
2.10

TOURISM



Tourism in Spain continues to grow, with the number of non-resident tourists rising year on year. In 2005, more than 55.6 million non-Spaniards chose Spain as a holiday destination, a 6% increase on the 2004 figures. 2005 also produced a positive balance in terms of tourism revenue, which rose by 4.3 percentage points, despite a slight drop in the average expenditure per tourist. While tourists spent an average of € 872 during each stay in 2004, the figure for 2005 fell to € 855. This trend was confirmed in 2006, with preliminary figures placing the number of foreign tourists at around 58 million.

Tourist habits have changed, following a trend which first emerged some time ago: more non-Spaniards visit Spain, but stay a shorter time and spend more per day, hence the fact that the sector continues to grow despite lower average overall expenditure.

The United Kingdom, France and Germany are well established as Spain's biggest sources of visitors, making up 63% of entries into the country. Six Autonomous Communities (Madrid, Catalonia, Valencia, Andalusia, the Canary and Balearic Islands) accounted for 90% of all visits.

The figures for employment generated by tourism again serve to confirm 2005 as a good year for the sector in Spain. According to Spain's Active Population Survey



(*Encuesta de Población Activa*), 2,345,415 people were employed in activities connected with tourism in Spain, 4.8% more than in 2004.

In terms of modes of transport, a new factor has made dramatic inroads over recent years: low-cost airlines (LCAs) brought in more than 15 million tourists in 2005, 29.7% of all arrivals by air (51.4 million). Air travel is booming, growing by 30.8% on the previous year.

The focus of tourism on overseas travel has led to the emergence of an extensive infrastructure which is highly profitable from a financial point of view, but far from sustainable environmentally. Hotels and other accommodation right on the shoreline, vast tourist complexes and the proliferation of golf courses in areas with a negative water

INDICATOR	GOAL	TREND
Number of foreign tourists per resident	Define real accommodation capacity of tourist destinations	All-time peak reached in 2005
Number of foreign tourists per km of coast	Minimise the impact of the presence of foreign tourists on the coast	Imbalance among Autonomous Communities. Increase in tourist numbers on the Bay of Biscay and Galician coast
Changes in Tourist Population Equivalent (TPE)	Assess tourist pressure on Spain	TPE fell by 3.1% over the period 2001-2004
Number of visitors to National Parks	Preserve National Parks in light of tourist pressure	Fall in visitors in 2005

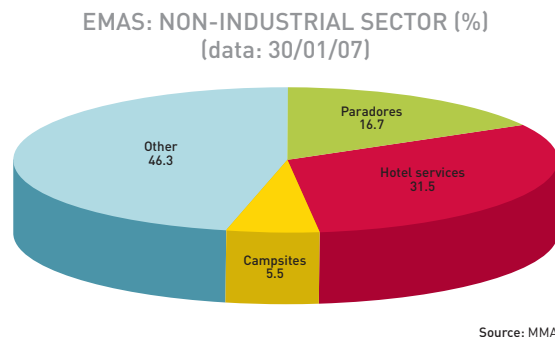
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balance lead to the degradation of the coastline and landscape, exhaustion of resources and congestion of resort towns.

This chapter presents indicators portraying the increase in the number of foreign tourists per resident, modes of transport used to arrive in Spain (with a growing predominance of air travel), the number of foreign tourists per kilometre of coast, changes in the Tourist Population Equivalent (i.e. the proportion of the visiting population in relation to the host population), and finally the number of visitors to National Parks. The final indicator is the only one to see a significant fall in 2004-2005.

Towards environmental management in the tourist sector

EMAS is the European Union's environmental management system. Within Spain, it has been implemented on a voluntary basis across various productive sectors and institutions, with 675 organisations, responsible for 830 centres, having signed up by January 2007. Non-industrial organisations account for 438 members, of which number 235 are connected with tourism, meaning that tourist organisations signed up to EMAS represent 53.7% of non-industrial organisations.



The graph presents the percentage breakdown across hotel services (138), Paradores (73) and campsites (24). The adoption of EMAS by the hotel sector allows for systematic, objective and regular assessment of its operations, making it easier to advance towards sustainability.

