

World Tourism Organization



THE SPANISH OUTBOUND TRAVEL MARKET TO AFRICA AND THE MIDDLE EAST

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Introduction

The present report on the *Spanish Outbound Travel Market to Africa and the Middle East* is part of the activities undertaken by UNWTO to support African and Middle Eastern countries in benefiting from the growing Spanish outbound travel market. This report aims to complement the activities of INVESTOUR, an entrepreneurial meeting to be held during FITUR 2010, as a result of an agreement between the Spanish Government and the Community of Western African States (CEDEAO). INVESTOUR 2010 will be the first investment forum for Africa, with CEDEAO countries as special guests.

The report aims to provide countries in Africa and the Middle East with, on one hand, a better understanding of the Spanish market – its size, main characteristics, needs and expectations – and on the other hand, information on the most efficient actions required for increasing tourism flows from the Spanish market to these two regions.

Several and complementary sources of information were used in the preparation of this report: tour-operators, travel agencies, embassies, tourist offices of Africa and Middle East countries (and others) in Spain and professional associations were interviewed to gather valuable insights into the Spanish outbound market to Africa and the Middle East. Also, secondary sources were thoroughly reviewed to gain the widest perspective possible. This allowed for the development of a reference and qualitative assessment of the attributes and behaviour of Spanish tourists when travelling to Africa and Middle East destinations.

Sources of Information



The report comprises five chapters: Chapter 1 provides hard data and a brief analysis of the main macro-economic indicators defining the current – and delicate – situation of the Spanish economy which, eventually, firmly determines the consumption behavior, tourism included; Chapter 2 describes the outbound market in Spain, based on Spanish official statistical sources (Spanish Institute of Tourism Studies/Instituto de Estudios Turísticos, IET). Special attention was paid to selecting information of the highest relevance for Africa and Middle East destinations; Chapter 3 sheds light on the Spanish outbound market to these two regions, both in quantitative and qualitative terms. Special attention is given to:

- Understanding the recent evolution of the market;
- explaining why Spaniards travel to Africa or the Middle East;
- analyzing the features of the Spanish trips to Africa and the Middle East;
- identifying positive and negative perceptions of the Spanish market regarding African and Middle East destination.

Chapter 4 includes a detailed SWOT analysis and Chapter 5 specifies how to better reach the Spanish market, regarding both the consumer perception (understanding how consumers take the decision to travel, how they behave online, etc.) and the most appropriate marketing actions for the Spanish market. A list is provided with prioritized tactics in the light of their effectiveness in the Spanish market.

The report is completed with extra information displayed in the Annexes:

- A sample of tour packages sold in the Spanish market to destinations in Africa and the Middle East;
- air connections from Spain to destinations in Africa and the Middle East;
- gross sales of air tickets in 2008 and 2009 (January-September) from Spain to Africa and Middle East destinations;
- elements that may influence the flows towards these destinations, such as the Spanish labour calendar, border crossing formalities and travel advisories;
- UNWTO basic guidelines on how to improve the effectiveness of the participation in tourism fairs.

Executive Summary

This report aims to provide a better understanding of the Spanish outbound market towards Africa and Middle East. Several insights have been gained through research, and the following ten are considered especially relevant:



The Spanish economy is powerful (8th world's GDP), but is currently struggling with serious difficulties derived from employment destruction and frozen internal demand.



The level of trips abroad is still relatively small in Spain. Only 7% of the total number of trips taken by the Spaniards is to a destination outside Spain. The good news is that the participation of Spain in international tourism is steadily growing. This growth is particularly strong in terms of expenditure (+10% in the 2005 to 2008 period).



When the Spanish travel abroad they go mainly to Europe (namely France, Portugal and Italy), where they seek cultural excitement and hospitality. In 2008, the Spanish made around 1 million trips to Africa and Middle East.



The absence of historical and economic links with African or Middle Eastern countries is relenting tourism flows towards these destinations. Morocco, with the strongest ties, receives more than half the trips from Spain to Africa and the Middle East.



Currently, the regions Africa and Middle East are limited, in terms of potential destinations for the Spanish, to 15-20 countries. The highest barrier is related with lack of awareness and biased preconceptions.



The greatest opportunities for destinations in Africa and the Middle East in this market are related to new consumer behaviour trends, namely the eagerness for unknown and for memorable experiences.



Factors explaining destination choice are: distance, existence of direct air connections, perception of security, economic links, perception of value-for-money, quality and uniqueness of local attractions and preconceptions.



Besides improving destination awareness (with better branding strategies), two other key success factors have been identified: giving the travel agent a key role (only 35% of travellers in Spain go online), and being strongly competitive on price.



Still, e-commerce is soaring in Spain: latest available data shows an extraordinary increase of 71% from 2006 to 2007. Air tickets and accommodation are first and third on the list of items bought online in Spain.



Several marketing tools have been pointed out as the most effective ones for the Spanish market (TV infomercials, Familiarization Trips, Fairs and Co-Marketing being the top four). National institutions in Spain should also play an active supporting role.

Chapter 1: Overview of the Spanish Economy

Key Messages

- According to International Monetary Fund (IMF) the GDP of Spain reached 1,612 billion US dollars in 2008 – the eighth place in the world.
- The Autonomous Communities with the highest GDP per capita are the Basque Country, Madrid, Navarra, Cataluña and Aragón.
- In 2009, there was a strong downturn in the economic indicators:
 - The decrease was due especially to the drop of domestic demand. External demand was still positive and contributed to the growth of the Spanish GDP.
 - The consumption of families, which was increasing until the 1st quarter of 2008, started to decline and reached its minimum in the second quarter of 2009.
 - According to the Spanish Central Bank, the quarter-on-quarter decline trend has been easing, including the main components of domestic expenditure, and more markedly, household consumption. The pace of deterioration in the labour market has also slowed.
- The total population of Spain is around 46 million people.
- The most populated autonomous communities are Andalusia, Catalonia, Madrid, Valencia and Galicia.
- Nationals from African countries constitute a relevant part of the immigration to Spain. Moroccan nationals are the most numerous immigrant group from a single country in Spain.

1.1. The Spanish Economy in Figures

A country's social reality and economic situation determines the consuming behaviour of its population.

For Spain, data referring to last two years objectively reflect a less positive situation; furthermore, indicators related to consumers and entrepreneurs' confidence are at levels below those of previous years. According to the Spanish Sociological Research Council (Consejo de Investigaciones Sociológicas)¹, 71% of the Spanish believe that the economic situation is bad or very bad, while 66% foresee the same or a worse situation for the next year.

¹ Barómetro CIS Septiembre 2009. http://datos.cis.es/pdf/Es2812sd_A.pdf

Therefore, an introduction to the socio-economic picture of Spain is essential to understand how this can affect the Spanish outbound tourism consumption.

Political Glance



- Official name:** Kingdom of Spain
- Chief of State:** King Rey Juan Carlos III
- Prime Minister:** José Luis Rodríguez Zapatero
- Legislative power:** Congress of 350 deputies and Senate of 264 members
- Government party:** PSOE (Socialist)
- Administrative Structure:** 17 autonomous communities and 2 autonomous cities
- Capital:** Madrid
- Official languages:** Castilian Spanish (official), Catalan, Galician, Basque
- Next Parliament elections:** March 2012

Source: *España Hoy 2009*, Ministry of the Presidency, www.la-moncloa.es

Population

Table 1.1 Spanish Population by Autonomous Community, 2009

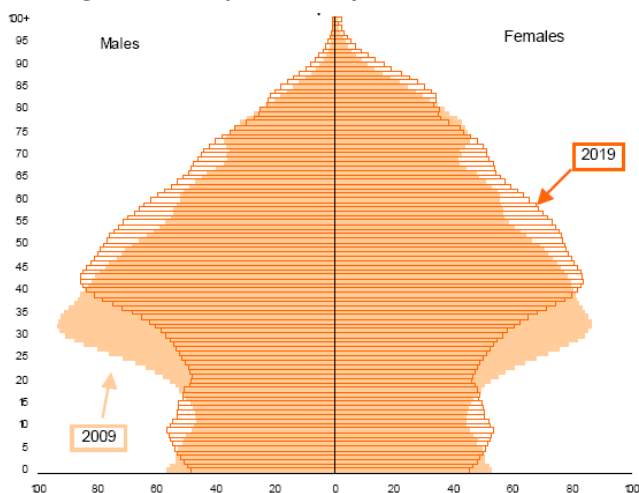
Andalusia	8,190,742	1st	Extremadura	1,080,932	12th
Aragon	1,320,762	11th	Galicia	2,737,074	5th
Asturias	1,057,171	14th	Madrid	6,302,690	3rd
Balearic Islands	1,078,821	13th	Murcia	1,455,275	10th
Canary Islands	2,089,691	8th	Navarre	618,035	15th
Cantabria	578,734	16th	Basque Country	2,134,168	7th
Castile and Leon	2,509,390	6th	Rioja (La)	316,790	17th
Castile-La Mancha	2,044,141	9th	Ceuta (Autonomous City)	72,899	18th
Catalonia	7,285,587	2nd	Melilla (Autonomous City)	70,907	19th
Valencia	5,023,826	4th	Total Spain	45,967,632	

Source: *Spanish National Institute of Statistics, 1 October 2009*

The total population of Spain is around 46 million people. The most populated autonomous communities are Andalusia, Cataluña, Madrid, Valencia and Galicia.

According to the Spanish National Institute of Statistics, the resident population of Spain will increase by 1.1 million inhabitants in the next 10 years.

Figure 1.1 Population Pyramid, 2009-2019



Source: Spanish National Institute of Statistics

Currently, the most populous age range in Spain is that of people between 25 and 40 years old.

Nevertheless, the National Institute of Statistics foresees that in ten years the greatest population increase will occur in those over 64 years, so that “this age group will come to represent 19% of the total inhabitants in Spain in 2019”.

It is relevant to note that immigration affects tourism, not only in terms of trips abroad for the purpose of visiting friends and relatives, but also because it creates economic and cultural interchanges between countries that, in the long run, tend to generate business and leisure tourism flows.

Nationals from African countries constitute a relevant part of the immigration flows to Spain. Specifically, people from Morocco are the most numerous immigrant group from a single country in Spain.

Table 1.2 Immigrant Population in Spain by Origin, 2008

Total	4,526,522	100%
Europe	1,721,475	38%
America	1,821,215	40%
Africa	767,588	17%
Morocco	539,773	12%
Other African Countries	227,815	5%
Asia	216,244	5%

Source: Spanish National Institute of Statistics

Economic Figures

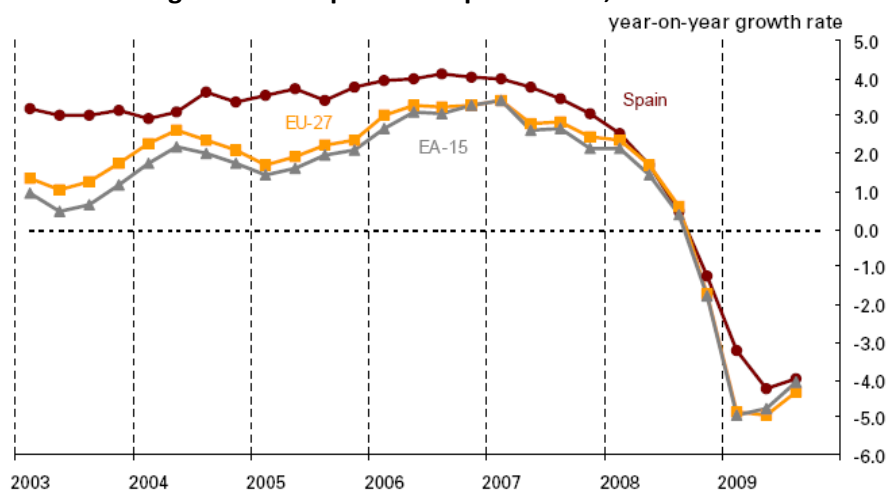
The Spanish economy was one of the most active among developed countries in recent years. However, since the third quarter of 2008 there has been a strong downturn in economic indicators. The main factors behind this economic slowdown had much in common with the global economic crisis, but in Spain the situation was worsened by the severe collapse of the real estate and construction sector, which, for years, was one of the major motors of economic growth and the employment engine in the country. This is clearly reflected in the dramatic decline of the Spanish GDP since 2008. The decrease was especially due to the drop in domestic demand. On the other side, external demand was still positively contributing to the Spanish GDP growth.

Table 1.3 Main Indicators of the Spanish Economy

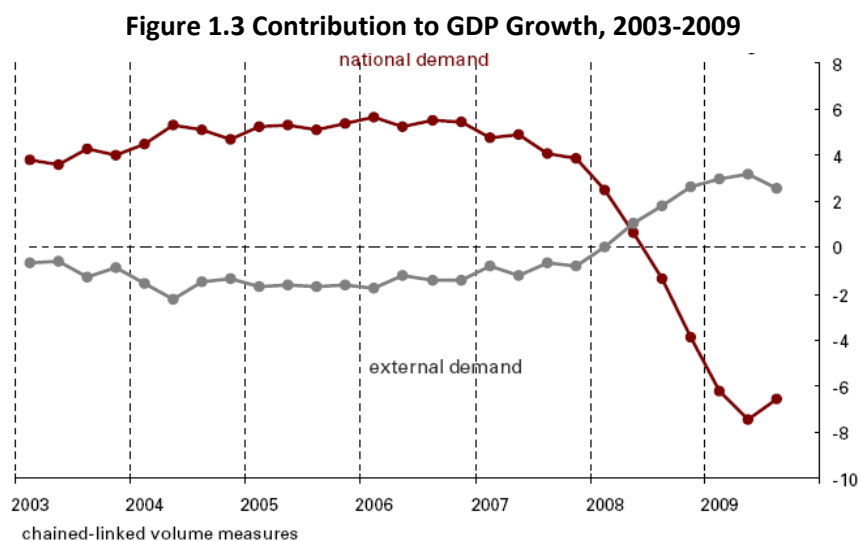
	1995	2000	2004	2005	2006	2007	2008
GDP at market prices (euro, million)	447,205	630,263	841,042	908,792	984,284	1,052,730	1,088,502
GDP per capita (euro, thousand)	13.4	18.5	21.9	22.9	24.6	26.2	26.1
Labour productivity	51.1	51.6	51.9	51.6	51.6	52.0	52.8
Total factors productivity (1995=100)	100.0	100.5	99.0	98.4	97.9	97.8	97.6
Research & Development expenditure/GDP (%)	0.8	0.9	1.1	1.1	1.2	1.3	...
Social expenditure (per 100 inhabitants)	330.9	376.5	422.8	442.0	449.4	...	...
Unemployment rate (%)	22.7	13.8	11.1	9.2	8.5	8.3	11.3

Sources: Eurostat, Ameco, OECD and Central Bank of Spain, 2009

Figure 1.2 European and Spanish GDP, 2003-2009



Source: Spanish National Institute of Statistics



Source: Spanish National Institute of Statistics

In regional terms, the Autonomous Communities with the highest GDP per capita are the Basque Country, Madrid, Navarra, Catalonia and Aragon. Therefore, despite Andalusia being the most populated area, the Autonomous Communities that contribute more to the national GDP are Catalonia and Madrid.

Table 1.4 Population and Gross Domestic Product (GDP) per capita per Autonomous Community, 2009

	Population		GDP per capita
Andalusia	8,190,742	Basque Country	32,133
Catalonia	7,285,587	Madrid	31,110
Madrid	6,302,690	Navarre	30,614
Valencia	5,023,826	Catalonia	28,095
Galicia	2,737,074	Aragon	26,323
Castile and Leon	2,509,390	Balearics	25,967
Basque Country	2,134,168	Rioja	25,895
Canary Islands	2,089,691	Cantabria	24,508
Castile-La Mancha	2,044,141	Castile and Leon	23,361
Murcia	1,455,275	Asturias	22,559
Aragon	1,320,762	Ceuta (Aut. City)	22,320
Extremadura	1,080,932	Melilla (Aut. City)	21,493
Balearic Islands	1,078,821	Valencia	21,468
Asturias	1,057,171	Canary Islands	21,105
Navarre	618,035	Galicia	20,619
Cantabria	578,734	Murcia	19,692
Rioja (La)	316,790	Andalusia	18,507
Ceuta (Aut. City)	72,899	Castile-La Mancha	18,471
Melilla (Aut. City)	70,907	Extremadura	16,828

Source: Elaboration on data from the Spanish National Institute of Statistics

The most negative effects of the economic crisis that Spain is suffering have been reflected in employment. Measured in terms of full-time equivalent job posts, unemployment stabilized recently at 7.2%, meaning that Spain has lost 1.36 million jobs in one year, with the consequent reduction of consumers' expenditure. Unemployment has increased in all economic sectors: the construction sector was the one with the greatest losses of employment, reducing its number of employees almost at a rate of 25% every three months in the last year.

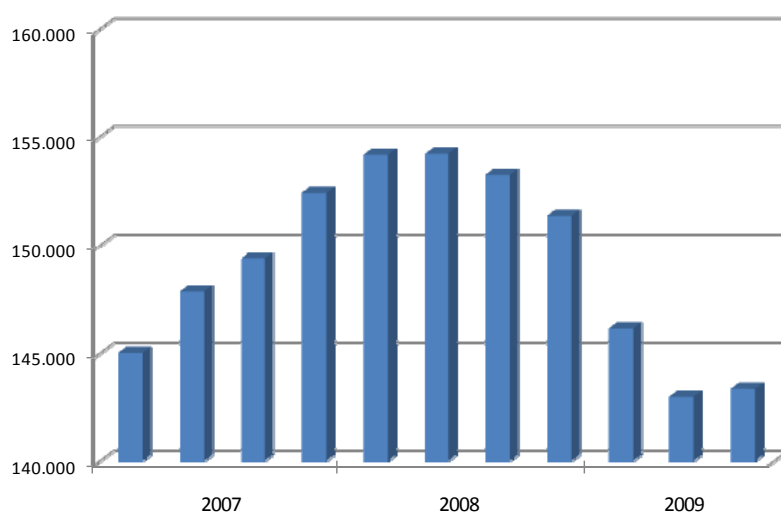
Table 1.5 Full-time Equivalent Jobs, year-on-year growth rates, 2008-2009

	2008				2009		
	Q. I	Q. II	Q. III	Q. IV	Q. I	Q. II	Q. III
Total	1.5	0.3	-1.0	-3.2	-6.3	-7.2	-7.2
Agriculture and fishing	-4.1	-3.1	-2.5	-3.3	-3.3	-3.7	-4.5
Energy and industry	0.7	0.8	-0.8	-4.9	-10.1	-12.2	-12.7
Construction	-1.0	-6.4	-12.3	-20.2	-25.2	-25.0	-24.3
Service activities	2.6	1.8	1.4	0.7	-1.7	-2.9	-3.0
- Market services	3.4	2.2	1.9	0.3	-3.1	-4.6	-5.0
- Non-market services	0.3	0.7	0.3	1.6	2.2	1.9	2.3
Employees	1.5	0.2	-1.1	-3.6	-6.2	-7.1	-7.0
Agriculture and fishing	-3.8	-1.3	-1.5	0.6	0.6	-1.0	-2.7
Energy and industry	0.8	1.0	-0.7	-5.0	-10.1	-12.3	-12.8
Construction	-1.0	-7.1	-12.9	-22.1	-27.2	-26.3	-25.2
Service activities	2.4	1.6	1.2	0.4	-1.1	-2.4	-2.5
- Market services	3.4	2.0	1.7	-0.1	-2.6	-4.3	-4.6
- Non-market services	0.3	0.7	0.3	1.6	2.2	1.9	2.3

Source: Spanish National Institute of Statistics

The consumption of families, which was increasing until the first quarter of 2008, started to decline, reaching its minimum in the second quarter of 2009.

Figure 1.4 Household Expenditure, 2007-2009 (euro, million)



Source: Spanish National Institute of Statistics, Quarterly National Accounts

Nevertheless, even if it is not yet possible to talk about the recovery of the Spanish economy, some positive signs of a change in trend are appearing. According to the Bank of Spain², the fall of the national economic activity is reducing its pace, suggesting that the worst of the crisis might have passed by: *“the economic activity continued to fall during the second quarter of 2009, albeit at a less sharp pace than in the first one, when the most acute phase of the contraction was seen. GDP posted a quarter-on-quarter decline of 1.1% (against a rate of -1.6% in the first three months of the year), while the related year-on-year rate of decline was 4.2%.*

The indicators for the third quarter confirm the slowing trend of the rate of contraction in activity, in an environment in which financial market normalization continued and in which global macroeconomic conditions showed signs of stabilizing.

The estimates made on the as-yet incomplete information available point to a quarter-on-quarter decline in GDP of 0.4%, the least pronounced since the recession began; that said, this more favourable performance is linked in part to public measures with temporary effects. The year-on-year rate of GDP contracted by 4.1% in Q3 (0.1 pp less than in Q2), as a result of a lesser fall-off in national demand (to 6.5%) and of a positive contribution of net external demand (of 2.7 pp). The easing in the quarter-on-quarter path of decline was extensive to the main components of domestic expenditure, although more markedly so in household consumption, where the direct aid for car purchases was influential, and in public investment, where there was headway in the roll-out of Local Investment Fund projects. In step with these developments, the fall in the gross value added of the main productive branches was less than that in the previous quarters, and the pace of deterioration in the labour market slowed.”

² Spanish Central Bank, Economic Bulletin, October 2009, Quarterly Report on the Spanish Economy.

Chapter 2: The Spanish Outbound Travel Market

Key Messages

► The size of the Spanish outbound market

- In 2008, Spaniards made 11.2 million outbound trips (7% of the total trips).
- In terms of expenditure, Spaniards spent euro 13.8 billion in their trips abroad during 2008.

