

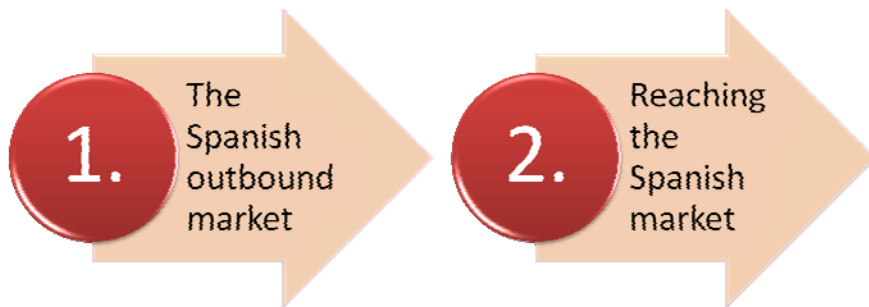


The Spanish market to Africa and the Middle East

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With the support of 

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Spanish outbound tourism to Africa & Middle East



Spanish outbound tourism to Africa & Middle East

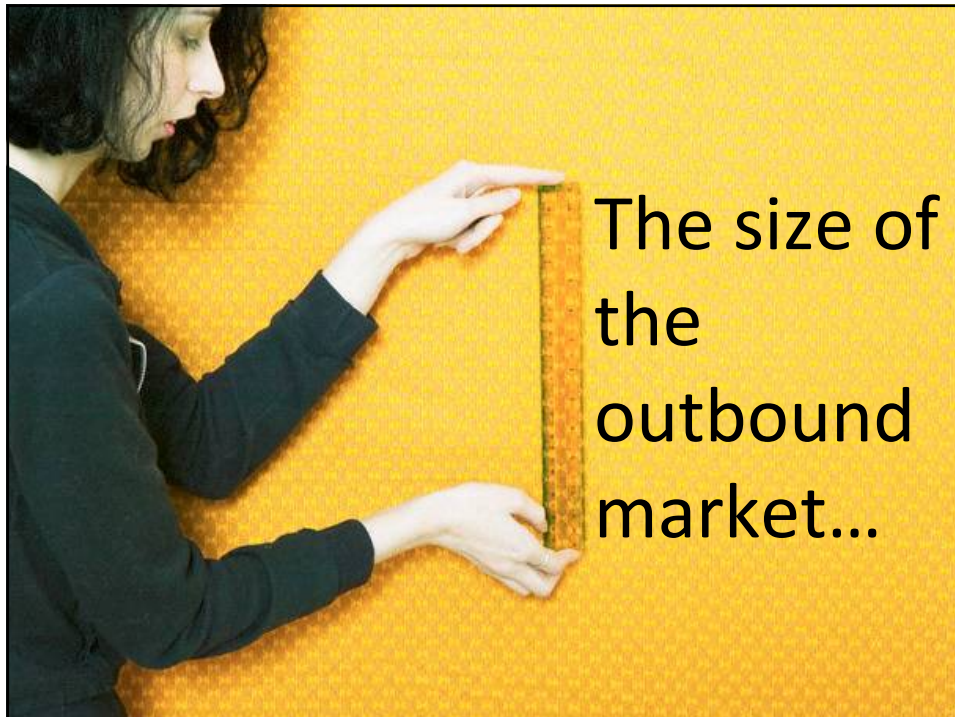
1. The Spanish outbound market

Sources of information used



The Spanish outbound in 2008

a. *Size and growth of the market*



11,200,000

Outbound travellers in 2008

7% of the total trips of the Spaniards in 2008

Source: IET, Spain

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Spanish outbound tourism is...

Growing by...

(2005-2008)

+2.2%

In terms of trips

And by...

+10%

In terms of expenditure

Source: IET, Spain

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The Spanish outbound market

b. *Main origins & destinations*

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Main origin areas of outbound trips in Spain are...

