



Exceltur

*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 €

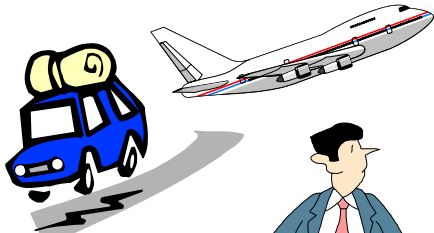
★ Over 200.000 Jobs

★ 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

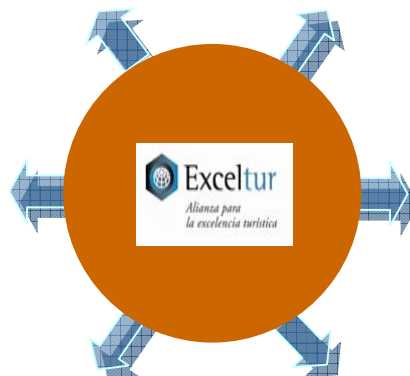
To reposition our industry so tourists perceive in Spain differential experiences

That tourism keeps its multiplying 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 competitiveness



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

Legal framework and Public sector Organizations

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 surveyes


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

Managerial Opinión:

- *Sales
- *Reservations
- *Price
- *Employment
- *Profits
- *Costs Estructure
- *Investments
- *Rating of Tourist Policies

Rellene el siguiente cuadro

Establecimiento		_____	
Persona que rellena la encuesta		_____	
Actividad:		Alojamiento	
Trimestre de referencia/año:		octubre-noviembre-diciembre 2003	
Dirección			
Localidad / Código Postal		_____ / _____	
Provincia /Comunidad Autónoma		_____ / _____	
Teléfono:		_____	
Fax:		_____	
e-mail:		_____	
Número medio de empleados del establecimiento en el año		[]	



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ENCUESTA DE CLIMA TURÍSTICO DE EXCELTUR

* Marque con una X la respuesta que usted considere más adecuada

1ª VENTAS

En mi establecimiento,

Ha experimentado en el trimestre de referencia en relación con el mismo periodo del año anterior un:	Previsto para el próximo trimestre en relación con el mismo periodo del año anterior un:					
Fuerte Leve Manteni- Leve Fuerte aumento aumento miento caída caída	Fuerte Leve Manteni- Leve Fuerte aumento aumento miento caída caída					
El volumen de ventas Total	<table style="width: 100%; text-align: center;"> <tr> <td>[]</td> <td>[]</td> <td>[]</td> <td>[]</td> <td>[]</td> </tr> </table>	[]	[]	[]	[]	[]
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2ª FACTORES DETERMINANTES DE LAS VENTAS

En relación con mi establecimiento, en el trimestre de referencia

Situación de la Compete	Variación Costes	Cambios regulació	Insuficie Climatol	ncia capacida	Ninguno					
Seleccione los factores que más han influido en la evolución de las ventas .	<table style="width: 100%; text-align: center;"> <tr> <td>[]</td> <td>[]</td> <td>[]</td> <td>[]</td> <td>[]</td> </tr> </table>	[]	[]	[]	[]	[]	<table style="width: 100%; text-align: center;"> <tr> <td>[]</td> <td>[]</td> </tr> </table>	[]	[]
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3ª RESERVAS

En mi establecimiento,

Ha experimentado en el trimestre de referencia en relación con el mismo periodo del año anterior un:	Fuerte Leve Manteni- Leve Fuerte aumento aumento miento caída caída					
El número de reservas	<table style="width: 100%; text-align: center;"> <tr> <td>[]</td> <td>[]</td> <td>[]</td> <td>[]</td> <td>[]</td> </tr> </table>	[]	[]	[]	[]	[]
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4ª PRECIOS

