

**The 3rd UNWTO/PATA Forum on**  
**TOURISM TRENDS AND OUTLOOK**

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**Guilin, China**



# How Spain has maintained its status as a top tourist destination

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Marketing Professor

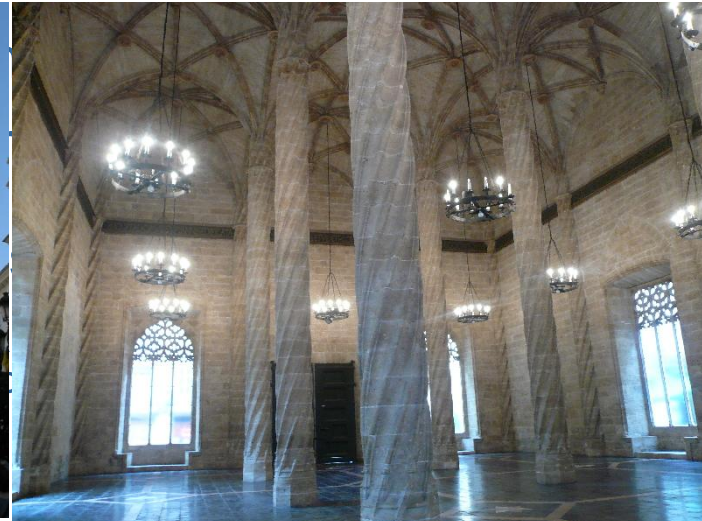
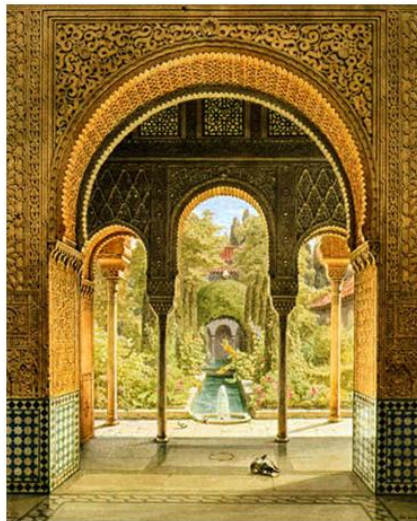
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DE VALÈNCIA [mk]

# Outline 盖恩

- 
1. Spain marks you: Some facts and figures
  2. Tourism indicators for Spain
  3. Tourism growth strategies
  4. Conclusions and challenges for the future

# 1. Spain marks you: Some facts and figures

- Spain is located in southwestern Europe
- The population of Spain reached 46 million people (2008)
- It is a developed country with the 9th largest economy by nominal GDP
- Spanish culture has its origins in the Iberian Peninsula, influenced by Latin, Visigothic, Roman Catholic, and Islamic





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## 2. Tourism indicators for Spain

### Arrivals

Country	Rank					Int. Arrivals 2008 Mill.	Market Share % 2008
	1990	1995	2000	2005	2008		
France	1	1	1	1	1	79.3	8.6
USA	2	2	2	3	2	58	6.3
 Spain	3	3	3	2	3	57.3	6.2
 China	12	8	5	4	4	53	5.7
Italy	4	4	4	5	5	42.7	4.6