1. Catalonia (28%)
2. Madrid (22%)
3. Andalusia (9%)
4. C. Valenciana (7%)
5. Galicia (7%)
6. Basque C. (6%)

80%

Source: IET, Spain

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And the main destinations are...

Europe → 77%

A & ME → 9%

France (21%)

Morocco
(5%)

UK & Andorra
(7%)

Italy
(9%)

Portugal
(12%)

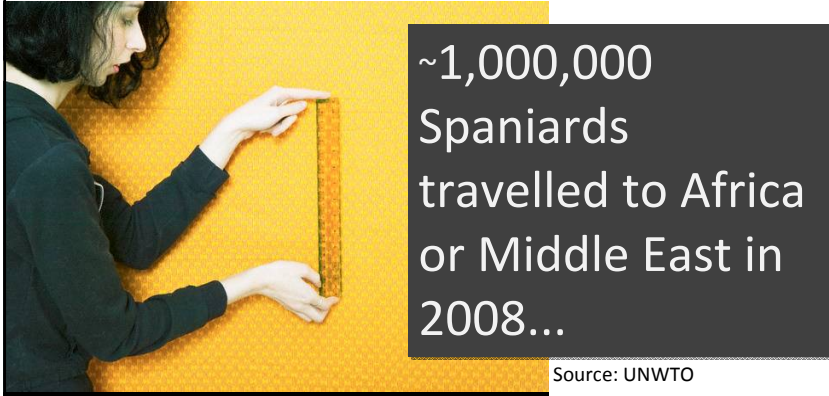
Source: IET, Spain

The Spanish outbound market



Africa & Middle East in the Spanish market

The size



~1,000,000
Spaniards
travelled to Africa
or Middle East in
2008...

Source: UNWTO

**Meaning
that...**



**...in January 100,000
Spaniards will have
visited a destination in
Africa or the Middle
East...**



**...in February,
another 100,000
...and so on**

And
steadily
growing...

+10%
(2005-08)

Source: UNWTO

Main destinations

Middle East:
254,000
(23%)

Africa: 857,000
(77%)

Source: UNWTO

Top 5 destinations in Africa



1. Morocco (69%)	595,000
2. Tunisia (15%)	127,000
3. South Africa (4%)	34,000
4. Algeria (4%)	20,000
5. Senegal (2%)	14,000

