

Spain

Tourism in the economy and outlook for recovery

Tourism is one of the main sectors of Spain's economy and is an outstanding driver of socio-economic development. In 2019, the total effects of tourism (direct and indirect) contributed EUR 155 billion or 12.4% of total GDP. The sector provided 13.5% of total employment. Following the COVID-19 pandemic, tourism's total contribution to GDP more than halved to 5.5%. Tourism remained an important employment contributor, providing 12% of Spain's total employment.

In 2019, international tourists reached 83.5 million, and tourist expenditure was EUR 84.5 billion. The impacts of the COVID-19 pandemic saw international tourists fall 77.3% to 18.9 million in 2020, while expenditure hit EUR 22.1 billion, down 73.9%. There was a slight recovery in 2021, but international tourists still remained 62.7% below 2019 levels at 31.2 million tourists.

Domestic tourists were also significantly impacted, falling 45.5% to 74.8 million tourists in 2020. Similar to international tourism, domestic tourism rebounded in 2021, increasing 40% to 107.7 million tourists but remaining 21% below pre-pandemic levels.

Spain is projecting a tourism recovery back to pre-pandemic levels in 2023.

Tourism governance and funding

The Ministry of Industry, Trade and Tourism has been responsible for tourism since 2018. The State Secretariat for Tourism continues to be responsible for defining, developing, co-ordinating and implementing tourism policy within the remit of the central government's responsibility and related institutions at national and international levels. The State Secretariat co-ordinates three organisations at the national level: Turespaña, Paradores de Turismo and SEGITTUR.

Turespaña is an autonomous body attached to the Ministry and is responsible for carrying out the international tourism marketing and promotion of Spain abroad. It undertakes this role using an international network of 33 tourism offices that support the implementation of the agreed marketing plan. Paradores de Turismo is a public company that runs the state-owned hotel network. Most establishments are located in historic sites, national parks or protected areas. There are now 97 establishments employing over 4 000 people. The Organisation for Innovation and Management of Tourism Technology (SEGITTUR) is a public sector body responsible for developing new tourism technologies in the 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 and the private sector are key. Entities that play an important role in Spanish tourism policy include:

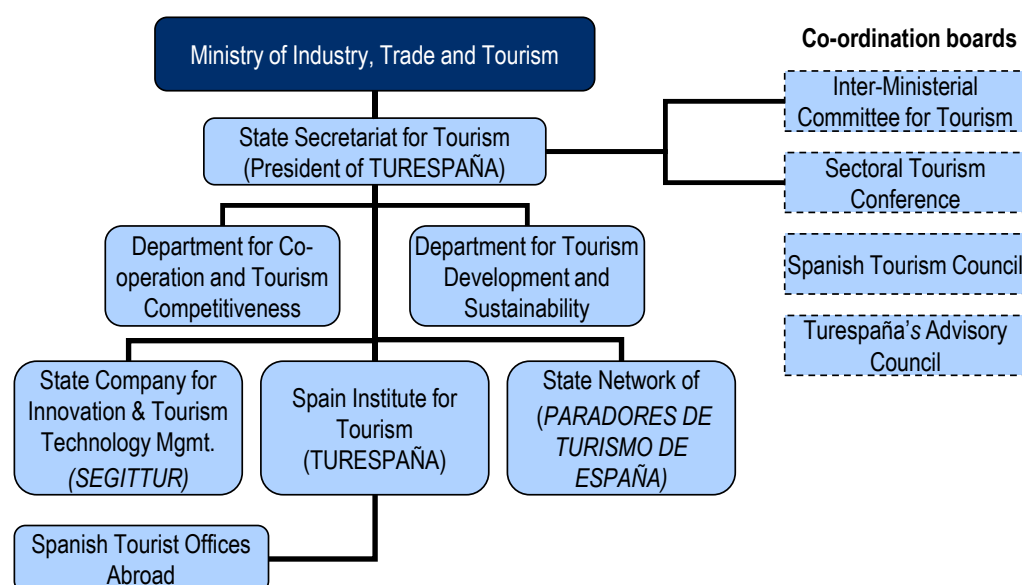
- The Sectoral Tourism Conference: an advisory and executive co-ordination body bringing together high-level public sector tourism representatives from central government and the autonomous

regions. It is chaired by the Minister for Tourism and analyses and debates the key policy issues and regulations affecting tourism.

- The Spanish Tourism Council (CONESTUR): an advisory body which brings together tourism administrations (state, regions and provinces/cities) and the private sector, such as chambers of trade, the National Employers' Association, professional associations, trade unions and a wide spectrum of tourism professionals.
- The Inter-Ministerial Committee for Tourism: represents national ministries responsible for tourism-related matters.
- The Advisory Council of Turespaña: comprises 11 members, five of which come from the private sector, and assists Turespaña in defining and implementing actions and strategies to market Spain abroad.