► The growth of the Spanish outbound market

- Between 2005 and 2008 Spanish outbound demand grew an average of 2.2% per year.
- Expenditure grew by 10.7% on average per year in the same period.

► Main destinations abroad

- Europe is, by far, the main destination abroad for Spanish travellers, with 77% of the outbound trips (8.6 million trips in 2008). France is the preferred destination with 21%.
- Morocco is the sixth preferred destination for the Spanish when travelling abroad.

► Most frequent trip features → the outbound trips of the Spanish are typically:

- By airplane (58%).
- With previous bookings (65%).
- Strongly concentrated in the high season (July, August and September account for over 30% of the total trips).
- For leisure purposes, namely culture.
- With 3* and 4* hotels as the preferred accommodation means.
- Booked offline (only 35% use the internet for planning outbound trips).

► Relevant topics for the Spanish travelling abroad

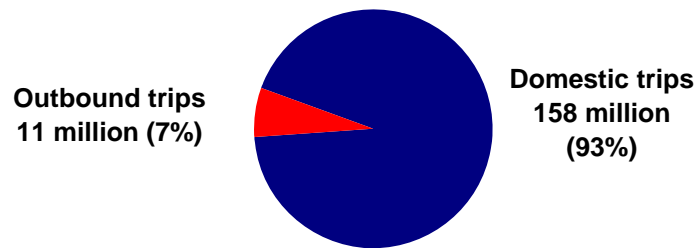
- Spaniards are not accustomed to travelling abroad for their holidays. There is still a widespread feeling of 'nowhere like home'.
- Spaniards show great interest in reaching the local population of the destinations they visit and integrating as much as possible within their every day life, traditions and rituals.
- They highly value being welcome (to a limit) and finding opportunities to receive good value-for-money.
- The language barrier might be relevant.
- Cleanliness is, usually, of uttermost importance to Spaniards.

2.1. The Spanish Outbound Travel Market in Figures

Trips and Expenditure Abroad

According to Spanish official statistics, provided by the Institute of Tourism Studies (Instituto de Estudios Turísticos, IET), 168.8 million trips were made by Spaniards in 2008. Out of these, 11.2 million were outbound trips. In spite of this volume, representing no more than 7% of the total trips, the outbound related expenditure climbed to euro 13.8 billion.

Figure 2.1 Share of Domestic and Outbound Trips in Spain, 2008

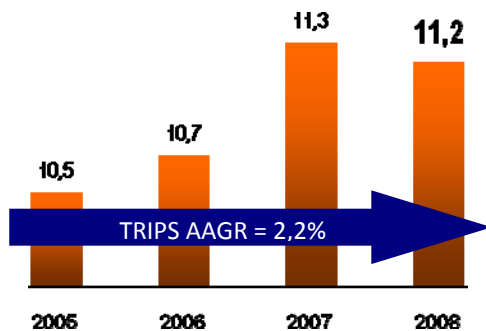


Source: IET, Familitur

Available data shows that the growth of outbound trips between 2005 and 2008 was only 2.2%, while expenditure registered an annual average growth rate (AAGR) of 10.7%.

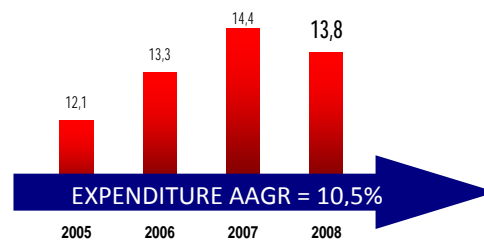
The outbound volume in Spain is quite low when compared to countries in the same economic and social level. According to different sources, the Netherlands, Austria, Germany or the United Kingdom enjoy (or have only recently ceased to enjoy) a rate of participation in outbound travel of over 100% per capita (more outbound trips than population in the country). Spain does not reach one third of that rate, which proves there are many opportunities in the Spanish market in terms of outbound development.

Figure 2.2 Spanish Outbound Trips, 2005-2008, (million)



Source: IET, Familitur

Figure 2.3 Spanish Outbound Expenditure, 2006-2008 (euro, billion)



Source: IET, Familitur

The official Spanish data series shows a methodological break up in 2005 which, in practical terms, disavows any comparison with previous data. However, outbound demand seems to be established around the 11 million trips per year. It is very likely that the above mentioned economic slowdown will reduce this outbound demand, especially affecting mid and long haul destinations.

Within a global context, Spain ranks 11th in terms of expenditure abroad, showing a significant 11% average annual growth rate in the period between 2005 and 2008. In terms of market share, the Spanish outbound market represents approximately:

- 2% of the world outbound tourism expenditure
- 5% of the European outbound tourism expenditure
- 28% of the Southern Mediterranean outbound tourism expenditure.

Mention was already made to the dynamism of the Spanish outbound market in recent times. However, this growth did not come together with the overtaking of an 'international trip culture', as many of the operators consulted for this report pointed. But, given this still low number of trips abroad, Spain shows one of the highest values in terms of expenditure per trip abroad (1,232 Euros).

Table 2.1 Top 25 Outbound Markets by Expenditure Abroad, 1990-2008

Rank	International Tourism Expenditure (euro, billion)				Change (%)		Market share (%)	Population 2008 (million)	Expenditure per capita euro	Trips abroad		per trip euro
	1990	2000	2007	2008*	07/06	08*/07				2008*	2007		2008
World	207	515	626	643	5.6	2.8	100	6,718	96			
1 Germany	30.6	57.4	60.6	61.9	2.9	2.0	9.6	82	753	70.4	73.0	847
2 United States	29.3	70.1	55.7	54.2	-3.0	-2.7	8.4	304	178	64.0	63.5	853
3 United Kingdom	14.3	41.6	52.1	46.6	3.7	-10.6	7.2	61	760	69.5	69.0	675
4 France	9.8	19.2	26.8	29.3	7.9	9.6	4.6	62	471	25.1	23.3	1,257
5 China	0.4	14.2	21.7	24.6	12.2	13.1	3.8	1,328	19	41.0	45.8	536
6 Italy	8.1	17.0	20.0	20.9	8.4	4.9	3.3	59	353	27.7	28.3	740
7 Japan	19.6	34.5	19.3	19.0	-9.7	-1.9	2.9	128	148	17.3	16.0	1,186
8 Canada	8.6	13.5	18.0	18.3	9.6	1.7	2.8	33	550	25.2	27.0	677
9 Russian Federation	..	9.6	16.1	16.9	12.0	4.8	2.6	142	119	34.3	36.5	463
10 Netherlands	5.8	13.2	13.9	14.8	2.6	6.2	2.3	17	885	17.6	18.5	801
11 Spain	3.3	6.5	14.4	13.8	8.3	-3.7	2.2	46	303	11.3	11.2	1,232
12 Korea, Republic of	2.5	7.7	16.0	13.0	6.8	-19.2	2.0	49	267	13.3	12.0	1,081
13 Belgium	4.3	10.2	12.6	12.8	2.1	1.5	2.0	11	1,198	8.4	8.9	1,443
14 Australia	3.3	6.9	10.7	12.5	15.6	16.5	1.9	22	579	5.5	5.8	2,157
15 Hong Kong (China)	3.7	13.5	11.0	10.9	-1.9	-0.5	1.7	7	1,557	80.7	81.9	133
16 Norway	2.9	5.0	10.0	10.8	7.2	8.5	1.7	5	2,263	3.4	..	..
17 Sweden	4.9	8.7	10.2	10.3	11.1	1.7	1.6	9	1,127	12.7	..	..
18 Singapore	1.5	4.9	9.1	9.6	2.7	6.2	1.5	5	2,067	6.0	6.8	1,413
19 Untd Arab Emirates	..	3.3	8.2	9.0	17.0	9.8	1.4	5	1,896	..	..	..
20 Austria	6.1	6.8	7.7	7.7	0.8	0.2	1.2	8	931	9.9	..	..
21 Brazil	1.2	4.2	6.0	7.5	30.5	24.4	1.2	190	39	4.8	4.9	1,510
22 Switzerland	3.9	5.9	7.4	7.4	0.4	0.9	1.2	7	1,017	..	..	..
23 Ireland	0.9	2.8	6.3	7.1	15.7	12.0	1.1	4	1,595	7.7	..	..
24 Denmark	3.0	5.1	6.4	6.7	7.8	3.7	1.0	5	1,215	6.6	6.3	1,048
25 India	0.3	2.9	6.0	6.5	10.0	8.9	1.0	1,186	6	9.8	10.6	613

Source: World Tourism Organization (UNWTO) ©

According to the IET (Familitur, 2008) the Spanish market generated a total of 781 million overnight stays in 2008 (+2% compared to 2007), of which around 99 million (13%) were abroad and had an average length of stay of 8.8 days (as compared to 4.3 days for national trips). Overnight stays abroad by Spanish grew by around 1.4% a year between 2005 and 2008.

2.2. Profile of the Spanish Outbound Traveller

2.2.1. Top Destinations

Europe is, by far, Spaniards' main destination when travelling abroad. As much as 77%, or 8.6 million, of Spaniards' outbound trips were heading for one of their European neighbouring countries.

Table 2.2 Top Ten Outbound Destinations of the Spanish, 2008 (x 1000)

	Trips	Share
Total	11,229	100%
France	2,392	21.3%
Portugal	1,392	12.4%
Italy	999	8.9%
Andorra	730	6.5%
UK	719	6.4%
Morocco	595	5.3%
Germany	550	4.9%
USA	303	2.7%
Mexico	157	1.4%
Dominican Rep.	135	1.2%

Source: IET, Familitur


France is the preferred destination of the Spanish, with 21% of the outbound trips in 2008. Portugal was second to France, with 9%, followed by Italy with 9%, Andorra (6%), the United Kingdom (6%) and Germany (5%).

Regarding non European destinations, Morocco stands as the top destination, with 5% of Spaniards' trips abroad (with a strong presence of Moroccans residing in Spain that return home for their holiday periods). The United States of America (3%) comes next, with Mexico, the Dominican Republic and Ecuador following with 1% of the outbound trips of the Spanish in 2008.

2.2.2. Main Tourism Source Regions in Spain

Unsurprisingly, most densely populated regions and best air connected ones are the top source regions in Spain for outbound tourism: Cataluña and Madrid stand as the top two source regions. According to Spanish official statistics from IET, Cataluña is first with 28% of these trips, followed by Madrid with 22%. Other regional markets in Spain worth mentioning would be Andalusia (origin of 9% of the outbound trips of Spaniards) and the Valencia (7%).

Table 2.3 Top Outbound Source Regions in Spain, 2008

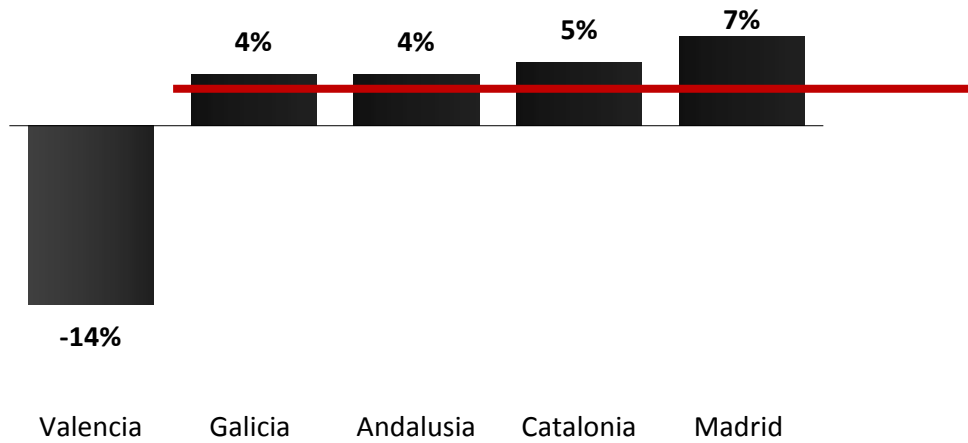


Region	Trips Abroad (share, %)	Trips Abroad per 100 Population
Catalonia	28%	42.9
Madrid	22%	38.8
Navarre	2%	32.9
Basque Country	6%	30.2
Balearic Islands	3%	28.4
Galicia	7%	27.0
Rioja (La)	1%	20.3
Castile and Leon	5%	20.3
Asturias	2%	19.0
Cantabria	1%	18.0
Extremadura	2%	17.3
Murcia	2%	16.2
C. Valencia	7%	15.6
Aragon	2%	13.5
Andalusia	9%	12.6
Canary Islands	2%	11.2
C. La Mancha	2%	8.8

Source: IET, Familitur

The big five source areas in Spain for outbound tourism have experienced different evolutions in the period 2005-2008. Thus, Catalonia, Madrid, Andalusia and Galicia have grown slightly faster than the national average, while the outbound trips coming from the Valencia decreased by 14%.

Figure 2.4 Annual Average Growth Rate of Outbound Trips from Top Five Regions in Spain, 2005-2008

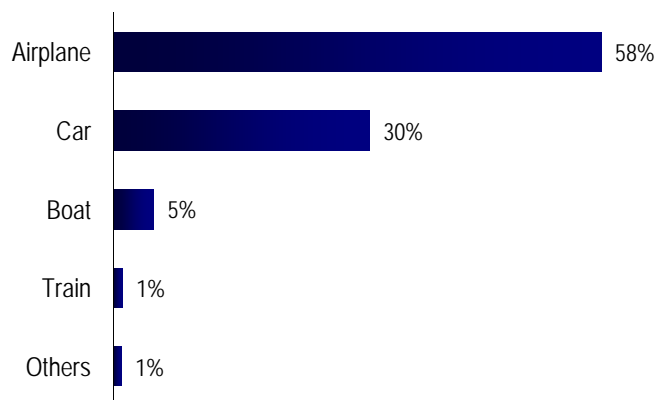


Source: IET, Familitur

2.2.3. Means of Transport

Spanish travelling abroad highly depend on air connectivity. According to official statistics, 57% of the trips were made by plane, while another 30% of were done by car.

Figure 2.5 Share of Outbound Trips per Means of Transport, 2008



Source: IET, Familitur

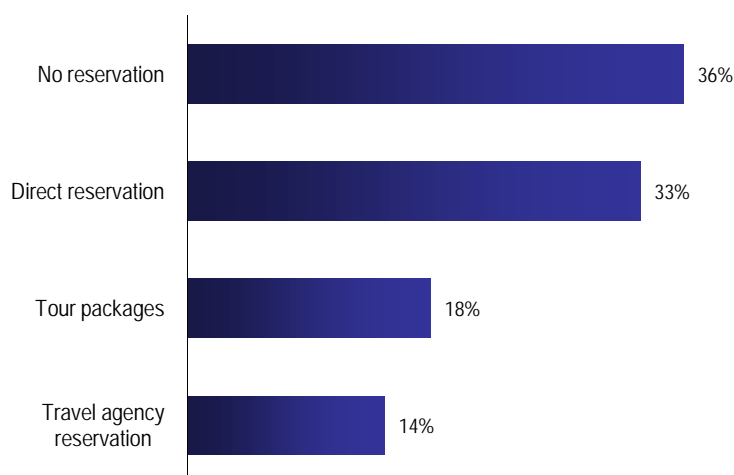
2.2.4. Booking Behaviour

Outbound trips in Spain tend to be made using previous bookings. A majority of travellers book transportation and accommodation in Spain, although a significant 35% travels with no previous reservations (again showing the importance of the immigrants residing in Spain and returning home for their holidays).

In 2008, bookings were made in practically two out of three outbound trips (64%). In 18% of the cases a package was booked, and for another 14% bookings were made through travel agencies. Direct reservations with service providers (accommodation, rent a car, etc.) were made in 33% of the outbound trips of the Spanish in 2008.

When compared to previous years, there is a clear tendency towards the increasing of direct bookings (+9% over 2007), meaning that bookings with travel agencies and sales of package tours diminished (-16% and -2% respectively).

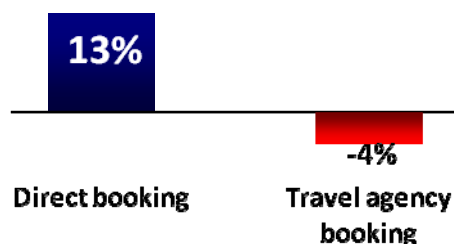
Figure 2.6 Share of Outbound Trips according to Form of Organization, 2008



Source: IET, Familitur

In terms of evolution, official statistics show that Spanish residents travelling abroad are more and more keen to make their own reservations in spite of booking through agencies: direct booking grew by 13% on average a year between 2005 and 2008 while agency reservation decreased by 4%.

Figure 2.7 Annual Average Growth Rate of Spanish Outbound Trips according to Type of Booking, 2005-2008

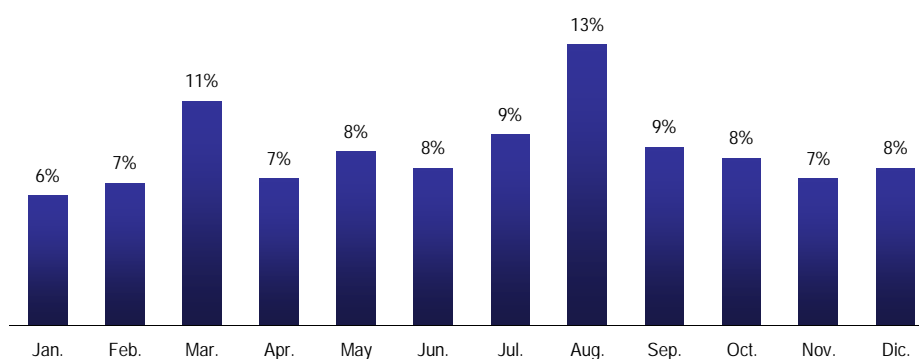


Source: IET, Familitur

2.2.5. Seasonality

The majority of Spaniards still keep the habit of taking a vacation in the high season (31% do it from July to September), a trend strongly associated with school and labour holidays, especially for the month of August (13% of outbound trips).

Figure 2.8 Share of Outbound Trips per Month, 2008

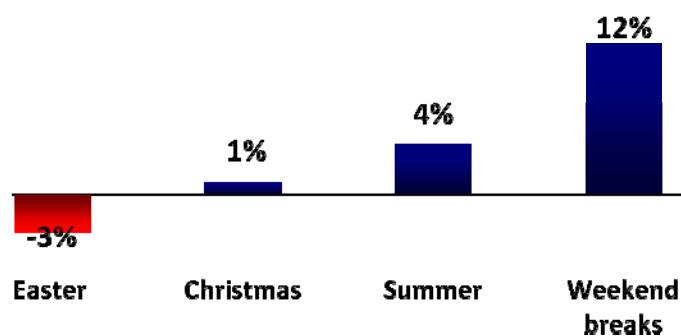


Source: IET, Familitur

The low season (January, February, March, November and December) accounts for 38% of all trips, mainly concentrated (in 2008) in the month of March (11%) due to Easter holiday break. In turn, 31% of outbound trips are concentrated in the mid season (April, May, June and October).

31% of the trips abroad take place during summer months, clearly the most relevant holiday period for Spaniards. However, the relevance of weekend breaks must be noted, with 14% of all outbound trips and the greatest dynamism in the period 2005-2008.

Figure 2.9 Annual Average Growth Rate of Spanish Outbound Trips according to Holiday Period, 2005-2008

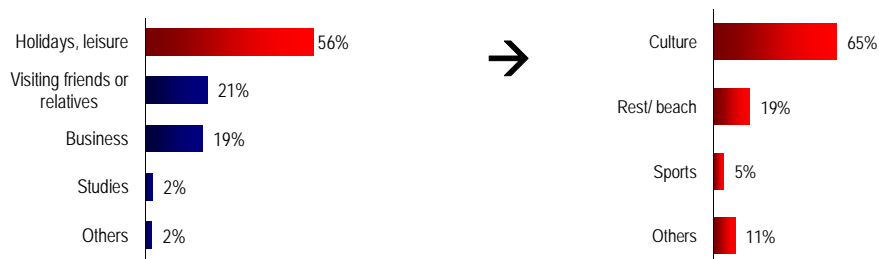


Source: IET, Familitur

2.2.6. Travelling Abroad by Purpose of Visit

In 2008, 56% of the Spaniards travelling abroad did so to enjoy their holidays. Visiting friends and relatives came second as a reason for travelling abroad, with 21% of the outbound trips. Business trips accounted for 19% of the outbound demand.

Figure 2.10 Share of Outbound Trips according to Purpose of Trip, 2008



Source: IET, Familitur

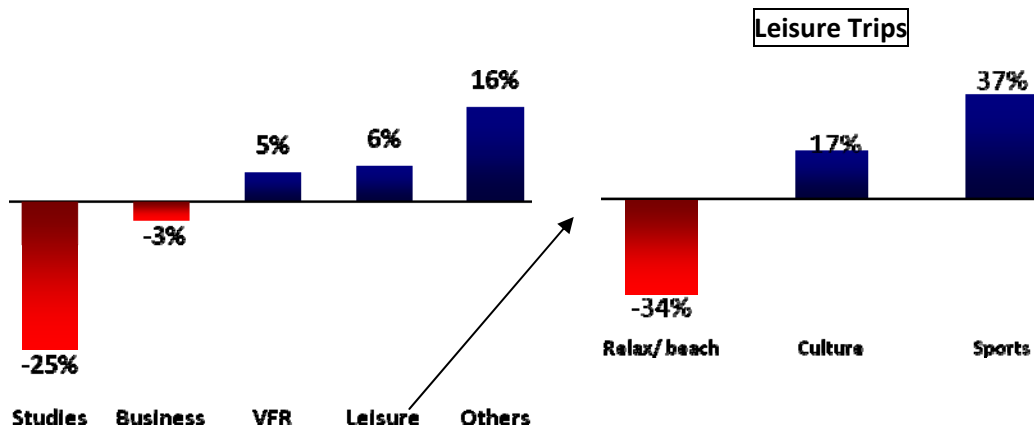
The Spanish travel outside Spain mainly for cultural purposes: culture explains nearly two of every three leisure trips.

