

Spain

Tourism in the economy

Tourism is one of the cornerstones of the Spanish economy and an outstanding driver of economic and social development. In 2017 it accounted for 11.8% of GDP and in 2018 sustained 13.5% of employment (or 2.6 million direct jobs). Tourism continues to contribute substantially to offsetting the country's trade deficit with tourism receipts amounting to EUR 62.5 billion, in 2018 – a growth of 3.6% compared with 2017. In 2018, tourist arrivals reached 82.8 million (+1.1% compared to 2017), generating EUR 89.8 billion in international receipts (+3.3% compared to 2017). Travel exports represented 52.3% of total service exports in 2018.

The top three inbound markets for Spain are the United Kingdom (22.4% of tourist arrivals), Germany (13.8%), and France (13.6%). There has been an increase in long-haul inbound travel from markets such as the United States, China and South Korea, largely due to improvements in air connectivity and growth in the global economy.

Spanish domestic tourism is also very significant. In 2018, Spain recorded a total of 425.4 million domestic trips, of which 139.9 million were overnight (+1.1% compared to 2017) and 285.5 million were day visitors (+1.9% from 2017).

Tourism governance and funding

National responsibility for tourism lies within the Ministry of Industry, Trade and Tourism since 2018, having previously been under the umbrella of the Ministry of Energy, Tourism and Digital Agenda. The State Secretariat for Tourism continues to be responsible for defining, developing, co-ordinating and implementing tourism policy within the remit of central government's responsibility, as well as related institutional relations at national and international levels. The State Secretariat co-ordinates three organisations at national level:

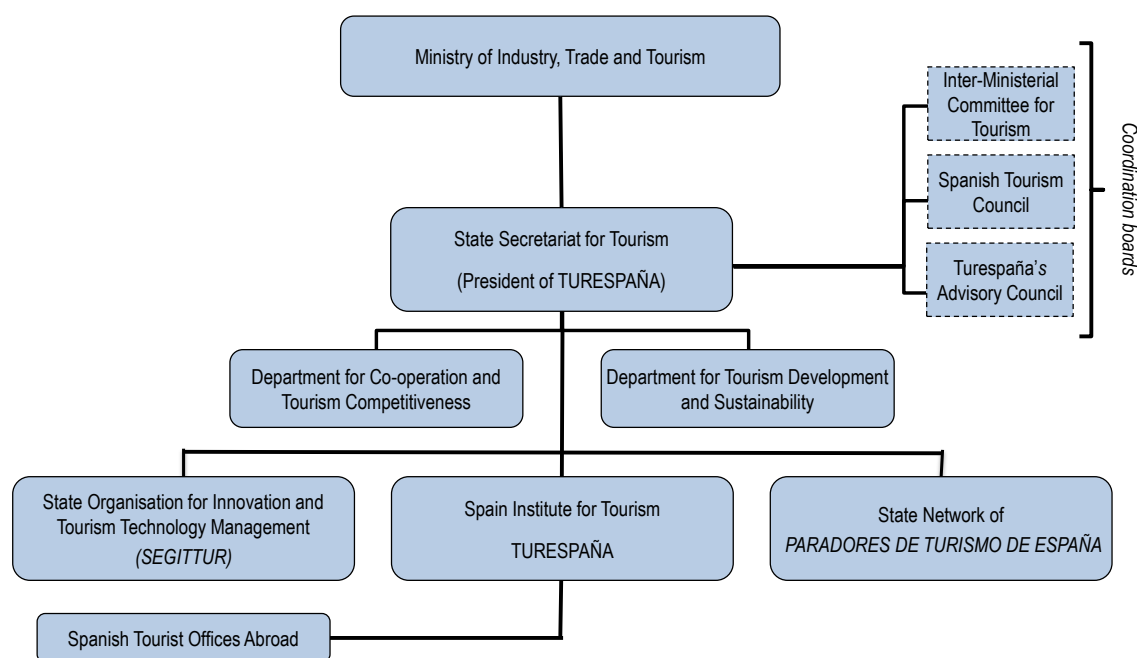
- Turespaña, which is an autonomous body attached to the Ministry, responsible for carrying out the international tourism marketing and promotion of Spain. It leverages an international network of 33 tourism offices that support the implementation of the agreed marketing plan.
- Paradores de Turismo, a public company that runs the state-owned hotel network with most of the establishments being located in historic sites, national parks or protected areas. There are now 97 establishments employing over 4 000 people.
- State Organisation for Innovation and Tourism Technology Management (SEGITTUR), a public sector body responsible for the development of new technologies in the Spanish tourism industry, in both public and private sectors. It researches and manages technology, knowledge and innovation to enhance the competitiveness, quality and sustainability of all aspects of tourism.

Co-ordinating mechanisms between the central and regional administrations are also important, given the size of the tourism economy. The 17 autonomous regions are responsible for the regulation and promotion of tourism within their territories. Local level entities, such as provinces and municipalities, manage their tourism interests mainly in terms of promotion and dissemination of visitor information.

