

TROBADA 2015 – TURISMO y CALIDAD DE LOS SS.PP.
22 de abril – MSC PREZIOSA



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Miguel PAYERAS



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Turismo



Diversification of destinations

| Rank | 1950 | Share | 1970 | Share | 1990 | Share | 2010 | Share |
|--------------|-------------------|-------|--------------------|-------|--------------------|-------|--------------------|-------|
| 1 | United States | | Italy | | France | | France | |
| 2 | Canada | | Canada | | United States | | United States | |
| 3 | Italy | 71% | France | 43% | Spain | 39% | China | 31% |
| 4 | France | | Spain | | Italy | | Spain | |
| 5 | Switzerland | | United States | | Austria | | Italy | |
| 6 | Ireland | | Austria | | Mexico | | United Kingdom | |
| 7 | Austria | | Germany | | Germany | | Turkey | |
| 8 | Spain | 17% | Switzerland | 22% | United Kingdom | 18% | Germany | 14% |
| 9 | Germany | | Yugoslavia | | Canada | | Malaysia | |
| 10 | United Kingdom | | United Kingdom | | China | | Mexico | |
| 11 | Norway | | Hungary | | Greece | | Austria | |
| 12 | Argentina | | Czechoslovakia | | Portugal | | Ukraine | |
| 13 | Mexico | 9% | Belgium | 10% | Switzerland | 9% | Hong Kong (China) | 11% |
| 14 | Netherlands | | Bulgaria | | Yugoslav SFR | | Russian Federation | |
| 15 | Denmark | | Romania | | Malaysia | | Canada | |
| | Others | 3% | Others | | Others | | Others | 44% |
| Total | 25 million | | 166 million | | 436 million | | 940 million | |





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Intensidad



| Destino | Visitantes/Residente |
|------------|----------------------|
| Mallorca | 14 |
| Menorca | 14 |
| Ibiza | 25 |
| Formentera | 120 |
| Vaticano | 5500 |
| Venecia CH | 365 |
| Andorra | 105 |
| Venecia | 81 |
| Las Vegas | 75 |



