	16.9
Ordesa and Monte Perdido	15,608	616,600	39.5	617,500	39.6
Picos de Europa	64,660	1,712,668	26.5	1,818,674	28.1
Sierra Nevada	86,208	684,573	7.9	673,302	7.8
Tablas de Daimiel	1,928	94,687	49.1	105,957	55.0
Teide	18,990	2,866,057	150.9	3,052,830	160.8
Timanfaya	5,107	1,600,175	313.3	1,371,349	268.5
TOTAL PPNN	347,030	10,222,818	29.5	9,952,606	28.7

Source: National Parks Agency. MARM, 2010

Notes: Size of Islas Atlánticas National Park: 7,282.2 marine ha and 1,194.8 terrestrial ha. Size of Cabrera National Park: 8,703 marine ha and 1,318 terrestrial ha.

NOTES

- The decreases observed in the graph (1999, 2003 and 2007) correspond to expansion of the National Parks Network to include the Sierra Nevada, Islas Atlánticas de Galicia and Monfragüe National Parks, respectively. The latter was incorporated by Law 1/2007, of 2 March, declaring creation of a National Park (BOE no. 54, of 3 March 2007), and increased the size of the National Parks Network by 5.22%.
- The area within National Parks may be publicly or privately owned. In two cases, the Cabrera Archipelago and Garajonay, the entire National Park is publicly owned. In five other cases — Aigüestortes, Ordesa, Tablas de Daimiel, Teide and Timanfaya — over 90% of the area is publicly owned. Significant areas of the Caldera de Taburiente (86%), Monfragüe (67%) and Doñana (15.6%) National Parks are also publicly owned.

SOURCES

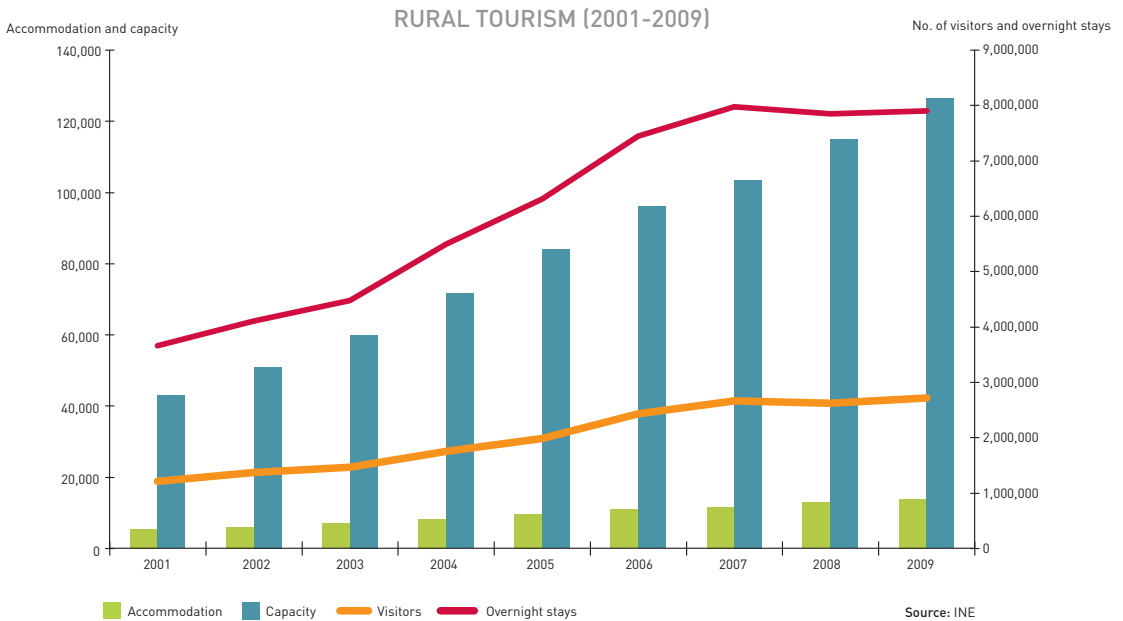
- National Parks Agency. Documentation service, 2010.
- National Parks Network. MARM: Primer informe de situación de la Red de Parques Nacionales a 1 de enero de 2007.
- INE. National Parks by situation, area and ownership, 2010.