En mi establecimiento,

Han experimentado en el trimestre de referencia en relación con el mismo periodo del año anterior un:	Fuerte Leve Manteni- Leve Fuerte aumento aumento miento caída caída					
Los precios medios de venta	<table style="width: 100%; text-align: center;"> <tr> <td>[]</td> <td>[]</td> <td>[]</td> <td>[]</td> <td>[]</td> </tr> </table>	[]	[]	[]	[]	[]
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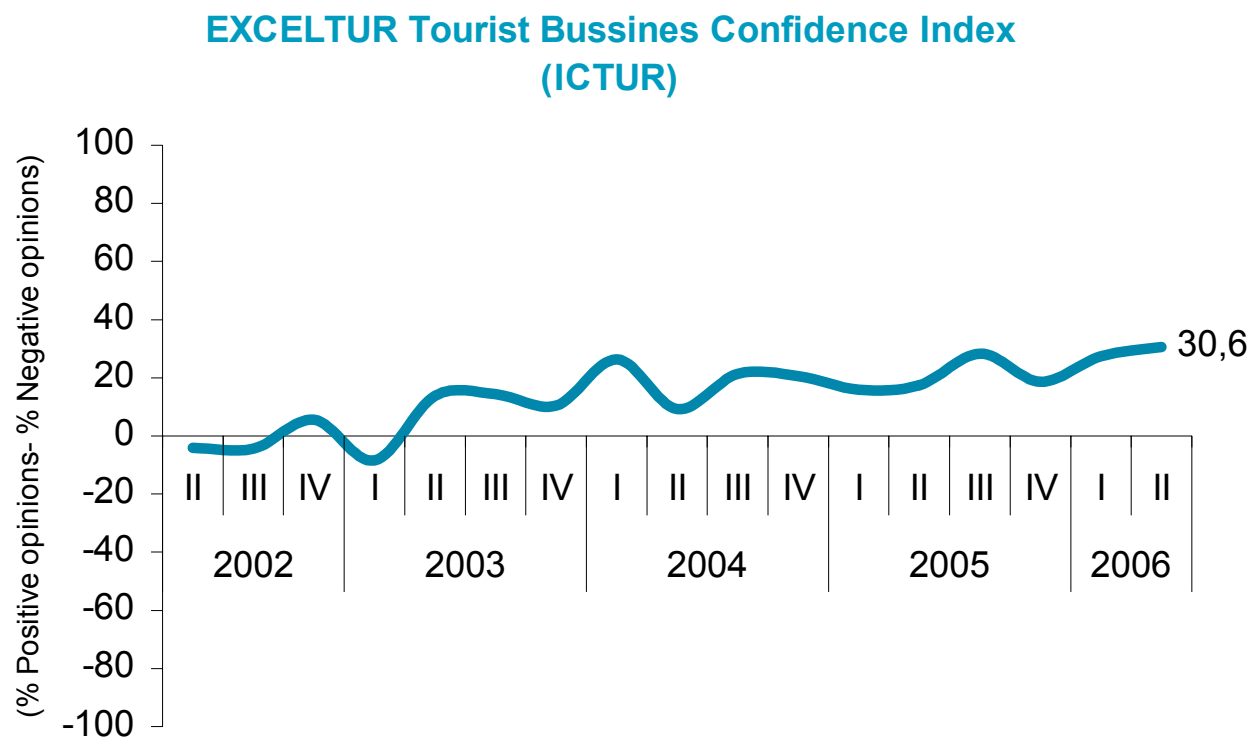
5ª EMPLEO

En mi establecimiento,

Ha experimentado en el trimestre de referencia en relación con el mismo periodo del año anterior un:	Previsto para el próximo trimestre en relación con el mismo periodo del año anterior un:					
Fuerte Leve Manteni- Leve Fuerte aumento aumento miento caída caída	Fuerte Leve Manteni- Leve Fuerte aumento aumento miento caída caída					
El número medio de empleados	<table style="width: 100%; text-align: center;"> <tr> <td>[]</td> <td>[]</td> <td>[]</td> <td>[]</td> <td>[]</td> </tr> </table>	[]	[]	[]	[]	[]
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2. The result is an advanced indicator of the progress of Spanish tourism: **Tourist Bussines confidence Index (ICTUR)**