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Competitividad



Table 2: Top three performing economies per pillar

| Country/Economy | Policy rules and regulations | Environmental sustainability | Safety and security | Health and hygiene | Prioritization of Travel & Tourism | Air transport infrastructure | Ground transport infrastructure | Tourism infrastructure | ICT infrastructure | Price competitiveness in the T&T industry | Human resources | Affinity for Travel & Tourism | Natural resources | Cultural resources |
|----------------------|------------------------------|------------------------------|---------------------|--------------------|------------------------------------|------------------------------|---------------------------------|------------------------|--------------------|---|-----------------|-------------------------------|-------------------|--------------------|
| Australia | 14 | 56 | 13 | 40 | 39 | 4 | 49 | 20 | 18 | 137 | 22 | 38 | 2 | 20 |
| Austria | 37 | 6 | 7 | 1 | 22 | 30 | 15 | 1 | 20 | 131 | 17 | 12 | 49 | 12 |
| Barbados | 41 | 27 | 32 | 28 | 8 | 32 | 9 | 26 | 19 | 113 | 23 | 2 | 133 | 50 |
| Brazil | 119 | 30 | 73 | 70 | 102 | 48 | 129 | 60 | 55 | 126 | 62 | 83 | 1 | 23 |
| Brunei Darussalam | 126 | 135 | 24 | 65 | 123 | 45 | 67 | 86 | 65 | 2 | 36 | 63 | 53 | 95 |
| Canada | 10 | 41 | 18 | 53 | 37 | 1 | 33 | 21 | 23 | 124 | 5 | 34 | 10 | 16 |
| Cyprus | 88 | 38 | 27 | 45 | 2 | 36 | 19 | 5 | 40 | 102 | 24 | 10 | 96 | 48 |
| Finland | 7 | 3 | 1 | 15 | 53 | 11 | 20 | 44 | 13 | 118 | 4 | 64 | 54 | 26 |
| Gambia, The | 65 | 34 | 84 | 105 | 25 | 81 | 50 | 126 | 110 | 3 | 111 | 21 | 114 | 121 |
| Germany | 33 | 4 | 14 | 2 | 77 | 7 | 6 | 23 | 11 | 125 | 18 | 61 | 31 | 4 |
| Greece | 98 | 72 | 69 | 13 | 28 | 20 | 58 | 3 | 33 | 127 | 50 | 55 | 40 | 25 |
| Hong Kong SAR | 3 | 118 | 3 | 50 | 12 | 6 | 1 | 71 | 2 | 32 | 8 | 3 | 84 | 42 |
| Iceland | 48 | 19 | 4 | 7 | 5 | 17 | 38 | 9 | 8 | 121 | 3 | 11 | 63 | 57 |
| Iran, Islamic Rep. | 124 | 101 | 106 | 79 | 130 | 102 | 76 | 133 | 93 | 1 | 87 | 128 | 74 | 45 |
| Italy | 100 | 53 | 44 | 29 | 79 | 24 | 39 | 1 | 31 | 134 | 41 | 72 | 34 | 7 |
| Kazakhstan | 99 | 124 | 99 | 3 | 90 | 82 | 80 | 87 | 48 | 73 | 71 | 121 | 120 | 117 |
| Korea, Rep. | 50 | 69 | 39 | 19 | 75 | 31 | 16 | 51 | 1 | 96 | 33 | 81 | 89 | 10 |
| Lebanon | 115 | 127 | 116 | 33 | 38 | 67 | 110 | 27 | 84 | 68 | 64 | 1 | 136 | 68 |
| Mauritius | 28 | 77 | 36 | 66 | 3 | 60 | 37 | 48 | 69 | 75 | 49 | 6 | 134 | 110 |
| New Zealand | 2 | 22 | 9 | 17 | 21 | 12 | 46 | 11 | 22 | 74 | 13 | 17 | 26 | 52 |
| Seychelles | 55 | 70 | 91 | 63 | 1 | 27 | 31 | 29 | 58 | 120 | 56 | 5 | 65 | 64 |
| Singapore | 1 | 23 | 5 | 56 | 4 | 14 | 2 | 38 | 9 | 66 | 2 | 8 | 92 | 35 |
| Spain | 67 | 25 | 23 | 24 | 10 | 10 | 10 | 5 | 28 | 106 | 34 | 39 | 29 | 1 |
| Sweden | 16 | 1 | 8 | 38 | 74 | 19 | 17 | 36 | 3 | 129 | 12 | 33 | 45 | 2 |
| Switzerland | 17 | 2 | 2 | 10 | 11 | 9 | 3 | 5 | 6 | 139 | 1 | 25 | 19 | 6 |
| United Arab Emirates | 13 | 91 | 50 | 61 | 36 | 3 | 26 | 24 | 39 | 35 | 15 | 24 | 71 | 33 |
| United Kingdom | 8 | 7 | 22 | 48 | 40 | 5 | 13 | 22 | 10 | 138 | 6 | 45 | 15 | 3 |
| United States | 23 | 112 | 57 | 51 | 30 | 2 | 27 | 13 | 17 | 94 | 14 | 69 | 3 | 5 |



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Policy rules and regulations

Environmental sustainability

Safety and security

Health and hygiene

Prioritization of Travel & Tourism

Air transport infrastructure

Ground transport infrastructure

Tourism infrastructure

ICT infrastructure

Price competitiveness in the T&T industry

Human resources

Affinity for Travel & Tourism

Natural resources

Cultural resources



SUBINDEX A: T&T REGULATORY FRAMEWORK

Pillar 1: Policy rules and regulations

- 1.01 Prevalence of foreign ownership
- 1.02 Property rights
- 1.03 Business impact of rules on FDI
- 1.04 Visa requirements*
- 1.05 Openness of bilateral Air Service Agreements*
- 1.06 Transparency of government policymaking
- 1.07 Time required to start a business*
- 1.08 Cost to start a business*
- 1.09 GATS commitments restrictiveness index of T&T services*

Pillar 2: Environmental sustainability

- 2.01 Stringency of environmental regulation
- 2.02 Enforcement of environmental regulation
- 2.03 Sustainability of T&T industry development
- 2.04 Carbon dioxide emissions*
- 2.05 Particulate matter concentration*
- 2.06 Threatened species*
- 2.07 Environmental treaty ratification*