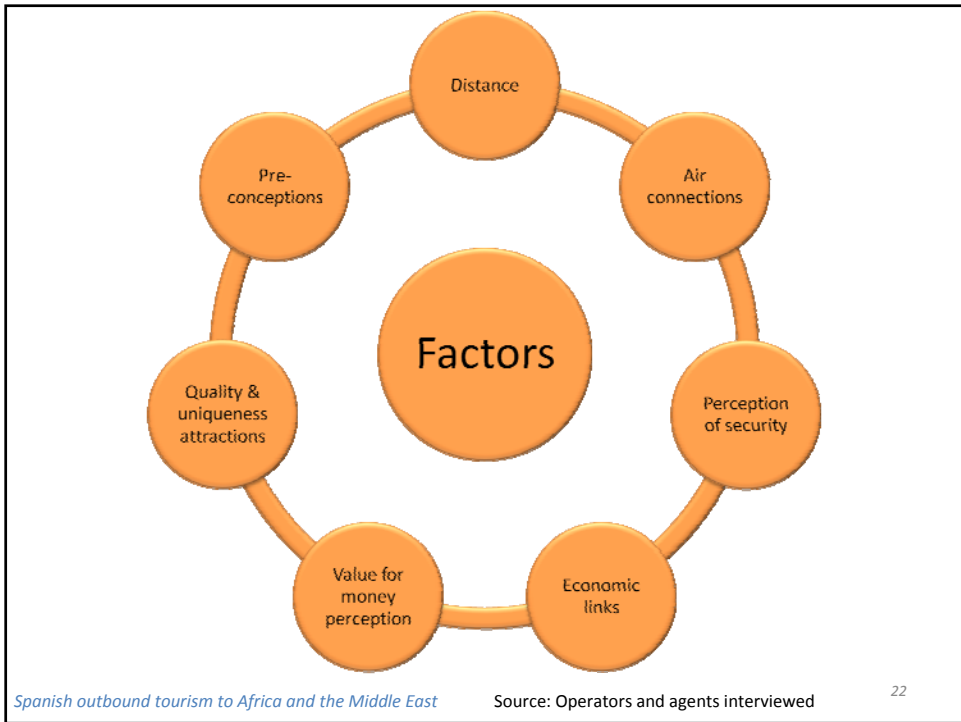
Source: UNWTO

Top 5 destinations in the Middle East



1. Egypt (61%)	156,000
2. Jordan (16%)	40,000
3. Syria (7%)	19,000
4. Saudi Arabia (7%)	17,000
5. Lebanon (4%)	10,000

Source: UNWTO



why do the Spanish visit Africa or the Middle East?

Main reasons for visiting Africa & Middle East



Source: Operators and agents interviewed

Types of trips identified

	Presence in the market today
Culture + Nature + Cities	● ● ● ● ●
Culture + Cities	● ● ● ● ○
Nature	● ● ● ○ ○
Nature + Cities	● ● ● ○ ○
Beach	● ○ ○ ○ ○
Beach + Cities + Culture	● ○ ○ ○ ○
Beach + Nature	● ○ ○ ○ ○
Beach + Nature + Culture	● ○ ○ ○ ○

Source: Tour packages analyzed



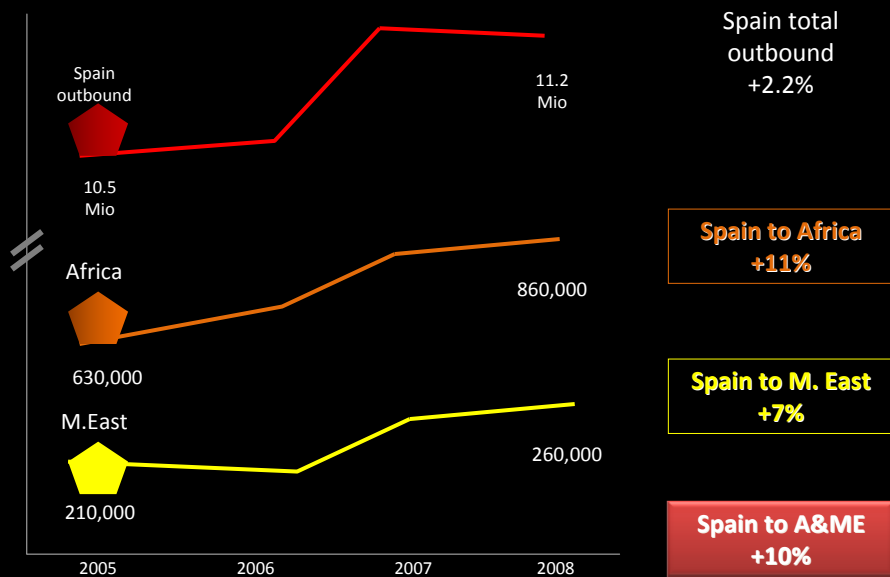
Spaniards most enjoy:

- Quality of resources
- Authenticity
- Untouched nature
- Access to local population

Spanish outbound tourism to Africa & Middle East

2. Reaching the Spanish market

Compared growth rates of Spanish outbound tourism



Source: UNWTO

Reaching the Spanish market



Growth potential

Can
Spain
keep
growing in
A & ME?

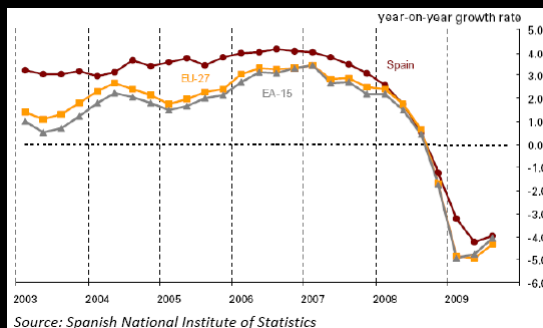


Operators say:

YES...