Europe is, by far, the preferred destination for all types of holiday/leisure trips of residents in Spain travelling abroad. Figures show that around 80% of both cultural and relaxing/beach trips abroad took place in a European country. Nevertheless, these results show that there is a bulk of nearly 900,000 cultural holiday trips that Spaniards took outside Europe. As for relaxing/beach trips, Spaniards that choose destinations other than Europe go mainly to Caribbean destinations (around 3% of total holiday trips).

With regards to the evolution of the different kinds of trips, several conclusions can be drawn:

- The Spanish increasingly travel abroad for reasons different than traditional leisure or beach relaxation: special interest travel is already a reality in Spain.
- However, leisure travel remains the main motivation for travelling abroad, and growing.
- Outbound cultural tourism has grown by 17% annually between 2005 and 2008.

Figure 2.11 Annual Average Growth Rate of Spanish Outbound according to the Purpose of Trip, 2005-2008



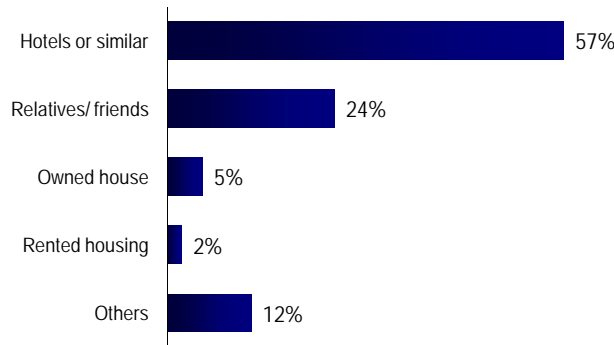
Source: IET, Familitur

2.2.7. Preferred Accommodation

Hotel accommodation was chosen in 57% of the outbound trips of the Spanish in 2008. Within this category, there is a preference for 4* hotels (37% of hotel users) and 3* (31%), while only 10% of them declared using 5* hotels.

Second to hotels comes the use of the ‘residence of friends or relatives’, chosen by 24% of the Spanish outbound travellers in 2008. Owning dwellings abroad is still a very limited trend in Spain, proved by the fact that only 3% used this type of accommodation while travelling abroad last year.

Figure 2.12 Share of Outbound Trips according to the Type of Accommodation Used, 2008



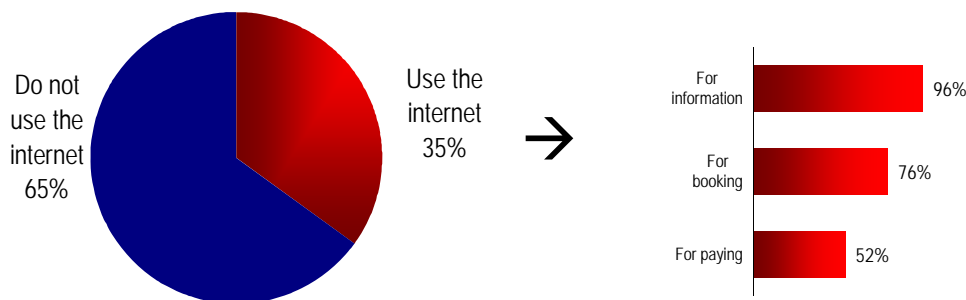
Source: IET, Familitur

According to official statistics, the volume of Spaniards choosing hotels while travelling abroad has grown by 3% annually between 2005 and 2008. Official statistics show that only trips to 5* hotels have decreased (-3%) in this period.

2.2.8. Use of Internet

35% of outbound travellers used internet while planning their trips abroad. They used it for searching for information, for booking and for paying for some of the services required in the destination. Official data shows that there is still 65% that plans their outbound trips completely offline.

Figure 2.13 Share of Outbound Trips according to the Use of Internet, 2008



Source: IET, Familitur

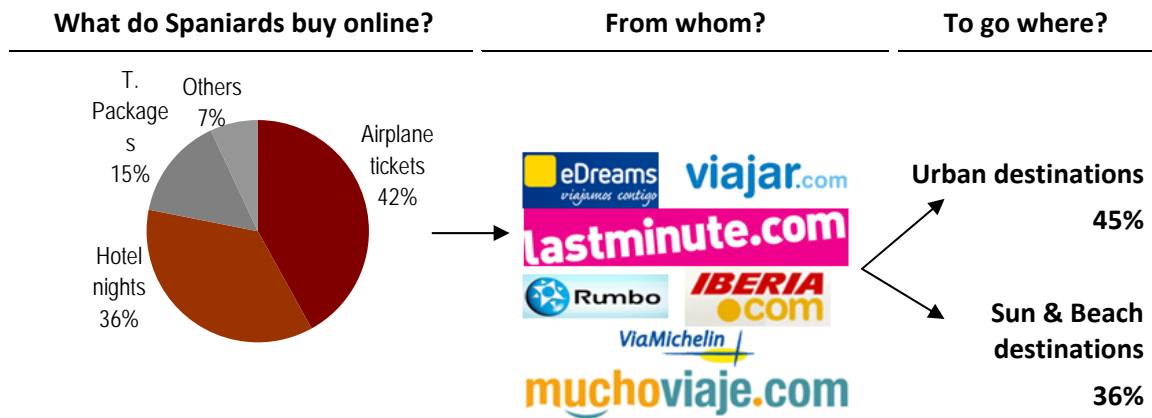
When the Spanish use the web while planning their outbound trips, they mostly do so to search for information about the destination of their choice (96% of internet users). Also significant is the share of outbound travellers who used the internet and booked online, 76%, with a surprisingly reduced 52% of the travellers paying online for these reservations.

Internet stands as the main information source related to outbound travelling for Spaniards, with personal recommendation in a second position and travel agencies coming third.

When the Spanish travelling abroad decide to book or purchase one or more of the services required for their outbound trip, it is air tickets what they mostly buy, followed by hotel nights. Favourite destinations booked online are cities (45%) and sun and beach destinations (36%), according to the e-marketer publications (2007).

According to the European Travel Commission, main online operators in Spain are e-Dreams, Viajar.com, Lastminute.com, Rumbo, Iberia, Via Michelin and Muchoviaje.com

Figure 2.14 Products Booked, Main Online Players and Types of Destination Booked Online, 2007

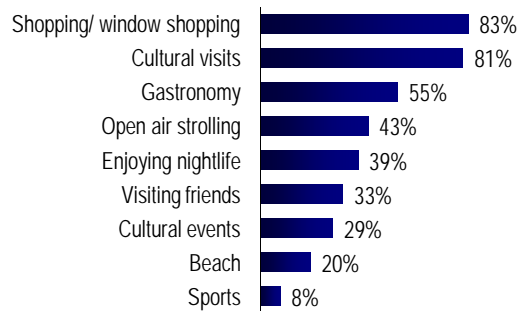


Source: e-Marketer, 2008

2.2.9. Activities While Abroad

Shopping -and also window shopping- together with cultural related activities are Spaniards’ top favourite activities while travelling abroad, as declared by around 80% of them. Enjoying gastronomy and local cuisine also play a key role for 55% of the Spanish outbound travellers in 2008.

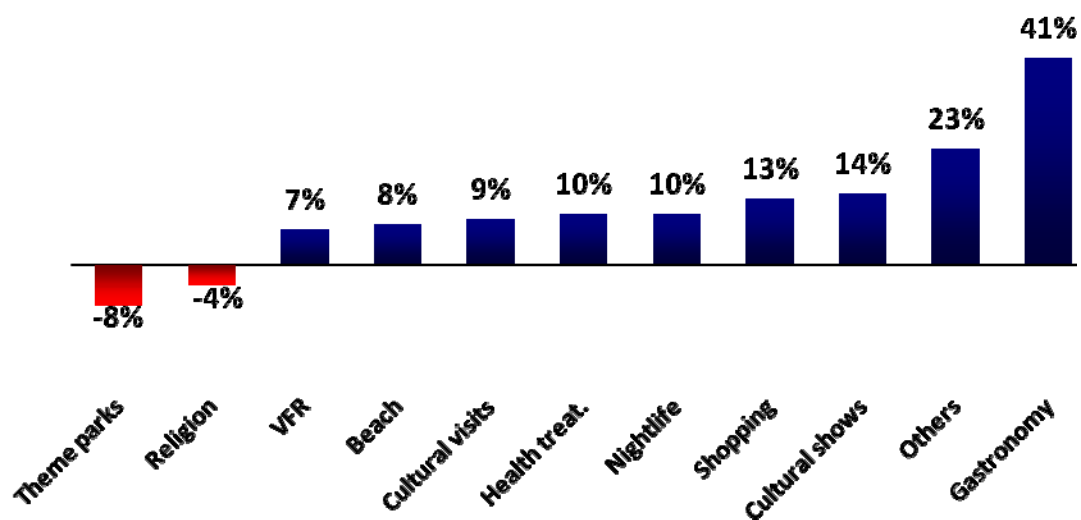
Figure 2.15 Share of Outbound Trips according to Activities Abroad, 2008



Source: IET, Familitur

Spaniards show a great interest in reaching locals and integrating as much as possible within the every day life, traditions and rituals of the visited destination.

Figure 2.16 Annual Average Growth Rate of Spanish Outbound Trips according to Activity Abroad, 2005-2008



Source: IET, Familitur

Note: Only comparable categories have been analyzed

2.2.10. Other Relevant Issues

The Spanish is, as previous data shows, not a heavy consumer of outbound trips (only around 7% of total trips are outbound). Spaniards are accustomed to travelling within Spain, with a genuinely rooted 'nowhere like home' kind of mindset. Thus, barriers for travelling abroad are easy to build in Spaniards minds.

TNS Visitor Satisfaction Research (2007) highlighted several areas of special interest for the Spanish outbound traveller while abroad:

- Being friendly and welcoming (to a limit).
- Providing relevant information in Spanish (the knowledge of foreign languages remains a full-size barrier for travelling abroad).
- Pointing opportunities to receive good value-for-money.

Some other practical advice on the Spanish needs and expectations are:

Language barriers ➤ Web sites, print and/or signs will be better appreciated if in Spanish. It is often a source of annoyance that brochures for attractions or information signs in hotels are printed in other languages, but not in Spanish.

Information availability ➤ The Spanish are interested in local colour – locals markets, restaurants, excursions and shopping possibilities – so providing local interesting information to Spanish travellers during the visit is essential.

➤ The Spanish rely more and more on non-commercial information. Therefore, and in combination with the language limitation factor, interactive platforms (blogs, forums, etc.) with information in Spanish are highly recommendable.

Food and Drink ➤ Spaniards prefer to eat lunch quite late (starting at 2-3pm) and similarly with dinner (starting usually around 9-10pm).

Accommodation ➤ Like most Europeans, the Spanish expect an en-suite bathroom. Cleanliness is paramount.

➤ The Spanish can be very demanding and will certainly not hesitate to complain if something is not to their satisfaction.

➤ However, their enjoyment relies more on what the destination can offer (fulfilling expectations) than the quality of accommodation. This is especially true for highly motivated Spanish travellers.

Chapter 3: The Spanish Outbound Market to Africa and the Middle East

Key Messages

- ▶ **The size of the Spanish outbound market to Africa and the Middle East**
 - In 2008, Spanish made 1 million trips to African and Middle Eastern destinations.

- ▶ **The growth of the Spanish outbound market to Africa and Middle East**
 - Between 2005 and 2008 the Spanish demand for these regions increased at a 10% annual average rate. Although the very limited historical links with these countries is still limiting tourism flows, there is consensus among the operators that this market has good growth prospects.

- ▶ **Main destinations in Africa and the Middle East**
 - Morocco is clearly the first destination, with nearly 60% of the Spanish outbound trips to Africa and the Middle East.
 - Second to Morocco are Egypt and Tunisia, followed by Jordan and South Africa.
 - Destinations are chosen based on distance, availability of direct air connections, perception of security, economic links, value-for-money perception, quality and uniqueness of attractions, and preconceptions.

- ▶ **Main types of trips**

Culture and nature are the strongest claims of African and Middle Eastern destinations. Eight types have been defined, out of which four are clearly the leaders:

 - Cities + nature + culture
 - Cities + culture
 - Nature
 - Cities + nature

These trips last, on average, 10 days; the Spaniards pay around euro 260 per day on average, with a noteworthy dispersion from one destination to another.

- ▶ **Satisfying and unsatisfying trip features**
 - Positively valued factors are the quality of cultural resources and the authenticity of cultural expressions, untouched nature and exoticism.
 - Unsatisfying trip characteristics are service quality, the quality of accommodation facilities, border control procedures and local gastronomy

3.1. The Spanish Market to Africa and the Middle East

Spanish are not very keen on travelling abroad. In fact, only 7% of their trips are outbound. In this context, and according to official data available, the Spanish market for African and Middle Eastern destinations in 2008 went up to around 1 million arrivals, with a 10% average growth rate a year between 2005 and 2008.

Figure 3.1 Spanish Outbound Market for Africa and the Middle East

Arrivals from Spain in 2008	Annual Average Growth 2005-2008
± 1,000,000	10%

Source: UNWTO and IET

Some opinion leaders consulted for the purpose of this report pointed that the very limited historical ties with African and Middle Eastern countries strongly condition the image of these destinations in Spain, which today remains quite limited, distorted and not realistic. In turn, this affects tourism flows to these regions.

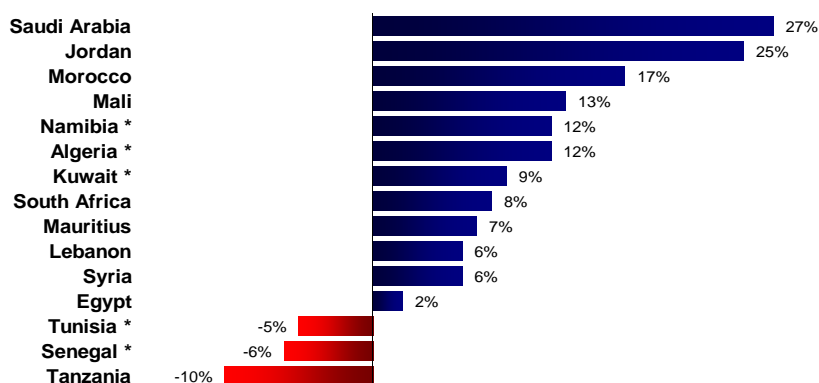
However, there is consensus among the operators consulted that the traffic from Spain to destinations in Africa and the Middle East has good growth prospects. The Spanish operators consulted for the purpose of this report consider that there are positive prospects for the development of these flows given that:

- The Spanish society values leisure highly;
- There are several population groups with excellent potential: couples with children, couples without children, independent travellers, young travellers and individual travellers;
- Spanish consumers have a deep interest in knowing different cultures and ways of life;
- The travelling population is still smaller than the population who wishes to travel abroad;
- Destinations with the greatest growth potential, according to operators consulted are Jordan, Tunisia, Syria, Egypt and South Africa;
- Per capita spending tends to grow faster in Sub-Saharan destinations than elsewhere in Africa or the Middle East.

According to UNWTO statistics³, Africa is a much greater destination for Spanish travelling abroad than the Middle East in terms of arrivals. In Africa, Morocco, Mali, Namibia and Algeria grew significantly in this period, but still slower than the Middle Eastern destinations like Saudi Arabia or Jordan, as shown in the graph below.

³ UNWTO data are based on arrivals registered to destination countries and originated from Spain.

Figure 3.2 Arrivals from Spain: Annual Average Growth Rate, 2005-2008



Source: UNWTO

Note: * Last available data for 2007

3.2. Why do the Spanish Travel to Africa and the Middle East?

The Spanish travel to Africa and the Middle East for quite a number of reasons and the tour-operating industry is well aware of the motivations for visiting such destinations. Their answers to this particular question showed that there are three main drivers: culture, nature, and exoticism.

Figure 3.3 Reasons for Travelling to Africa and Middle East destinations in the Spanish market



Source: Tour-operators and specialists interviews

Usually combinations of these factors can be found in the market, but the underlying travel motivations can be summarized into one of these three categories. Africa and Middle Eastern destinations are not positioned in the Spanish sun and beach market – where domestic destinations are very strong, although some packages have been identified. The thorough analysis of 351 packages from 23 Spanish tour operators provides further insight into this issue.

Table 3.1 Types of Packages Available in the Spanish Market to destinations in Africa and the Middle East, 2009

Cities + Culture + Nature	30%
Cities + Culture	25%
Nature	19%
Cities + Nature	15%
Beach	4%
Cities + Culture + Beach	3%
Beach + Nature	2%
Beach + Nature + Culture	2%
Flight + Hotel	Over 60 destinations

Source: Research on tourism packages to destinations in Africa and the Middle East

Note: Annex I shows specific tour packages for each identified type of trip.

It must be noted that the Spanish outbound traveller is usually highly interested in reaching and getting to understand deeply the destination visited. Spanish travellers enjoy very much being in contact with locals, their ways of life, traditions and also their cultural and artistic expressions. This has to be seen under the influence of the factors mentioned above: limited knowledge of languages, some prejudices and lack of information in relation to certain destinations.

This deep and sincere interest on foreign ways of life perfectly suits the ‘cultural tourism’ definitions included in the ETC/UNWTO report *City Tourism and Culture* (2005).

Cultural Tourism → choosing a definition: The definition of the complex word ‘culture’ further complicates the definition of cultural tourism. Culture as presented in the definitions, not only consists of traditional culture, such as visiting museums, the performing arts, galleries, cultural heritage, etc., but it also includes the way of life of people living in a certain area, including aspects such as language, beliefs, cuisine, dress, customs etc. and the products that arise from it (for example architecture, artefacts and the related atmosphere).

Definition 1: a conceptual definition of cultural tourism to cities

The movement of persons to cultural attractions in cities in countries other than their normal place of residence, with the intention to gather new information and experiences to satisfy their cultural needs.

Definition 2: an operational definition of cultural tourism to cities

All movements of persons to specific cultural attractions, such as heritage sites, artistic and cultural manifestations, arts and drama to cities outside their normal country of residence.

Source, UNWTO, *City Tourism and Culture*, 2005

Given the improvement in access and an increasing economic interest in some countries, meetings and incentives from Spain are also growing in African and Middle Eastern destinations. Another point to emphasize is that while the basic resources to generate products are closely linked to culture, nature, exoticism and lifestyle, several elements are already being used in product development. A grasp on the diversity of what is offered is gained by revising the list of components of tour packages available in Spanish market.

Table 3.2 Activities offered by Spanish tour-operators to destinations in African and the Middle East, 2009

	Africa	Middle East		Africa	Middle East
CULTURE RELATED ACTIVITIES			NATURE RELATED ACTIVITIES		
Local cultural expressions			National parks		
Modern cities			Natural Reserves		
Ancient cities			Landscapes		
Lake cities			Deserts		
Monument visiting			Islands		
Archaeological sites visiting			Mountaineering		
Festivals			Trekking & Hiking		
Traditional architecture			4 Wheel Drive excursions		
Cave & rock ancient painting			Salt generating plants		
Historical routes			Camelback riding		
Castles			River boat trips		
Fortresses			Thermal springs		
Monasteries			Lake visiting		
Temples/ churches/ mosques			Volcano watching		
Museums			Wildlife observation		
Troglodyte sites			Flora observation		
Light & sound shows			Coral reefs observation		
Templar sites			Waterfalls		
Pyramids			Forests		
Biblical sites			Small planes excursions		
Ritual observation			Camping sites		
Ceremony observation			Adventure based trips		
Involvement in ceremonies			Thalasso-therapy		
Street markets & zouks			Fishing		
Nightlife			Visiting river deltas		
Visiting peoples			Visiting natural dunes		
Handicraft markets			Rain forest		
Ways of life			Oasis		
			Canyons and gorges		
			Safaris		
			Photograph safaris		
			Curative plants discovery		
			Horseback riding		
			Scuba diving		
			Hunting		

Source: Research on tourism packages to destinations in Africa and the Middle East

There is a consensus that the products Spanish tourists buy are highly valued and appreciated. However, in some destinations in North Africa and the Middle East packages sold show important incidence on very few resources. This implies:

- Lack of dynamism in terms of product creation and offering;
- Overexploitation, or at least some saturation, in several destinations and during certain moments;
- Need for better visitor management during peak seasons or peak moments;
- New products (or new combinations thereof) sold to Spanish visitors would be a safe bet.

Operators have been asked about the future of outbound travel from Spain to Africa and the Middle East, to find out which types of products would have the greatest growth potential in each region:

Table 3.3 Potential per Type of Product and Regions

Type of Product	Overall potential	Africa	Middle East
Urban tourism	Medium		X
Cultural tourism	High	X	X
Nature	High	X	
Beach	Medium	X	
Safaris	Medium	X	
Cruises	Low		X
Exoticism	High	X	X
Short stays	Low	X	X
Thermals	Low	X	X
Sport activities	Low	X	X

Source: Tour-operators and specialists interviews

3.3. A 'Typical' Trip to Africa and the Middle East

3.3.1. Top Destinations in Africa and the Middle East

Interviews held with tour-operators and professionals all pointed out a number of key points to fully understand how Spaniards travelling to Africa and Middle East chose their destination:

Figure 3.4 Factors influencing destination choice in the Spanish market to Africa and Middle East

Distance	Direct air connections	Perception of security	Economic links	Value for money perception	Quality and uniqueness of attractions	Biased pre-conceptions
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The perception of factors such as security, in the broadest sense, is important in a market like the Spanish, which grows (in expenditure and volume) rapidly but does not have the same degree of maturity of other European tourism generating countries.

Some stereotypes (mainly related with the lack of security, widely understood) are set in the minds of less experienced Spanish tourists. This fact makes the decision to visit a destination in Africa or the Middle East more complex. Operators insist that there is usually a lack of knowledge and information in a significant share of Spanish travellers to these destinations.