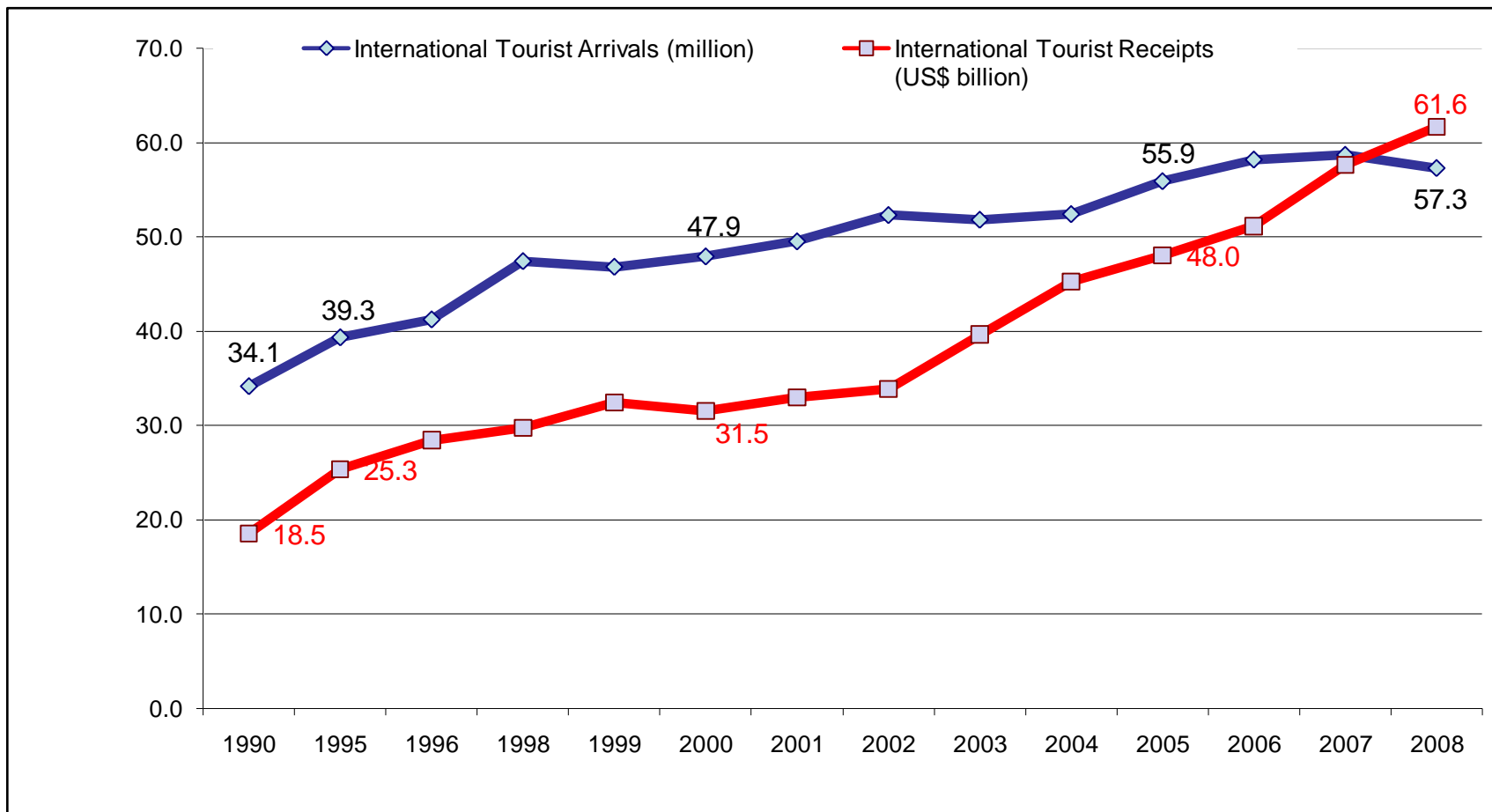
### Receipts

Country	Rank					Receipts US\$ million	Market Share % 2008
	1990	1995	2000	2005	2008		
USA	1	1	1	1	1	110.1	11.6
 Spain	4	4	4	2	2	61.6	6.5
France	2	2	3	3	3	55.6	5.8
Italy	3	3	4	4	4	45.7	4.8
 China	25	10	5	5	5	40.8	4.3

World's Top 5 Tourism Destinations

Source: UNWTO Tourism Highlights

# International Tourist Arrivals & Receipts (Spain)



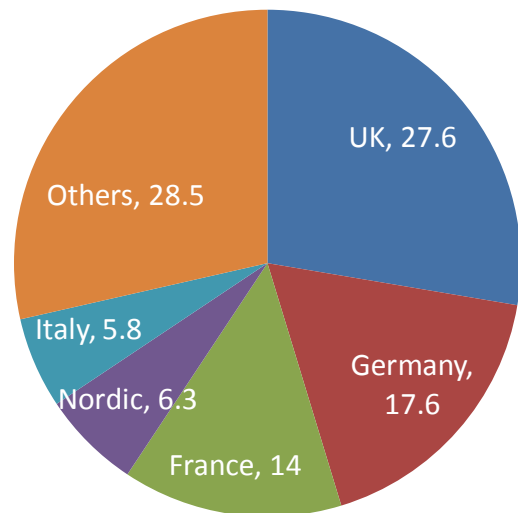
Average growth: 3.78 12.9

Cumulative growth: 68% 233%

Source: UNWTO

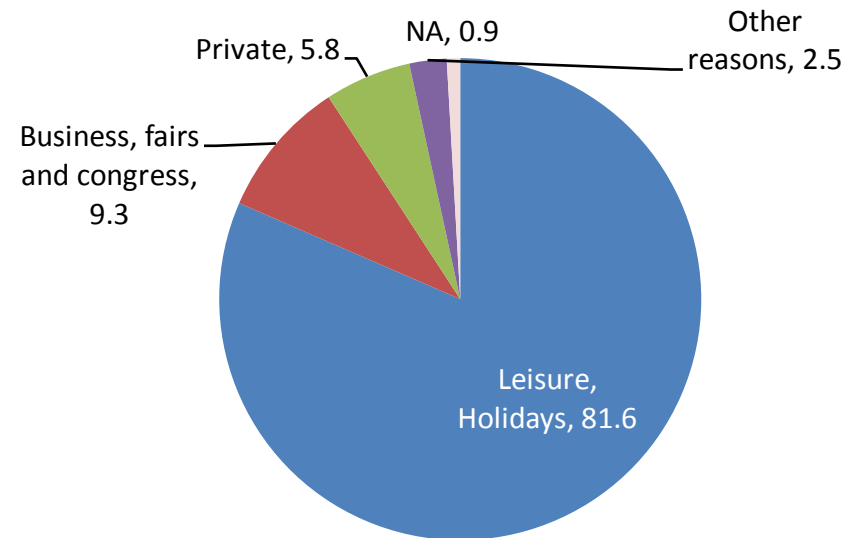
# International Tourist Arrivals Profile 2008 (Spain)

## By country (%)



- Mainly European countries
- 3 concentrate more than 63%

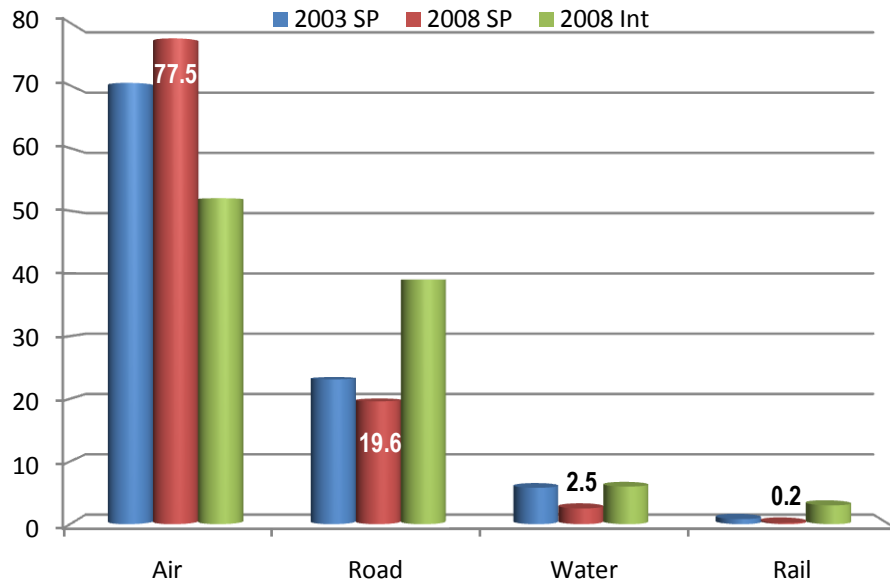
## Arrivals by purpose of visit (%)