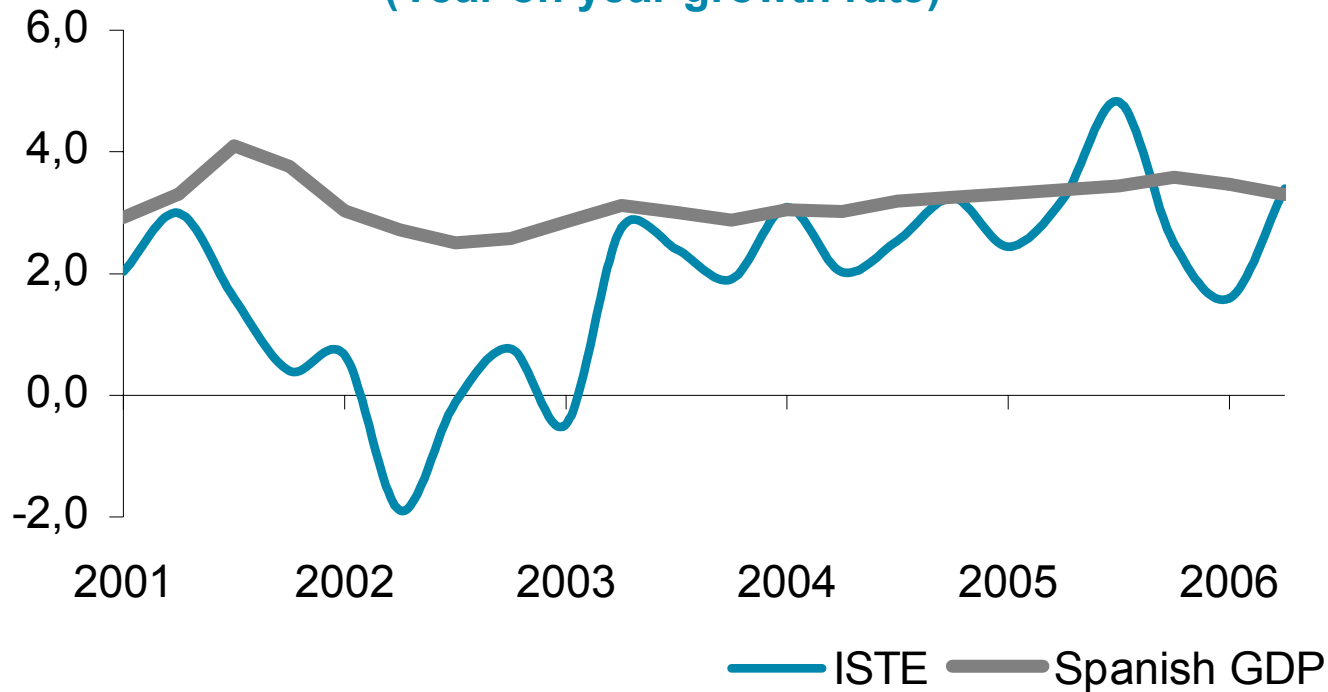
Forecasted sales + Reservations + Employment