Pillar 3: Safety and security

- 3.01 Business costs of terrorism
- 3.02 Reliability of police services
- 3.03 Business costs of crime and violence
- 3.04 Road traffic accidents*

Pillar 4: Health and hygiene

- 4.01 Physician density*
- 4.02 Access to improved sanitation*
- 4.03 Access to improved drinking water*
- 4.04 Hospital beds*

Pillar 5: Prioritization of Travel & Tourism

- 5.01 Government prioritization of the T&T industry
- 5.02 T&T government expenditure*
- 5.03 Effectiveness of marketing and branding to attract tourists
- 5.04 Comprehensiveness of annual T&T data*²
- 5.05 Timeliness of providing monthly/quarterly T&T data*²



SUBINDEX B: T&T BUSINESS ENVIRONMENT AND INFRASTRUCTURE

Pillar 6: Air transport infrastructure

- 6.01 Quality of air transport infrastructure
- 6.02 Available seat kilometers, domestic*³
- 6.03 Available seat kilometers, international*³
- 6.04 Departures per 1,000 population*
- 6.05 Airport density*
- 6.06 Number of operating airlines*
- 6.07 International air transport network*

Pillar 7: Ground transport infrastructure

- 7.01 Quality of roads
- 7.02 Quality of railroad infrastructure
- 7.03 Quality of port infrastructure
- 7.04 Quality of domestic transport network
- 7.05 Road density*

Pillar 8: Tourism infrastructure

- 8.01 Hotel rooms*
- 8.02 Presence of major car rental companies*
- 8.03 ATMs accepting Visa cards*

Pillar 9: ICT infrastructure

- 9.01 ICT use for business-to-business transactions²
- 9.02 ICT use for business-to-consumers transactions²
- 9.03 Individuals using the Internet*
- 9.04 Telephone lines*
- 9.05 Broadband Internet subscribers*
- 9.06 Mobile telephone subscriptions*
- 9.07 Mobile broadband subscriptions*

Pillar 10: Price competitiveness in the T&T industry

- 10.01 Ticket taxes and airport charges*
- 10.02 Purchasing power parity*
- 10.03 Extent and effect of taxation
- 10.04 Fuel price levels*
- 10.05 Hotel price index*



SUBINDEX C: T&T HUMAN, CULTURAL, AND NATURAL RESOURCES

Pillar 11: Human resources

Education and training

- 11.01 Primary education enrollment*
- 11.02 Secondary education enrollment*
- 11.03 Quality of the educational system
- 11.04 Local availability of specialized research and training services
- 11.05 Extent of staff training

Availability of qualified labor

- 11.06 Hiring and firing practices
- 11.07 Ease of hiring foreign labor
- 11.08 HIV prevalence*⁴
- 11.09 Business impact of HIV/AIDS⁴
- 11.10 Life expectancy*

Pillar 12: Affinity for Travel & Tourism

- 12.01 Tourism openness*
- 12.02 Attitude of population toward foreign visitors
- 12.03 Extension of business trips recommended
- 12.04 Degree of customer orientation

Pillar 13: Natural resources

- 13.01 Number of World Heritage natural sites*
- 13.02 Quality of the natural environment
- 13.03 Total known species*
- 13.04 Terrestrial biome protection*²
- 13.05 Marine protected areas*²

Pillar 14: Cultural resources

- 14.01 Number of World Heritage cultural sites*
- 14.02 Sports stadiums*
- 14.03 Number of international fairs and exhibitions*
- 14.04 Creative industries exports*



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Policy rules and regulations

Singapur

Tourism infrastructure

Austria

Environmental sustainability

Suecia

ICT infrastructure

Corea (Sur)