It can grow

And in spite of the current economic situation...



Unemployment

Consumer Confidence

...operators say:

**“There are
strong
arguments for
optimism”**

Operators say:



**“The Spanish increasingly
travel abroad for reasons
different than traditional
leisure or beach relaxation:
SPECIAL INTEREST TRAVEL
HAS TAKEN OVER”**

Operators say:



“The Spanish increasingly travel abroad for reasons different than traditional leisure or beach relaxation:

SPECIAL INTEREST

Culture

Nature

Exoticism

Your core business!!

Operators say:



There are key segments with excellent potential:

- ❑ Couples with children
- ❑ Couples without children
- ❑ Independent
- ❑ Young
- ❑ Travelling “solo”

Operators say:



“Spanish consumers have a deep interest in knowing different cultures and ways of life”

Operators say:



“The outbound travelling population is still much smaller than the population who wishes to travel abroad”

*Propensity to travel abroad
(% trips/ inhabitants)*

	2000	2008
1. UK	96%	112%
2. Germany	91%	89%
3. Netherlands	88%	113%
4. Canada	62%	81%
5. Austria	-	118%
6. Italy	38%	47%
7. France	34%	38%
8. USA	22%	21%
9. Australia	18%	27%
10. Japan	14%	13%
11. Russia	13%	26%
12. Mexico	11%	14%
13. Spain	10% → 25%	
14. South Africa	9%	9%
15. Brasil	2%	3%

**Spain is a
fast
growing
market**

Sources: UNPD, World Bank, UNWTO

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**Other
arguments
explaining the
potential are...**

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Africa & Middle East
offer exactly what
Spaniards look for

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Pent-up demand

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Constant improvement of A & ME image in Spain

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Reaching the Spanish market

b. *Barriers to reach the market*

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Lack of
awareness

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Biased
preconceptions

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Spaniards most dislike:

- ❑ Service quality
- ❑ Accommodation facilities
- ❑ Border control procedures
- ❑ Hygiene

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Reaching the Spanish market

C. *How to reach the market?*

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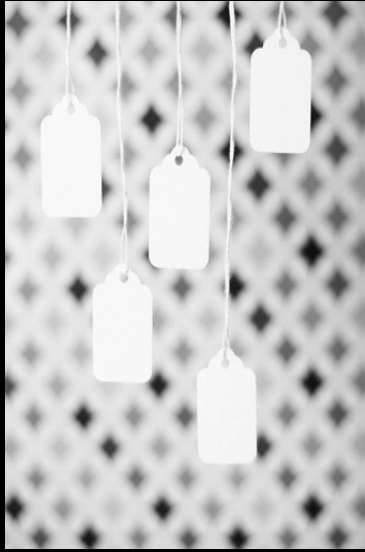
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**Improve
branding
strategies**

**Rely on the
travel agent**





**Be price
competitive**

**Recommended
marketing
actions**

TV 'Infomercials'
FAM trips
Fairs
Co-marketing
Final consumer advertising

Sales workshops
Road shows
Destination brochures
On line marketing
Press trips
Advertising
Product brochures
Training the trade
Merchandising

SUMMARY

Summary 1

11 million Spanish travel abroad every year
(and steadily growing by 2,2%)



Summary 2

1 million Spanish travel to A & ME every year
(and steadily growing by 10%)



Summary 3

**The Spanish go there for
Culture, Nature and Exoticism**



Summary 4

Spain will continue to grow after the economic slowdown



Summary 5

Lack of awareness and biased pre-conceptions are the greatest barriers





Top three recommended strategies are:

BRANDING
RELYING ON TRAVEL AGENTS
PRICE



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