Sustainable Tourism General Plan.
Concha Gil Díaz 2012. EUSA
COASTAL AREAS OF ANDALUSIA

Sustainable Tourism General Plan.
Concha Gil Díaz 2012. EUSA
<table>
<thead>
<tr>
<th>YEAR</th>
<th>NUMBER</th>
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<tbody>
<tr>
<td>2000</td>
<td>6,991,973</td>
</tr>
<tr>
<td>2001</td>
<td>7,591,511</td>
</tr>
<tr>
<td>2002</td>
<td>7,686,167</td>
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<tr>
<td>2003</td>
<td>7,908,400</td>
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<tr>
<td>2004</td>
<td>7,943,253</td>
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<tr>
<td>2005</td>
<td>8,351,628</td>
</tr>
<tr>
<td>2006</td>
<td>7,975,629</td>
</tr>
<tr>
<td>2007</td>
<td>8,429,556</td>
</tr>
<tr>
<td>2008</td>
<td>7,975,202</td>
</tr>
<tr>
<td>2009</td>
<td>7,465,415</td>
</tr>
<tr>
<td>2010</td>
<td>7,437,435</td>
</tr>
<tr>
<td>2011</td>
<td>7,884,875</td>
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</table>
### INTERNATIONAL tourists in ANDALUSIA - by COUNTRIES of ORIGIN

<table>
<thead>
<tr>
<th>Country</th>
<th>Number 2010</th>
<th>Variation 2009</th>
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</thead>
<tbody>
<tr>
<td>UK</td>
<td>2,280,000</td>
<td>-12.2 %</td>
</tr>
<tr>
<td>France</td>
<td>897,000</td>
<td>+10.7 %</td>
</tr>
<tr>
<td>Germany</td>
<td>859,000</td>
<td>-6.9 %</td>
</tr>
<tr>
<td>Scandinavia</td>
<td>547,000</td>
<td>+15.3 %</td>
</tr>
<tr>
<td>Republic of Ireland</td>
<td>1,813,000</td>
<td>-17.6 %</td>
</tr>
<tr>
<td>Northern Ireland</td>
<td>334,000</td>
<td>+10.8 %</td>
</tr>
<tr>
<td>Rest of World</td>
<td>707,000</td>
<td>+14.9 %</td>
</tr>
<tr>
<td>Total</td>
<td>7,437,000</td>
<td>-0.4 %</td>
</tr>
</tbody>
</table>
Main REASONS for VISITING Andalusia

- Climate: 26%
- Beach: 15%
- Cultural: 17%
- Monuments: 11%
- Visit Family: 8%
- Price: 5%
- Nature: 5%
- Golf: 3%
- Ski: 1%
- Other reasons: 10%

International Tourists in Andalusia – Arrivals & Spendings

2011

- **Arrivals**
  - International tourists received: 7.8 million (ie country of residence not Spain)
  - Percentage **2010 and 2009**: 6% up.
  - Percentage **2007**: down. peak of 8.4 million and equal to the last ten year average of 7.8 million.
  - Position in the world (arrivals): 25th in a world league of foreign tourist arrivals. Andalusia (if a country).

- **Spendings**
  - 3% up on **2010** reaching **8,070 million euro**
  - Average holiday spend per tourist: **1,052 euro**.
  - Average stay per tourist: **11.7** nights.
  - Average daily spending: **89.7 euro**.
  - Holiday spending: broken down - **19.7 %** on transport.
    - **26.3 %** on accommodation.
    - **15.3%** in a package holiday.
    - **6.4%** in restaurants or food.
    - **22.3 %** in excursions.

2012

- International tourists received: **1.1m international tourists**
- **(16% down** on a 10yr average, and
- **9% down on 2010 or 2011).**

- “**2011 was a year of consolidation** for tourism in Andalusia”.
- Advance figures suggest that **2012 will fall down** with respect to **2011**.
INTERNATIONAL Tourists in Andalusia

ACCOMMODATION
- Hotel stay: averaged 7.8 nights.
- Not Hotel stay: averaged 15.8 nights.

TRANSPORT
- Main arrival: via airport (79.8%)
- Second arrivals: by road (8.2%)

MODALITY OF TRAVEL
- Package holiday: A minority of foreign tourists.
- Self planned (organized) tours: 79.8% of international tourists. (2010)

SEASONALITY
- High seasonality: 2.7 million or 36% arrive in July, August or September.