Source: Tourist Bussines Confidence Survey, EXCELTUR

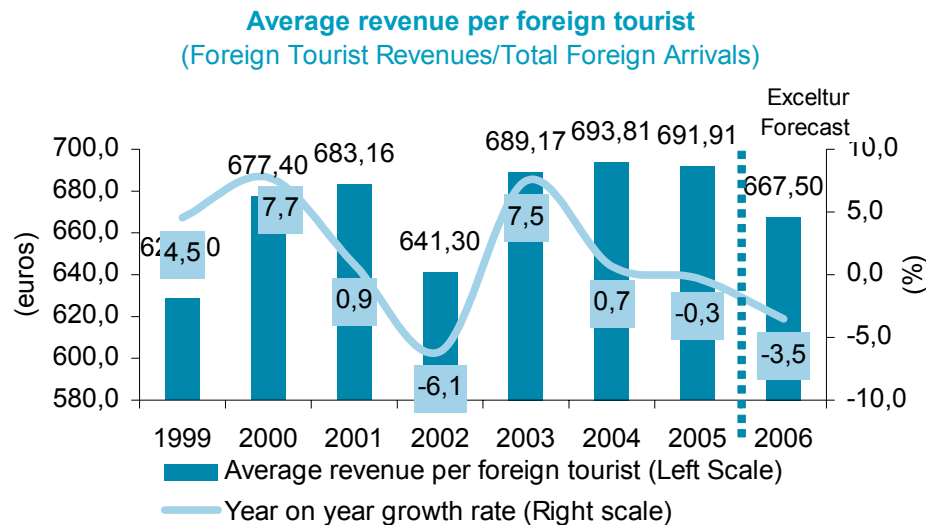
3. Create a Tourist activity Indicator that shows the quarterly Tourist GDP growth **Exceltur Tourist Synthetic Index (ISTE)**

Exceltur Tourist Synthetic Index ISTE (Tourist GDP) versus Spanish GDP. 2001-2006
(Year on year growth rate)

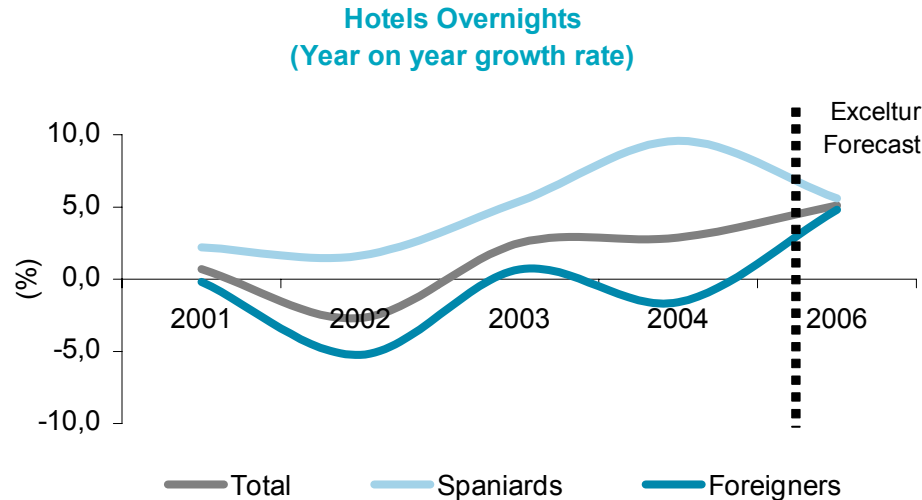


Source: Exceltur and INE

4. Forecast of the key variables that determine the evolution of the tourism in Spain. Forecasting models



Source: Exceltur with IET and Banco de España data.



Source: 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



www.exceltur.org

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?