- Holydays on the beach is the most important
- 55% perform cultural activity;
- 24% Leisure activities, discos;
- 13% Sport activities

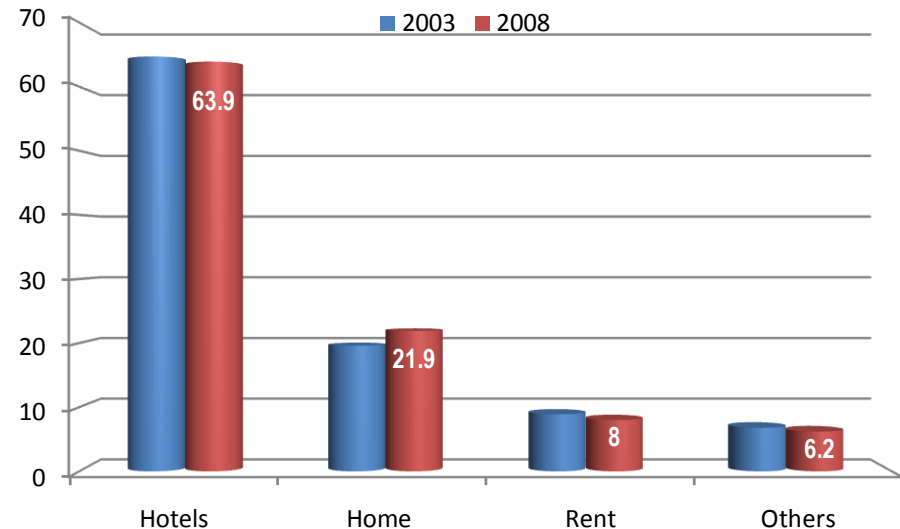
# International Tourist Arrivals Profile 2008 (Spain)

## By means of transport (%)



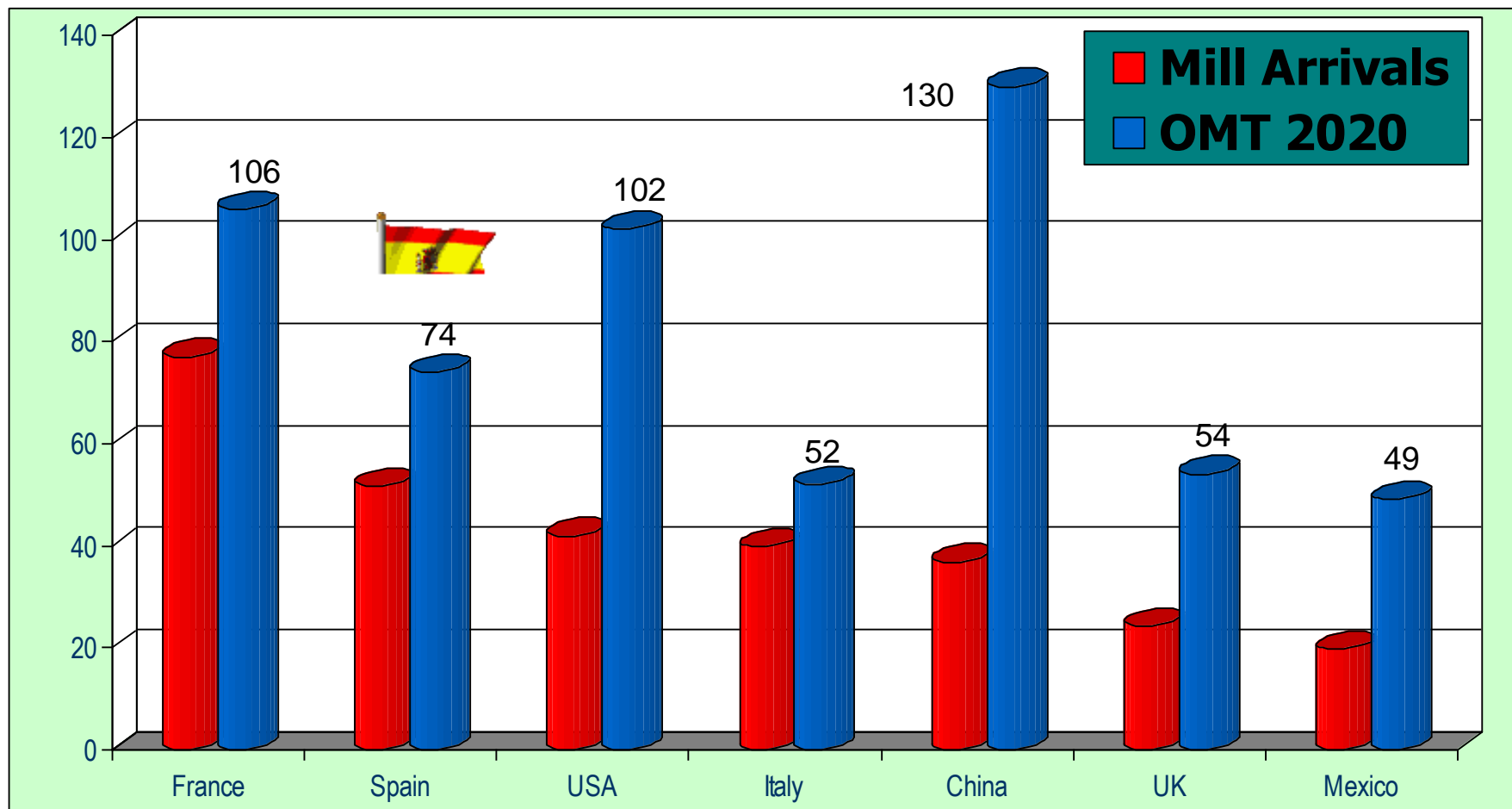
- The plane was consolidated as a gateway for foreign tourists.
- Increase the presence of airlines low cost (CBC's).