Notwithstanding, the Spanish already travel to almost all destinations in Africa and the Middle East. The tour operators offer destinations in virtually all countries in Africa and the Middle East. Some may be temporarily excluded for *force majeure* reasons.

Table 3.4 Arrivals from Spain in Destinations in Africa and the Middle East, 2008

Africa				Middle East			
Country	Series	2008	AAGR* 2005- 2008 (%)	Country	Series	2008	AAGR* 2005- 2008 (%)
Morocco	TF	595,279	17	Egypt	VF	156,236	2
Tunisia ¹	TF	127,335	-5	Jordan	TF	39,762	25
South Africa	TF	33,883	8	Syria	TCE	18,625	6
Algeria ¹	VF	19,748	12	Saudi Arabia	TF	16,965	27
Senegal ¹	TF	13,750	-6	Lebanon	TF	9,987	6
Mauritius	TF	12,001	7	Bahrain ¹	VF	6,398	37
Mali	THS	10,164	13	Oman	THS	3,638	16
Cape Verde	THS	9,880	9	Kuwait ¹	VF	2,797	9
Tanzania	VF	8,470	-10	Yemen	THS	369	-
Kenya ²	VF	6,055	-				
Gambia	TF	5,681	11				
Namibia ¹	TF	4,968	12				
Zimbabwe ¹	VF	4,121	4				
Angola	TF	2,593	-29				
Reunion ¹	TF	1,466	-				
Guine-Bissau ¹	TF	1,458	65				
Madagascar	TF	375	0				
Benin ¹	TF	100	-20				

Source: UNWTO, except data for Kenya

Notes: ¹ Last available data for 2007; ²: Kenyan Embassy in Madrid

*AAGR: Annual average growth rate

Series: TF: International tourist arrivals at frontiers (excluding same-day visitors); VF: International visitor arrivals at frontiers (tourists and same-day visitors); THS: International tourist arrivals at hotels and similar establishments; TCE: International tourist arrivals at collective tourism establishments

There is a clear hierarchy in terms of the volume of arrivals from Spain which is directly defined by the travelling distance:

- North Africa, including Southern Mediterranean countries from Morocco to Libya. Star destinations are Morocco and Tunisia;
- Egypt;
- Jordan and Syria;
- Sub-Saharan Africa, which in turn could be subdivided into three sub-zones:
 1. South Africa;
 2. East Africa: key destinations are Kenya and Tanzania;
 3. West Africa: key destinations are Senegal, Cape Verde and Gambia;
- Indian Ocean Islands: Mauritius and Seychelles;
- Saudi Arabia and the UAE, with Dubai emerging as a major destination.

The Spanish outbound market has limited weight in destinations in Africa and the Middle East. It usually fails to reach a share of more than 8% of the total arrivals to a country (Morocco, 2008). The case of Morocco is a very particular because of its proximity to Spain, its increasing accessibility, the growing supply and the strong economic links with Spain.

As in the case of Tunisia, Spanish companies (tourism and non-tourism related) have strong economic links with both countries, often tending to processes of vertical integration. This fact actively expands the efforts that tourism Spanish companies undertake to attract visitors to these destinations.

Table 3.5 Spanish Investment in Africa and the Middle East, 2000-2008

Countries	Spanish Investment 2000-2008 (euro, x 1,000)	Share in Total Spanish Investment in Africa and the Middle East (%)
Morocco	3,090,633	57
Egypt	645,625	12
South Africa	640,250	12
Tunisia	279,987	5
Algeria	204,932	4
Mauritius	84,650	2
Jordan	69,146	1
Saudi Arabia	30,969	1
Lebanon	722	0
Syrian Arab Republic	637	0
Mali	5	0

Source: Spanish State Trade Secretariat, 2009

Official data for Spanish tourism related investment in Africa and the Middle East are only available for Morocco (a total of 9.1 million euros in 2007).

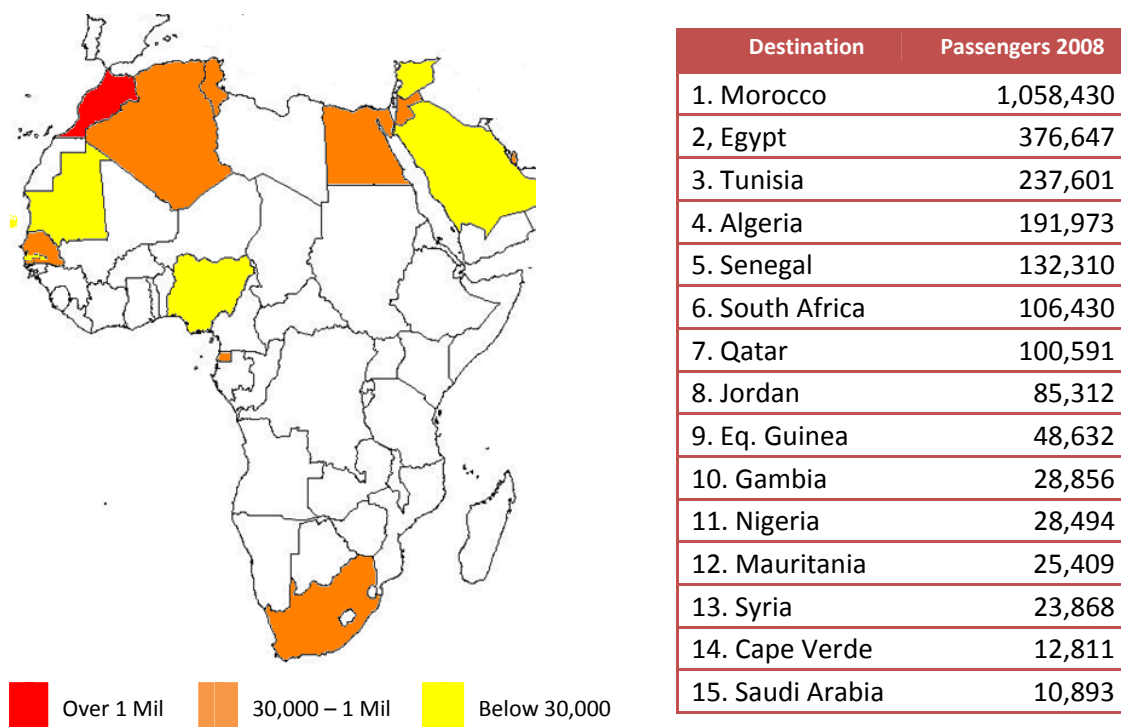
The importance of destinations such as Egypt, Morocco and Tunisia in the Spanish outbound to Africa and the Middle East is also confirmed by data on overnight stays as reported by destination countries. Egypt registers the highest volume of overnight stays from Spain (around 1.7 million in 2008), followed by Tunisia (1 million in 2007) and Morocco (817 thousand).

Table 3.6 Overnight stays from Spain in Destinations in Africa and the Middle East, 2008 (x 1000)

	Series	Overnight Stays from Spain							Change (%)		Average Annual Growth Rate (%)	
		1990	1995	2000	2005	2006	2007	2008*	07/06	08*/07	90-00	00-08
Egypt	NHSn	352	191	850	1,344	1,313	2,022	1,670	54.0	-17.4	9.2	8.8
Tunisia	NHSn	283	232	753	1,139	1,093	966	-	-11.6	-	10.3	3.6
Morocco	NHSn	634	376	729	699	817	767	817	-6.2	6.6	1.4	1.4
Syrian Arab Republic	NHSn	9	17	31	121	48	76	92	57.5	21.5	13.5	14.5
Mauritius	NHSr	15	23	56	68	77	71	87	-7.5	22.9	13.8	5.7
Senegal	NHSn	7	14	40	37	44	51	-	16.2	-	19.0	3.4
Cape Verde	NHSr	-	-	16	29	34	27	40	-21.1	49.0	-	12.4
Mali	NHSn	1	2	8	10	13	17	19	36.3	7.6	24.3	11.9
Madagascar	NHSn	2	5	-	3	3	2	6	-18.1	195.3	-	-
Oman	NHSn	-	-	-	3	3	4	5	22.0	40.8	-	-
Angola	NCER	-	-	1	-	-	-	-	-	-	-	-

Source: World Tourism Organization (UNWTO) ©

The availability of direct flights largely determines the choice of destination. According to official air transportation statistics, Spain has good air connections with around 15 countries in Africa and the Middle East. The full list of flight destinations can be found in Annex II.

Table 3.7 Passengers to top 15 destinations in Africa or the Middle East with direct air connections from Spain, 2008


Source: Compiled from AENA, Spanish Airports Authority (www.aena.es)

Supporting these analyses, data from BSP (total gross sales through travel agencies) shows a very similar ranking of preferred destinations for Spanish travelling to Africa and the Middle East. According to Nexotur (#640, September 2009), “Between January and August 2009, Africa suffered the lowest downturn of all international destinations (-9%) of all in the Spanish market.”

Table 3.8 Travel Agency Sales of Air Tickets to Destinations in Africa and the Middle East, 2008 and January-September 2009 (euro, million)

Destination	2008	January-September 2009
South Africa	19.7	13.0
Morocco	16.7	14.6
Egypt	15.8	14.5
Mauritius	8.0	6.0
Senegal	6.9	5.9
Angola	6.0	5.8
Tanzania	4.9	4.6
Nigeria	4.5	3.8
Algeria	4.1	5.6
Tunisia	3.6	4.1
Kenya	2.8	4.3
Ghana	2.5	2.2
Seychelles	2.2	1.8
Ethiopia	1.7	2.1
Mozambique	1.7	1.3

Source: BSP, IATA

South Africa appears as the top destination in terms of air tickets sales, although all other sources of information do not show it as such. This is probably due to factors like the higher prices of tickets to South Africa than to other destinations, the absence of charter flights, etc. Comprehensive information on BSP figures can be found in Annex III.

3.3.2. Seasonality

Seasonality is a structural feature of the Spanish travelling to destinations in Africa and the Middle East. It has grown to such an importance that, today, the travel trade sees it as one of the main barriers for developing this traffic further. Therefore, they are obliged to cope with this factor when managing flows to Africa and Middle East.

In many cases this fact has an appreciable impact on the quality of the service received because seasonality:

- Concentrates, in a relatively short time, a significant number of tourists which may lead to situations of punctual saturation;
- forces local operators to provide full services to an demanding clientele that visits the destination concentrated on very limited periods during the year;
- professionalism can, at times, be compromised due to the fact that the best professionals may prefer to work for visitors other than Spaniards that ensure they receive higher revenues during all year;
- reduces the opportunities for receiving proper training for local professionals (e.g. Spanish language).

All sources consulted point in this direction, and so do the opinions of operators, professionals and travel agents interviewed for this report.

The Spanish focuses on very specific time periods of the year for travelling to Africa and Middle East, namely summer months, Easter, Christmas and scattered short trips throughout the year (adding extra days to official breaks and weekends: 'puentes'). National Public holidays in 2009 were, with slight differences among regions:

- | | |
|------------------------------|--------------------------------------|
| ➤ 1 January – New Year's Day | ➤ 15 August – Assumption |
| ➤ 6 January – Epiphany | ➤ 12 October – National Day |
| ➤ 19 March – Saint Joseph | ➤ 1 November – All Saints' Day |
| ➤ 9 April – Maundy Thursday | ➤ 6 December – Constitution Day |
| ➤ 10 April – Good Friday | ➤ 8 December – Immaculate Conception |
| ➤ 1 May – Labour day | ➤ 25 December – Christmas Day |

Annex IV shows the national and regional holidays for the year 2010.

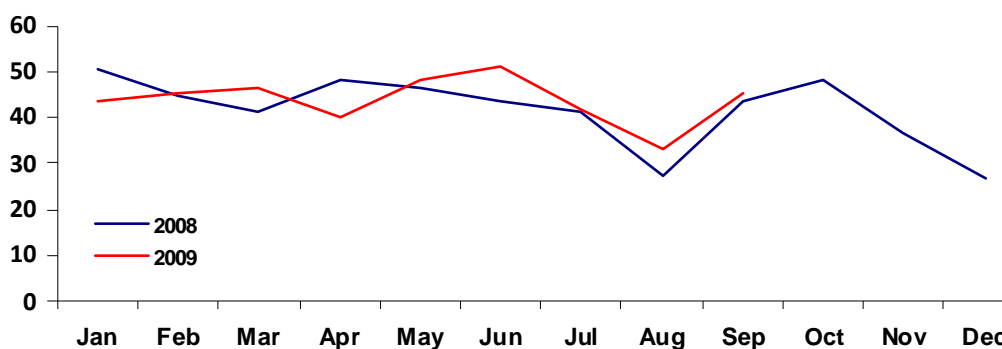
University holidays go from mid-June until the first or second week in October. School holidays are approximately from mid-June to mid-September. There are also two-week holidays during Christmas and Easter, with variations between the different regions.

According to Amadeus data on air bookings, Spaniards travel to destinations in Africa and the Middle East mainly during the month of August, as can be seen in the graph below. These data provide interesting conclusions:

- Destinations in Africa and the Middle East represent a market share of 1.2% in 2008 and of 1.4% in 2009.

- Spaniards travel to Africa and Middle East mainly during the summer season, and especially in August.
- During 2009 there has been a clear trend towards booking much later (around 1.5 months later) than in previous years.
- 2009 results are higher than those of 2008, with distortions in March and April because of Easter moving effect.

Figure 3.4 Air Bookings from Spain to Destinations in Africa and Middle East, 2008 and January-September 2009 (x 1000)



Source: Amadeus

A comprehensive set of data on air bookings from Amadeus is included in Annex V.

3.3.3. Trip Profile: Analysis of Tour Packages

351 tour packages from 21 operators (both online and offline) were thoroughly analyzed with the aim of better understanding packages available in the Spanish market to destinations in Africa and the Middle East for the purpose of this report. This analysis was carried out between the second week of September and the second week of October 2009.

Table 3.9 Number of Packages Analysed per Operator and Channel

Tour Operator	Offline	Online	Total
Total	217	134	351
Viajes iberia.es		63	63
Angalia	25		25
Transrutas	24		24
Rumbo.es		23	23
Edreams.es		22	22
Catai	22		22
V. El Corte Ingles	20		20
Nuba	20		20
Royalvacaciones	19		19
Marsans.es		16	16
Mundicolor	16		16
Nobel tours	13		13
Travelider	12		12
Halcon	12		12
Politours	10		10
Muchoviaje.com		10	10
Solplan	6		6
Viamed	5		5
Royaltours	5		5
Planet travel	4		4
Marsans	2		2
Iberojet	1		1
Kirunna	1		1

Source: Research on tourism packages to destinations in Africa and the Middle East

From this research, five lines of analysis can be set up:

1	2	3	4	5
Destinations sold	Single versus multi -country	Types of trip per destination	Average price per type of trip	Average length of stay per type of trip

3.3.3.1. Destinations in Africa and the Middle East available in the Spanish market

Three countries, namely Egypt, Kenya and South Africa, concentrate nearly half of the packages available in the Spanish market to Africa and the Middle East. It must be noted that Morocco, by far the first destination in terms of volume, accounts for only 5% of the total packages analysed. This can only be explained by the weight of the Moroccans residing in Spain that return to their home country every year and also by the weight of independent travel to a neighbouring destination like Morocco.

Table 3.10 Packages Available in Spain to Destinations in Africa and the Middle East

Country	Number of packages	%	Country	Number of packages	%
Africa	242	68.9	Middle East	109	31.1
Kenya	50	20.7	Egypt	63	57.8
South Africa	48	19.8	Jordan	23	21.1
Tunisia	33	13.6	Syria	16	14.7
Senegal	20	8.3	Dubai	5	4.6
Tanzania	19	7.9	Lebanon	2	1.8
Morocco	16	6.6			
Namibia	11	4.5			
Kenya	8	3.3			
Tunisia	7	2.9			
Rwanda/ Uganda	7	2.9			
Ethiopia	6	2.5			
Mauritius	5	2.1			
Gambia	3	1.2			
Mali	3	1.2			
Zanzibar	2	0.8			
Cape Verde	1	0.4			
Zambia	1	0.4			
Madagascar	1	0.4			
Seychelles	1	0.4			

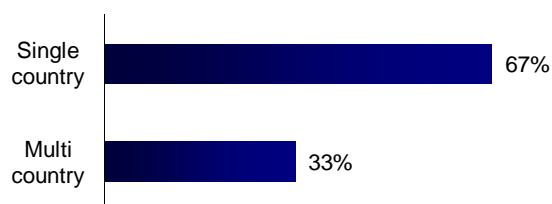
Source: Research on tourism packages to destinations in Africa and the Middle East

3.3.3.2. Single versus Multi-country Packages

The sample of programmes analysed clearly shows that Spaniards tend to visit one single country rather than several, for a number of reasons:

- Spanish travellers are more and more interested in deepening their experiences while abroad, so visiting several destinations, within an 8 day time frame is not perceived as the best option. Quality stands before quantity;
- Spaniards are price sensitive travellers.

Figure 3.5 Share of Single and Multi-country Packages to Destinations in Africa and the Middle East



Source: Research on tourism packages to destinations in Africa and the Middle East

In the case of packages that include more than one destination, the destinations more frequently combined are:

- Jordan and Syria
- Tanzania and Kenya
- South African with Botswana, Namibia, Lesotho or Mozambique
- Tours from some East African destinations, combined with Seychelles or the Mauritius Islands
- Uganda and Rwanda

3.3.3.3. Types of Trips per Destination

Usually Spaniards buy a package to Africa and the Middle East for its culture, somehow combined with a bit of nature. Together the top two preferred categories ('cities, nature, culture' and 'cities, culture') comprise 56% of the packages identified. In this context, Egypt stands as the top destination (strongly positioned for its cultural and historical heritage), with Kenya second with a heavy demand for nature (mainly safaris), very similar in size to South Africa, where safaris (nature trips) are combined with visiting cities (Johannesburg and Cape Town).

Table 3.11 Types of Trip per Destination Country and Spanish Tour Operator

Tour Operator	Total	Cities, Nature, Culture	Cities, Culture	Nature	Cities, Nature	Beach	Cities, Culture, Beach	Beach, Nature	Nature, Culture, Beach
Total	351	107	89	65	54	13	9	7	7
Egypt	63	6	49				8		
Edreams.es	16	3	13						
Royalvacaciones	9	3	3				3		
V El Corte Inglés	8		5				3		
Transrutas	7		6				1		
Marsans.es	5		5						
Travelider	4		4						
Halcon	4		4						
Politours	3		3						
Rumbo.es	2		2						
Viamed	2		1				1		
Nuba	2		2						
Marsans	1		1						
Kenya	58	18		40					
Viajes iberia.es	23			23					
Rumbo.es	13			13					
V El Corte Inglés	4	4							
Catai	4	4							
Angalia	4	4							
Mundicolor	4	4							
Marsans.es	2			2					
Nuba	2	2							
Halcon	2			2					
South Africa	48	1	1	7	39				
Viajes iberia.es	23				23				
Catai	8			2	6				
Nobel tours	7	1	1	2	3				
Angalia	6			2	4				
Marsans.es	2			1	1				
V El Corte Inglés	1				1				
Nuba	1				1				

Tour Operator	Total	Cities, Nature, Culture	Cities, Culture	Nature	Cities, Nature	Beach	Cities, Culture, Beach	Beach, Nature	Nature, Culture, Beach
Tunisia	40	11	2	1	6	4	1	1	7
Iberojet	1								1
Muchoviaje.com	10	1		1		3	1		4
Mundicolor	6	6							
Nobel tours	1	1							
Nuba	1				1				
Planet travel	4	2	1						1
Royaltours	5				5				
Solplan	6	5	1						
Transrutas	5	2				1		1	1
Viajes iberia.es	1	1							
Jordan	23	15	8						
Edreams.es	4		4						
Royalvacaciones	4	4							
Transrutas	4	1	3						
Halcon	3	3							
Nuba	2	1	1						
Politours	2	2							
Viamed	1	1							
Marsans	1	1							
Catai	1	1							
Marsans.es	1	1							
Senegal	20	10	3	2	1	2		2	
Viajes iberia.es	7	5	1	1					
Rumbo.es	4		1			2		1	
Halcon	3		1	1				1	
Nobel tours	2	2							
Angalia	2	2							
Catai	2	1			1				
Tanzania	19	17	1	1					
Angalia	6	5	1						
Mundicolor	4	4							
Nuba	3	3							
V El Corte Inglés	3	3							
Catai	2	2							
Marsans.es	1			1					

Tour Operator	Total	Cities, Nature, Culture	Cities, Culture	Nature	Cities, Nature	Beach	Cities, Culture, Beach	Beach, Nature	Nature, Culture, Beach
Syria	16	5	11						
Transrutas	3	3							
Politours	3		3						
Viamed	2		2						
Edreams.es	2		2						
Nuba	2	1	1						
Travelider	1		1						
V El Corte Inglés	1		1						
Catai	1	1							
Royalvacaciones	1		1						
Morocco	16	5	4	2	5				
Transrutas	5	5							
Royalvacaciones	5		2		3				
Travelider	2		1	1					
Nuba	2			1	1				
Nobeltours	1				1				
Marsans.es	1		1						
Namibia	11	9		1	1				
Angalia	5	5							
Catai	2	1			1				
Nuba	2	2							
Viajes iberia.es	1			1					
V El Corte Inglés	1	1							
Rwanda/ Uganda	7			7					
Angalia	2			2					
Travelider	1			1					
Nuba	1			1					
Mundicolor	1			1					
V El Corte Inglés	1			1					
Nobeltours	1			1					
Ethiopia	6		4	1	1				
Viajes iberia.es	6		4	1	1				
Dubai	5	2	2		1				
Travelider	4	2	1		1				
Catai	1		1						

Tour Operator	Total	Cities, Nature, Culture	Cities, Culture	Nature	Cities, Nature	Beach	Cities, Culture, Beach	Beach, Nature	Nature, Culture, Beach
Mauritius	5					5			
Nuba	2					2			
V El Corte Inglés	1					1			
Marsans.es	1					1			
Nobel tours	1					1			
Gambia	3							3	
Rumbo.es	3							3	
Mali	3	1	2						
Catai	1		1						
Mundicolor	1	1							
Kirunna	1		1						
Zanzibar	2			1		1			
Viajes iberia.es	1			1					
Marsans.es	1					1			
Lebanon	2		2						
Politours	2		2						
Cape verde	1							1	
Rumbo.es	1							1	
Zambia	1			1					
Viajes iberia.es	1			1					
Madagascar	1			1					
Marsans.es	1			1					
Seychelles	1					1			
Marsans.es	1					1			

Source: Research on tourism packages to destinations in Africa and the Middle East

3.3.3.4. Average Price per Type of Trip

In aggregate terms, and taking into consideration all types of trips to all destinations in Africa and the Middle East analysed for the purpose of this report, Spaniards are willing to pay around euro 260 per day.