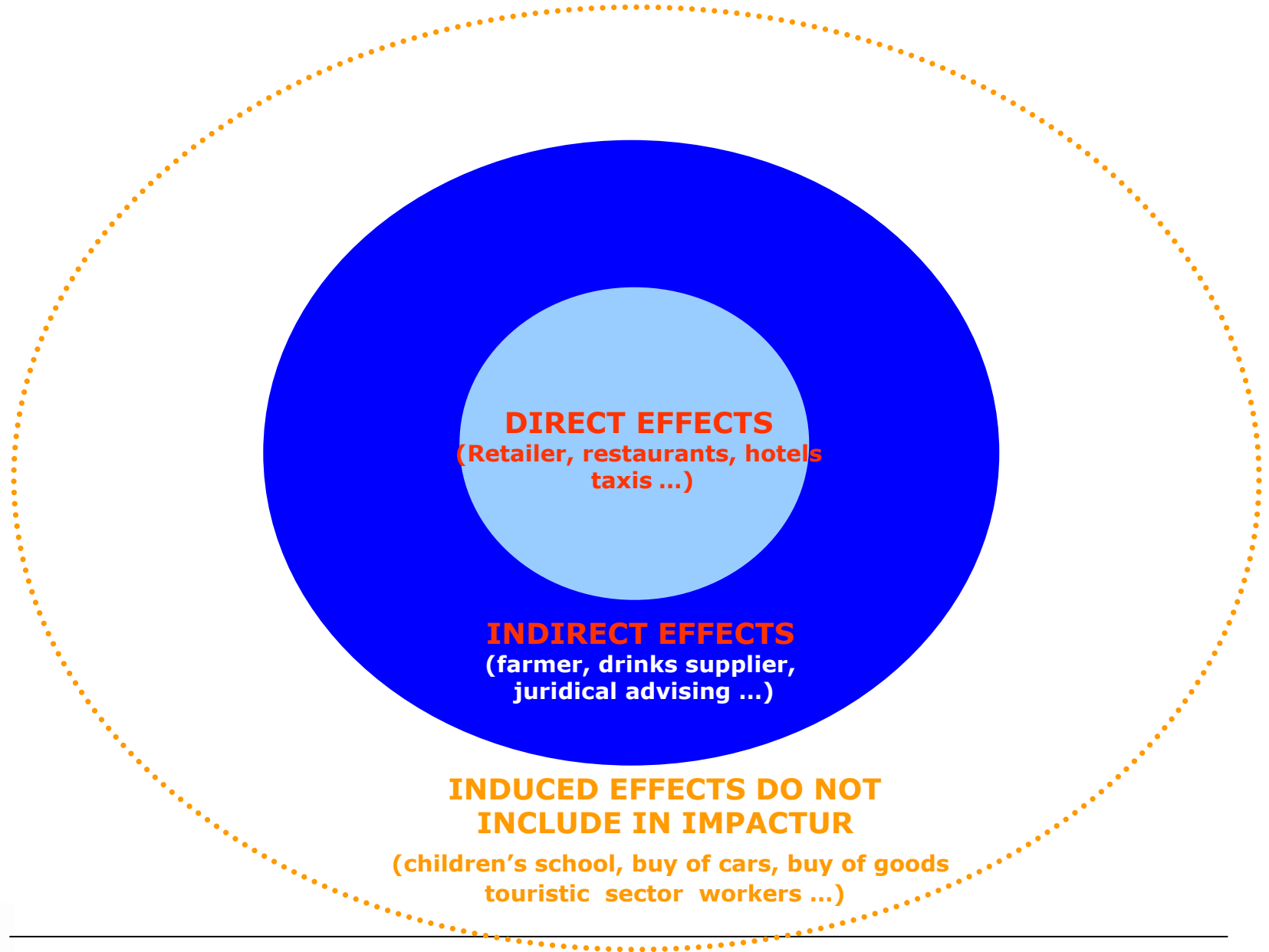
- **Similar to the TSA's** , they are an estimation of the **impact of the tourism activities on the main variables of the regional economy** : Gross Domestic Product (GDP), Employment, Investment, Taxes, etc.

- **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 ?