## By type of accommodation (%)



The hotel accommodation is mostly used, but loses share (71% in 1997)

# International Tourist Arrivals 2002 -2020



Source: UNWTO

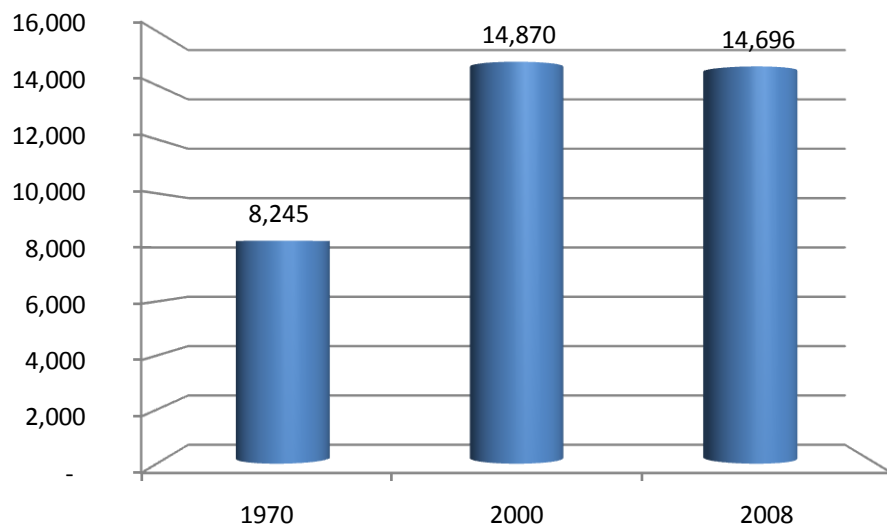
# International Departures by Country 2020

Country of origin	International departures (millions)	Market Share (%)
1. Germany	163,5	10,2
2. Japan	141,5	8,8
3. USA	123,3	7,7
4. China	100,0	6,2
5. United Kingdom	96,1	6,0
6. France	37,6	2,3
7. Netherlands	35,4	2,2
8. Canada	31,3	2,0
9. Russia Fed.	30,5	1,9
10. Italy	29,7	1,9

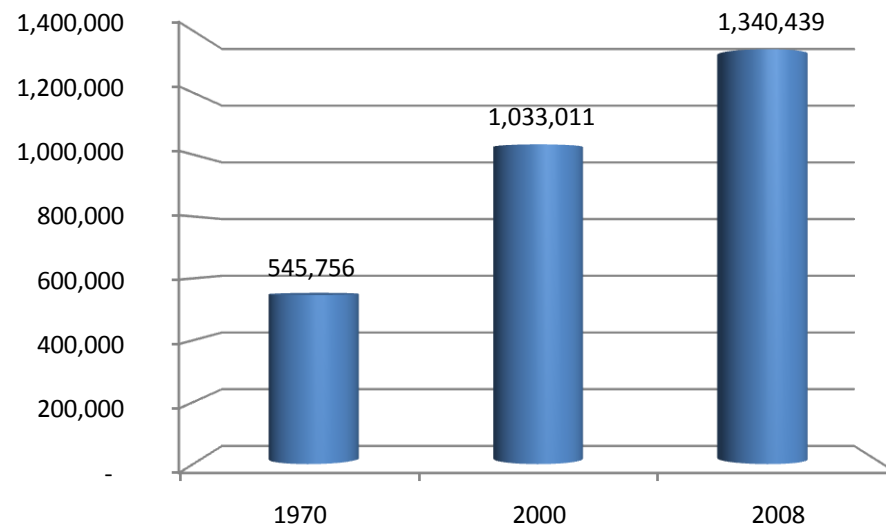
- European Countries
- Asia
- North America