The State Secretariat for Tourism had an overall budget of EUR 1.3 billion for 2021. A large portion of the budget (81%) is financed by Next Generation EU and the European Recovery Fund, with the rest coming from the general public budget. The current budget for 2022 is EUR 1.7 billion. Of this, EUR 1.56 billion is allocated to implementing the Recovery, Transformation and Resilience Plan for Tourism.

Spain: Organisational chart of tourism bodies



Source: OECD, adapted from Ministry of Industry, Trade & Tourism, 2022.

Tourism policies and programmes

As a lesson learned from the pandemic, Spain has a core objective to transform and modernise the tourism sector by increasing its competitiveness and resilience. The aim is to recover to pre-COVID-19 levels and build a more sustainable, diversified and profitable tourism model.

Spain has defined a range of strategic action areas encouraging investments in innovation, energy efficiency and the green transition, as well as enhancing the effectiveness of policies supporting research. Further actions include sustaining the economy, supporting employment and skills development, improving access to digital learning and broader digitalisation.

The Tourism Sustainability Strategy aims to strengthen the environmental, socio-economic and regional sustainability of tourism and targets tourist destinations, social partners and private operators in the sector to stimulate:

- **Green transition:** including actions concerning environmental restoration, management and public use of protected natural areas, the implementation of tourism certification systems and circular economy measures and investment in cycling and walking paths.
- **Energy efficiency:** including actions to reduce CO2 emissions in buildings, public infrastructure and services, implement environmental technologies and improve urban environments.
- **Digital transformation:** including actions to digitise services for tourists at destinations, develop the digital footprint of the destination and improve tourism demand management (see box below).
- **Competitiveness transformation:** improving local tourism infrastructures and fostering job creation through developing new tourism products relating to culture, nature, gastronomy, traditional crafts and industrial tourism services.

The Tourism Resilience Strategy for the extra-peninsular territories (Canary and Balearic Islands and Ceuta and Melilla) aims to improve the competitiveness and capacity of these territories to adapt to changes in international markets. Investments have been made in public infrastructure, environmental management, waste treatment, public services, training, and the development of alternative tourism products. The Strategy also creates incentives to facilitate the connectivity of these territories and for tourism companies to operate outside the peak seasons. There are also special actions to boost competitiveness by developing new tourism products aligned with the Sustainable Tourism Strategy, such as energy efficiency and circular economy projects.

The National Food and Wine Tourism Plan, which falls within the plan for the modernisation and competitiveness of the tourism sector, will have an investment of EUR 68.6 million which includes tourism sustainability plans in food and wine destinations (EUR 51.4 million), the Spain Tourism Experiences Programme (EUR 10 million), and the International Promotion Programme (EUR 2.2 million). The Plan aims to promote food and wine destinations by financing destination sustainability plans, generating sustainable and diverse gastronomic tourism experiences, and improving worker training and skills.

In 2022, Spain started a multiannual programme to rehabilitate historical heritage buildings in the frame of the Recovery, Transformation and Resilience Plan for Tourism. The budget of this project is EUR 109 million.

Tourism digitisation and intelligence programme in Spain

The aim of Spain's Digitisation and Intelligence Programme is for destinations and the sector to develop smart destination platforms making interoperable public and private services available to tourists. This will be complemented by developing a Tourist Intelligence System and a set of initiatives to boost the Spanish Smart Destinations Network. The actions will also support digital solutions based on artificial intelligence and provide financing for the development of industrial data spaces and the promotion of digital innovation in the tourism sector.

To implement the Recovery, Transformation and Resilience Plan for Tourism, Spain is co-funding different projects to foster digitalisation for tourism destinations within the Spanish Smart Destinations Network and tourism companies. In 2022, EUR 45 million will be spent on implementing Artificial Intelligence in companies in the tourism sector. EUR 115 million will be spent on fostering the digital development of tourism destinations. Projects will be co-funded for the next three years.