The calculation of average prices from brochures is quite complex and, if performed in absolute detail, impossible to compare from one operator to another. Therefore, maximum and minimum prices were registered as published, disregarding surcharges or discounts, absolutely variable from one operator to another. These are the ‘extra’ factors most usually found on brochures:

Table 3.12 Most Usual Extra Price Setting Variables

Variables	Surcharge	Discount
Children travelling	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
High – medium – low season trip	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Origin airport not Madrid or Barcelona	<input checked="" type="checkbox"/>	
Airport taxes	<input checked="" type="checkbox"/>	
Oil surcharges	<input checked="" type="checkbox"/>	
Optional Excursions	<input checked="" type="checkbox"/>	
Visas	<input checked="" type="checkbox"/>	
Tips	<input checked="" type="checkbox"/>	

Source: Research on tourism packages to destinations in Africa and the Middle East

Aggregated, these are the average daily prices that Spaniards would pay when travelling with a package to a destination in Africa and the Middle East.

Table 3.13 Estimated Average Daily Prices of Tour Packages Available in Spain to Destinations in Africa and the Middle East

Type of Package	Total	Africa	Middle East
Total	260	287	203
Cities, nature, culture	269	289	212
Cities, culture	226	335	202
Nature	296	296	
Cities, nature	296	296	312
Beach	306	306	
Cities, culture, beach	150	44	164
Beach, nature	128	128	
Nature, culture, beach	75	75	

Source: Research on tourism packages to destinations in Africa and the Middle East

3.3.3.5. Average Length of Stay per Type of Trip

Unlike prices, assessing the length of stay in aggregate terms is not as difficult. As can be seen below, Spaniards travel for around 10 days when visiting destinations in Africa and the Middle East.



Per type of trip, trips composed by ‘cities, culture and beach’ have the longest length, reaching the two weeks on average. The most common length of stay of a package to a destination in Africa and the Middle East is of around 9 to 10 days.

Table 3.14 Estimated Average Length of Stay per Type of Packages to Destinations in Africa and the Middle East Available in the Spanish Market (days)

Type of Package	Total	Africa	Middle East
Total	10	9	10
Cities, nature, culture	10	10	10
Cities, culture	9	9	9
Nature	10	10	
Cities, nature	10	10	12
Beach	8	8	
Cities, culture, beach	13	15	13
Beach, nature	8	8	
Nature, culture, beach	9	9	

Source: Research on tourism packages to Africa and Middle East destinations

3.3.4. Composition of Target Group

According to Spanish operators and other professionals consulted, the average target group composition is that of mid aged couples travelling without children, and enjoying a comfortable economic situation (medium to high income). Youngsters (below 30) with adventurous impulses are also a significant target group.

Figure 3.6 Top priority age groups

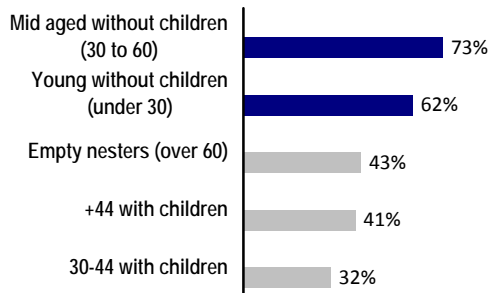
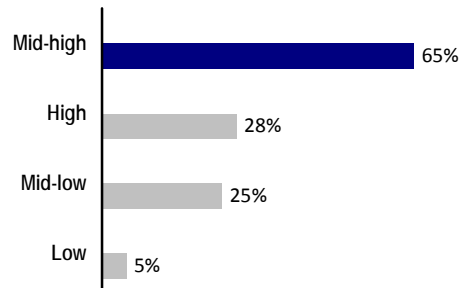


Figure 3.7 Income levels



Source: Tour-operators and specialists interviews

Source: Tour-operators and specialists interviews

3.3.5. What do Spanish like in destinations of Africa and the Middle East?

Overall level of satisfaction of Spanish visitors in Africa and the Middle East



Source: operators interviewed

Spanish travellers, in the opinion of operators interviewed, value very positively their visits to destinations in Africa and the Middle East: out of 10, these trips receive 8 points on average, with very few ratings below 7. Below are some of the aspects that Spaniards value best of their trips to Africa and Middle East.

A) Quality of Cultural Resources and Authenticity of Cultural Expressions

Mentioned repeatedly by all agents consulted, culture is likely to be the top deciding factor and the most satisfying one for the Spanish having visited destinations in Africa and the Middle East. Culture has to be understood in a wide sense, beyond contemplating and discovering the basic and 'traditional' cultural resources, according to operators:

- Interest in local lifestyles;
- experimenting proximity and contact with locals;
- participating in local life, knowing and understanding festivities, community expressions and traditions;
- living those traditions and being placed in geographical, social and cultural environments very different and far from their own;
- interest on local arts and crafts;
- experiencing freedom.

All types and sorts of cultures are highly rated by the Spanish travellers, from Pharaohs to religious legacies or the very different African and Middle East cultures. Specialized operators point that the emotional link that the first visit produces on some of the Spanish travellers encourages them for future visits (increased loyalty arises from authenticity).

B) Untouched Nature

This is a major attraction factor for the Spanish traveller, both in absolute terms and because it:

- Has a differentiating capacity;
- has a high quality in terms of landscapes and natural sites;
- allows visitors to enjoy less conventional destinations, less known but yet enticing experiences. This opportunity additionally provides a sense of escape.

C) Other Positive Factors

Besides culture and nature, several other factors were mentioned by the operators surveyed for the purpose of this study:

- Exoticism;
- history and historical heritage preservation;
- feeling of freedom in a cultural environment;
- romanticism (especially related to safaris);
- the feeling of being able to 'live the adventure', be a part of it for a while;
- the real opportunity to be alone, rest, disconnect and make the long due 'inner journey';
- the excellent price/value ratio in some destinations;

3.3.6. What Do Spanish Most Dislike About Destinations in Africa and the Middle East?

Information here depicted comes from two different sources:

- Spanish travellers complaints before operators and travel agents;
- reports and studies that tour-operators and travel agents prepare to assess their customers' opinions.

The types of issues that the Spanish most dislike about destinations in Africa and the Middle East are basically a consequence of:

- Objective conditions of the destinations when welcoming Spanish tourists;
- the assessment that Spanish tourists make, based on conceptions, criteria and schemes built prior to the visit;
- the gap between expectations and what is eventually offered during the trip.

A) Quality of the Service

This issue includes both the service itself as well as the way it is provided (speed, for instance). Cleanness and hygiene are also included here, but the greatest source of unsatisfied Spanish travellers related to guiding services, namely:

- Professional quality of the guide, the information and the way customers (Spanish travellers) are treated;
- the quality of the Spanish language;
- commercial attitudes, specifically non-scheduled stops considered annoying for Spanish travellers, breaking the foreseen flow of the trip or excursion.

Given its complexity, this issue requires specific and detailed explanation. In the opinion of the interviewed operators, complaints related to tour guide services are in most of the cases due to the fact that as tours from Spain are often done during a very short season and with a quite limited the number of customers, in some destinations access to the best service providers is limited. Some operators have even mentioned that Spanish customers complain about having to listen to guides giving explanations in several languages besides Spanish.

The guide plays a very relevant role in the trip of Spaniards to these destinations, since many other responsibilities are awarded to him besides providing basic information. It is often frustrating to find guides not able to fulfil all these expanded expectations of Spaniards.

B) Quality of Accommodation

A significant number of complaints are related to the accommodation standards in African and Middle Eastern destinations; although in some countries most accommodation units present a quality similar to European standards, this is still one of the most important sources of uneasiness for the Spanish when travelling to Africa and the Middle East.

C) Border Control Procedures

The complexity and the duration of border crossing is another relevant complaint of the Spanish which is directly affecting the destination choice. Even the cost of this procedure is somehow shocking to Spanish travellers, who are used to frequently visiting other countries without any kind of border control. Annex VII shows a list of African and Middle Eastern countries where visa requirements are still operative for Spanish visitors.

D) Gastronomy

Operators insist in the relevance of this topic for the Spanish. Usually the quality and diversity is highly appreciated, but at times they miss the availability of more 'international food' options (including Spanish food).

E) Other Negative Factors

Besides the above mentioned negative factors, others have been mentioned by the operators interviewed for this study, namely:

- The quality of the transportation systems, including infrastructure, vehicles and the management of these services, which affect punctuality, reliability or road safety;
- the quality of basic infrastructures, namely health services, personal safety, communications, etc.;
- harassment in the streets and markets. This is a general complaint, but it qualifies as a surmountable discomfort and even reflecting the local way of life;
- local lifestyle, absolutely different from the Spanish ones;
- flight delays;
- hired services not provided, or provided differently to what was expected;
- insufficient visitor management and control in some destinations;
- lack of night leisure options;
- not being able to wander freely around the destinations, the way they are used to in European destinations;
- other issues inherent to the destinations like the excessive heat, mosquitoes, etc.

The Spanish traveller is not a common one in Sub-Saharan destinations, where other European tourists visit much more frequently. In return, Spaniards are capable of

reaching locals, sometimes giving rise to awkward situations where they are not comfortable with the camaraderie they inspire.

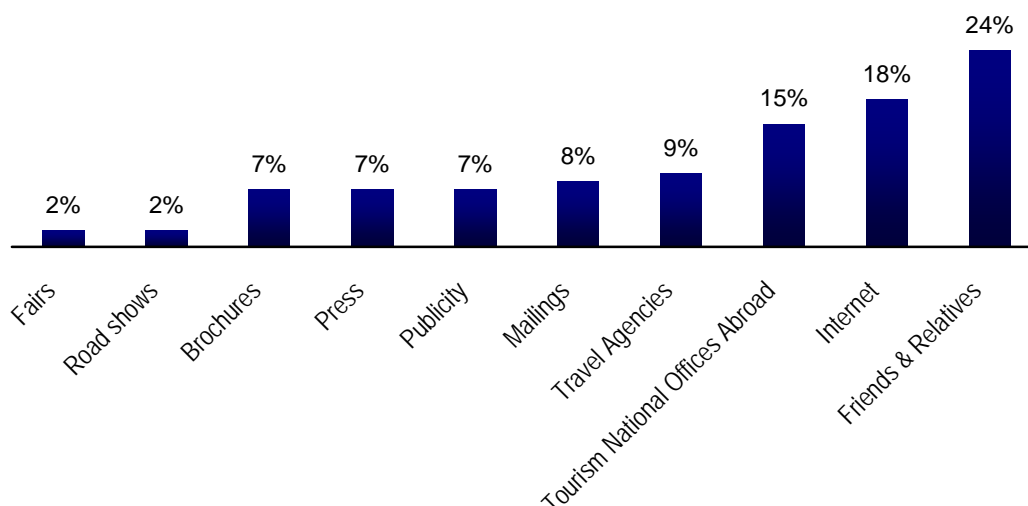
Table 3.15 Summary of Likes and Dislikes of Spanish Travellers in Africa And Middle East Destinations

Likes	Dislikes
Quality of cultural resources	Quality of the service
Authenticity of cultural expressions	Quality of accommodation
Untouched nature	Border control procedures
Exoticism	Hygiene
Access to local population	Others <ul style="list-style-type: none"> ▪ Basic infrastructure and services ▪ Harassment for shopping/visiting ▪ Flight delays ▪ Lack of freedom ▪ Lack of nightlife options
Others:	
▪ Local gastronomy	
▪ Heritage preservation	
▪ Romanticism	
▪ Opportunity to ‘Live the adventure’	
▪ Excellent price/value ratio	
▪ Opportunity to disconnect	

3.3.7. Sources of Information for Travelling to Africa and the Middle East

One fourth of Spaniards travelling to Africa and the Middle East rely on friends and relatives as the main source of information. Internet comes second, followed by national tourism offices.

Figure 3.8 Sources of Information



Source: Tour-operators and specialists interviews

Chapter 4: SWOT Analysis

Key Messages

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> ➤ Authenticity and exoticism ➤ Cultural and natural resources ➤ Easiness of contact with people and cultures ➤ Ability to provide memorable experiences to the visitors ➤ Constant improvement of destinations' image ➤ The proximity of some of the destinations ➤ The reverse order of seasons ➤ The 2010 FIFA World Cup ➤ The improvements in complementary supply 	<ul style="list-style-type: none"> ➤ Limited accommodation and services quality ➤ Limited nightlife supply ➤ Visitor harassment ➤ Lack of direct flights to many destinations ➤ Weak country brands ➤ Weak destination image ➤ Limited knowledge of the Spanish market ➤ Limited marketing activity in Spain ➤ Limited knowledge of Spanish ➤ Limited innovation and creativity ➤ Lack of proper planning
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> ➤ Emergence of new destinations and consolidation of emerging ones ➤ Spanish pent-up demand ➤ Eagerness for memorable experiences ➤ Communicating destinations in their entirety, not strictly related to the basic attraction features ➤ Developing (and communicating in Spain) events, festivals, etc ➤ New target groups: <ul style="list-style-type: none"> - Seniors/empty nesters - Independent travellers - DINKS 	<ul style="list-style-type: none"> ➤ Limited product diversity ➤ Limited destination quality ➤ Marked (and rather stable over time) seasonality in the Spanish tourism, both outbound and domestic ➤ High cost of air transport and limited number of destinations with direct connections ➤ Economic situation of Spanish families (+50% saving rate during 2009)

4.1. Strengths of the African and Middle Eastern Destinations in the Spanish Market

Ability to deliver memorable moments to the visitors		
1. Authenticity and exoticism	2. Preservation of cultural and natural resources	3. Easiness of contact with people and cultures
<ul style="list-style-type: none"> ➤ Gastronomy ➤ Perceived distance in time ➤ Authenticity of local communities 	<ul style="list-style-type: none"> ➤ Abundance, diversity and quality of cultural and historical resources ➤ World heritage sites, historic monuments, religious sites ➤ Excellent preservation of nature ➤ Diversified natural scenarios 	<ul style="list-style-type: none"> ➤ Hospitality ➤ Local lifestyle ➤ Handicraft ➤ Improved capacities of human resources
Constant improvement of destination image		

The ability to convey authentic experiences to visitors stands as the main strength of African and Middle Eastern destinations for the Spanish market. This capability relies on three main features: first, the exoticism (very intensely mentioned by nearly all operators surveyed for this study), second, the quality and diversity of cultural and natural resources and last, but surely not least, the easiness of contact with locals, which wraps the whole experience with an authenticity layer very difficult to find anywhere else.

This capability has led to a constant improvement of these destinations' image among Spanish consumers. And though not all destinations have seen their image improved over the last years, it is accurate to say that overall, the Spanish market is becoming more and more interested on African and Middle East destinations.

In addition to these factors, other strengths can be mentioned:

- The proximity of some of the destinations;
- the reverse order of seasons;
- the FIFA 2010 World Cup;
- improvements in complementary supply.

4.2. Weaknesses of the African and Middle Eastern Destinations in the Spanish Market

1. What is offered	2. How it is offered
<p>TOURISM SUPPLY</p> <ul style="list-style-type: none"> ➤ Quality of the accommodation ➤ Limited and unpredictable services quality ➤ Insufficient interpretation centres ➤ Limited nightlife supply ➤ Visitor harassment ➤ Non-application of sustainability criteria 	<p>MARKETING FAILURES</p> <ul style="list-style-type: none"> ➤ Weak country brands ➤ Weak destination image ➤ Limited presence in Spanish tourism trade fairs ➤ Limited knowledge of the Spanish market ➤ Limited marketing activity in Spain ➤ Limited local negotiation power with strong and vertically integrated operators
<p>COMPLEMENTARY SUPPLY</p> <ul style="list-style-type: none"> ➤ Weak tourism related services (transfers, guides, etc.) ➤ Insufficient supporting and/or related services: health, communication, banks, etc. 	<p>HUMAN RESOURCES</p> <ul style="list-style-type: none"> ➤ Limited knowledge of Spanish ➤ Limited innovation and creativity ➤ Unpunctuality, lack of schedule compliance ➤ Limited training programs for Spanish market-oriented personnel ➤ Need for entrepreneurial and business training and attitude
<p>INFRASTRUCTURE</p> <ul style="list-style-type: none"> ➤ Few convention and conference venues ➤ Unreliable in-destination transport system ➤ Lack of direct flights to many destinations ➤ Weak transport system in destinations 	<p>TOURISM POLICY AND LOCAL COORDINATION</p> <ul style="list-style-type: none"> ➤ Visa and border crossing procedures ➤ Weak private sector (not competitive) ➤ Limited domestic investment to develop tourism ➤ Limited awareness of the importance of tourism ➤ Not enough incentives for tourism as an economic activity ➤ Limited incorporation of local population ➤ Limited Spanish investment in many African countries ➤ No recognition of tourism as an economic activity

4.3. Opportunities for the African and Middle Eastern Destinations in the Spanish Market

OPPORTUNITIES	HOW TO SEIZE THEM
Market size and growth rate	
<ul style="list-style-type: none"> ➤ Appearance of new destinations and consolidation of emerging ones ➤ Spanish pent-up demand ➤ Only 7% of the trips of the Spaniards are outbound 	<ul style="list-style-type: none"> ➔ Generating 'ready to buy' experiences and communicate them appropriately ➔ Generating awareness ➔ Penetrating the preferred sales system for booking outbound trips today
Shifting consumer behaviour	
<ul style="list-style-type: none"> ➤ Desire to visit as many destinations as possible ➤ Eagerness for memorable experiences 	<ul style="list-style-type: none"> ➔ Diversifying destination and products ➔ Emphasizing the trip as an experience rather than a product
<ul style="list-style-type: none"> ➤ Astonishing peers with 'off the beaten track' destinations 	<ul style="list-style-type: none"> ➔ Boosting the 'novelty factor' to generate awareness and desire to visit
<ul style="list-style-type: none"> ➤ Discovering the 'backstage' ➤ Travelling 'with a cause' 	<ul style="list-style-type: none"> ➔ Communicating destinations in their entirety, not strictly related to the basic attraction features ➔ Developing (and communicating in Spain) events, festivals, etc
New target groups	
<ul style="list-style-type: none"> ➤ DINKs ➤ Seniors/ empty nesters ➤ Independent travellers ➤ Single travellers ➤ Young people 	<ul style="list-style-type: none"> ➔ Generating authentic and memorable experiences with a high local component ➔ Improving online access to info and e-commerce ➔ Improving accommodation facilities ➔ Improving the quality of services ➔ Reducing harassment on visitors ➔ Reasonable level of prices ➔ Creating 'single friendly' experiences and complementary supply ➔ Improving online notoriety of the strengths ➔ Widening price ranges

4.4. Threats for the African and Middle Eastern Destinations in the Spanish Market

1. Biased and incomplete knowledge of the destinations	2. Hard facts on Spanish market
<ul style="list-style-type: none"> ➤ Lack of security in many destinations (ongoing or new conflicts) ➤ Lack of hygiene ➤ Lack of sanitary back up in case of emergency ➤ Limited product diversity ➤ Limited destination quality ➤ Temporary saturation in certain cultural destinations and attractions 	<ul style="list-style-type: none"> ➤ Strength of competitors: domestic market and the Caribbean ➤ Marked (and rather stable) seasonality in the Spanish tourism demand, both outbound and domestic ➤ High cost of air transport and limited destinations with direct connections ➤ Economic situation of Spanish families (+50% saving rate during 2009)

Chapter 5: Reaching the Spanish Market

Key Messages

► Reaching the Spanish consumers

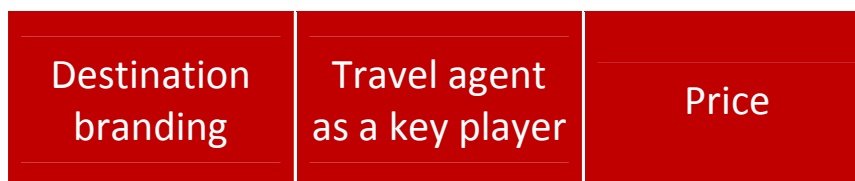
- There are three key issues for addressing the Spanish consumer: destination branding, giving the travel agent a key role, and being strongly competitive on price.
- Although TV remains the first media used by the Spanish, the internet is soaring in Spain, especially among younger population strata.
 - > As much as 50% of the households are connected to the internet, and 35% of the Spaniards change their purchasing intentions after consulting the web.
 - > E-commerce is soaring in Spain. Last available data shows an extraordinary increase of 71% from 2006 to 2007.
 - > Air tickets and accommodation are first and third in the ranking of online goods and services bought.
- With regards to long haul destinations, travel agencies and tour operators are the main booking channel.
- Africa and Middle East destinations represent a significant portion of the business for Spanish operators, varying from 10-15% up to 50% of their declared portfolios.
- The key success factors to effectively promote destinations in Spain are:
 - > Public-private partnership;
 - > coordination among public institutions;
 - > actions carried out by tourism offices and embassies in Spain;

5.1. Reaching the Spanish consumer

Tour operators, travel agents, professional associations, embassies and national tourism offices have been consulted on how to reach the Spanish outbound traveller and how to encourage the trade. Based on all operators' opinions, several introductory comments can be made:

- Destination brands (many of them non existent or extremely weak in Spain) contribute positively to generate flows. African and Middle Eastern destinations are very much lacking awareness, or the brands/destinations suffer from negative attributes derived from overcrowded attractions or high priced experiences.
- Travel agents are awarded a prominent role in the value chain of outbound tourism in Spain. They are expected to generate confidence in the destinations, besides providing useful insight.
- The price factor is playing a decisive role these days. Although ensuring present demand from Spain, it is very likely to be discouraging upscale travellers to visit these regions. In addition, the difficulties to reposition the destinations in a near future are expected to be very important.