Source: Instituto de Estudios Turísticos (IET). Ministerio de Industria, Turismo y Comercio
<table>
<thead>
<tr>
<th>CONCEPT</th>
<th>EUROS</th>
<th>PERCENTAGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tourism Income</td>
<td>15.600 millions</td>
<td>7.7%</td>
</tr>
<tr>
<td>Employment</td>
<td>15.600 millions</td>
<td>11.1%</td>
</tr>
<tr>
<td>Nights spent in hotels</td>
<td>26 millions</td>
<td>7.7%</td>
</tr>
<tr>
<td>GPD</td>
<td>15389 millions</td>
<td>12.1%</td>
</tr>
</tbody>
</table>
SUSTAINABLE TOURISM GENERAL PLAN OF ANDALUSIA

SUSTAINABLE TOURISM PRINCIPLES:

Management of resources in order to satisfy the economic and social needs while being respectful to natural and cultural heritage in the tourist destinations.
## SWOT Analysis. STRENGTHS AND WEAKNESSES

<table>
<thead>
<tr>
<th>STRENGTHS</th>
<th>WEAKNESSES</th>
</tr>
</thead>
<tbody>
<tr>
<td>+ WARM WEATHER AND SECURITY.</td>
<td>- HIGH SEASONALITY.</td>
</tr>
<tr>
<td>+ PROXIMITY TO MAIN ISSUING MARKETS AND GOOD ACCESIBILITY</td>
<td>- ACCOMMODATION SURPLUS IN COASTAL DESTINATIONS</td>
</tr>
<tr>
<td>+ PREDOMINANCE OF QUALITY ESTABLISHMENTS AND PROFESSIONAL TOURISTIC KNOW –HOW</td>
<td>- DEPENDENCY ON TRADITIONAL MARKETS</td>
</tr>
<tr>
<td>+ GOOD BRAND POSITIONING</td>
<td>- LOW LEVEL OF INVESTMENTS IN NEW TECHNOLOGIES</td>
</tr>
<tr>
<td>+ PUBLIC POLICIES BASED ON PUBLIC - PRIVATE PARTNERSHIP</td>
<td></td>
</tr>
</tbody>
</table>
**THE TOURIST MODEL. DIAGNOSIS**

| - COMPANIES | New Trends in Tourism Demand |
| - TOURISTS | New Tourism Scenery |
| - COMPETITIVE CONTEXT | |
| - COMPETITIVENESS | |
| - PROMOTION | New Trends in Tourism Supply |
| - THE TIME (SEASONALITY) | |
| - THE SPACE (TERRITORIAL DISTRIBUTION) | |
| - CONCLUSION: NEED A NEW TOURIST MODEL | |
OBJECTIVES

1. Redefine our competitive position according to new market trends.

2. Adequate our productive structure to new market requirements.

PILLARS OF THE NEW TOURIST MODEL

The 3 pillars (MAIN IDEAS)

- DIFFERENTIATION AND SINGULARITY (OB 1)
- TOTAL QUALITY (OB 2)
- SUSTAINABILITY (OB 3)
GENERAL OBJECTIVES

OBJECTIVE 1: REDEFINE THE COMPETITIVE POSITION OF ANDALUSIA. DIFFERENTIATION AND SINGULARITY

- IDENTITY OF ANDALUSIA . DISTINCT ASPECTS
- RESOURCES AND ELEMENTS OF SINGULARITY
- EXPERIENCE

OBJECTIVE 2: MODERNIZE THE PRODUCTIVE STRUCTURE AND TOTAL QUALITY

- COMPANY ACTIVITY IN DESTINATIONS. SUSTAINABLE PROJECTS.
- CONNECTION BETWEEN TOURIST SECTOR AND ECONOMIC SECTORS

OBJECTIVE 3: COORDINATION OF THE ACTIONS AND SUSTAINABILITY

- FRAGMENTED ACTION OF PUBLIC AND PRIVATE AGENTS.
- ACTIONS OF THE REGIONAL TOURIST POLICY
PROGRAMS

I. Tourism space improvement
II. Strengthening of tourism industry
III. Promotion and commercialization development
IV. Human resources professional qualification
V. Quality and customer service improvement
VI. Innovation and research (I+D +i) PRODUCTIVE SYSTEM MODERNIZATION.
VII. Solidarity with developing countries
VIII. Knowledge and business management support
INSTRUMENTS

1. STRATEGIC PLANS
2. TOURIST SPACE MANAGEMENT
3. REGIONAL TERRITORY PLANNING
4. LOCAL TERRITORY PLANNING
5. PROCESSES MANAGEMENT
## PRIORITY DESTINATIONS

### MARKET SEGMENTS IN TERRITORIAL SCOPES

<table>
<thead>
<tr>
<th>SUN AND BEACH</th>
<th>5 provincial coastal areas (different degrees and modalities).</th>
</tr>
</thead>
<tbody>
<tr>
<td>RURAL-NATURAL</td>
<td>Sierra Morena, Doñana, Sierra Nevada, Cazorla, Cabo de Gata.</td>
</tr>
<tr>
<td>IDIOMATIC</td>
<td>Sevilla, Málaga, Granada.</td>
</tr>
<tr>
<td>NAUTIC</td>
<td>Málaga, Campo de Gibraltar.</td>
</tr>
<tr>
<td>BEAUTY AND WELLNESS</td>
<td>Not defined.</td>
</tr>
<tr>
<td>CULTURAL</td>
<td>Granada, Sevilla, Córdoba, Málaga, Jerez de la Frontera, Ronda, Úbeda, Baeza, Antequera and network of medium sized cities.</td>
</tr>
<tr>
<td>CONGRESS</td>
<td>Costa del Sol, Sevilla, Málaga, Granada, Córdoba y Jerez de la Frontera.</td>
</tr>
<tr>
<td>EQUESTRIAN</td>
<td>Jerez-provincia de Cádiz, Doñana-Huelva, provincia de Sevilla.</td>
</tr>
<tr>
<td>CRUISE</td>
<td>Málaga, Cádiz, Campo de Gibraltar y Sevilla.</td>
</tr>
</tbody>
</table>
PRIORITY DESTINATIONS