A recent law relating to the legal obligations of the public sector highlights a range of fora established for effective co-ordination between tourism and related ministries, and key stakeholders – see box below.

The State Secretariat for Tourism had an overall budget of EUR 336 million for 2018. In addition, the 17 autonomous regions and other bodies also contribute significantly to the overall expenditure on tourism.

Spain: Organisational chart of tourism bodies



Source: OECD, adapted from Ministry of Industry, Trade and Tourism, 2020.

Tourism policies and programmes

Tourism policy in Spain is moving the Spanish tourism model towards the principles of sustainability, innovation and knowledge. The broad aim is to develop a smart and specialised high quality product, fit for the digital age. Sustainability means greater revenues and profits, improvement in the quality of experience, reduced seasonality and more efficient resource utilisation. Sustainable and inclusive tourism development demands a greater degree of innovation in the use of big data, digitalisation and smart tourism destinations.

Recently, Spain has begun to prepare a new Strategy of Sustainable Tourism for 2030. The aim is to transform Spanish tourism towards a model of both sustained and sustainable growth to maintain the country's leading position in tourism, while protecting the assets on which the sector depends. The Strategy will contribute to the achievement of UN Sustainable Development Goals and meet both medium and long-term challenges of sustainable tourism in terms of socio-economic, environmental and territorial impacts.

The Strategy proposes that tourism growth should be based on the following five principles:

- Socio-economic growth - including both a focus on improving business profitability and the equitable distribution of wealth, while at the same time guaranteeing greater sustainability by encouraging both the commercial sector and destinations to change and adapt.
- Protection of natural and cultural resources - providing the foundation for the conservation of valuable heritage, addressing the need for ecological improvement, and promotion of the underlying environmental values as part of the tourism experience.
- Social benefit - contributing directly to the great challenges of Spanish society, such as growing rural depopulation and inequality, tourism will be managed as an engine of economic and social development with the benefits and burdens distributed more equitably.
- Wide participation and involvement - as tourism is a cross-cutting sector that involves many stakeholders mechanisms will be designed to ensure strong governance between administrations at all levels together with the tourism industry.
- Permanent adaptation - the Strategy is not only concerned with growth and improvement but is also focused on supporting the sector to have the capacity to respond to a highly dynamic environment, illustrated by new and emerging business models, changing customer motivations and increasing competition.

Digitalisation and modernisation of all the various elements of the sector is a high priority with work to develop smart tourism destinations overseen by SEGITTUR, which is leading the Smart Tourist Destinations project. This aims to improve the position of Spain as a leading global tourism destination, seeking new mechanisms to boost destination innovation through the deployment of information and communication technologies in order to create different and highly competitive services.

Tourism governance co-ordination measures in Spain

A recent law relating to the legal obligations of the public sector reinforces the importance of co-ordination measures which now include:

- Sectoral Tourism Conference is a collegiate, advisory and executive co-ordination body which brings together high level public sector tourism representatives from central government and the autonomous regions. Chaired by the Minister for Tourism, it analyses, debates and is informed about any important policy issue or regulation affecting tourism.
- Spanish Tourism Council (CONESTUR) is an advisory body, which brings national, regional and provincial/city tourism administrations together with the private sector including chambers of trade, the National Employers' Association (CEOE), professional associations, trade unions and a wide spectrum of tourism professionals.
- Inter-Ministerial Committee for Tourism, whose members represent those national ministries that have responsibility for tourism related matters.
- Advisory Council of Turespaña, which comprises 11 members, five of which come from the private sector, and assists in defining and implementing the most appropriate strategies to market Spain abroad.

These co-ordination entities have neither specific budget nor staff. They are all chaired by the Minister or the State Secretary for Tourism and all secretariat services are implemented by the State Secretariat for Tourism. Recent issues that have been covered include Brexit, the new Strategic Tourism Plan for Spain, short rental accommodation regulation, Thomas Cook insolvency, new Marketing Plan for Turespaña, tourism statistics and connectivity. Considering tourism's cross-cutting nature, these co-ordination bodies will play a relevant and important role in Spanish tourism policy.