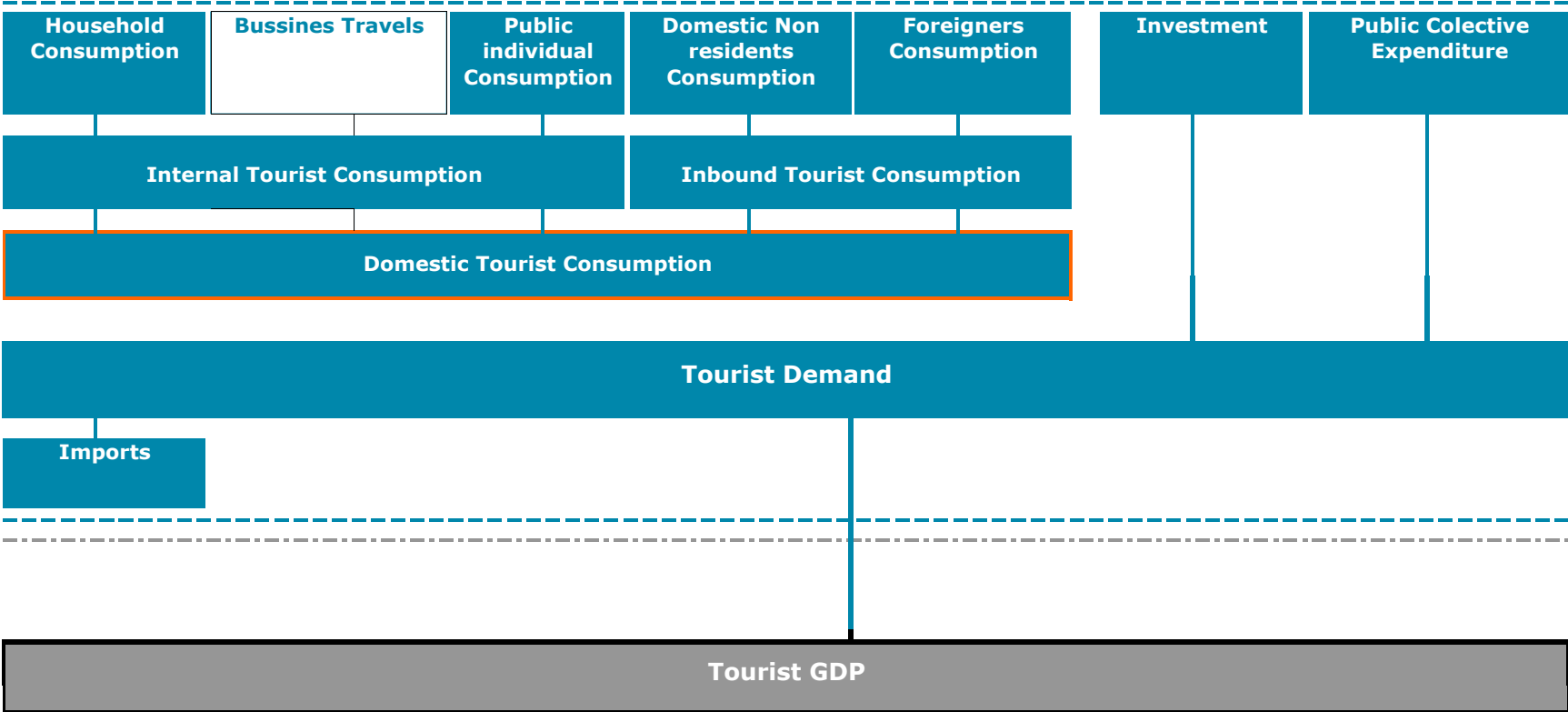
- **Improve the socioeconomic recognition of tourism at regional scale, showing the direct and indirect effects,** in order to improve the awareness of society and helping to prioritize the necessary public policies.
- **Have a better knowledge of the level of integration and how does the tourist value 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?