# Evolution of Hotel and Hostels Accommodation. Spain

## Units

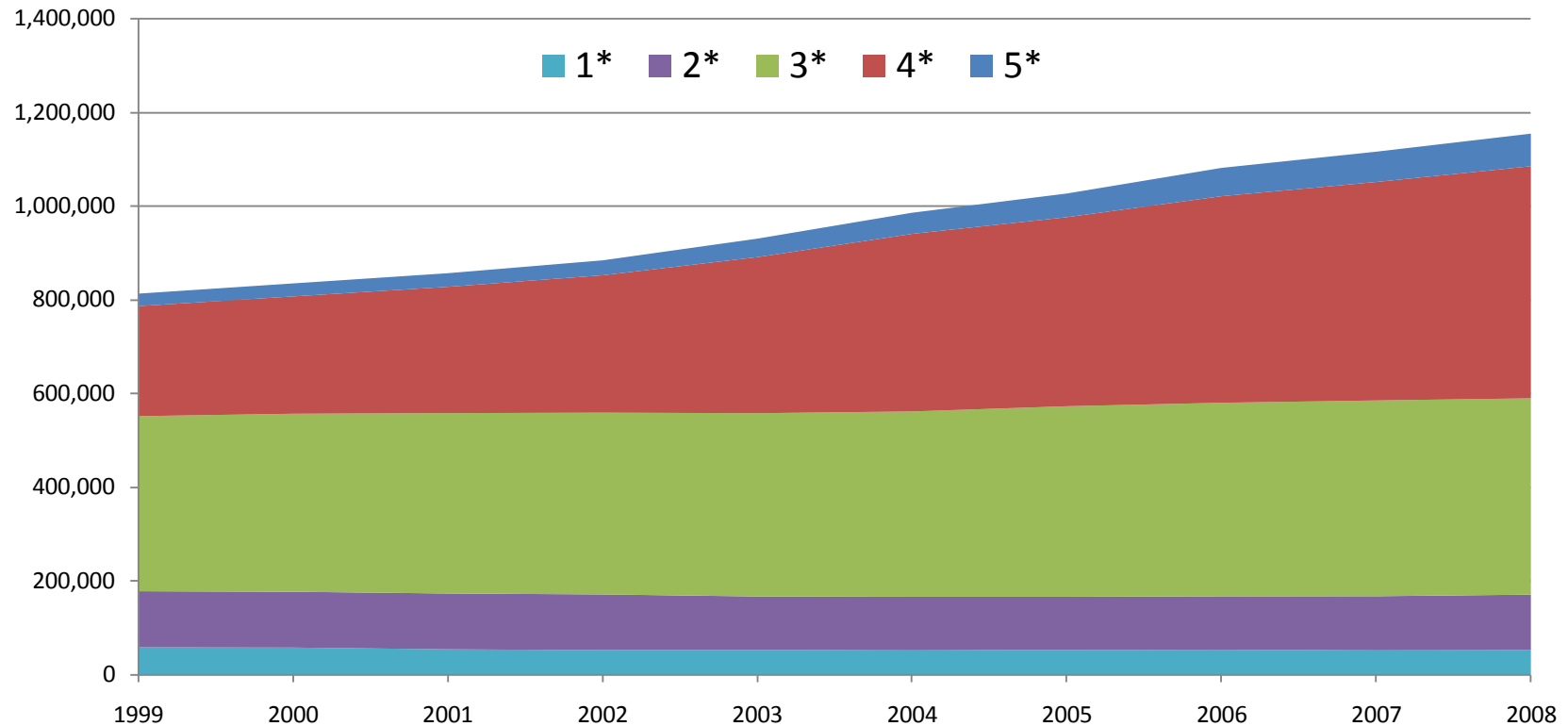


## Rooms



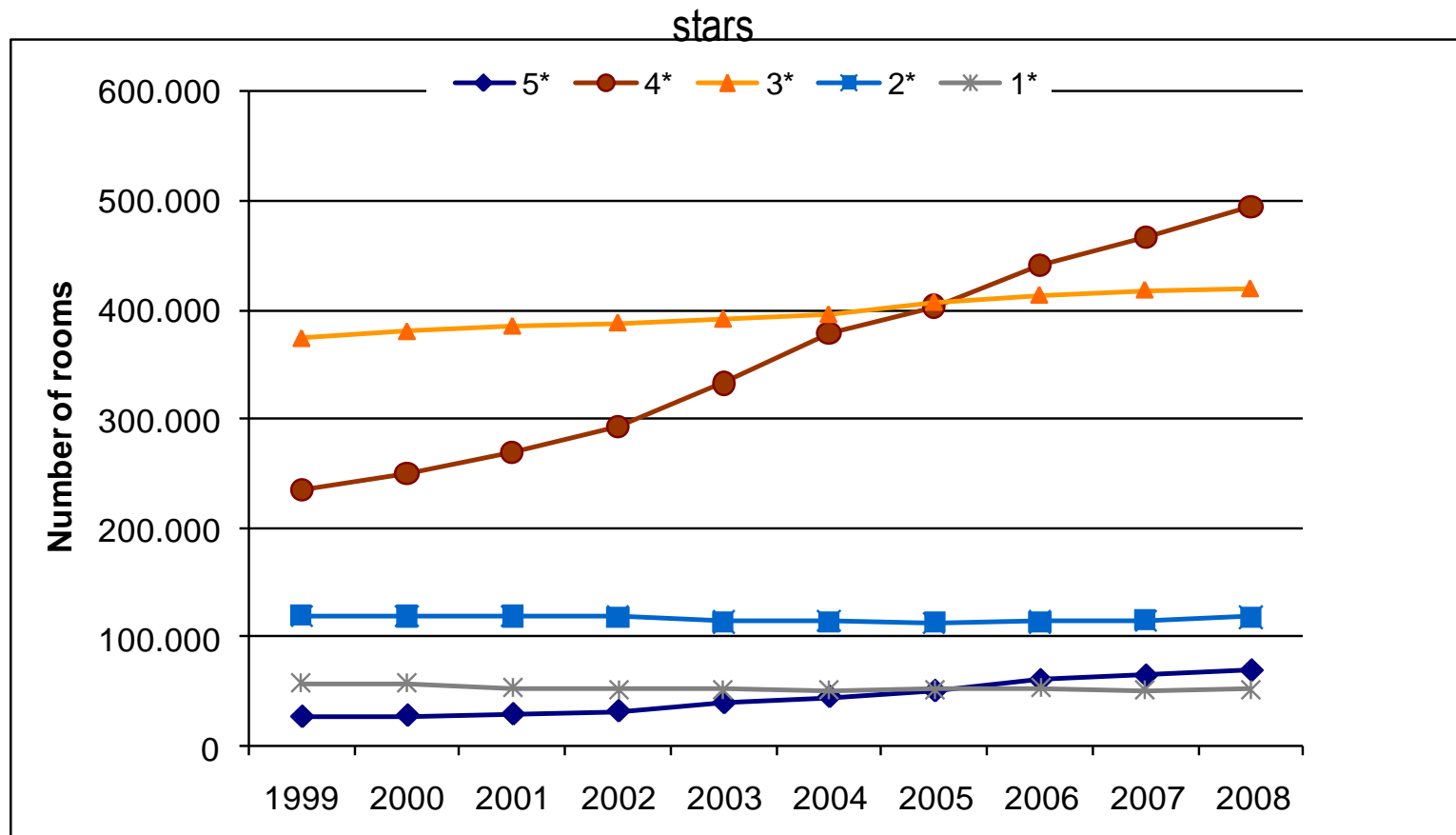
Increases in the average size of establishments