Sustainability in tourism involves increasing alternatives to avoid concentration, overcrowding and seasonality, encouraging inland tourism and a change in inland travel habits, promoting more sustainable modes of transport. The Integral Quality Plan for Spanish Tourism (*Plan Integral de Calidad del Turismo Español* - PICTE 2000-2006) has

been focusing on developing high-quality tourism as a means of counteracting seasonality and diversifying the available offering.

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.
- The carrying capacity of an area, according to the UNEP, is 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.

SOURCES

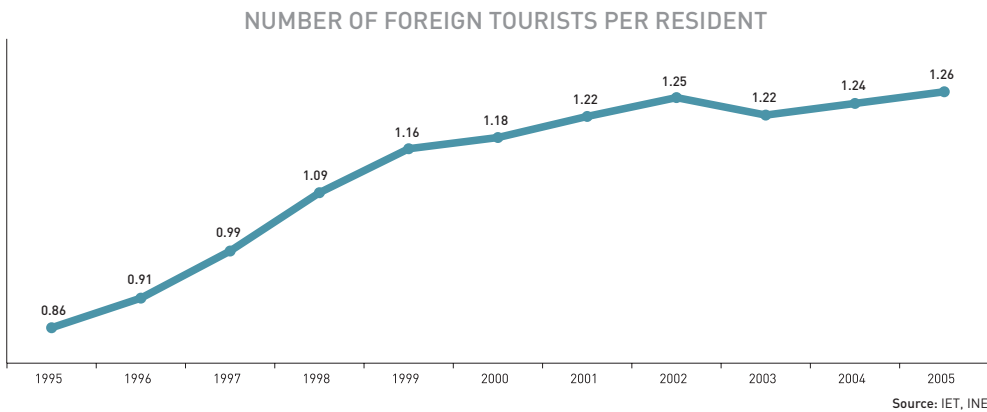
- Spanish Border Survey of Inbound Tourism (FRONTUR - *Movimientos turísticos en fronteras*). Spanish Institute of Tourism Studies (*Instituto de Estudios Turísticos*). Spanish Ministry of Trade, Industry and Tourism (*Ministerio de Industria, Turismo y Comercio*).
- Spanish National Institute of Statistics (INE - *Instituto Nacional de Estadística*).

FURTHER INFORMATION

- www.ine.es
- www.iet.tourspain.es

Number of foreign tourists per resident

Arrivals of foreign tourists in Spain rose by 6% in 2005 compared with 2004

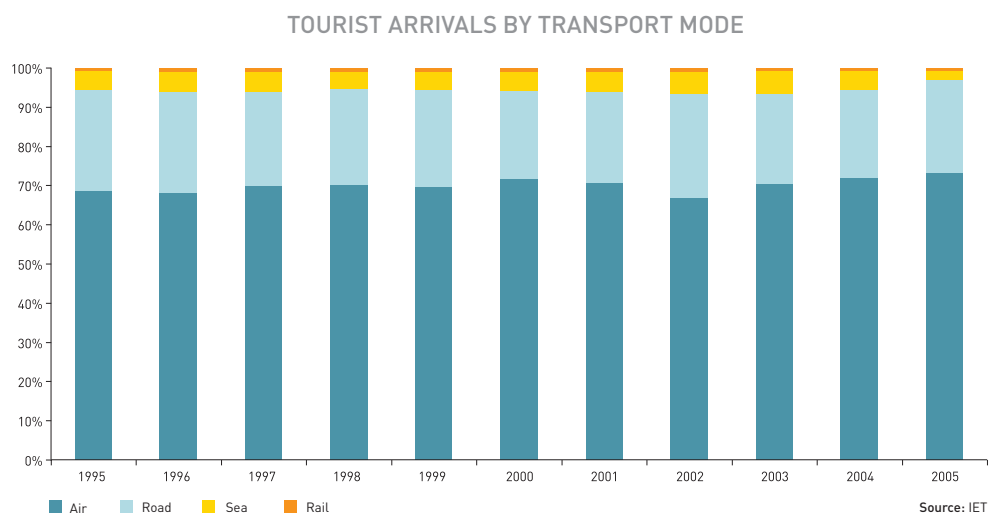


The graph shows the number of foreign tourists per resident visiting the country each year, with the curve steadily rising. Comparing Spain with other nearby countries, the index is similar to that of France in 2004 (1.26) and somewhat lower than that of Italy (1.54). It must however be remembered that the average pressure exerted by tourists nationwide is much lower than that seen in traditional tourist areas and in particular the islands.