FURTHER INFORMATION

- <http://www.mma.es>
- <http://reddeparquesnacionales.mma.es/parques/index.htm>
- <http://www.ine.es>

Rural tourism: accommodation, capacity, tourists and overnight stays

In 2009, rural tourism continued its year-on-year growth, although the number of tourists (3.25%) and overnight stays (0.74%) rose by less than the increases in accommodation (8.56%) and capacity (10%)



In relation to 2008, the number of establishments offering rural accommodation rose by 8.56% and the capacity available increased similarly (9.99%). The number of tourists also increased (3.25%), as did, to a lesser extent, the number of overnight stays (0.74%). Following the trend of recent years, there was a reduction in the average length of stay, which stood at 2.92 nights, compared to 2.99 in 2008 and 3.34 in 2001.

Overall, the rural tourism industry remained stable in 2009, a fact that deserves to be emphasised in the context of the downturn in consumer spending in general and in the tourism sector in particular. However, there appears to be an imbalance between the significant increase in supply (accommodation and hotel beds) and the number of tourists and, above all, overnight stays, which remained practically the same as the year before.

Analysis of the data by autonomous community reveals that the greatest number of establishments offering rural accommodation were located in Castile-Leon, Catalonia, Asturias, Andalusia, Castile-La Mancha and Aragon, all of which had over 1,000 establishments (66.5% of the total). In relation to 2001, the largest increases in the number of facilities occurred in Andalusia, followed by Extremadura, Valencia and Castile-La Mancha. The number of establishments in Andalusia increased fivefold in comparison with the base year.

By number of tourists received, Castile-Leon once again led the ranking with over half a million (611,289), followed by Catalonia (329,205), Cantabria (201,042) and Asturias (187,384). As regards the average length of stay in the various autonomous communities, the Canary Islands and Balearic Islands (traditional holiday destinations) recorded the highest figures at around 6.1 nights (Canary Islands) and 4.9 nights (Balearic Islands), both above the national average.

Between 2001 and 2009, rural tourism developed significantly and the sector's infrastructure expanded from comprising 5,497 establishments and 42,925 beds to 13,889 establishments and 126,235 beds. With regard to use of these facilities, the number of tourists increased by 123.7% to reach 2.7 million in 2009. The number of overnight stays also increased (115.8%) to stand at 7.9 million in 2009.

The social return of this subsector of the hotel and catering industry is measured in terms of the number of jobs it provides. In 2001, it provided employment for 7,973 people. This figure increased steadily over the period to reach 21,041 in 2009. In other words, it has created 1.5 jobs per establishment offering rural accommodation. Finally, employment increased by nearly 3% between 2008 and 2009.

NOTES

- Rural tourism accommodation refers to establishments or houses that charge for tourist accommodation (with or without other complementary services) and that are listed in the Tourist Accommodation Register maintained in each autonomous community. These establishments tend to share several common features, such as being located in buildings typical of the local architectural style or on working farms (agro-tourism).
- Law 45/2007, of 13 December, on sustainable development of the rural environment, promotes rural tourism by managing supply and encouraging demand. Particular attention is paid to sustainable tourism in priority rural areas and to agro-tourism.