# Evolution of Hotel Rooms by Category. Spain



3 and 4 stars hotels rooms are the most relevant

# Evolution of Hotel Rooms by Category. Spain



Lower category reduces and higher increases (specially 4 stars hotels)

Source: Survey of Hotel Occupation, Encuesta de Ocupación Hotelera, [www.ine.es](http://www.ine.es)

### 3. Tourism growth strategies

- Ansoff Product-Market Growth Matrix

		Products	
		Present	New
Markets	Present	Market Penetration	Product Development
	New	Market Development	Diversification

Emerging tourism destinations, both beaches and others

- New products: cultural, conferences, learn Spanish, sports (golf) health and spa, thematic parks
- New segments: seniors
- Public policies and bodies

# Some drivers of Spanish tourism growth

- Member of the European Union (1993) and Euro (1999)
- Economic growth and stability
- Events:
  - Olympic Games in Barcelona 1992
  - Universal Exposition “Expo” in Sevilla 1992 and in Zaragoza 2008
  - F-1 in Barcelona (1991-) and Valencia (2008-)
  - America’s Cup in Valencia 2007
  - Madrid Open Tennis
- Holiday extension and city breaks
- Low cost airlines development
- Autonomous communities launch new products
- Build up a Tourism Statistic System
- Marketing orientation and perceived value

# Public policies

- First Tourism National Plan launched in 1951
- Two key public bodies: IET and Tourspain
- More relevant was FUTURES Plan (90's) focusing on:  
Innovation Modernization New Products Competitiveness
- QUALITY Plan (2000-2006), including products and destinations
- Plan 2020 (2007-2020), focusing on customer perceived value, and sustainability [www.turismo2020.es](http://www.turismo2020.es)

# Institute for Tourism Studies: Public Knowledge



- It is a public body, under the presidency of Turespaña,
- Main functions of the IET:
  - Investigate the factors that impact on tourism
  - Development, assessment and collection of data related to tourism.
  - Creation and dissemination of knowledge and intelligence and coordination of tourism information on tourism
- Statistics:
  - Frontur: International tourism
  - Familytur: Domestic Tourism
  - Others: Tourism Expenditure Survey ; Tourism Satellite Account; Hotel, Home holiday, Holiday Campsite Occupation Surveys; Lodging Occupancy Survey for Rural Tourism; Labour Force Surey; Hotel Prices Index, Consumer Price Index for Tourism...
- Documentation Center of Tourism is available through website

# Tourspain/Turespaña: A Public Marketing Body

- TURESPAÑA is the Administrative unit of the Central Government charge of promoting Spain abroad as a tourism destination.
- Budget: 148 million Euros (76.8 were used for promotional campaigns and activities). It has 505 staff members
- Strategic Axis:
  1. Market surveys in a broad sense, including how Spain is in the media. IET
  2. Brand image and communication : campaign on-line and off-line in 24 languages in 32 countries.▶
  3. Development of the product and marketing of specific tourism products (Sun and Sea, Cultural and Urban, Sports and Rural, and Congress and Incentive Tourism), as well as the inter-regional trade names
  4. On-line marketing; incorporates on-line information and marketing tools; CRM; [Spain.info](#) site in 19 languages. The on-line advertising campaign, combines four tools: Search Engine Optimization, strategic alliances with web pages, advertising in on-line media and e-mail marketing. ▶
  5. Managerial excellence: Professional seminars and meetings
  6. Crisis management



# Tourspain website in Chinese



- 景点推荐
- 美食
- 计划行程
- 多媒体集锦

## 准备去西班牙旅游

- 关于我们
- 最新消息
- 请下载您所喜爱的西班牙旅游宣传册

## 不容错过

- 西班牙概况
- 西班牙世界文化遗产之旅

## 这星期我们去...

巴塞罗那标志性建筑，世界文化遗产

1883年，天才建筑师高迪（Gaudí）同堂叔Francisco de Paula主持这一工程，高迪将毕生精力都倾注于这座教堂，直至他意外车祸身亡，直到现在，教堂的建设工程仍未结束。第一位建筑师最初将这团教堂设计为新哥特风格，但在他过世后，这项工程转由高迪接手，虽然高迪尊重教堂的初始设计，但很快他就融入了自己的风格和理念。目前，高迪只完成了圣约瑟祭坛（Capilla de San José）、地下室（La Cripta）和耶稣诞生门（Portada del Nacimiento），所有外墙上都有颜色醒目的玻璃元素，而在耶稣诞生门（Portada de la Pasión）上则可以看到密码文字。

## 我们推荐

- 通向圣彼得之门等，教堂建筑
- 教堂建筑博物馆巴勃罗
- 毕尔巴鄂 Bilbao 教堂建筑
- 教堂建筑 西班牙南部大区

<http://www.spain.info/cn/tourspain>



# Advertising. Spain

- It began 80 years ago
- 1970: Spain is different
- 1980 Everything under the sun
- 1984-1989 Everything new under the sun
- 1991-1996 Passion for life
- 1997-2002 Bravo Spain
- 2003-2005 Spain Marks
- 2005-2009 Smile you are in Spain



# SPAIN MARKS. 2003-2005

Objectives: to present Spain as a competitive and differentiated tourist destination: cultural quality, gastronomical quality, environmental quality.  
Budget: 21 million euros in 2002 and 36.9 million euros in 2003.