Despite the obvious financial benefits of an increase in tourists, their arrival also leads to greater resource and energy consumption, more waste generation, expansions in 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, concentrating environmental pressures during a short period of time and thereby exacerbating the situation, at times exceeding the environment's carrying capacity.

In terms of transport modes, not only does air travel continue to be the tourist's favoured form of entering the country, it also makes up an ever greater proportion, accounting for 73% of journeys in 2005.



The only mode of transport which approaches sustainability targets is rail, which has seen a clear decline since the end of the 1990s, when it reached its peak, and not even then did it account for more than 1% of tourist arrivals. In 2005, barely 320,000 tourists arrived in Spain by rail, while maritime arrivals are also at a low level, being used for just 2.5% of journeys.

NOTES

- The 2005 figures for tourist arrivals by mode of entry are provisional.

SOURCES

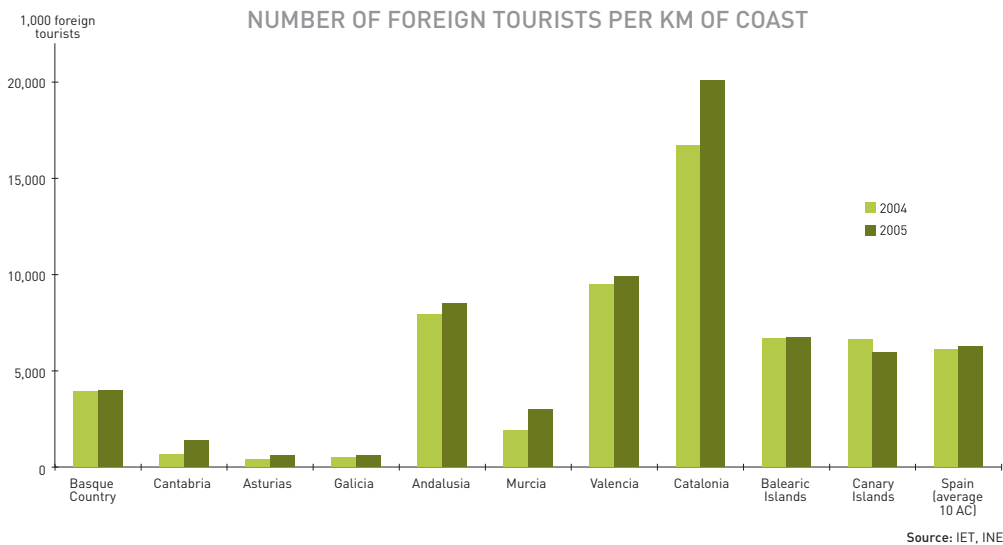
- Spanish Institute of Tourism Studies. Balance of Tourism in Spain 2005 (*Balance del turismo en España en 2005*).
- Spanish Border Survey of Inbound Tourism. Spanish National Institute of Statistics. Inbound tourism. Tourist arrivals by Autonomous Community 2004-2005 (*Turismo receptor. Entrada de turistas por CCAA 2004-2005*).

FURTHER INFORMATION

- www.iet.tourspain.es
- www.ine.es

Number of foreign tourists per km of coast

The tourist presence on Spain's coastline in 2005 stood at 6,258 tourists per kilometre of coast, with major differences among the Autonomous Communities