Statistical Profile

Spain: Domestic, inbound and outbound tourism

	2014	2015	2016	2017	2018
TOURISM FLOWS, THOUSAND					
Domestic tourism					
Total domestic trips	462 761	345 599	370 397	418 689	425 452
Overnight visitors (tourists)	139 615	123 923	132 201	138 357	139 931
Same-day visitors (excursionists)	323 146	221 676	238 196	280 332	285 521
Nights in all types of accommodation	621 835	476 459	508 758	517 502	507 739
Hotels and similar establishments	94 351	84 074	91 254	90 650	90 648
Other collective establishments	40 635	27 574	32 702	38 664	35 713
Private accommodation	486 850	364 810	384 802	388 187	381 378
Inbound tourism					
Total international arrivals	107 614	109 834	115 561	121 717	124 456
Overnight visitors (tourists)	64 995	68 175	75 315	81 869	82 808
Same-day visitors (excursionists)	42 619	41 659	40 246	39 849	41 647
Top markets					
United Kingdom	15 007	15 764	17 675	18 807	18 524
Germany	10 422	10 260	11 209	11 897	11 415
France	10 616	11 504	11 259	11 267	11 293
Nordic Countries	5 045	5 009	5 129	5 827	5 804
Italy	3 698	3 907	3 969	4 223	4 389
Nights in all types of accommodation	575 795	597 319	593 417	633 697	616 715
Hotels and similar establishments	279 623	288 472	280 646	291 692	287 884
Other collective establishments	34 830	41 004	26 547	32 412	35 599
Private accommodation	261 342	266 654	286 224	309 593	293 233
Outbound tourism					
Total international departures	13 952	15 706	16 144	17 594	19 750
Overnight visitors (tourists)	11 783	12 488	13 272	14 351	16 424
Same-day visitors (excursionists)	2 169	3 218	2 872	3 243	3 326
Top destinations					
France	2 124	1 836	2 147	2 462	2 410
Portugal	1 503	1 670	1 650	2 086	2 282
Italy	1 207	1 263	1 451	1 292	1 860
United Kingdom	993	1 188	1 299	1 388	1 465
Germany	688	891	804	803	948
TOURISM RECEIPTS AND EXPENDITURE, MILLION EUR					
Inbound tourism					
Total international receipts	53 883	56 309	60 351	66 682	69 023
International travel receipts	53 883	56 309	60 351	66 682	69 023
International passenger transport receipts	..	..	..	..	..
Outbound tourism					
Total international expenditure	13 572	15 724	16 998	19 611	22 692
International travel expenditure	13 572	15 724	16 998	19 611	22 692
International passenger transport expenditure	..	..	..	..	..

.. Not available; | Break in series

Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888934077882>

Spain: Enterprises and employment in tourism

	Number of establishments	Number of persons employed				
	2018	2014	2015	2016	2017	2018
Total	..	..	..	..	..	..
Tourism industries	707 689	2 203 044	2 322 381	2 447 758	2 510 795	2 604 899
Accommodation services for visitors	229 760	321 742	344 323	395 968	402 530	409 208
Hotels and similar establishments	16 714	281 373	303 249	354 717	354 740	361 444
Food and beverage serving industry	269 405	1 082 036	1 160 832	1 208 180	1 234 568	1 298 528
Passenger transport	64 265	267 550	264 877	269 001	278 882	281 328
Air passenger transport	231	41 501	39 757	36 373	41 068	43 196
Railways passenger transport	71	24 614	22 562	25 981	28 705	26 791
Road passenger transport	63 307	191 924	193 646	197 406	200 806	199 190
Water passenger transport	656	9 512	8 912	9 241	8 303	12 151
Passenger transport supporting services	24 115	..	..	..	..	..
Transport equipment rental	7 850	178 068	182 726	204 261	212 381	215 580
Travel agencies and other reservation services industry	17 915	62 144	74 724	65 108	65 512	78 698
Cultural industry	40 812	96 630	99 411	97 179	110 266	112 674
Sports and recreation industry	53 567	194 874	195 490	208 060	206 656	208 884
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/10.1787/888934077901>

Spain: Internal tourism consumption

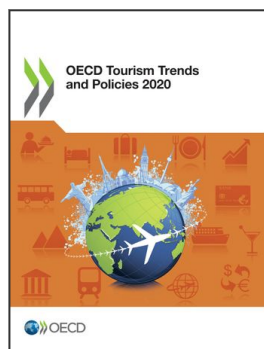
Million EUR

	2015		
	Domestic tourism expenditure	Inbound tourism expenditure	Internal tourism consumption
Total
Consumption products	66 663	59 213	125 876
Tourism characteristic products	57 170	41 468	98 638
Accommodation services for visitors
Food and beverage serving services
Passenger transport services
Air passenger transport services
Railways passenger transport services
Road passenger transport services
Water passenger transport services
Passenger transport supporting services
Transport equipment rental services
Travel agencies and other reservation services industry
Cultural services
Sports and recreation services
Country-specific tourism characteristic goods
Country-specific tourism characteristic services
Other consumption products	9 494	17 745	27 239
Tourism connected products
Non-tourism related consumption products
Non-consumption products

.. Not available

Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888934077920>



From:

OECD Tourism Trends and Policies 2020

Access the complete publication at:

<https://doi.org/10.1787/6b47b985-en>

Please cite this chapter as:

OECD (2020), "Spain", in *OECD Tourism Trends and Policies 2020*, OECD Publishing, Paris.

DOI: <https://doi.org/10.1787/8ed5145b-en>

This work is published under the responsibility of the Secretary-General of the OECD. The opinions expressed and arguments employed herein do not necessarily reflect the official views of OECD member countries.

This document, as well as any data and map included herein, are without prejudice to the status of or sovereignty over any territory, to the delimitation of international frontiers and boundaries and to the name of any territory, city or area. Extracts from publications may be subject to additional disclaimers, which are set out in the complete version of the publication, available at the link provided.

The use of this work, whether digital or print, is governed by the Terms and Conditions to be found at <http://www.oecd.org/termsandconditions>.