The main protagonist is the public, the FOREIGN TOURIST,  
It is a campaign with high capacity to mobilize emotions represented in the faces of the protagonists.

www.spain.info

## SPAIN MARKS

You don't have to be a "believer" to take part in the Easter celebrations in Spain. In Seville, Valladolid and many other towns and villages, the devotion and art will draw you in. You have to experience a saeta breaking the silence to appreciate its effect on your body and your soul. And you might just discover why in Spain, we call it The Passion.

Be marked by [www.spain.info](http://www.spain.info)

<http://www.tourspain.es>

www.spain.info

## SPAIN MARKS

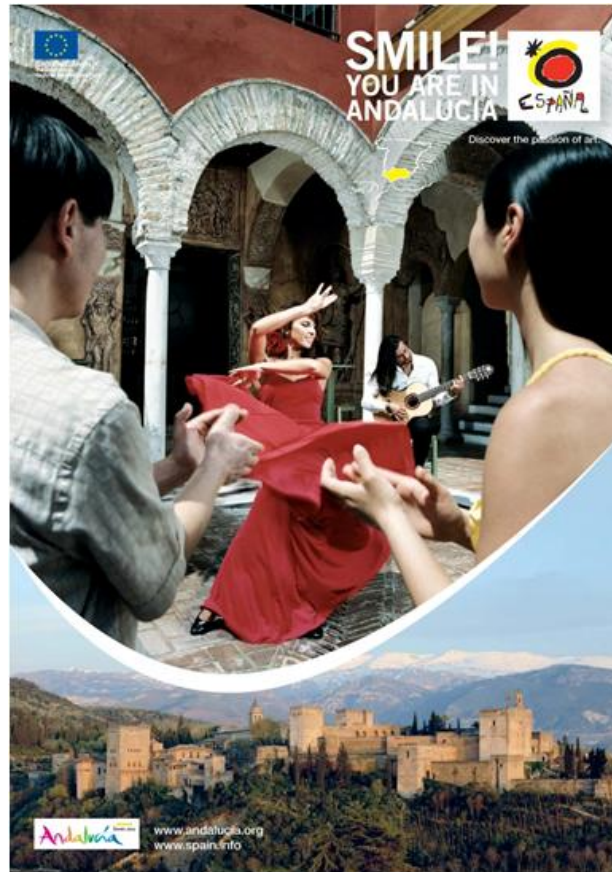
Who ever said that Spain isn't green? With 241 top-class golf courses, the most experienced instructors and 300 days of sun a year it's the best place to indulge your passion for golf. And you'll undoubtedly discover other passions as well: history, art, gastronomy ...

Be marked by [www.spain.info](http://www.spain.info)