Figure 5.1 Key Issues to Address the Spanish Market



Source: Tour-operators and specialists interviews

However, for some operators (those targeting upscale consumers) product itself is an excellent marketing tool, given the quality they are delivering (either based on the resource itself or on the services that come with it)

5.1.1. Media Habits

Television is by far the most popular media in Spain: 89% of the population watched 227 minutes of TV per day during 2008, when the economic and financial crisis started weakening families' consumption dramatically. It is especially important to select the appropriate programs to be sure to reach the appropriated target segments. TV programs have an emission life shorter than ever before and very much depends of audience response.

Table 5.1 Media Use by the Spanish, 2008

Rank 2008	Channel	Audience/ penetration (%)	Estimated growth over 2007
1	TV	89%	Low
2	Internet	71%	Very high
5	Radio	5%	Medium
3	Magazines	49%	Very low
4	Daily newspapers	41%	Negative

Source: *www.etcnewmedia.com, Barlovento Comunicación*

Table 5.2 Population that watches TV daily in Spain per region (%)

Region	Share of Population (%)
Andalusia	89.7
Aragon	91.7
Asturias	90.5
Balearic Islands	83.7
Canary Islands	87.5
Cantabria	85.6
Castile and Leon	90.0
Castile-La Mancha	88.8
Catalonia	87.1
Valencia	89.8
Extremadura	93.3
Galicia	86.0
Madrid	86.7
Murcia	89.6
Navarre	90.2
Basque Country	89.4
Rioja (La)	87.2

Source: *Spanish Association on Media Habits research*

Women, population over 45 year old, lower income families and rural communities were the strongest TV users in 2008.

Internet shows, no doubt, the most spectacular increase in terms of number of users (from 37% in 2006 to 71% in 2008). Spaniards dedicate around 35.6 minutes per day to internet, the longest time after TV and radio. Internet ranks as a favourite among urban young people.

Radio ranks a quite distant second, with 57.4% of Spaniards listening to over 100 minutes of radio every day. Radio audience has a much higher quality profile, and a bigger audience, in Madrid than in Barcelona.

The consumption of printed media is clearly decreasing in Spain, in favour of internet and TV. Magazines have an audience of 49%, although it is important to note that half of the magazines belong to the so called 'yellow' media. Up-market youngish population living in big cities is among one of the top readers of these magazines. 99% of the Spanish magazines are monthly.

Daily newspapers rank fifth with 41% in 2008. Sport newspapers, with the highest audience and a significant growth, have mainly a male audience. Urban healthy people are the ones who read general free and paid-for newspapers.

5.1.2. Use of Online Channels

There were 29 million internet users in Spain (71% of the population) in August 2009 (Internet World Stats). In Europe, only the Nordic Countries, the United Kingdom and Switzerland enjoy a higher internet penetration. In Spain, over 50% of the households have internet access, with 8 million broadband connections as of November 2008. According to the European Interactive Advertising Association (EIAA), the Spanish consumer spends 12.1 hours per week surfing the internet, half an hour more than they do watching TV (11.7 hours per week).

Figure 5.2 Compared growth of internet penetration 2000-2009



Source: Internet World Stats, Nov 2009

The Autonomous Communities with the highest percentage of dwellings with internet access are Madrid (62%) and Cataluña (60%). In addition the Basque Country, Navarre, the Balearic Islands, Cantabria, Asturias, Canary Islands, Aragon and La Rioja show a rate of over 50%.

The main internet services used for personal reasons are search of information for goods and services (82% of internet users), e-mail (82%) and the use of travel accommodation related services -information, reservation, and purchase- (62%). As for advanced online communication services, instant messaging (for example, messenger) is used by 54% of internet users, 31% read blogs and 26% of internet users have posted on chat rooms, news groups or online forums in the last three months. It is of a great relevance to note that, according to the EIAA, 35% of Spanish consumers change their purchasing intentions after consulting the internet.

The last available official report on e-commerce in Spain provides info for 2007: e-commerce represented euro 4.7 billion that year, soaring by 71% as compared to 2006.

Table 5.3 E-Commerce in Spain: Basic Concepts and Ideas

<p>1. Who buys online?</p>	<ul style="list-style-type: none"> ➤ Men; ➤ 25 to 49 years old, especially 25 to 34; ➤ live in cities with over 100,000 inhabitants; ➤ mid-level education and college graduates; ➤ all socio-economic levels, but especially high and mid-high strata ; ➤ active (employed); ➤ a new type of consumer has been identified: one that enjoys a good economic and cultural position and searches online for high quality bargains. 																												
<p>2. What do they buy?</p>	<p style="text-align: center;">Online goods and services bought, 2007</p> <table border="1" style="margin-left: auto; margin-right: auto;"> <thead> <tr> <th>Category</th> <th>Percentage</th> </tr> </thead> <tbody> <tr> <td>Air/train tickets</td> <td>49%</td> </tr> <tr> <td>Shows/tickets</td> <td>37%</td> </tr> <tr> <td>Accommodation</td> <td>35%</td> </tr> <tr> <td>Electronics</td> <td>28%</td> </tr> <tr> <td>Clothes</td> <td>20%</td> </tr> <tr> <td>Books</td> <td>18%</td> </tr> <tr> <td>DVD/music</td> <td>16%</td> </tr> <tr> <td>Software</td> <td>14%</td> </tr> <tr> <td>Food</td> <td>11%</td> </tr> <tr> <td>Carrentals</td> <td>10%</td> </tr> <tr> <td>Internet serv.</td> <td>10%</td> </tr> <tr> <td>Financial serv.</td> <td>9%</td> </tr> <tr> <td>Home appl.</td> <td>5%</td> </tr> </tbody> </table> <p style="text-align: center;"><i>Source: Comercio electrónico B2C, 2008. Red.es</i></p>	Category	Percentage	Air/train tickets	49%	Shows/tickets	37%	Accommodation	35%	Electronics	28%	Clothes	20%	Books	18%	DVD/music	16%	Software	14%	Food	11%	Carrentals	10%	Internet serv.	10%	Financial serv.	9%	Home appl.	5%
Category	Percentage																												
Air/train tickets	49%																												
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Internet serv.	10%																												
Financial serv.	9%																												
Home appl.	5%																												
<p>3. Key success factors for e-commerce in Spain</p>	<ul style="list-style-type: none"> ➤ Three out of four online consumers had previously bought online: repeating buyers; ➤ providing clear information on the rights of the consumers (i.e. the contract proposed); ➤ providing clear information on the costs of the buying process (i.e. shipping and handling, taxes, etc.); ➤ clearly stating the security features of the buying process, including unambiguous identification of the selling company; ➤ form of payment. Spanish consumers buyers consider a key aspect that the firm offers their preferred payment method (credit card first or debit card, second); ➤ finding the website in Spanish. 																												

Source: E-commerce B2C, 2008. Red.es

5.1.3. Booking Patterns

Several comments have been made by the operators consulted related to this point:

- Traditional early birds – never a bulk of the Spanish market – are nearly disappearing, with a strong trend towards late bookings. The once relevant arguments of price, assuring one’s place on the plane or receiving add-ons to the basic offer no longer motivate Spanish consumers for early booking.
- The Spanish book between one and two months in advance of the trip. If the offers available are very attractive, one week can also be enough.
- Young travellers usually book within one month prior to the trip.
- Honeymoons trips are booked well in advance.

5.2. Reaching the Spanish Trade

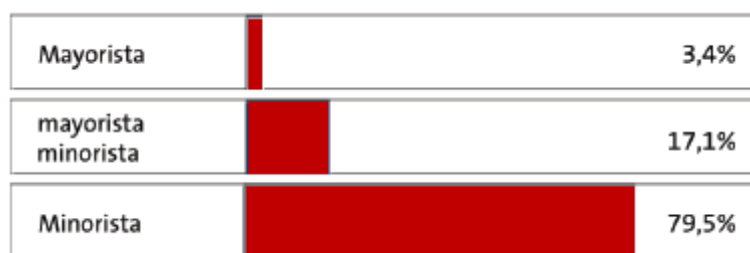
5.2.1. Understanding the Structure Travel Trade in Spain

There are around 5,500 firms registered as travel agencies in Spain with no less than 14,500 sales outlets. 40% of these are based in Madrid and in Barcelona.

It is important to know the differences between tour operators and travel agencies, all of whom are controlled, in terms of licence granting, by regional governments. Three types of licence can be obtained to tour-operate in Spain.

1. Mayorista (tour operator)	These are wholesalers who organise all types of tourism services and packages. They can only sell through retail agencies ('minoristas'). There are approximately 100 'mayoristas' who have another 75 branches throughout the country. Examples include Tourmundial, Nobel tours, etc.
2. Mayorista- minorista	They can act as both operator and retailer. There are around 150 businesses falling into this category, with another 3,400 branches. Examples include Viajes El Corte Inglés, Viajes Marsans, etc.
3. Minorista (travel agency)	These are the retailers, who can only sell to the public and not to other retailers or operators. They are quite numerous, and usually have branches throughout Spain. Examples include Viajes Halcón, Viajes Iberia, etc.

Figure 5.3 Types of Business

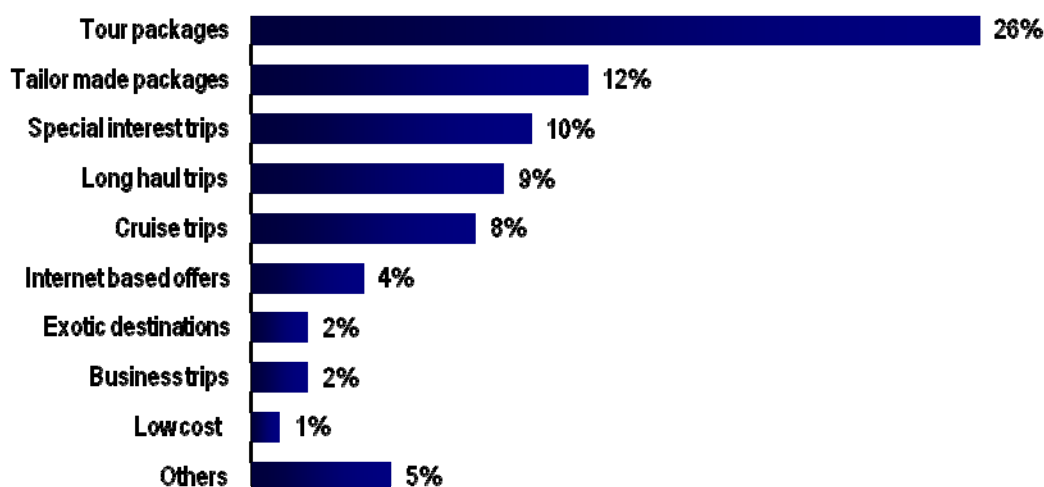


Source: Amadeus and ACAV, October 2009

According to Amadeus and the Catalan Association of Travel Agents (ACAV), 51% of the operators sell exclusively offline, while 45% complements their sales via online activities. Only 4% operate exclusively online. This same study also points out that it is with tour-packages that operators earn their greatest profits (80%), while selling plane tickets only brings them 8% of their yearly profits while another 6% comes from hotel nights sold.

In line with this, ACAV estimates that tour packages are the product with the highest potential for the upcoming years. Tailor-made packages will also be on the rise.

Figure 5.4 Products with the Greatest Growth Potential



Source: Amadeus and ACAV, October 2009

5.2.2. Interest of Spanish Tour Operators in Africa and Middle East Destinations

A) Africa and Middle East presence in Spanish operators' portfolio

Around two thirds of the interviewed operators declared that Africa and the Middle East represent approximately 10-15% of their portfolio. There is also one third of the sample stating that these destinations have a weight of nearly 50% of their portfolio.

It is a fact that the Spanish traveller tends to use tour packages and consults travel agents when they plan to travel long-haul. They use tour operators because:

- They require further details and information on the destinations;
- they would like to find out about leisure possibilities and options;
- they need security; and, above all
- they believe that this is the way to lower rates.

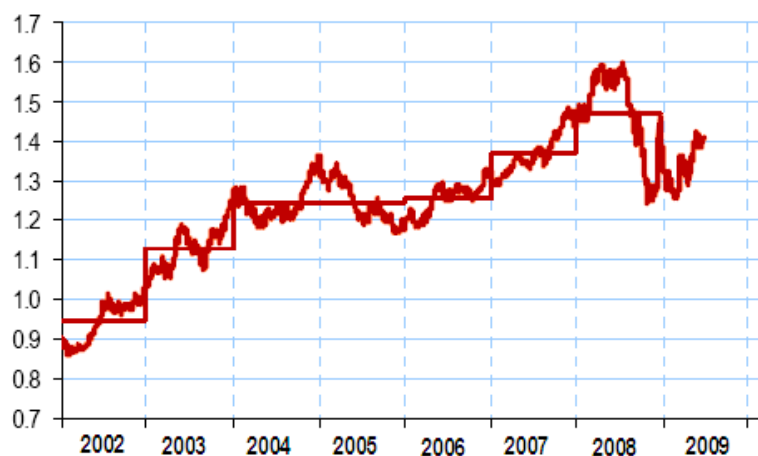
“Direct bookings have grown for middle haul destinations”, says Antonio Araújo, President of the National Tourism Offices in Spain Organization (ONETE). He adds: “With regards to long haul destinations, there is no doubt that travel agencies and tour operators are the main booking channel”.

Source: Hosteltur

B) Recent evolution of the presence of Africa and Middle East destinations in Spanish operators' portfolio

Disregarding the last six months of 2008 and 2009, when the economic turmoil undoubtedly cooled – and is still cooling – long-haul outbound flows, operators highlight that there was a very positive trend for long-haul travel in the Spanish market in recent years. One encouraging element has been the strength of the euro.

Figure 5.5 Exchange rate Euro to US dollar (US\$ per €)



Source: UNWTO World Tourism Barometer, October 2009

Nearly 25% of the interviewed operators stated that the outbound flows to Africa and the Middle Eastern destinations are holding up still in spite of the economic situation. However, a significant 30% of the operators said they had stopped programming destinations in Africa or the Middle East in the last three years, due mainly to:

- Perceived lack of security
- Objective lack of security
- Unreliable incoming operators
- Not enough demand
- Insufficient air connections

5.3. Recommended Marketing Tools and Actions

Operators and officers from national tourism offices in Spain have identified the most effective marketing tools to operate within the Spanish market.

Before this, it is worth remembering two basic factors pointed by the majority of operators interviewed:

- Africa and Middle East destinations struggle with a very low level of awareness in Spain.
- Positive information about these destinations and countries is scarce.

Operators consulted strongly recommend that promotional activities in Spain are undertaken from a State perspective. It is time to promote optimistic and positive messages regarding events of any kind – themed promotions, etc. In this line of work there are several key success factors mentioned by operators:

- Public-private partnerships;
- coordination among public institutions (Ministries of Tourism, Foreign Affairs, Culture, etc.);
- actions carried out by embassies in Spain in order to stimulate and encourage Spanish operators.

Table 5.3 Marketing Actions Recommended by Operators (by importance)

1. TV infomercials	Although very expensive, it is perceived as a very influential tool. Good practices pointed are the use of relevant personalities or the appearance in movies/TV series with a positive perspective (product placement).
2. Familiarization trips	'Seeing is believing' is the rule. A new approach to traditional familiarization trips is the so called 'interline' trips, where the accompanying person's ticket is half paid by the destination as well.
3. Tourism Fairs	Third in the list of preference, although the majority of operators are anticipating a downward trend for the following years. Special attention should be awarded to return on investment. (See Annex VII for guidelines on <i>How to Make Trade Fair Participation Profitable</i>)
4. Co-marketing activities with tour operators	This type of activity – considered first in terms of efficiency – reinforces the activities developed by national tourism offices abroad.
5. Final consumer direct advertising	Useful to generate awareness regarding destinations and products/experiences. It needs a significant budget to be effective.
6. Sales workshops for travel agents	These are crucial in Spain given the relevance of travel agents in the market. Operators provide three practical recommendations regarding this tool: a) focus on several destinations (four or five they mentioned), b) increase their current duration, and c) focus on conveying the message of destinations' exploring possibilities.
7. Road shows in the Spanish regions	Especially suitable for destinations with strong demand, they are often considered by operators as a different way of handling a workshop for travel agents.
8. Brochures focused on destinations	Interesting tool for national tourism offices abroad. They should also be available online and include information on lifestyles and other 'qualitatively relevant' information rather than being too factual and include only hard data.
9. Online marketing tools	A number of these tools were mentioned, out of which the following are worth highlighting: agreements with travel portals, improving Search Engine Optimization (SEO) and Search Engine Marketing (SEM). Interacting has become the new cornerstone (blogs, social media presence, etc.). The Web 2.0 offers immense opportunities for these destinations to position themselves in the Spanish market.
10. Press trips	It is crucial to make a follow up after these trips to ensure that invited media do publish news/stories on the destination as expected. The increase of freelance journalists is somehow limiting the effectiveness and convenience of this tool.

11. Advertising in tour operators' brochures	Closely related to co-marketing, it allows sharing the cost of brochure's editing, printing and distributing.
12. Advertising in specialised media	This option seems more suitable for special interest product offerings and operators.
13. Brochures focused on products	These are perceived by operators as less effective than brochures that combine destinations and products
14. Training the trade (sales manuals)	The suggestion is to upload them to national tourism travel websites. It is not seen as a key tool today.
15. Merchandising	The majority of operators only see it as a supporting tool for other actions. Poster editing is seen as the most effective action within merchandising.

Source: Tour-operators and specialists interviews

Recommendation from friends and relatives was pointed as a major influencing factor in the Spanish market. Other tools mentioned during the interviews were:

- The sponsorship of Travel Agents Congresses ('produce direct sales increase');
- professionally edited newsletters oriented to the trade;
- contracting professional communication agencies to benefit from a more structured activity in each market and:
- implementing call centres which can help Spanish travellers to plan all trip features.

6. FITUR: A 30-Year Commitment to Tourism

The 30th edition of the International Tourism Trade Fair (FITUR) will take place in Madrid from 20 to 24 January 2010. Over the years the Exhibition has grown and participant numbers have increased from 1500 entities and 37 nationalities in 1981 to a total of 12,312 companies and 170 countries/regions at the last edition. A total of 3000 trade professionals and 359 journalists went along to the first edition to satisfy their curiosity about the new event organised by the Trade Fair Institution of Madrid (IFEMA). In 2009, more than 136,170 visitors and 8470 media professionals made a note of the FITUR dates in their diaries as a not-to-be-missed date in the tourism world. In short, the trade fair has proven itself to be a useful tool for promoting tourism products from all over the world and as a business platform for destinations and companies.

It is because of this that FITUR is now a benchmark event not only for the Spanish tourism industry, but also for trade professionals from around the world. The exhibition is particularly relevant for the Latin American market which, thanks to its familiarity of the culture and language of the trade fair organisation, has established FITUR as a gateway to Europe, as well as other markets with great potential, such as Africa and the Near East.

One of the key factors in this evolution has been the sensitivity demonstrated by FITUR towards recognising business trends and reflecting them in its proposals. This is just as true today, as FITUR 2010 sees the incorporation of programmes such as **INVESTOUR**, a forum organised in conjunction with the World Tourism Organisation (UNWTO) to promote business investment in Africa, thus contributing to the continent's development, and most particularly that of this event's guest region, the Economic Community of West African States (ECOWAS).

On the same note, the application of tools such as renewable energies will be highlighted at the 2010 edition, to encourage sustainability within the industry and its contribution to the environment in the **FITUR GREEN** section. With a view to boosting business for the exhibitors, **INBOUND SPAIN** is to be unveiled at FITUR 2010, a section that groups together companies offering these types of programmes at the trade fair.


FITUR already showed its capacity to adapt to new trends in the sector back in 1994 with **FITUR ACTIVO**, the section specialising in adventure, cultural and nature tourism itineraries, showing the changes resulting from the diversification of the Spanish offering. A year later, the organisers again showed their commitment to the industry through the creation of **FITUR KNOW HOW**, knowledge in the areas of hotel management, consultancy and training, etc. In 2000, coinciding with the trade fair's 20th anniversary, **FITUR CONGRESOS** was launched, a workshop dedicated to business and incentive travel, thus highlighting the enormous importance this segment had gained in recent years.

The revolution caused by the application of new technologies in the tourism industry has continued to grow, and in 2007 the **FITURTECH** seminars were held for the first time to analyse the evolution and application of technological advances in tourism processes.

The importance of FITUR in the Spanish and international tourism sectors can be widely attributed to the support received from the Government and the Spanish business network, who have gradually introduced their extraordinary experience in other markets. Together with these, the importance of the Spanish outbound tourism market has also been key and as proof of this strength, in spite of the difficult economic climate, this segment still managed to grow 2% up to November 2009.