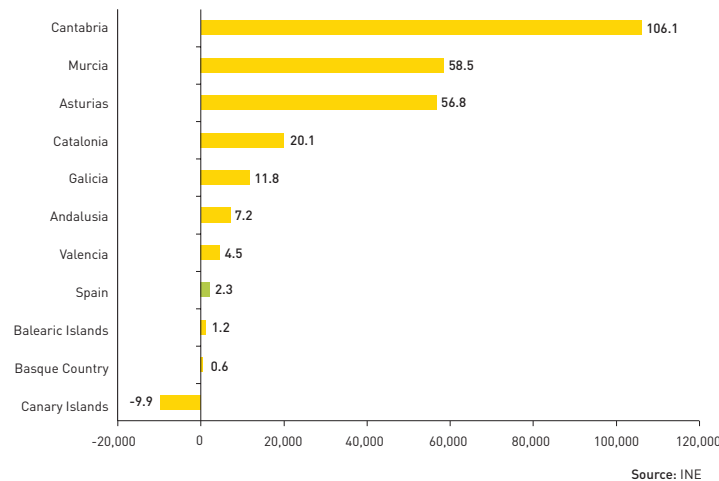


The pressures which build up along the coastline include in particular those derived from tourism, especially in the most appealing areas and above all in summer. The influx of foreign tourists constitutes one of the most significant aspects of this pressure. As is well known, tourism is seen as one of Spain's main sources of income, as clearly reflected in its share of GDP.

In both 2004 and 2005, almost 50 million foreign tourists visited the Spanish coast, an average of 6,258 tourists per kilometre of coast per year. By Autonomous Community, in 2005, Catalonia (20,080 tourists per km) was most popular, followed by Valencia (9,895), Andalusia (8,493) and the two island groups. On the Bay of Biscay, the Basque Country has the highest figure (3,947), while Asturias, Cantabria and Galicia have lower levels, although pressure is tending to increase. The major regional differences may be seen in the fact that Catalonia receives 46 times more foreign tourists than Asturias.

Overall, the northern and north-western coastlines have seen levels rise from 850 tourists per kilometre of coast in 2004 to 1,007 tourists per kilometre in 2005, while the Mediterranean seaboard and Andalusia received 11,499 foreign tourists per kilometre of coast in 2005, compared with 10,094 the previous year.

RATE OF INCREASE IN FOREIGN TOURISTS PER KILOMETRE
OF COAST IN COASTAL REGIONS 2004-2005 (%)



Consideration must also be given to foreign day-trippers spending a day in Spain. Given their proximity to the French border, Catalonia and the Basque Country receive several million day-trippers every year, with Catalonia being visited by 9.4 million in 2004 and 10.9 million in 2005, and the Basque Country by 7.2 million in 2004, rising to 7.8 million in 2005. Day-trippers arriving in Galicia from Portugal also account for a substantial number (4 million per year).

Finally, in terms of pressure from domestic tourism, it should be highlighted that Spanish tourists also tend to travel to the mainland's Mediterranean coast: Andalusia accounts for 20.6% of all domestic tourist travel, followed by Valencia (13.2%) and Catalonia (13.1%). These three regions are the destination of almost half (46.9%) of Spain's annual domestic tourist travel. The average length of stay is 9.6 days, with the largest number of tourists coming from the Basque Country, Madrid, Catalonia, Navarre, Rioja and Murcia.

NOTES

- In calculating this indicator, the number of tourists throughout the Autonomous Community is considered. This should be remembered when interpreting the indicator for those Autonomous Communities that have both a coastline and a considerable inland area.

SOURCES

- Spanish Border Survey of Inbound Tourism. Spanish Institute of Tourism Studies.
- Spanish National Institute of Statistics.

FURTHER INFORMATION

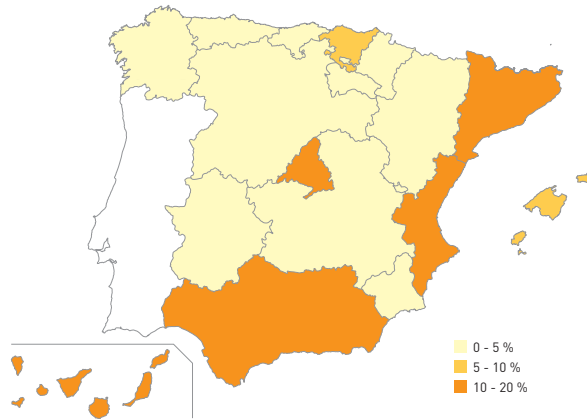
- www.mma.es
- www.iet.tourspain.es
- www.ine.es

Changes in Tourist Population Equivalent (TPE)