Statistical Profile

Spain: Domestic, inbound and outbound tourism

	2017	2018	2019	2020	2021
TOURISM FLOWS, THOUSAND					
Domestic tourism					
Total domestic trips	418 689	425 452	394 810	235 089	320 698
Overnight visitors (tourists)	138 357	139 931	137 191	74 750	107 727
Same-day visitors (excursionists)	280 332	285 521	257 619	160 340	212 971
Nights in all types of accommodation	517 502	507 739	510 938	353 020	441 404
Hotels and similar establishments	90 650	90 648	93 696	38 001	67 638
Other collective establishments	38 664	35 713	33 081	23 661	32 199
Private accommodation	388 187	381 378	384 161	291 358	341 567
Inbound tourism					
Total international arrivals	121 717	124 456	126 170	36 410	51 631
Overnight visitors (tourists)	81 869	82 808	83 509	18 933	31 181
Same-day visitors (excursionists)	39 849	41 647	42 661	17 477	20 451
Top markets					
France	18 807	18 524	18 012	3 150	5 823
Germany	11 897	11 415	11 158	2 391	5 209
United Kingdom	11 267	11 293	11 147	3 888	4 303
Netherlands	5 827	5 804	5 530	1 175	2 049
Nordic Countries	4 223	4 389	4 535	947	1 840
Nights in all types of accommodation	633 697	616 715	594 018	147 986	253 985
Hotels and similar establishments	291 692	287 884	287 764	57 065	108 424
Other collective establishments	32 412	35 599	34 093	7 942	14 832
Private accommodation	309 593	293 233	272 161	82 979	130 729
Outbound tourism					
Total international departures	17 594	19 750	20 097	5 610	7 557
Overnight visitors (tourists)	14 351	16 424	17 126	4 314	6 032
Same-day visitors (excursionists)	3 243	3 326	2 971	1 296	1 525
Top destinations					
France	2 462	2 410	2 560	691	1 102
Portugal	2 086	2 282	2 355	796	1 066
Italy	1 292	1 860	1 895	328	761
Germany	803	948	1 039	217	289
United Kingdom	1 388	1 465	1 487	332	218
TOURISM RECEIPTS AND EXPENDITURE, MILLION EUR					
Inbound tourism					
Total international receipts	66 682	69 168	71 202	16 202	..
International travel receipts	66 682	69 168	71 202	16 202	..
International passenger transport receipts	..	..	..	..	..
Outbound tourism					
Total international expenditure	19 611	22 395	24 813	7 573	..
International travel expenditure	19 611	22 395	24 813	7 573	..
International passenger transport expenditure

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Source: OECD Tourism Statistics (Database).


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Spain: Enterprises and employment in tourism

	Number of establishments	Number of persons employed				
	2021	2017	2018	2019	2020	2021
Total	..	..	..	..	..	..
Tourism industries	739 232	2 510 795	2 604 899	2 673 520	2 333 736	2 367 560
Accommodation services for visitors	254 433	402 530	409 208	407 804	318 697	317 858
Hotels and similar establishments	17 133	354 740	361 444	360 134	276 236	271 613
Food and beverage serving industry	261 373	1 234 568	1 298 528	1 307 576	1 113 390	1 144 229
Passenger transport	64 491	278 882	281 328	317 596	288 436	265 383
Air passenger transport	240	41 068	43 196	52 334	44 275	46 061
Railways passenger transport	86	28 705	26 791	24 794	21 709	27 098
Road passenger transport	63 363	200 806	199 190	231 537	213 837	185 815
Water passenger transport	802	8 303	12 151	8 932	8 613	6 410
Passenger transport supporting services	24 727	..	..	..	..	..
Transport equipment rental	8 701	212 381	215 580	232 442	242 114	255 530
Travel agencies and other reservation services industry	17 125	65 512	78 698	70 119	63 124	66 315
Cultural industry	49 409	110 266	112 674	115 887	105 101	102 125
Sports and recreation industry	58 973	206 656	208 884	222 096	202 875	216 121
Retail trade of country-specific tourism characteristic goods
Other country-specific tourism industries
Other industries

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Source: OECD Tourism Statistics (Database).

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Spain: Internal tourism consumption

Million EUR

	2020		
	Domestic tourism expenditure	Inbound tourism expenditure	Internal tourism consumption
Total	..	..	..
Consumption products	29 022	22 050	59 795
Tourism characteristic products	23 022	14 268	46 013
Accommodation services for visitors	5 384	6 004	17 548
Food and beverage serving services	9 930	2 332	12 336
Passenger transport services	2 511	2 417	6 125
Air passenger transport services	1 365	1 739	3 808
Railways passenger transport services	352	169	685
Road passenger transport services	534	447	1 149
Water passenger transport services	259	63	483
Passenger transport supporting services	..	..	..
Transport equipment rental services	107	150	259
Travel agencies and other reservation services industry	3 571	304	4 036
Cultural services	296	1 370	2 066
Sports and recreation services	1 223	1 693	3 644
Country-specific tourism characteristic goods	..	..	..
Country-specific tourism characteristic services	..	..	..
Other consumption products	6 000	7 782	13 782
Tourism connected products	..	..	..
Non-tourism related consumption products	6 000	7 782	13 782
Non-consumption products

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Source: OECD Tourism Statistics (Database).

StatLink  <https://stat.link/v3kuna>



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