Annexes

Annex I: Examples of Tour Packages Available in Spain


ESSENCES OF EGYPT				Type of trip: CITIES + CULTURE
Days: 8				
Half Board <input checked="" type="checkbox"/> (4days) Full Board <input checked="" type="checkbox"/> (3days)				
Price:	Category:	Period:		
Lower:	882 €	5* standard	DEC	
Higher:	2,639 €	5* grand luxe	APR	
Taxes ⁽¹⁾ :	Included <input type="checkbox"/>	Not included <input checked="" type="checkbox"/>		
Entries/tours:	Included <input checked="" type="checkbox"/>	Not included <input type="checkbox"/>		
Group minimum number: NO				
Frequency of departure: weekly				
Description:				
<p>Day 1.- Spain / Aswan Presentation at the airport, Royal Vacaciones desk, two hours (3 hours at the T4 of Madrid) before flight take off. Check in and embark on the airplane with destination Aswan. Arrival, transfer to the ship. Dinner and accommodation (for arrivals before 20.00 hours).</p> <p>Days 2 and 3.- Nile Cruise (Aswan-Luxor) <i>Full board.</i> During the cruise it will be visited: Aswan: visit of the upper dam of Aswan and of the temple of PHILAE, protected by UNESCO and only Egyptian temple built on an island. In certain periods of the year, the visit to the Temple of Philae could be changed with one to the Temple of Edfu. Possibility to realize an optional excursion to the Temples of Abu Simbel. In case of doing it, the departure will be early morning. Kom Ombo: Visit of the temple of Sobek and Haroeris. In the old Thebes the majority of the architectural treasures raised from the magnificence of the New Empire are concentrated. In the Oriental Bank, visit to the impressive temples of Karnak and Luxor, that stand up in the landscape of the city. In the Occidental Bank, visit of Thebes Necropolis, including the Valley of Kings, the temple of the Queen Hathshepsut in Deir el Bahari, unique among the Egyptian architecture, and the sensational Memnon Colossuses. Optionally the visit to the Occidental Bank could be completed with the visit to the Ramesseum, the temple built up by Ramses II, and to the temple of Medinet Habu, funerary work of Ramses III and considered as the best preserved temple in Luxor.</p> <p>Day 4.- Cruise / Cairo <i>Breakfast</i> and disembark. Conclusion of the included visits in case of not having had the possibility of making them in their totality. With the foreseen timetable, transfer to the airport to flight with destination Cairo. Arrival and transfer at the hotel according to the selected category. Accommodation. The number and time of the domestic flight will be reconfirmed during your stay in Egypt.</p> <p>Day 5.- Cairo <i>Breakfast</i> in the hotel. Departure with the bus to visit the Giza Pyramids precinct: Keops, Kefren and Mycerinos, the Sphinx and the Valley Temple. This day you can complete the visit with an optional excursion to the funerary complex of Memphis and Sakkara that hosts the famous staggered pyramid of the pharaoh Zoser.</p> <p>Days 6 and 7.- Cairo <i>Accommodation and Breakfast.</i> Free days with the possibility of participating to optional excursions, as for example a full day excursion to Alexandria (lunch included), visiting the Citadel, the beautiful Mosque of Mohamed Ali and obviously, the Egyptian Museum and its astonishing collection of treasures of all the ages of Egyptian dynasties, and the lively bazaar Khan el Khalili.</p> <p>Day 8.- Cairo / Spain <i>Breakfast</i> (according to the flight time and opening of the restaurant). With the foreseen timetable, transfer to the airport to flight back to Spain. Arrival. End of the trip and of our services.</p>				

⁽¹⁾ Approximately 152 € (Airport taxes + service fees: they may vary significantly according to the date of travel, age of traveller, etc.)

JORDAN – DEAD SEA				Type of trip: CITIES + CULTURE + BEACH
Days: 8				
Half Board <input checked="" type="checkbox"/> Full Board <input type="checkbox"/> All Inclusive <input type="checkbox"/>				
	Price:	Category:	Period:	
Lower:	1,260 €	4*	OCT	
Higher:	1,769 €	5* L	AUG	
Taxes ⁽³⁾ : Included <input type="checkbox"/> Not included <input checked="" type="checkbox"/>				
Entries/tours: Included <input checked="" type="checkbox"/> Not included <input type="checkbox"/>				
Group minimum number: 10				
Frequency of departure: weekly				
Description:				
<p>Day 1.- City of Origin – Amman (HB) Departure on a charter flight with destination Jordan. Arrival at Amman, attendance and transfer at the hotel. Dinner and accommodation.</p> <p>Day 2.- Amman – Jerash –Ajlun – Amman (HB) Breakfast and departure for a sightseeing tour of Amman. Its most important avenues, the citadel, the urban centre and the Roman Theatre. Continuing towards the city of Jerash, one of the cities of the Decapolis, located north of Amman, approximately at 45 km. During the excursion we will visit the triumph arch, the oval place, the thistle, the colonnade, the Aphrodite temple and the roman theatre, with its incredible acoustics. Afterwards we will visit the Ajlun Castle, a fortress built in 1185 reconstructed later in the XIII century, by the Mameluks after its destruction by the Mongols. It is a castle of the crusaders, located up on the hill and from where you can appreciate a wonderful view. When completed the tour, we will come back to Amman. Dinner and accommodation in the hotel.</p> <p>Day 3.- Amman – Desert Castles – Amman (HB) Breakfast and departure towards the East of the city, to visit three of the most representative so-called Desert Castles: Harrannah, Amra and Hallabat. These castles, built up from VII to XI century, some of them were used as caravansary, others as resting pavilions and some of them as military fortresses to defend its territories. Still today, it is possible to find ten of them, in different conditions of preservation. These three we will visit are the most representative, especially the Amra one, for its internal frescoes that cover the walls and that were painted by Syrian artists during the caliphs’ period. Return to Amman. Dinner and accommodation in the hotel.</p> <p>Day 4.- Amman – Madaba – Nebo – Kerak – Petra (HB) Breakfast and departure to visit the Orthodox church of Saint George, where it’s located the first mosaic-map of Palestine. We will follow to Mount Nebo to admire the panoramic view of the Jordan Valley and the Dead Sea by the mountain. This was the last place visited by Moses and from where the prophet spotted the promised land, which he never reached. We will follow towards Kerak. Visit of the crusaders’ fortress, the most important of the area after the knight’s Crac in Syria. We will follow towards Petra. Dinner and accommodation.</p> <p>Day 5.- Petra (HB) Full day dedicated to the visit of the rose city, the capital of the Nabateans. We will lower on horses toward the entry of the gorge. During the visit by walk, we will visit the most important and representative monuments sculptured in the rock by the Nabateans. The treasure, famous and internationally renowned by appearing in Indiana Jones movie, coloured Tombs, royal Tombs, the Monastery. Petra is one of the sites in the world where you should go at least once in a lifetime. Dinner and accommodation.</p> <p>Day 6.- Petra – Wadi Rum – Dead Sea (HB) Breakfast and departure towards Wadi Rum. After a 2 hours walk, we will arrive at the desert of Lawrence of Arabia. The visit, in 4 wheels drive vehicles, driven by Bedouins, it consist of a small excursion to the lunar scenery of this desert. During our ride we will observe the wonders made by the nature, with the rocks and the sand. The village of Wadi Rum, Lawrence’s spring, the inscriptions of Alamele, the seven pillars, the sand dunes. When completed the visit, transfer to the Dead Sea. In the afternoon, we will visit the Dead Sea. The lowest site in the Earth, located at 400 hundred meters below the sea level. Its saltiness and its minerals offer curative possibilities for different diseases, as well as for the manufacture of cosmetic and beauty products. Dinner and accommodation.</p> <p>Day 7.- Dead Sea (HB) Day free to rest and relax with half board accommodation.</p> <p>Day 8.- Dead Sea – Origin city Breakfast. At the indicated time, transfer to the Amman airport. Departure on a charter flight with destination the origin city. Arrival and end of the trip.</p>				

⁽³⁾ Approximately 144 € (Airport taxes + Country exit taxes: they may vary significantly according to the date of travel and exchange rates)


TERANGA SENEGAL				Type of trip: BEACH + NATURE
Days: 9				
Half Board <input checked="" type="checkbox"/> Full Board <input type="checkbox"/> All Inclusive <input type="checkbox"/>				
	Price:	Category:	Period:	
Lower:	1.685 €	3* and 4*	APR-MAY	
Higher:	2,000 €	3* and 4*	JUL-SEP	
Taxes:	Included <input checked="" type="checkbox"/>	Not included <input type="checkbox"/>		
Entries/tours:	Included <input checked="" type="checkbox"/>	Not included <input type="checkbox"/>		
Group minimum number: NO				
Frequency of departure: twice a week				
Description:				
<p>Day 1.- Spain / Dakar Departure on an airplane with destination Dakar. Arrival and transfer at the hotel. Accommodation. Hotel Novotel 4* / Faidherbe 4* or similar.</p> <p>Day 2.- Dakar / Goree Island / Dakar Breakfast. Departure and panoramic tour of the Senegalese capital visiting some of its spots and markets where the colour of its tissues and the fragrance of the spices mix up with the hustle and bustle of this great African city. Later on we will embark on the boat that will bring us to mythical island of Gorée, testimonial of what should never have been. Visit of the house of the slaves and free time to enjoy the spots of this island declared human heritage by the UNESCO. Return at sunset to the hotel in Dakar. Accommodation in the hotel.</p> <p>Day 3.- Dakar / Rose lake / St. Louis Breakfast. Early departure towards the north of the Country. On the road we will pass by the famous rose lake of Retba, arrival of the popular rally Paris-Dakar. We will observe the traditional process of salt collection by the Lebu women. We will cross the lands of Sahel until arriving at St. Louis, which was capital during the French domination period. At the arrival its magnificent bridge Faidherbe will welcome us. Free time for visit the colonial neighbourhoods of the north and south in the centre of the island. Dinner and accommodation in the hotel.</p> <p>Day 4.- St. Louis / Barbarie reserve / St. Louis Breakfast. Departure in the morning to get a motor pirogue and enter the waters of the ornithological reserve of the "langue de Barbarie". Pelicans, flamingos, cormorants and a continuum of birds have made of this place a unique refuge for migrating birds. Free afternoon in the city of St. Louis to walk or shopping. Dinner and accommodation in the hotel.</p> <p>Day 5.- St. Louis / Kaolack / Sine Saloum Breakfast. Slowly we will leave the northern dry lands towards the green region of Saloum, which will be our connection place for the route southwards. We will visit its market where the fruits and fishes' sellers mix up with charlatans and the sorcerers come from all over Africa. In the afternoon we will arrive at the shore of the Saloum river, where our hotel is located, in a spot populated by birds and surrounded by Serer villages. Paletuviers 3* / Keur Saloum 3* or similar</p> <p>Day 6.- Sine Saloum Breakfast. The region of the Sine Saloum gets its name because of two rivers that cross it. With no doubt the best way to know it will be on a motorboat to furrow its waters. We will embark from our hotel and we will wander the natural reserve formed by islands of the delta of the Saloum. We will visit a village of the ethnicity Serer, fishermen that live in this land. From there we will continue our journey and finally we will reach the hotel while crossing beautiful sceneries. Arrival at the hotel, dinner and accommodation.</p> <p>Day 7.- Saloum / Saly Breakfast. Few kilometres away there is the coastal resort of Saly. An endless variety of gardens and leisure centres are located along its beaches. We can enjoy the free activities of the hotel such as windsurf, volley or the optional ones as moto-quad, water-ski or including golf in the magnificent course of Saly. Dinner and accommodation. Hotel Lamantin 5* / Teranga 4* or similar.</p> <p>Day 8.- Saly / Dakar / Spain Breakfast. Free day and at afternoon transfer to the airport of Dakar. Departure on the flight back. Overnight flight.</p> <p>Day 9.- Spain. Arrival</p>				

FASCINATING TUNISIA				Type of trip: BEACH+NATURE+CULTURE
Days: 8				
Half Board <input checked="" type="checkbox"/> Full Board <input checked="" type="checkbox"/> All Inclusive <input checked="" type="checkbox"/>				
	Price:	Category:	Period:	
Lower:	402 €	4* (HB)	end of AUG	
Higher:	794 €	5* (AI)	begin. of AUG	
Taxes ⁽⁴⁾ :	Included <input type="checkbox"/> Not included <input checked="" type="checkbox"/>			
Entries/tours:	Included <input checked="" type="checkbox"/> Not included <input type="checkbox"/>			
Group minimum number: NO				
Frequency of departure: 3 times a week				
Description:				
<p>Day 1: Spain / Tunis Cartago or Monastir / Tunis capital or Gammarth Presentation in the airport ninety minutes before the take off of the flight at the Solplan desk in the international departures lobby. Once checked the luggage in and passed the police control, departure with destination Tunis or Monastir. Airport assistance and transfer.</p> <p>Day2: Sousse, Hammamet, Skanes and Monastir / Kairouan / Tozeur / Nefta Breakfast in the hotel and departure towards Kairouan, holy city of the Islam where you visit the Great Mosque, the Barber Mausoleum and the water reserves constructed by the Aghlabids and the medina. Lunch (included) on the road. After it, departure towards Netta, Dinner and accommodation. Possibly, dinner and accommodation could be in Tozeur.</p> <p>Day 3: Tozeur or Nefta / Chott Djerid / Douz or Kebili Breakfast in the hotel and free morning with the possibility of making an interesting excursion (optional) in all-terrain vehicles to the mountain oasis of Chibika, Tamerza and Mides. Lunch and departure towards Tozeur to visit the museum of Arts and Traditions Dar Chraiet. Continuing towards Douz, dinner and accommodation. Possibly the dinner and accommodation could be in Kebili.</p> <p>Day 4: Douz or Kebili / Matmata / El Djem / Sousse, Hammamet, Skanes, Monastir and Gammarth After breakfast visit to the sand dunes with a camel ride (optional). Following, departure towards Matmata to observe an extraordinary lunar landscape and visit a troglodyte house. Lunch on the road. In the afternoon departure to El Djem to visit its roman amphitheatre. Afterwards departure towards the hotel of stay where you arrive to lodge according to the selected hotel and arrangement.</p> <p>Days 5, 6 & 7: Sousse, Hammamet, Skanes, Monastir, Mahdia and Gammarth Breakfast in the hotel. Free days with the possibility to make optional excursions according to the information that you will receive by our representatives. Accommodation according to the selected hotel and arrangement.</p> <p>Day 8: Tunis, Cartago or Monastir /Spain Breakfast in the hotel Free time until the time of gathering for the transfer to the airport. Check in of the luggage and departure towards the Spanish airport of origin.</p>				
End of our services				


⁽⁴⁾ Approximately 57 € (Airport taxes)

WHOLE JORDAN				Type of trip: CITIES+CULTURE+NATURE
Days: 8				
Half Board <input checked="" type="checkbox"/> Full Board <input type="checkbox"/> All Inclusive <input type="checkbox"/>				
	Price:	Category:	Period:	
Lower:	995 €	"A"	April 09	
Higher:	1,560 €	"E"	March 10	
Taxes ⁽⁵⁾ : 225€ Included <input type="checkbox"/> Not included <input checked="" type="checkbox"/>				
Entries/tours: Included <input checked="" type="checkbox"/> Not included <input type="checkbox"/>				
Group minimum number: NO				
Frequency of departure: weekly				
Description:				
<p>Day 1 Spain / Amman Friday - dinner Departure from Madrid on a scheduled direct flight with destination Amman. Arrival and attendance by our personnel. Visa proceedings. Transfer to the hotel. Accommodation (passengers from Barcelona fly with the Turkish Airline Company, via Istanbul, with change of aircraft).</p> <p>Day 2 Amman / Jerash / Ajlun / Amman Saturday – Breakfast + dinner – 73 km Departure for a sightseeing tour of the city of Amman. Its most important avenues, the Citadel, the urban centre and the Roman Theatre. Continuing towards the city of Jerash, one of the cities of the Decapolis. Jerash is located north of Amman, approximately at 45 km and at an hour of distance by road. During the excursion we will visit the triumph arch, the oval place, the thistle, the colonnade, the Aphrodite temple and at the end, the roman theatre, with its incredible acoustics. Afterwards we will visit the Ajlun Castle, a fortress built in 1185 and reconstructed later in the XIII century, by the Mameluks after its destruction by the Mongols. It is a castle of the crusaders' period, located up on the hill and from where you can appreciate a wonderful view. When completed the tour, return to Amman. Accommodation.</p> <p>Day 3 Amman / Wadi Rum / Aqaba Sunday – Breakfast + dinner – 335 km Departure towards Wadi Rum. After a 2 hours walk, we will at the desert of Lawrence of Arabia. The visit, that will be made in typical 4 wheels drive vehicles, driven by Bedouins, it consist of a small excursion to the lunar scenery of this desert. During our ride we will observe the wonders made by the nature, with the rocks and the sand. When ended the visit, departure towards Aqaba. Arrival and Accommodation.</p> <p>Day 4 Aqaba / Petra Monday – Breakfast + dinner – 133 km Free morning. At the established time, departure towards Petra. Arrival and accommodation in the hotel.</p> <p>Day 5 Petra Tuesday – Breakfast + dinner Full day dedicated to the visit of the rose city, the capital of the Nabateans. During the visit, we will know the most important and representative monuments sculptured in the rock by the Nabateans. The treasure, famous and internationally renowned by appearing in Indiana Jones movie, the coloured Tombs, the royal Tombs, the Monastery, etc. Petra is one of those sites in the world where you should go at least once in a lifetime. When finished the visit, in the afternoon, return to the hotel. Accommodation.</p> <p>Day 6 Petra / Madaba / Mount Nebo /Dead Sea Wednesday – Breakfast + dinner – 220 km Departure towards Madaba to visit the Orthodox Church of Saint George, where it's located the first mosaic-map of Palestine. Continuing towards Mount Nebo to admire the panoramic view of the Jordan Valley and the Dead Sea by the mountain. Departure towards the Dead Sea. Accommodation.</p> <p>Day 7 Dead Sea Thursday – Breakfast + dinner Free day in the lowest site in the Earth, located at 400 hundred meters below the sea level. You can enjoy a swim in the Dead Sea and the hotel equipments. Accommodation.</p> <p>Day 8 Dead Sea / Spain Friday – Breakfast + dinner – 52 km At the indicated time, transfer to the Amman international airport to leave on a regular flight with destination Madrid (passengers to Barcelona fly with the Turkish Airline Company, via Istanbul, with change of aircraft).</p>				

⁽⁵⁾ Airport taxes: they may vary significantly according to the date of travel

DINGANE ROUTE				Type of trip: CITIES + NATURE
Days: 12				
Half Board <input checked="" type="checkbox"/> Full Board <input type="checkbox"/> All Inclusive <input type="checkbox"/>				
	Price:	Category:	Period:	
Lower:	2,416 €	3*	MAY-AUG	
Higher:	2,999 €	4* superior	MAR-APR	
Taxes ⁽⁶⁾ :	Included <input type="checkbox"/> Not included <input checked="" type="checkbox"/>			
Entries/tours:	Included <input type="checkbox"/> Not included <input checked="" type="checkbox"/>			
Group minimum number: NO				
Frequency of departure: weekly				
Description:				
<p>Day 1 Spain / Johannesburg Departure on a regular flight with destination Johannesburg, via a European city. Arrival and transfer to the hotel. Accommodation in the selected option.</p> <p>Day 2 Johannesburg / Mpumalanga Half board. After breakfast, departure on the road towards Kruger through the province of Mpumalanga. On the way we could observe some of the wonders of the area, such as the Bourke's Luck Potholes in the Blyde River Canyon (the visits may vary according to the available time and subject to weather conditions). Lunch not included. Arrival to the accommodation according to the selected option. Note Category C: The transports to Kruger are made with special planes from Johannesburg to the private reserve, way out and return. All the services in Kruger are English speaking and on a full board arrangement.</p> <p>Day 3 Kruger National Park Half board. Full day photographic safari. Very early transfer by road to the entrance of the park. There, our open 4WD vehicles driven by skilled English speaking rangers will wait for us. Because of the peculiarity of the vehicles, with a maximum capacity of 9-10 people, at least one Spanish speaking guide is guaranteed during half a day, who will be turning among the various 4WD, in case there will be more than 10 participants. With luck we will know the so-called "Big Five": lion, leopard, elephant, rhino and buffalo. Lunch not included.</p> <p>Day 4 Mpumalanga (Kruger) / Pretoria / Durban Breakfast. Return by road to Johannesburg. Sightseeing tour of Pretoria: highlighting the Church Square, the Union Buildings or the monument to the Voortrekker (the visit does not include the entries to the monuments being a sightseeing visit; they can change according to the available time and subject to the weather conditions). Departure from the Johannesburg airport on a regular flight with destination Durban. Arrival and transfer to the accommodation based on the selected option.</p> <p>Day 5 Durban Breakfast. Free day. We recommend walking in the multicoloured Indian Market or visiting the Aquarium, where to feed the sharks.</p> <p>Day 6 Durban / Cape Town Breakfast. Departure from the Durban airport on a regular flight with destination Cape Town. Arrival and transfer to the accommodation based on the selected option. Rest of the day free to enjoy the most chic city of Africa.</p> <p>Days 7 and 8 Cape Town Breakfast. Free days at your entire disposal.</p> <p>Day 9 Cape Town / Victoria Falls Breakfast. Departure on a regular flight with destination Victoria Falls or Livingstone, via Johannesburg. Arrival and English speaking transfer to the hotel. Free time to relax. In the afternoon, sunset "mini-cruise" through the Zambezi river with snacks and drinks included. Accommodation according to the selected option.</p> <p>Day 10 Victoria Falls Breakfast. Visit of the Victoria Falls with English speaking guide. Rest of the day free.</p> <p>Day 11 Victoria Falls / Spain Breakfast. Rest of the day free until the departure of the flight back to Spain, via Johannesburg and a European city. Overnight flight.</p> <p>Day 12 Spain Arrival</p>				