SOURCES

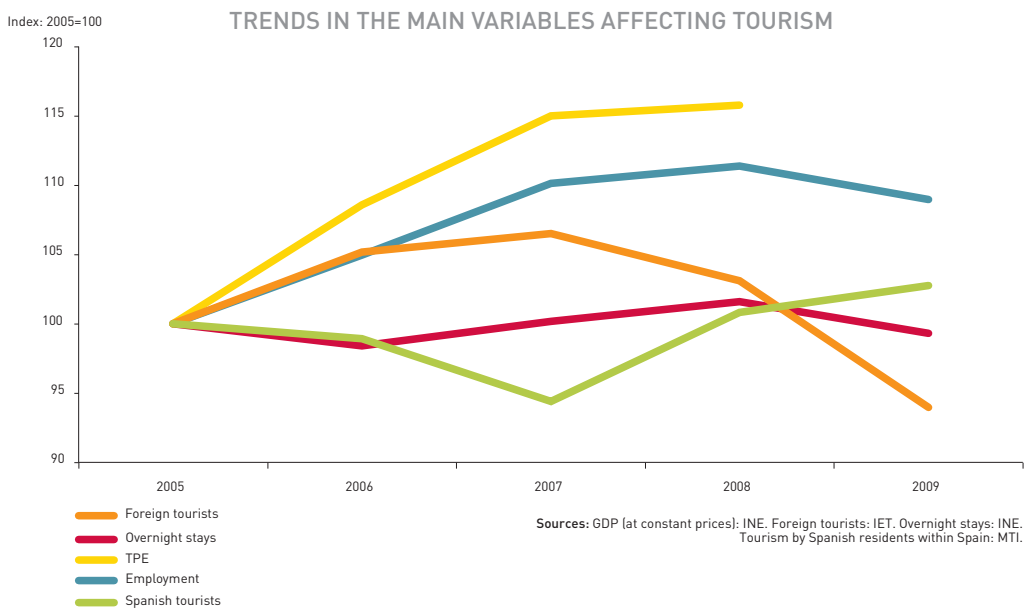
- INE. Tourist Accommodation Occupancy Survey, 2009.

FURTHER INFORMATION

- [http:// www.marm.es](http://www.marm.es)
- <http:// www.ine.es>

Trends in the main variables affecting tourism in Spain

After reaching record figures in 2007, tourism in Spain suffered the consequences of the global crisis in 2008 and 2009, with some variables being affected more than others



The tourism industry was affected by the global financial crisis in the second half of 2008, a trend that became even more pronounced in 2009. The number of foreign tourists fell from 55.7 million in 2005 to 52.2 million in 2009, a level similar to that recorded in 2002. Nevertheless, this decline occurred after a sustained increase that lasted several years and peaked at its highest-ever level in 2007.

For its part, employment in the sector rose significantly until 2008 and even though there was a downturn in 2009, this was very moderate and still remained nine percentage points above the base year level. According to data provided by the Ministry of Labour and Immigration, in 2009 the number of sector employees making social security contributions stood at 1,917,405, an increase of 158,049 on 2005.

Tourism's gross domestic product at current prices (base year 2000) grew significantly until 2008 (the last year for which data are available) and was 15.5 points above the base year figure. In absolute terms, it rose from €98.39 billion in 2005 to €113.93 billion in 2008.

NOTES

- The GDP figures (absolute values) for 2007 are provisional, while those for 2008 are an advance estimate.
- The data for tourism by Spanish residents (2009) are taken from the statement released by the IET for the month of October. The figures for November and December are estimates based on the previous year's data and were calculated to provide annual figures, as the official data had not been published at the time of going to press.

SOURCES

- INE: GDP at constant prices. Tourism Satellite Account of Spain. Base 2000. Accounting series 2000–2008.
- INE: Domestic tourism (overnight stays by tourists resident in Spain).
- INE: Occupancy surveys (overnight stays by foreign tourists).
- INE: Inbound tourism (number of foreign tourists).
- Ministry of Labour and Immigration (quoted by the IET): Number of employees in all tourism activities making social security contributions.
- IET: FAMILITUR (tourism by Spanish residents) and recent data on tourism and overnight stays.

FURTHER INFORMATION

- <http://www.iet.tourspain.es>
- <http://www.ine.es>