Overnight stays by tourists increased by 9.89% over the period 2001-2004

% TPE COMPARED WITH POPULATION, 2004 (*)

Aut. Comm. (AC)	Compared with AC	Compared with national total
Andalusia	3.40	12.77
Aragon	4.60	2.81
Asturias	4.15	2.14
Balearic Islands	14.97	8.02
Canary Islands	10.54	10.76
Cantabria	2.46	0.66
Castile-Leon	3.92	4.72
Castile-La Mancha	2.98	2.69
Catalonia	4.65	15.76
Valencia	4.48	10.15
Extremadura	2.65	1.36
Galicia	2.08	2.71
Madrid	5.56	16.10
Murcia	3.49	2.24
Navarre	3.42	0.97
Basque Country	5.46	5.65
Rioja	3.36	0.48



Source: compiled in-house
 (*) See definition of Local Population in Notes

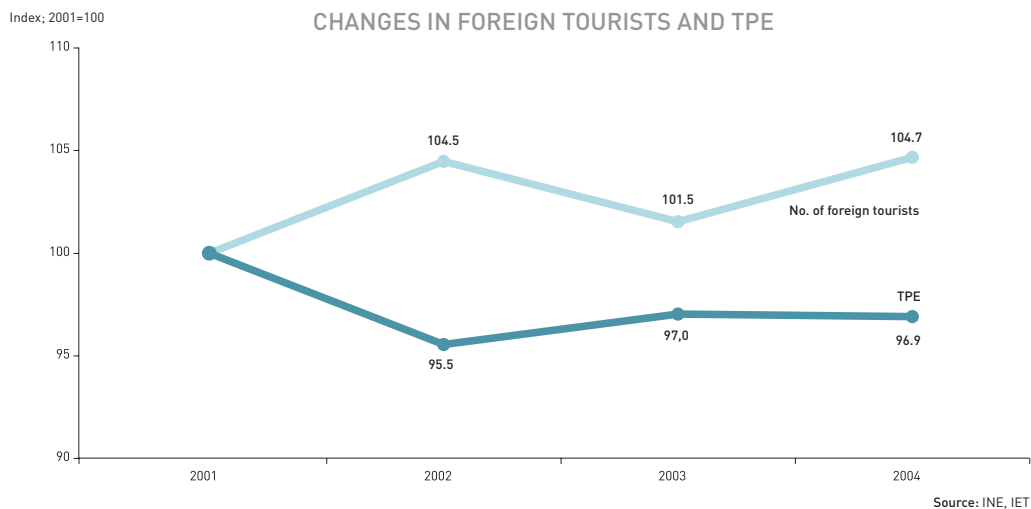
The Tourist Population Equivalent (TPE) is the total of all overnight stays at hotel accommodation, campsites, tourist apartments and rural accommodation by foreign and Spanish tourists, in addition to overnight stays by Spanish citizens at second homes, divided by the 365 days of the year. In other words, the TPE tells us the population (living all year round in Spain) equivalent to the number of overnight stays recorded in the tourist statistics.

The TPE allows a more precise analysis to be made of the pressure exerted by tourism. The indicator most commonly seen in the media in terms of tourism are the growing millions of foreign tourists travelling to Spain. However, the length of their stay in the country is declining, in accordance with the ever-increasing fragmentation of holiday periods and the highly diverse tourist destinations available worldwide.

The Tourist Population Equivalent, taken as a percentage of the Local Population (1) (of Spain or, where applicable, of each Autonomous Community), provides a means of assessing tourist pressure on destination areas. High figures, of 10% or above, indicate that the tourist sector produces an average annual increase in population on the same scale. This naturally has an impact on resource consumption and urban and environmental service management, as well as influencing spatial planning and land use.

As may be seen from the above table, in Spain as a whole, Madrid (16.10) has the highest TPE percentage in relation to Local Population, followed by Catalonia (15.76), Andalusia (12.77), the Canary Islands (10.76) and Valencia (10.15). At the other end of the scale we have Rioja (0.48), Navarre (0.96), Cantabria (0.66) and Extremadura (1.36).

However, this proportion changes radically if we look at TPE for each Autonomous Community in comparison with its Local Population. According to this criterion, the 10% level is exceeded only by the Balearic (14.97) and Canary Islands (10.54).