⁽⁶⁾ Approximately 526 € (Airport taxes + fuel surcharge: they may vary significantly according to the date of travel and price of oil)

SEYCHELLES: EXOTIC ISLANDS				Type of trip: BEACH
Days: 11				
Half Board <input checked="" type="checkbox"/>	Full Board <input checked="" type="checkbox"/>	All Inclusive <input type="checkbox"/>		
	Price:	Category:	Period:	
Lower:	2,356 €	n.a.	April	
Higher:			October	
Taxes ⁽⁷⁾ :	Included <input type="checkbox"/>	Not included <input checked="" type="checkbox"/>		
Entries/tours:	Included <input type="checkbox"/>	Not included <input checked="" type="checkbox"/>		
Group minimum number: NO				
Frequency of departure: daily				
Description:				
<p>Day 1.- Spain / Seychelles Departure on a regular flight with destination Seychelles, via a European city. Overnight flight</p> <p>Day 2.- Mahé /Praslin Arrival at Seychelles (Mahé Island) and connection with a flight to Praslin. Assistance and transfer to the selected hotel. Rest of the day free.</p> <p>Days 3 and 4.- Praslin Free days in Praslin. In this island you can relax and enjoy its wonderful beaches or making optional excursions, such as: the May Valley, the walking tour inside an absolutely wild tropical forest, where you will see centenary trees and the astonishing and famous "Coco de Mer" palm tree.</p> <p>Day 5.- Praslin /Mahé / Bird Transfer to the airport to embark on a flight to Mahé and departure on a flight to Bird. Rest of the day free.</p> <p>Day 6.- Bird Free day on a full board arrangement in the hotel, enjoying the wild and primitive beauty of the island that stays unaffected through the times, protected by the coral reefs that round it. A real paradise for the lovers of the birds.</p> <p>Day 7.- Bird / Mahé / Desroches Transfer on a helicopter to Mahé where we will connect with the flight to Desroches. Arrival and transfer to the Lodge and rest of the day free.</p> <p>Days 8 and 9.- Desroches This island arise imposingly just 3 metres upon a great coral atoll in an azure sea abundant in fishes. The lodge lies along the beach of thin sand.</p> <p>Day 10.- Desroches / Mahé Return on a small plane and transfer to the hotel. Rest of the day free.</p> <p>Day 11.- Mahé / Spain Breakfast and transfer to the airport to leave on the flight of return, via a European connection. Arrival.</p>				

⁽⁷⁾ Airport taxes + fuel surcharge (149€): they may vary significantly according to the date of travel and price of oil

Annex II: Air Passengers from Spain to Africa and the Middle East

Table II.1 Number of Air Passengers from Spain to Destinations in Africa and the Middle East, 2005-2008

To	From Spain				Change 2008/2007	From Barajas Airport (Madrid)	
	2005	2006	2007	2008	%	2008	Share (%)
Morocco	465,891	559,224	854,396	1,058,430	23.9	638,334	60
Egypt	330,196	336,3	402,193	376,647	-6.4	246,323	65
Tunisia	311,760	304,682	285,051	237,601	-16.6	102,165	43
Algeria	111,944	118,632	156,468	191,973	22.7	68,697	36
Senegal	94,923	99,127	122,701	132,31	7.8	121,423	92
South Africa	116,403	143,005	116,332	106,43	-8.5	102,054	96
Qatar	1,398	53,449	102,412	100,591	-1.8	100,537	100
Jordan	75,441	48,615	69,243	85,312	23.2	65,319	77
Eq. Guinea	36,425	43,459	45,327	48,632	7.3	48,617	100
Gambia	17,668	22,143	24,320	28,856	18.7	11,508	40
Nigeria	24,266	26,499	27,007	28,494	5.5	28,352	100
Mauritania	22,895	22,922	23,269	25,409	9.2		
Syria	24,468	21,824	25,411	23,868	-6.1	20,875	87
Cape Verde	11,907	7,335	8,522	12,811	50.3	2,280	18
Saudi Arabia	2,429	6,896	6,253	10,893	74.2	8,822	81

Source: compiled by UNWTO from AENA (www.aena.es)

Table II. 2 Number of Air Passengers from Spain to Destinations in Africa and the Middle East, January-October 2009 vs. January-October 2008

To	From Spain		
	January-October 2009	January-October 2008	Change YTD 2009/2008 (%)
Morocco	1,045,610	884,101	18.3
Egypt	260,151	323,817	-19.7
Tunisia	188,414	215,516	-12.6
Algeria	190,208	161,728	17.6
Senegal	112,139	111,408	0.7
South Africa	72,753	88,941	-18.2
Qatar	79,395	85,469	-7.1
Jordan	65,247	72,926	-10.5
Eq. Guinea	34,542	41,87	-17.5
Gambia	17,102	24,268	-29.5
Nigeria	21,459	24,091	-10.9
Mauritania	23,629	20,961	12.7
Syria	15,838	20,42	-22.4
Cape Verde	6,003	10,145	-40.8
Saudi Arabia	9,697	9,196	5.4

Source: compiled by UNWTO from AENA (www.aena.es)

Annex III: Air Ticket Sales of Spanish Travel Agencies to Destinations in Africa and the Middle East

Table III. 1 Data from the Billing and Settlement Plan (BPS) of Spanish Travel Agencies related to tickets issued to Destinations in Africa and the Middle East (euro, million)

	2008	January-September 2009
Total Africa	119.8	108.0
South Africa	19.7	13.0
Morocco	16.7	14.6
Egypt	15.8	14.5
Mauritius Island	8.0	6.0
Senegal	6.9	5.9
Angola	6.0	5.8
Tanzania	4.9	4.6
Nigeria	4.5	3.8
Algeria	4.1	5.6
Tunisia	3.6	4.1
Kenya	2.8	4.3
Ghana	2.5	2.2
Seychelles	2.2	1.8
Ethiopia	1.7	2.1
Mozambique	1.7	1.3
Ivory Cost	1.6	1.7
Mali	1.6	1.7
Libya	1.6	1.6
Cameroon	1.3	1.6
Madagascar	1.3	0.8
Namibia	1.2	1.0
Mauritania	0.9	0.7
Reunion Island (France)	0.9	0.7
Gambia	0.8	1.4
Zambia	0.7	0.7
Zimbabwe	0.7	0.5
Burkina Faso	0.7	0.7
Uganda	0.6	0.5
Niger	0.5	0.1
Sudan	0.4	0.4
Gabon	0.4	0.4
Rwanda	0.3	0.5
Benin	0.3	0.3
Chad	0.3	0.2
Sierra Leone	0.3	0.2
Togo	0.3	0.3
Congo	0.2	0.2
Malawi	0.2	0.1
Liberia	0.1	0.2
Others	1.5	2.1

Source: BSP, IATA

Annex IV: Public Holidays in Spain in 2010

Calendar 2010

National holiday (Red background) **Holiday in the Autonomous Communities** (Yellow background)

JANUARY						
MON	TUE	WED	THU	FRI	SAT	SUN
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

FEBRUARY						
MON	TUE	WED	THU	FRI	SAT	SUN
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28

MARCH						
MON	TUE	WED	THU	FRI	SAT	SUN
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

APRIL						
MON	TUE	WED	THU	FRI	SAT	SUN
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

1 Balearic Islands and Andalucía.
19 Castilla-La Mancha, Castile y León, Valencian Com., Extremadura, Galicia, Madrid, Murcia, Navarre, Basque Country, La Rioja and Melilla.

1 In all autonomous communities excepting Catalonia and Valencian Com.
5 Balearic Islands, Catalonia, Valencian Com., Navarre and Basque Country.
23 Castile y León and Aragón.

MAY						
MON	TUE	WED	THU	FRI	SAT	SUN
				1	2	
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

JUNE						
MON	TUE	WED	THU	FRI	SAT	SUN
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

JULY						
MON	TUE	WED	THU	FRI	SAT	SUN
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

AUGUST						
MON	TUE	WED	THU	FRI	SAT	SUN
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

17 Galicia.
31 Castilla-La Mancha and Canary Islands

3 Madrid.
9 Murcia and La Rioja.
24 Catalonia.

28 Cantabria.

16 Andalucía, Aragón and Asturias.

SEPTEMBER						
MON	TUE	WED	THU	FRI	SAT	SUN
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

OCTOBER						
MON	TUE	WED	THU	FRI	SAT	SUN
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

NOVEMBER						
MON	TUE	WED	THU	FRI	SAT	SUN
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

DECEMBER						
MON	TUE	WED	THU	FRI	SAT	SUN
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

2 Ceuta.
8 Asturias and Extremadura.
11 Catalonia.
15 Cantabria.

9 Valencian Com.

17 Ceuta and Melilla.

Annex V: Global Distribution Systems (GDSs) Air Bookings from Spain to Africa and the Middle East

Table V. 1 Air Bookings from Spain to Destinations in Africa and the Middle East, 2008-2009 (x 1000)

	Total	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.
TOTAL	498.6	50.4	44.8	41.0	48.4	46.3	43.5	41.3	27.6	43.8	48.0	36.6	27.0
Egypt	111.9	9.8	8.0	8.7	10.3	10.3	10.8	10.5	7.2	12.3	12.1	6.8	5.1
Gambia	4.5	0.4	0.3	0.4	0.4	0.3	0.3	0.4	0.2	0.3	0.6	0.2	0.7
Jordan	24.2	2.3	2.5	2.4	2.5	1.8	1.9	3.0	2.3	1.9	1.6	1.1	0.8
Kenya	12.4	-0.3	1.2	1.2	1.9	1.9	0.5	0.8	0.8	1.0	1.4	1.4	0.7
Morocco	206.6	21.1	18.5	15.4	18.3	18.0	19.6	18.1	11.1	16.1	19.8	17.3	13.3
Rwanda	0.7	0.1	0.1	0.1	0.1	0.1	0.0	0.0	0.1	0.0	0.0	0.1	0.0
Senegal	38.2	4.8	3.2	2.6	3.2	3.0	2.7	2.2	2.3	3.7	4.8	3.3	2.2
South Africa	51.7	7.6	5.9	6.2	6.3	5.7	3.9	2.4	1.3	4.1	4.0	2.8	1.6
Syria	11.5	0.9	1.1	0.9	1.5	1.1	0.8	1.2	0.9	1.2	0.7	0.6	0.6
Tanzania	8.5	1.4	1.5	1.0	1.1	1.0	0.2	0.2	0.1	0.7	0.6	0.6	0.2
Tunisia	26.9	2.1	2.4	2.0	2.6	2.9	2.6	2.1	1.2	2.5	2.4	2.3	1.7
Uganda	1.5	0.1	0.2	0.1	0.1	0.1	0.1	0.4	0.1	0.1	0.1	0.2	0.1

Source: Amadeus. Note: Includes data from all Global Distribution System (GDSs).

Table V. 2 Air Bookings from Spain to Destinations in Africa and the Middle East, January-September 2009 (x 1000)

	Total	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.
TOTAL	395.1	43.8	45.6	46.4	39.8	48.4	50.9	42.0	33.0	45.2
Egypt	94.0	7.9	10.1	11.1	9.0	10.4	12.8	10.8	9.2	12.7
Gambia	1.2	0.3	1.3	-0.3	-1.1	-1.5	0.6	0.8	0.7	0.4
Jordan	15.4	0.9	1.5	1.9	1.7	1.6	1.9	2.1	1.7	2.1
Kenya	14.9	2.7	2.6	2.0	1.6	1.7	1.7	0.7	0.9	1.0
Morocco	148.9	18.4	17.0	18.0	15.1	17.4	17.7	17.2	11.6	16.5
Rwanda	0.4	0.1	0.0	0.1	0.0	0.1	0.1	0.1	0.0	0.1
Senegal	26.6	4.2	2.9	3.0	2.7	2.8	3.1	2.3	2.1	3.5
South Africa	38.4	4.8	5.4	5.3	5.2	4.5	5.6	2.5	2.3	2.8
Syria	9.4	0.7	0.8	1.4	0.9	1.1	1.1	1.2	1.1	1.3
Tanzania	7.6	1.4	1.5	1.0	0.9	1.3	0.8	-0.1	0.3	0.4
Tunisia	37.3	2.4	2.5	2.9	3.6	8.9	5.3	4.2	3.1	4.4
Uganda	1.0	0.1	0.1	0.1	0.1	0.1	0.2	0.2	0.1	0.1

Source: Amadeus. Note: Includes data from all Global Distribution Systems (GDSs).

Annex VI: Border crossing formalities and travel advisories

Table VI. 1. Visa Requirements and Specific Travel Advisories

Regions/country	Visa required		Specific Travel advisory
	Yes	No	Security(2)
Africa			
Algeria	X		X
Angola	X		
Benin	X		
Botswana	X		
Burkina Faso	X		X
Burundi	X		
Cameroon	X		X
Cape Verde	X		
Central African Republic	X		X
Chad	X		X
Congo	X		X
Democratic Republic of the Congo	X		X
Djibouti	X		X
Equatorial Guinea	X		
Eritrea	X		X
Ethiopia	X		X
Gabon	X		X
Gambia	X		
Ghana	X		
Guinea	X		X
Guinea Bissau	X		X
Ivory Coats	X		X
Kenya	X		X
Lesotho		X	
Madagascar	x		
Malawi		X	
Maldives		X(1)	
Mali	X		X
Mauritania	X		X
Mauritius		X(1)	
Morocco		X	
Mozambique	X		
Namibia	X		
Niger	X		X
Nigeria	X		X
Uganda	x		x
Rwanda	X		X
Sao Tome and Principe	X		
Senegal		X(1)	
Seychelles		X	
Sierra Leone	X		X
South Africa		X(1)	X
Sudan	X		X
Swaziland		X	
Togo	X		
Tunisia		X(1)	
United Republic of Tanzania	X		X
Zambia	X		X
Zimbabwe	X		

Regions/country	Visa required		Specific Travel advisory
	Yes	No	Security(2)
Middle East			
Bahrain	X		
Egypt	X		X
Iraq	X		X
Jordan	X		X
Kuwait	X		X
Lebanon	X		X
Libyan Arab Jamahiriya	X		X
Oman	X		
Qatar	X		
Palestine			
Saudi Arabia	X		
Syrian Arab Republic	X		
Yemen	X		X

Notes: (1) Visa is not required for short stays (maximum stay: 3 months).

(2) In most cases tourism destinations/sites are not included in the security restrictions.

Source: Ministry of Foreign Affairs and Cooperation. Recomendaciones para viajar al extranjero.

Updated September 4, 2009

Annex VII: How to Make Trade Fair Participation Profitable: Excerpt from UNWTO Seminars (prepared by Mr. Claudio Meffert)

The objective of the seminars is to present and order the guidelines for the correct use of the tourism trade fairs as tools to optimise the promotional and commercial efforts of a destination, its products and offers. They are directed to the potential exhibitors or trade visitors. Both can either be tourism administrations, private enterprises, suppliers and media of the sector amongst others. The seminar is divided in three stages and contemplates theoretical and practical concepts.

- Preparation
- Realization and Control
- Innovation

The basic programme presents the following steps:

1. Tourism Trade Fairs and their Evolution

- Definitions
- Types of trade fairs
- Exhibitors and co-exhibitors
- Presence in a trade fair
- Trade fairs advantages and objectives
- Participation
- Human factor
- Tourism (outline)

2. Investigation

- Identification

3. Planning

- Basic concepts
- Trade fairs director
- Trade visitor
- Trade fair choice

4. Implementation

- Budget
- Stand and its location
- Printed, DVD, CD or UBS material
- Publicity
- Parallel activities
- Public Relations and Protocol
- Stand personnel
- Communication
- During the stand assembly
- During the closing time
- Pre-trade fair nominative promotional actions

5. Follow-Up

- Post-trade fair nominative commercial actions
- Results report

Annex VIII: Methodology: questionnaire* and project planning

Q1. What is the weight of AME ⁴ destinations in your portfolio?	Q8. What are clients looking for when booking a trip to AME?
Q2. What was the recent evolution in terms of sales of these destinations?	Q9. How would you define the typical client that buys a trip AME in terms of age group and disposable income?
Q3. Which destinations is your operator selling in the AME regions? (<i>Terminate if none</i>)	Q10. How advanced are usually the trips to AME usually booked?
Q4. How do you think the evolution of these destinations in your portfolio will be?	Q11. Has your tour operator ceased operating any destination in AME in the last 3 years? If so, for which reason?
Q5. Which types of trips are you currently selling to AME destinations?	Q12. Which are the main barriers that are slowing AME destinations growth in the Spanish market?
Q6. Which is your forecast for the evolution of each kind of trip?	Q13. Which marketing tools would you recommend to increase the efficiency of actions in the Spanish market?
Q7. What is the opinion of your clients on the following list of features related with the trip to AME destinations?	

* *Not all interviewees responded to all the questions*

This study was accomplished within a 10 weeks time frame, with the following task planning:

	Weeks									
	1	2	3	4	5	6	7	8	9	10
Tour-packages gathering & analysis										
Secondary sources analysis										
Interviews										
Study editing										
Follow up meetings with UNWTO		<input type="checkbox"/>		<input type="checkbox"/>			<input type="checkbox"/>			

⁴ AME: Africa and Middle East

Annex IX: Terms of Reference

OUTLINE

Guidebook on Spanish Outbound Market

Preamble

Following the request of the African and Middle Eastern Ministers expressed at the lunch that was hosted by UNWTO and FITUR this year, a guidebook on the Spanish Outbound Market to Africa and the Middle East will be developed by UNWTO.

Aim

The aim of the Guidebook is to identify and assess the current situation and potential of the Spanish outbound market to destinations in African and the Middle East. The guidebook should provide an overview of the Spanish outbound market, and in particular, useful and practical information that would increase the effectiveness of the activities carried out by the African and Middle Eastern national tourism administration/organizations in Spain, and finally increase the tourism flow from Spain to Africa and the Middle East.

The guidebook would also give the opportunity to African and Middle Eastern tourism boards to build a solid communication network and make direct contacts with Spanish Tour Operators and enterprises in the most effective manner.

Proposed Content

The guidebook will include three sets of actions:

- Overview of the Spanish outbound market
- Overview of the Spanish outbound market to Africa and the Middle East
- Travel Distribution (tour operators and travel agents / destinations / products and segments)
- Air Access
- How to Promote in the Market (fairs, etc)
- SWOT Analysis
- Recommendations
- List of contacts (TOs)

The guidebook is envisaged to have around 50/60 pages.

Annex X: Complete List of Acknowledgments

Embassy of the Republic of Kenya	Ambassador Extraordinary and Plenipotentiary	Mwakai K. Sio	Madrid
Embassy of the Republic of Kenya	Third Secretary	Kimani G. Kuria	Madrid
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Embassy of South Africa	Counsellor, Political Affairs	Mike Basson	Madrid
Embassy of Egypt	Counsellor, Tourism Affairs	Magued Abou Sedera	Madrid
Cuban National Tourist Office in Spain	Director	Iyolexis Correa Lorenzo	Madrid
Dominican Republic National Tourist Office in Spain	Director	Paola Dimitri Buonpensière	Madrid
Jordan National Tourist Office in Spain	Director	Pedro Oviedo	Barcelona
Moroccan National Tourist Office in Spain	Director	Essaid Kasmi	Madrid
Moroccan National Tourist Office in Spain	Deputy Director	Mohamed Sofi	Madrid
Tunisian National Tourist Office in Spain	Director	Issam Khereddine	Madrid
Seychelles National Tourist Office for Spain & Portugal	Director	Bernardette Willemin	Paris
Oficinas Nacionales Extranjeras de Turismo en España (ONETE)	Chairman	Antonio Araújo	Madrid
Asociación Empresarial de Agencias de Viajes Españolas (AEDAVE)	Director	Pedro Fernández	Madrid
Asociación de Mayoristas de Viajes Españolas (AMAVE)	Director	Ruperto Donat	Madrid
Ambar VIAJES	Director	Manuel de la Peña	Madrid
Barceló Viajes	Director	Elisa Villazán	Gijón
Catai	Managing Director	Matilde Torres	Madrid
Club 5 Estrellas	Director	José Manuel Blasco	Zaragoza
Club de Vacaciones	Director	Miguel Cantalapedra	Madrid
Cultura Africana	Director	Javier Lago	Madrid
Descubre Viajes	Director	María Luísa Nogales	Madrid
Kanaga	Director	Sandra García Nolán	Barcelona
Infanta Viajes	Director	Ana García	Madrid
Mapa Tours	Director General	Alberto Díaz	Madrid
Marsans	Office Manager	Beatriz Lendinez	Madrid
Marsans	Travel Agent	Noelia Orgaz	Madrid
Nobel Tours	Director General/C.E.O.	Roberto Peregrín	Madrid
Nuba	Director General	Francisco Balaguer	Madrid
Orient Tours	Director General	Salah Maaoui	Barcelona
Planet Travel	Director	Yasser Lassued Arfa	Madrid
Planet Travel	Product Manager	Beligh Boukadida	Madrid
Royal Vacaciones	Director General	Stefan Dapper	Madrid
Rutas 10	Director	Sonia Robles	Madrid
TourMundial	Product Manager	Isabel Pampliega Delgado	Madrid

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Viajes El Corte Inglés	Head of regional branch	Gustavo Ciriza	Madrid
Viajes El Corte Inglés	Travel Agent	Ana Belén Morcillo	Madrid
Viajes Génesis	Director	Hayssam Sudki	Madrid
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World Tourism Organization (UNWTO)	Regional Representative for the Middle East	Amr Abdel Ghaffar	
World Tourism Organization (UNWTO)	Regional Representative for Africa	Ousmane N'Diaye	
Ms. Angela San Miguel	Former CEO of the CATA		