Alianza para
la excelencia turística
What is EXCELTUR:

- A non-profit association of the 25 biggest & leading Spanish tourist companies
- Includes airlines, railways, cruise companies, city and resort hotels TTOO & TTAA
- They represent a turnover of over 20,000 Million €
- Over 200,000 Jobs
- Direct Investments in 45 countries and commercial relations with over 175 countries.
- 80% of the Spanish Air transport
- Over 50% of the 4&5 stars Hotel properties
- 50% of internal travel distribution
VISION OF EXCELTUR

- That tourism becomes a national priority
- To reposition our industry so tourists perceive in Spain differential experiences
- That tourism keeps its multipliying effect as the main driver of the spanish economy
- That Spanish touristic destinations improve their socio-economic yield.
- That Spain keeps its leadership setting up new tourism models and innovative standards
- That public–private sectors improve their cooperation and governmental authorities improve their efficiency and competitiviness
WHICH ARE EXCELTUR's STRATEGIC AIMS?

TWO MAIN OBJECTIVES

Improve the Socio-economic perception of Tourism among Spanish society

Raise the levels of tourism competitiveness
Wholesalers and Retailers

Transport Operators and Infrastructures

Accommodation

Leisure activities

Design, Packaging and sale

Transport

Stay

Entertainment

Tourism value chain
What have we done from Exceltur?

1. Carry out a quarterly Business Confidence Survey since 2002

**Size of the sample:** 1,200 businessmen

**Periodicity:** Quarterly

**Subsectors surveyed:**
- Lodging
- Convention Bureau
- Travel Agencies and Tour operators
- Transportation
- Car renting
- Golf Fields
- Ski resorts
- Thematic Parks

**Managerial Opinion:**
* Sales
* Price
* Profits
* Investments
* Reservations
* Employment
* Costs Structure
* Rating of Tourist Policies
2. The result is an advanced indicator of the progress of Spanish tourism: *Tourist Business confidence Index (ICTUR)*

**Forecasted sales + Reservations + Employment**

![EXCELTUR Tourist Business Confidence Index (ICTUR)](chart)

Source: Tourist Business Confidence Survey, EXCELTUR
3. Create a Tourist activity Indicator that shows the quarterly Tourist GDP growth. **Excltur Tourist Synthetic Index (ISTE)**

**Excltur Tourist Synthetic Index ISTE (Tourist GDP) versus Spanish GDP. 2001-2006**

*(Year on year growth rate)*

Source: Excltur and INE
4. Forecast of the key variables that determine the evolution of the tourism in Spain. Forecasting models

Average revenue per foreign tourist
(Foreign Tourist Revenues/Total Foreign Arrivals)

Source: Exceltur with IET and Banco de España data.

Hotels Overnights
(Year on year growth rate)

Source: Exceltur with INE data.

Exceltur Forecast

Exceltur with INE data.
5. From the 2nd Quarter 2002 we publish a "Tourist quarterly report" that includes an analysis of both the official available information and the business information generated by Exceltur
6. Launched a series of Studies to measure the socio-economic impact of Tourism at a regional scale. **IMPACTUR**

Why do these studies arise?

- Due to the Public and Spanish private sector interest in knowing how much does tourism represent for a region.

- Following the WTO’s efforts to establish a methodological framework of calculation of the tourist impact as well as the work of the Spanish National Institute of Statistics (INE) in the case of Spain.
What are Impactur Studies?

• Similar to the TSA’s, they are an estimation of the impact of the tourism activities on the main variables of the regional economy: Gross Domestic Product (GDP), Employment, Investment, Taxes, etc.

• A set of tourist indicators and comparable with the ones of the TSA elaborated by the INE for Spain
What purpose does IMPACTUR serve for?

• Improve the socioeconomic recognition of tourism at regional scale, showing the direct and indirect effects, in order to improve the awareness of society and helping to prioritize the necessary public policies.

• Have a better knowledge of the level of integration and how does the tourist value chain work in order to improve public and private sector decisions.

• Evaluate and propose new tourism policies based on better indicators and information systems to improve the performance of local tourism.
What does IMPACTUR calculate?

**DIRECT EFFECTS**
(Retailer, restaurants, hotels, taxis …)

**INDIRECT EFFECTS**
(farmer, drinks supplier, juridical advising …)

**INDUCED EFFECTS DO NOT INCLUDE IN IMPACTUR**
(children’s school, buy of cars, buy of goods, touristic sector workers …)
How does IMPACTUR show?

IMPACTUR INFORMATION SYSTEM

- Household Consumption
- Business Travels
- Public Individual Consumption
- Domestic Non Residents Consumption
- Foreigners Consumption
- Investment
- Public Collective Expenditure

- Imports

- Internal Tourist Consumption
- Inbound Tourist Consumption

- Domestic Tourist Consumption

- Tourist Demand

- Tourist GDP
An example: Impactur Co. Valenciana results

**DIRECT EFFECTS**
- +9.2% local GDP
- +9.6% Employment

**INDIRECT EFFECTS**
- +4.6% local GDP
- +4.4% Employment

**Induced Effects** do not include in Impactur

14.1% Employment
13.8% GDP
16.5% Taxes
4.2% Investment
An example: Impactur Co. Valenciana results

COMUNIDAD VALENCIANA IMPACTUR STUDY
Year 2005

<table>
<thead>
<tr>
<th>Household Consumption</th>
<th>Business Travels</th>
<th>Public Individual Consumption</th>
<th>Domestic Non Residents Consumption</th>
<th>Foreigners Consumption</th>
<th>Investment</th>
<th>Public Collective Expenditure</th>
</tr>
</thead>
<tbody>
<tr>
<td>53% 6.398</td>
<td></td>
<td>1% 72</td>
<td>36% 4.347</td>
<td>36% 4.287</td>
<td>10% 1.166</td>
<td>6% 670</td>
</tr>
<tr>
<td>54% 6.470</td>
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<td>72% 8.633</td>
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<tr>
<td>126%</td>
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</tbody>
</table>

Inbound Tourist Consumption = 8.633

Domestic Tourist Consumption = 15.103

Tourist Demand = 16.940

Imports = 49% 4.923

Tourist GDP = 12.017
Which are the main results of IMPACTUR by regions?

<table>
<thead>
<tr>
<th>Region</th>
<th>GDP</th>
<th>Employment</th>
<th>Exportation Services</th>
<th>Investment</th>
</tr>
</thead>
<tbody>
<tr>
<td>CANARIAS</td>
<td>32,6%</td>
<td>37,3%</td>
<td>90,9%</td>
<td>21,2%</td>
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<tr>
<td>Co. Valenc.</td>
<td>13,8%</td>
<td>14,1%</td>
<td>67,0%</td>
<td>4,2%</td>
</tr>
<tr>
<td>Galicia</td>
<td>11,6%</td>
<td>13,3%</td>
<td>68,6%</td>
<td>8,3%</td>
</tr>
<tr>
<td>ESPAÑA</td>
<td>11,4%</td>
<td>11,2%</td>
<td>70,5%</td>
<td>5,0%</td>
</tr>
</tbody>
</table>
THANK YOU VERY MUCH FOR YOUR ATTENTION

www.exceltur.org