This imbalance in the change in number of foreign tourists and TPE percentages may be seen in the graph. By combining both sets of figures in one index, the number of foreign tourists can be seen to increase by 4.66 points over the period 2001-2004, while TPE fell over the same period by a similar amount (3.09). The absolute figures in the table below reveal a fall of around 22 million overnight stays during the period examined, equivalent to 9.89%.

(1) See definition in Notes.

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	Overnight stays in Spain by foreign tourists	Overnight stays in Spain by Spanish tourists	Overnight stays in second homes by Spanish citizens
2001	231,997,709	403,141	150,113
2002	220,651,297	382,908	146,657
2003	217,801,923	389,587	154,498
2004	209,041,767	387,271	164,652

Source: INE

NOTES

The Tourist Population Equivalent (TPE) is the sum total of all overnight stays at hotel accommodation, campsites, apartments and rural accommodation by foreign and Spanish tourists, and overnight stays by Spanish citizens at second homes, divided by 365.

$TPE = (Ons + Onf + Onsh) / 365$, where:

Ons = number of overnight stays by Spanish tourists.

Onf = number of overnight stays by foreign tourists.

Onsh = number of overnight stays in second homes by Spanish tourists.

The percentage Tourist Population Equivalent is calculated as follows:

$\% TPE = (TPE / TTP) * 100$, where Total Population Present $TTP = LP + TPE$.

TPE is defined above, while LP = Local Population, namely:

$LP = \{[\text{Registered population} * (365 \text{ days} - 10 \text{ days})] / 365 \text{ days}\} - [\text{Overnight stays in second homes by Spanish tourists within the local area} / 365 \text{ days}]$

The figures for the Registered Population are drawn from the INE's Municipal Register at national and regional levels.

The Local Population (national and regional) has been estimated using an average holiday period of 10 days, during which the local registered population leave their place of residence. This period corresponds to the figure provided by the IET's Familitur surveys on Spanish tourist movements, the 2004 edition of which, for example, gave an average stay by Spanish tourists on holiday of 9.3 nights.

SOURCES

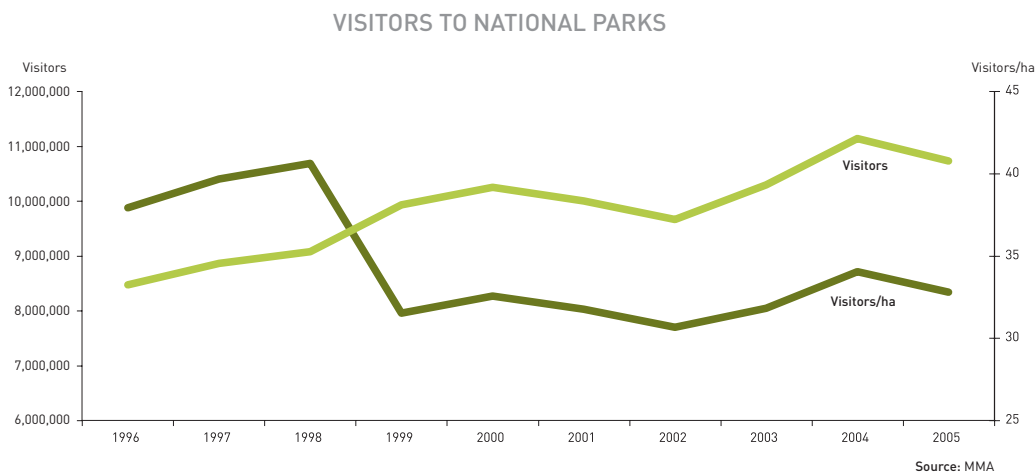
- Spanish National Institute of Statistics (INE). Overnight stays by foreign tourists in hotels, tourist apartments and rural accommodation (*Pernoctaciones de turistas extranjeros en hoteles, apartamentos turísticos y turismo rural*).
- Spanish National Institute of Statistics (INE). Drawn from the annual municipal census statistics (2001-2004).
- Spanish Institute of Tourism Studies. Familitur survey (various years).