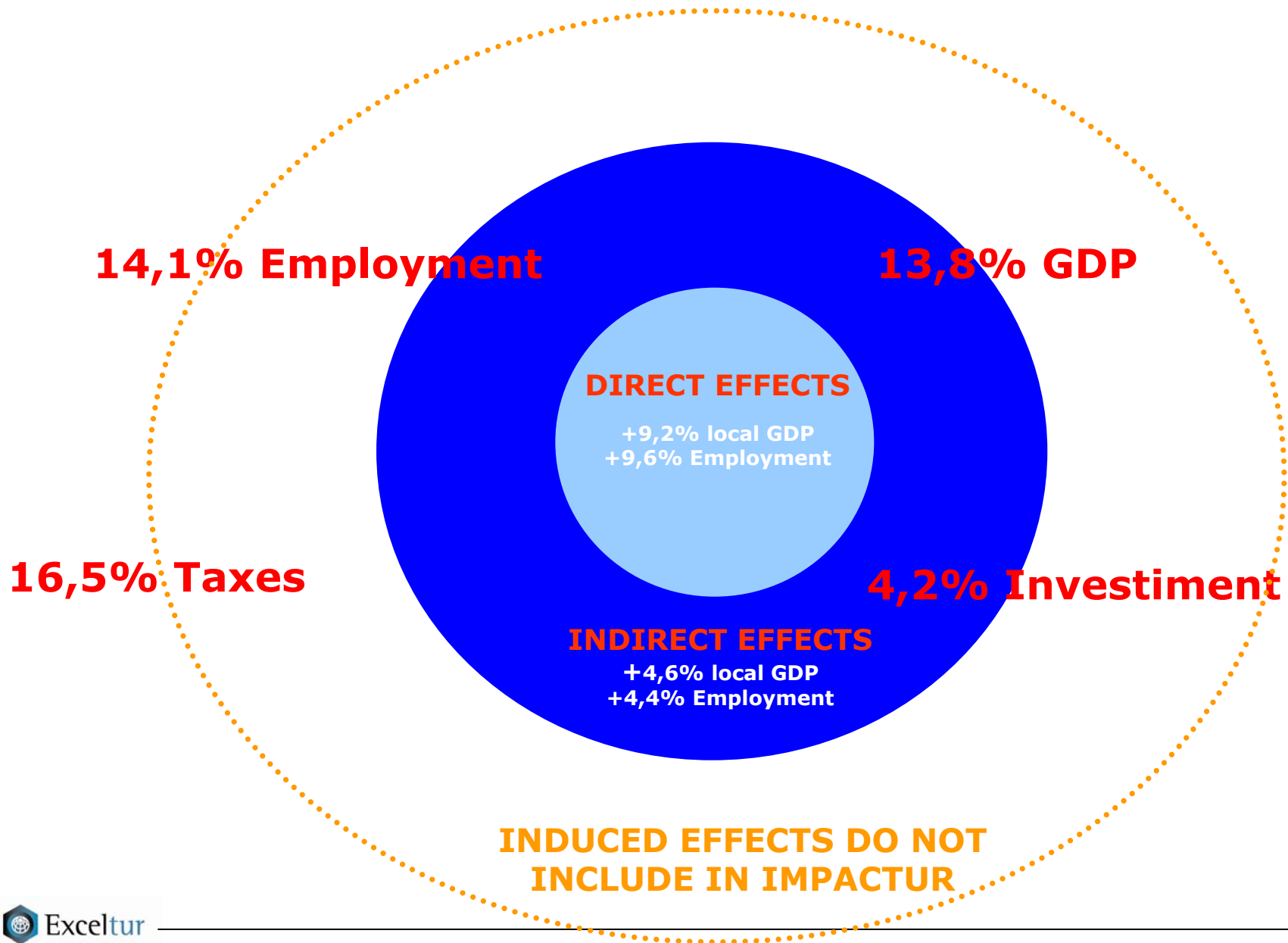


How does IMPACTUR show?