Safety and security

Austria

Price competitiveness
in the T&T industry

Irán

Health and hygiene

Finlandia

Human resources

Suiza

Prioritization of Travel &
Tourism

Seychelles

Affinity for Travel & Tourism

Líbano

Air transport infrastructure

Canadá

Natural resources

Brasil

Ground transport
infrastructure

Hong Kong

Cultural resources

ESPAÑA

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Prosperidad



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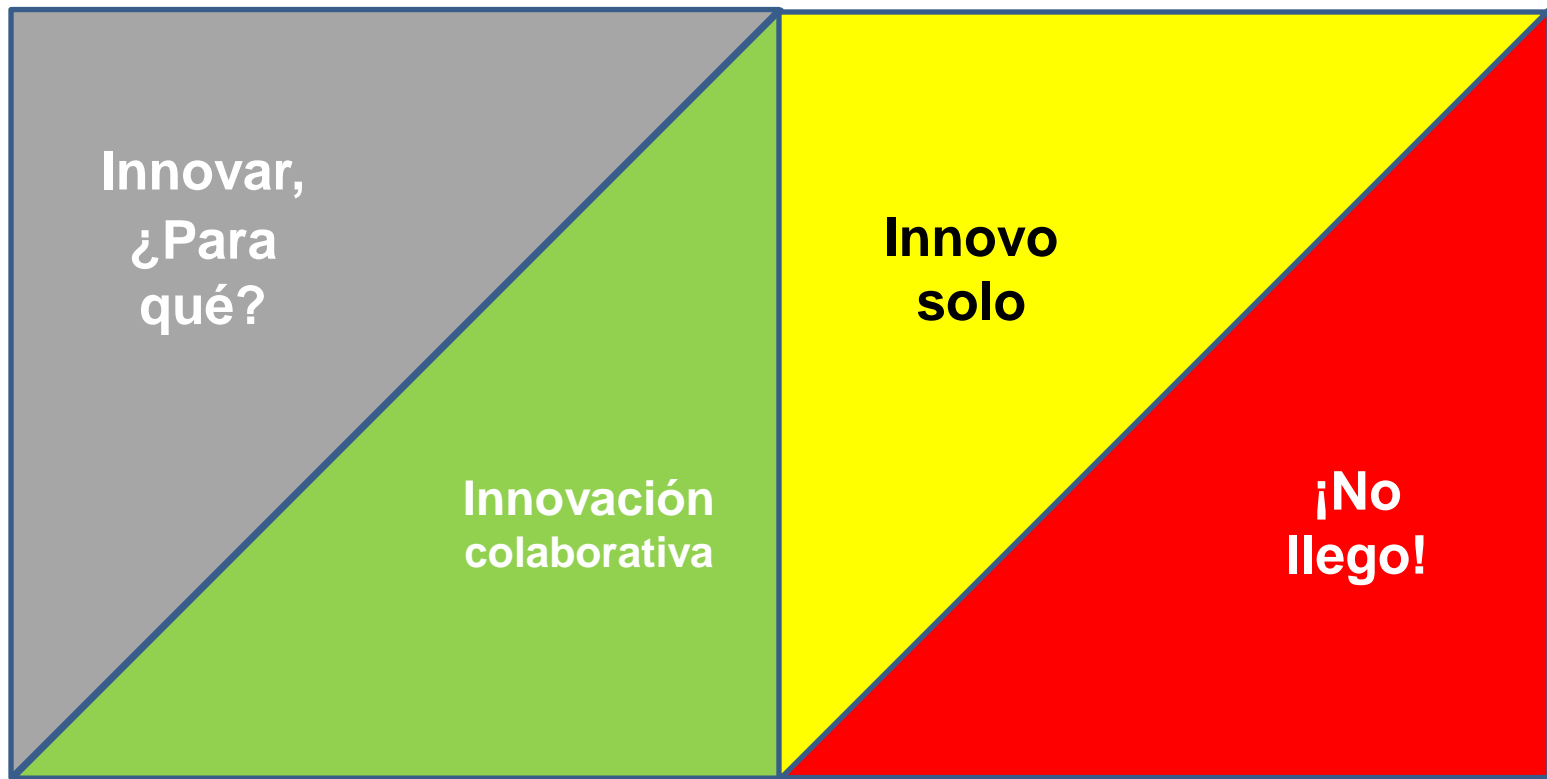


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Oportunidad



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Muchas gracias – Moltes gràcies

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