FURTHER INFORMATION

- www.ine.es
- www.iet.es

Number of visitors to National Parks

The Canary Islands' National Parks receive 65% of the visitor total, and have the highest visitors per hectare ratio



A National Park is a natural area of considerable ecological value subject to limited human impact and which, on account of its natural worth (wealth of flora and fauna) or its geomorphological features, deserves to be preserved. This is the highest level of conservation protection afforded in Spanish law, and such areas are also the subject of scientific research and study.

Balancing conservation and use and enjoyment of such areas is no simple task. The millions of visitors every year to Spain's National Parks exert pressures on these areas, among them the need to create the minimum required infrastructure, waste generation, degradation by traffic, increases in noise levels, etc.

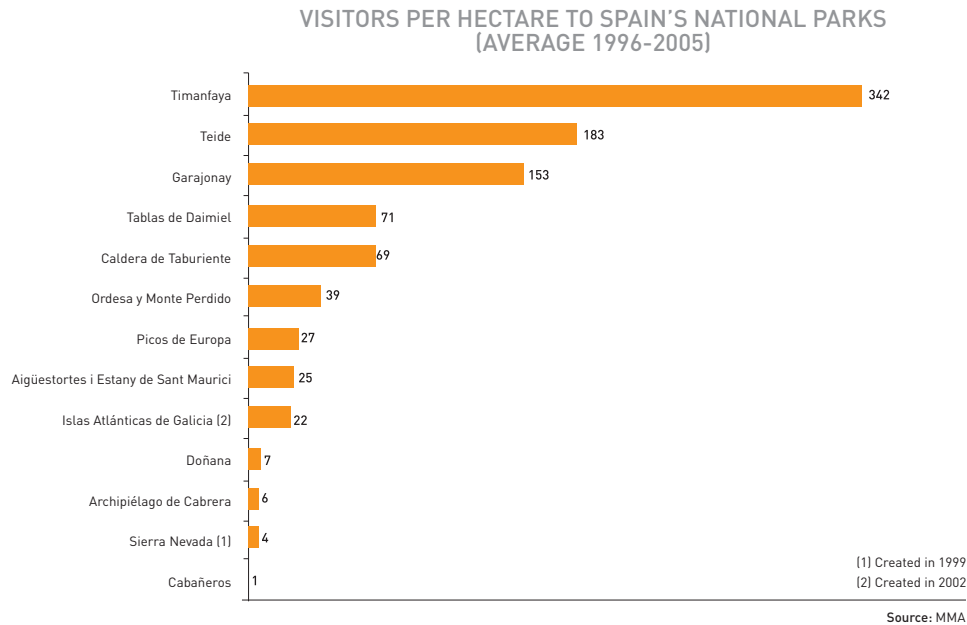
For the third time in the last ten years, the number of visitors to National Parks has fallen, with only the National Parks covering the Islas Atlánticas in Galicia, Ordesa and Sierra Nevada registering a slight increase in numbers compared with the previous year, while all others have lower visitor numbers, producing a slight fall of 3.6% for the thirteen National Parks as a whole.

As may be seen in the graph, 1999 saw a considerable decrease in terms of the number of visitors per hectare, despite the fact that the number of visitors continued to rise.

This variation was due to the inclusion in the classification of the Sierra Nevada National

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Park which, in terms of total area, is the largest in Spain at 86,208 hectares. The high number of endemic species present in the Park also make it one of the largest reserves of biodiversity anywhere in Europe.



The Canary Islands are home to four of the five most visited National Parks by visitors/ha, and they also receive 63% of all visits to Spain's National Parks (6,154,932 visitors on average per year). The islands also have the most visited National Park, Teide, which receives an average of 3,471,559 visits per year.

NOTES

- Sentence 194/2004 passed by the Constitutional Court on 10 November 2004 (*Sentencia del Tribunal Constitucional 194/2004*) establishes the requirement for management of Spain's National Parks to be performed exclusively by the Regional Governments of Spain's Autonomous Communities (Official State Gazette (*BOE*) no. 290, 2 December 2004).

SOURCES

- National Parks Network (*Red de Parques Nacionales Ministerio de Medio Ambiente*).

FURTHER INFORMATION

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