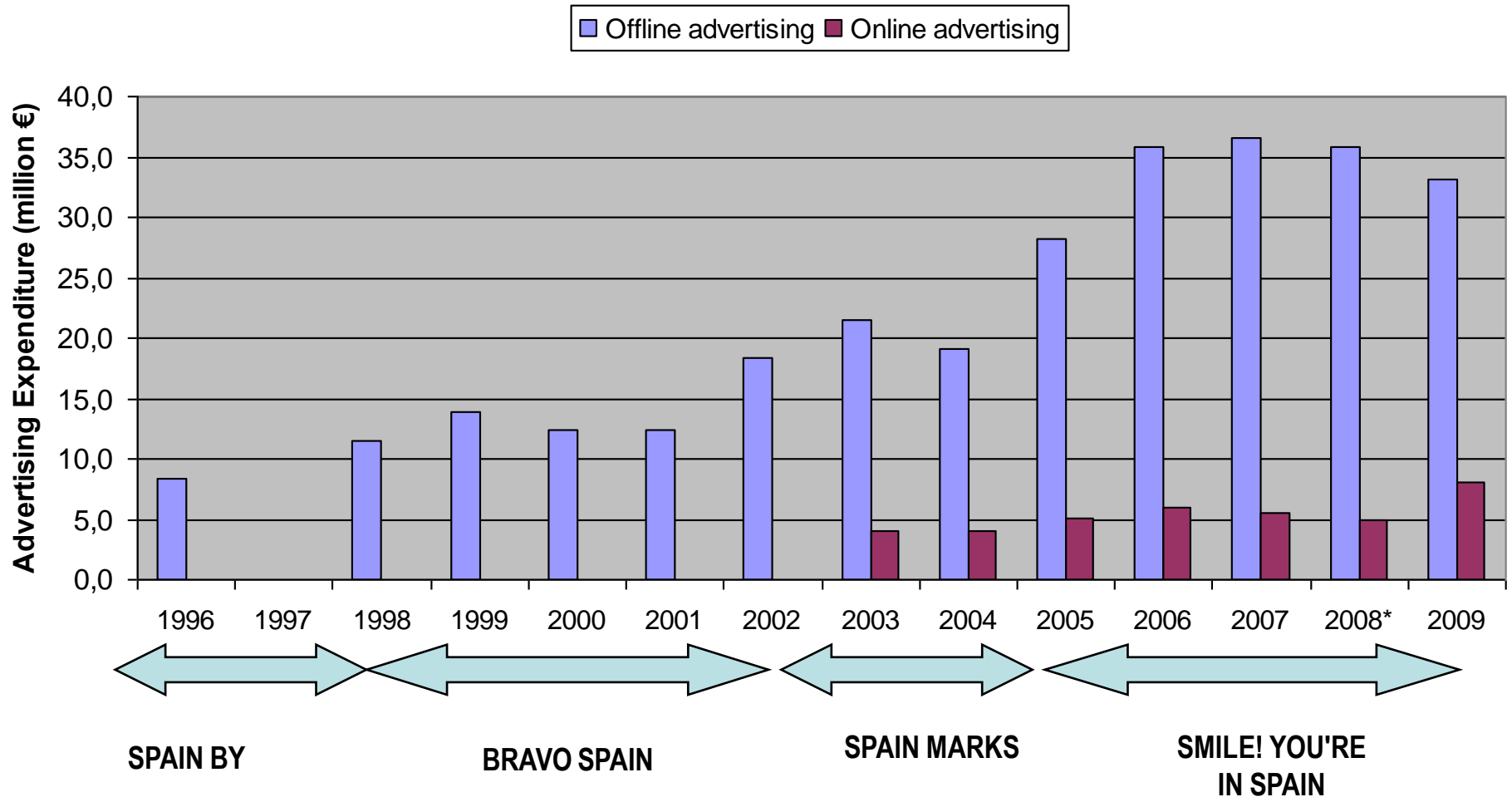
<http://www.tourspain.es>

# SMILE. 2005-2009

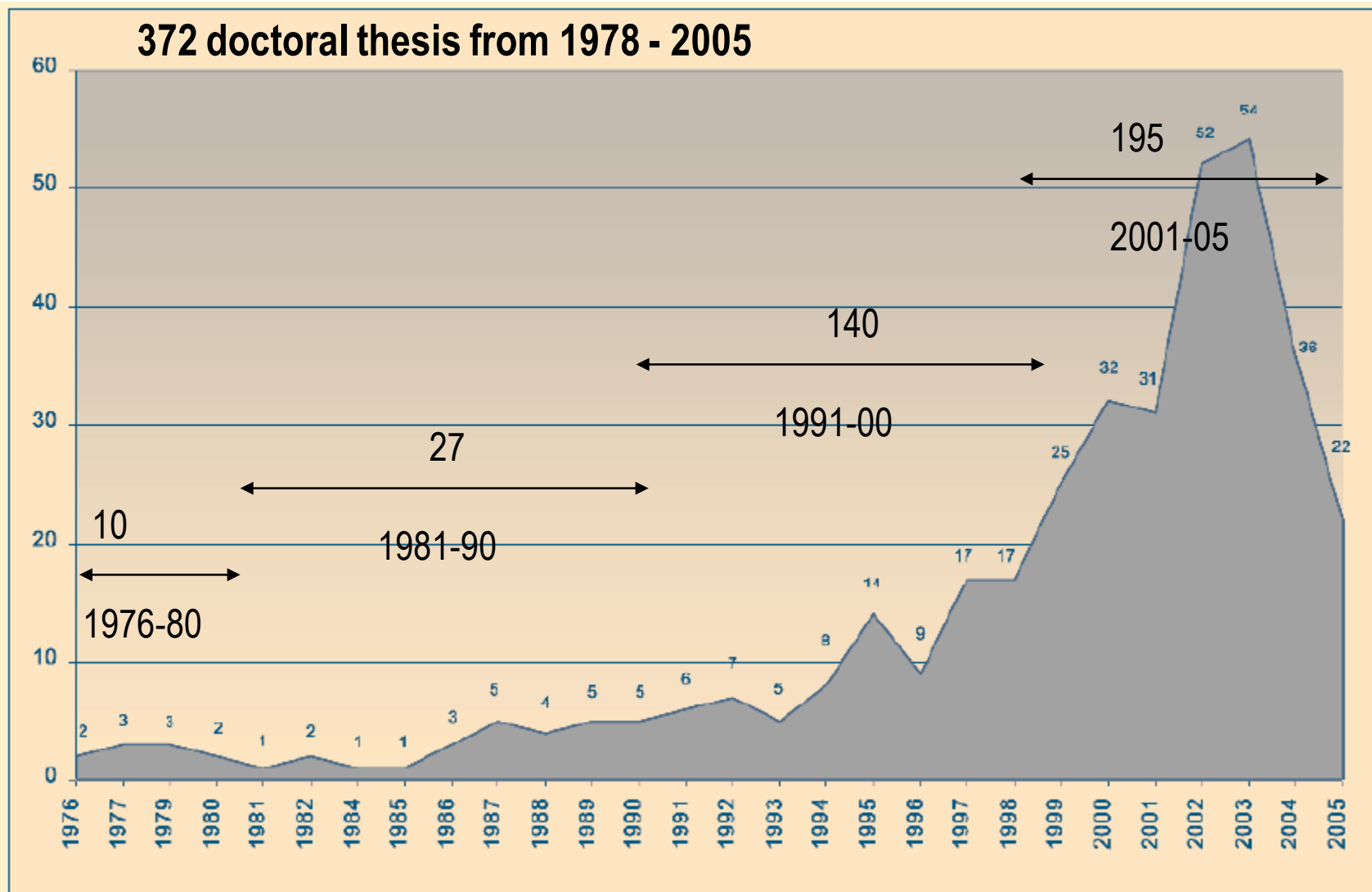
<http://www.youtube.com/watch?v=uvf-XRLPOqM>  
<http://www.youtube.com/watch?v=QmPf5RR7gqQ>



# Advertising Expenditure, Mill€. Spain 1996-2009



# Evolution of doctoral thesis in tourism. Spain



Fuente: Elaboración propia, a partir de Teseo, Ministerio de Educación y Ciencia

Source: Based on Solsona (2006) and Ministerio de Educación - TESEO

## 4. **Conclusions** and challenges for the future

- Geo-climate-economic strategic position.
- Top tourist destination from many years ago
- A clear product positioning, and increasing perceived value
- Larger in terms of suppliers and with better quality
- Public policies and plans
- Large promotional activity

## 4. Conclusions and challenges for the future

- Maintaining the key previous conclusions
- Sustainability
- Interregional cooperation between brands and products

Thank you

Gracias

谢谢

Enrique.Bigné@uv.es

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