

## Template for case studies

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Summary of Case study	CULTURAL TOURISM IN SPAIN
Organisations concerned	CAMARA DE COMERCIO DE OVIEDO
Case study detail	<p>The present situation of cultural tourism in Spain based upon a study on the existing tourism products in our country carried out by the Institute of Tourism in Spain, Turespaña, whose responsibilities include planning, developing and launching actions to promote Spanish tourism in international markets.</p> <p>All the data described herein can be fully extrapolated to the region of Asturias, which has enormous potential for development as a cultural tourism destination, as we hope you will appreciate in the course of your visit in two months.</p> <p><b>CULTURAL TOURISM</b></p> <p>37% of trips worldwide are for reasons of culture. Spain's market share of cultural tourism is 8.2%.</p> <p>59% of the 43 million plus foreign tourists who visited Spain in 2003 for leisure and holiday purposes did so</p>

to relax in the countryside or on the beach; 21% came for cultural tourism and 4% stated that they came to Spain for sports-related leisure. 16% had other leisure-associated reasons for visiting us (*Tourists according to their reasons for travelling 2003*).

This data makes cultural tourism the second biggest segment of international tourism in Spain, with figures of 9 million tourists in 2003.

As far as the activities tourists engage in during their trips to Spain is concerned, shopping leads the field, according to tourists' declarations (85%). This is followed by cultural visits, which 61% of tourists state that they made.

At 63%, the Germans most declared having made cultural visits during their stay in Spain, followed by the Italians, with 62%.

Average daily spending of the cultural tourist to Spain is 77,72€, which is 1,98 times higher than the average spending for tourists as a whole.

Sources for statistical information on cultural tourism products (in Spain is scarce.

The basic features of supply and demand

Cultural tourism: the supply side.

Spain boasts 40 places of artistic and historic value that have been declared UNESCO World Heritage Sites, more than any other country in the world. There are 11,516 registered historical buildings in Spain, and 16,642 objects that have been declared of cultural interest.

Through a lack of access and/or conservation, only 10% of Spain's cultural heritage is good enough to be considered a 'cultural product'

Although it is true that cultural resources abound, attempts to incorporate them into tourist services are fraught with major defects. As a result, there is a dearth of cultural tourism on the supply side, of which there is only a token presence in sales outlet networks.

Cultural supply is structured around destinations (Spanish cities or regions) but very rarely around cultural themes (the Way of Saint James, opera in Spain, the great museums and so forth)

It is often marketed through general market

operators, as operators that specialise in cultural tourism, with few exceptions, are non-existent.

The demand for cultural tourism:

The typical cultural tourist in Spain is a member of a heterogeneous age group, with a marked tendency towards the under-fifties; he or she has a high level of education (71% are university graduates), travels as a couple (52.8%) and has a medium to high (46.8%) or high spending power (19.5%).

The level of return visits of these cultural tourists is good, and is greater amongst the Spanish (89%) but significantly lower amongst foreign visitors (36.1%), particularly as far as the French, German and British markets are concerned.

Organising their own holiday is the predominant method they use (73.8%).

An analysis of the information that affects travel decisions highlights the importance of self-acquired information by foreign tourists (36.6%) using a range of different media, amongst which the Internet stands out. However, recommendations of friends and family is undoubtedly the main source of information for Spaniards (57%) and for foreigners(42%).

Today's cultural tourist is a very satisfied customer as far as expectations are concerned: 84% say that their holiday exceeded their expectations, and 93% plan to make another cultural trip in the near future. Cultural diversity and old quarters and historic towns and cities stand out as being valued most positively.

The modern cultural tourist can be described by the following criteria:

- A group containing a range of ages with a marked predominance of the under-fifties
- High educational levels
- Average and average to high spending power
- Basically travels with a partner
- Low seasonality.

As for the image of Spain as a cultural destination, there is scant knowledge of Spain's cultural supply, of which only 34.9% of Europeans are aware. Spain lags behind Greece(40.5%), France (40.8%) and Italy (55.3%) in this respect. Knowledge of Spanish gastronomy stands at a mere 27.4% of the population,

compared to Italy's 69% and France's 73% as destinations for gastronomic delight.

## A SWOT ANALYSIS

### Strengths

- The scope of cultural resources, the unique nature of some of them and the diversity of time-honoured cultures
- 2- Top resorts in Spain
- 3- The fact that some leading destinations and other places complement each other.
- 4- The general impression made on today's cultural tourist: satisfaction levels, percentage of return visits and the degree of interest in other Spanish destinations not yet visited.

### Weaknesses

- Spain's competitiveness in the cultural tourism market, with an image that lags way behind France and Italy and some way below Greece.
- 2- Management problems relating to the use and enjoyment of our heritage: no product catalogue, problems of accessibility, management of routes and of special events, poor exploitation of events and resources that could be benchmarks, such as the Prado Museum.
- 3- Management of the cultural tourism product: the limited development of specialised professional sectors (culture organisers, specialist guides); an absence of culture management in the cities; an unawareness of Spain's potential to supply culture.
- 4- Low levels of expectation amongst today's tourists due to limited promotion of what is available.
- 5- A dearth of pre-visit information about tourism-culture and about cultural tourism programmes.

### Opportunities:

- Future growth of the cultural tourism market into Europe and an increase in the levels of cultural awareness in countries origins
- 2- The geographic characteristics of Spain, the increase in short-stay cultural tourist in neighbouring and Spain's good climate.
- 3- The general nature of tourism in Spain: the leading holiday destination and the fact that "sun and sand" in a major point of entry into cultural tourism.
- 4- The characteristics of the cultural tourism trip: a public over a range of ages, low seasonality, high consumption of complementary activities (shopping, gastronomy and so forth) and in consequence more spending per person per day.

5- The way trips are planned for and organised, with a high degree of planning and preparation by the tourist himself, which implies that the tools to make information more available to potential tourists should be put to proper and full use.

Threats:

- The general nature of tourism in Spain: the image of a country of "sun and sand" and the reality of some coastal areas.
- 2- Law and order.
- 3- A shortage of direct flights.

Conclusions:

- 21% of the 43 million tourists who came to Spain in 2003 for leisure and holidays did so for a culture-related reason.
- This makes cultural tourism the second largest segment of international tourism in our country, with 9 million tourists in 2003. 37%.trips world-wide are culture-driven. Spain's share of cultural tourism stands at 8.2% of the market.
- Urban, or city, tourism in Spain is continually on the up, especially after the events held in 1992 in Spain and as a spin-off of low-cost airlines. Other factors that contribute to product growth are:
  - There are major cultural resources that can serve as emblems of city tourism in Spain (the Prado and Guggenheim Museums)
  - The tendency for holidays to be split up into shorter periods of a cultural nature and especially based on interest in the cities.
  - The great cultural wealth of Spanish cities.
- A mere 10% of Spain's cultural heritage is ready enough at present to be considered a cultural product due to lack of accessibility and/or conservation.
- The competition of other European cities is intense and the market share of Spanish cities is low.
- Demand for cultural tourism is usually driven by high or medium-high spending power with average spending topping that of other tourists.
- Progress in the development of cultural tourism products related to routes and themes must be made.  
Culture supply revolves around destinations (Spanish cities or regions) but very little

	<p>around cultural themes or routes.</p> <ul style="list-style-type: none"><li>• International promotion and marketing of the product should be preceded by greater development of the cultural product and its conversion into a tourism product.</li><li>• The diversity and wealth of cultural destinations in the city and their complementary natures are key factors in the development of the product.</li></ul>
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