IMPACTUR INFORMATION SYSTEM



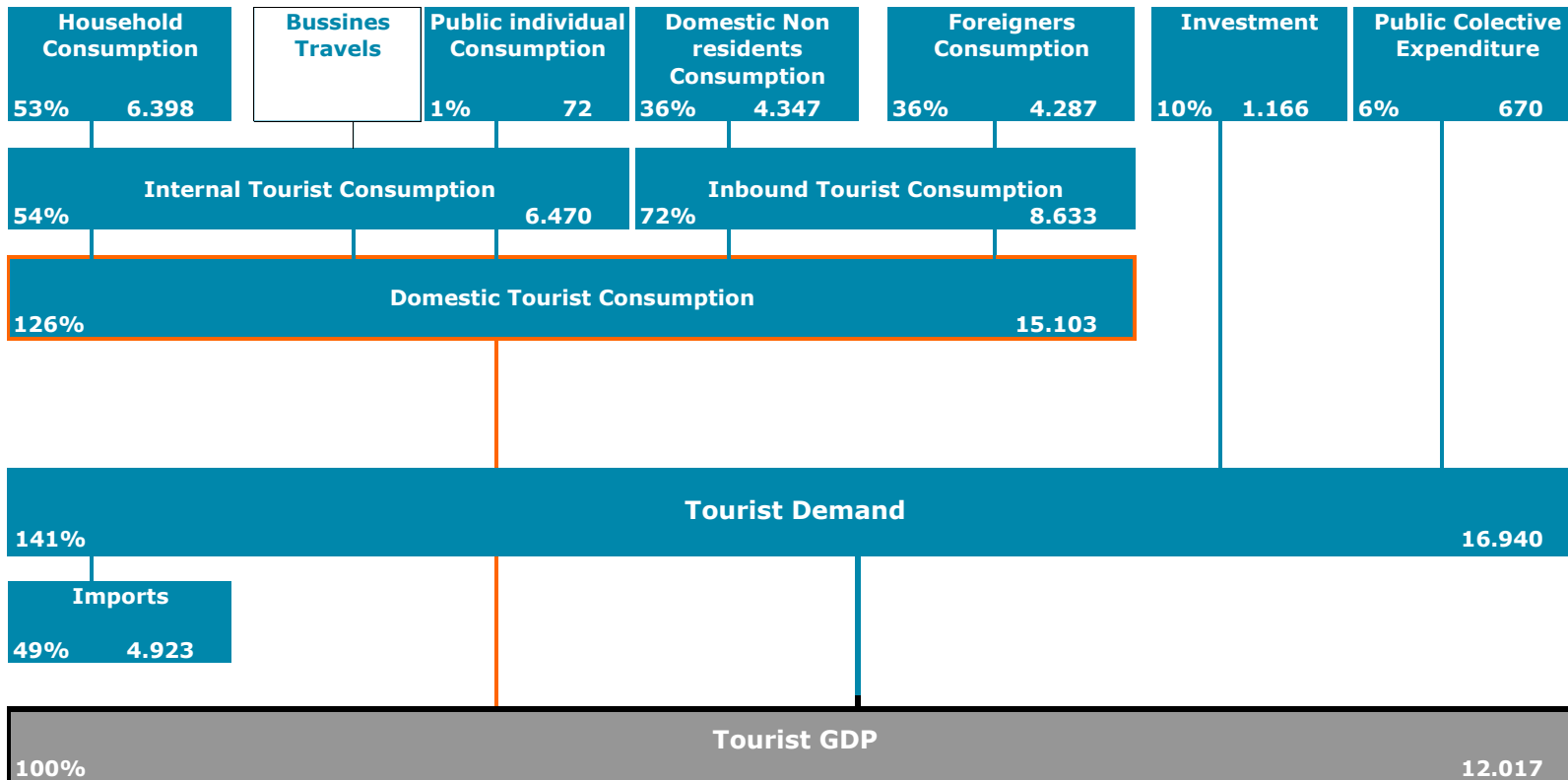
An example: Impactur Co. Valenciana results



An example: Impactur Co. Valenciana results

COMUNIDAD VALENCIANA IMPACTUR STUDY

Year 2005



Which are the main results of IMPACTUR by regions?

	<u>CANARIAS</u>	<u>Co. Valenc.</u>	<u>Galicia</u>	<u>ESPAÑA</u>
GDP	32,6%	13,8%	11,6%	11,4%
EMPLOYMENT	37,3%	14,1%	13,3%	11,2%
EXPORTATION SERVICES	90,9%	67,0%	68,6%	70,5%
INVESTMENT	21,2%	4,2%	8,3%	5,0%



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THANK YOU VERY MUCH FOR YOUR ATTENTION

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