MARKET SEGMENTS AND TERRITORIAL SCOPES

Sustainable Tourism General Plan.
Concha Gil Díaz 2012. EUSA
Sustainable Tourism General Plan.
Concha Gil Díaz 2012. EUSA
OBJECTIVES – LARGE SCOPE POLICIES.
INLAND URBAN SCOPES

1. EXPANSION AND ENRICHMENT OF THE OFFER.

2. EXPANSION OF THE TOURIST URBAN SPACES WITH THE FINAL INCORPORATION OF MEDIUM SIZED CITIES.

3. CREATION OF MORE EXPERIENCE - BASED PRODUCTS.

5. SUPPORT COMPLEMENTARY PRODUCTS: CONVENTIONS, BEAUTY AND WELLNESS, ETC.

6. COORDINATION BETWEEN MEDIUM SIZED CITIES.

7. CREATION OF A NETWORK OF MEDIUM SIZED CITIES FOR COMBINED TOURIST PRODUCTS
INLAND URBAN SCOPES
OBJECTIVES – LARGE SCOPE POLICIES.
INLAND  RURAL AND NATURAL SCOPES

1. STRUCTURE A COHESIVE OFFER IN FOREIGN COUNTRIES.

2. ESTABLISH QUALITY CONTROL SYSTEMS.

3. PROMOTE PARTICIPATION AND INTEGRATION OF COMPANIES. KEY ROLE OF TOURISM COMPANIES.
OBJECTIVES – LARGE SCOPE POLICIES.
COASTAL AREAS

1. REQUALIFY TOURIST SPACES.

2. SUPPORT DIVERSIFYING PRODUCTS (CULTURAL, CONGRESSES, GOLF, ETC).

3. INCREASE TOURIST MOBILITY AND PUBLIC TRANSPORT.
COASTAL SCOPES
QUALIFICA PLAN COSTA DEL SOL

Plan Qualifica, includes the following municipalities:

- Torremolinos
- Benalmádena
- Fuengirola
- Mijas
- Marbella
- Estepona
- Casares
- Manilva
QUALIFICA PLAN COSTA DEL SOL
The theory of urban life cycle of tourist destinations

Fig. 1 - The theory of urban life cycle of tourist destinations, “revisited” version

Sustainable Tourism General Plan.
Concha Gil Díaz 2012. EUSA
The theory of urban life cycle of tourist destinations

Evolutivo cycle of tourist areas

Fig. 1 - The theory of urban life cycle of tourist destinations, “revisited” version

Sustainable Tourism General Plan.
Concha Gil Díaz 2012. EUSA
### QUALIFICA PLAN COSTA DEL SOL (Malaga)

#### DIAGNOSIS. STRENGTHS

1. **Climate**
2. **Beaches**
3. **Atmosphere**
4. **Hospitality**
5. **Good external connections (accessibility)**
6. **Sports offer**
7. **Cultural offer nearby**
8. **Natural attractions nearby**
### TERRITORIAL PROBLEMS

- *Modification and artificiality of the coastal area*, as in not other part of Andalusia. Overall in Western Costa del Sol.

- Vertical buildings.

- Horizontal constructions.

- Second homes.

- Silting of the coast.

- Urban continuum of the coast. Most of the coastal strip has been urbanized with a depth between 2 to 5 kilometres.

### TOURISTS

- Polarization of tourists: 70% Spanish and British.

- Residential tourism. Foreign tourists.

- Tourist typologies: drunken tourism / package tour tourists / high standard tourists.
Sustainable Tourism General Plan.
Concha Gil Díaz 2012. EUSA

QUALIFICA PLAN COSTA DEL SOL

IRRUPCIÓN DEL PROCESO URBANIZADOR EN MANILVA.
QUALIFICA PLAN COSTA DEL SOL
QUALIFICA PLAN COSTA DEL SOL

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QUALIFICA PLAN COSTA DEL SOL (MÁLAGA).
Synthesis of Diagnosis

ENVIRONMENTAL IMPACTS

- Dirty beaches
- Massive urbanization.
- Traffic congestion and lack of parking facilities
- Environmental degradation
- Lack of coordination in promotion
- Transport problems.
QUALIFICA PLAN COSTA DEL SOL
- **Tourism monoculture.** All the space is directly or indirectly related to tourism: buildings, infrastructures, equipment, jobs, incomes: dependency on tourism

- **Poor representation of local companies**

- **Lack of identity and authenticity, not desired by local residents and tourists (germanization and anglicism)**

**CONCLUSION:** The Costa del Sol must recover its Spanish roots and identity
QUALIFICA PLAN COSTA DEL SOL (MÁLAGA)
• Benahavís, Istán and Ojén
1. REQUALIFYING THE TERRITORY. Territorial UNsustainability
2. REHABILITATING INSTEAD OF EXPANDING
3. IMPROVING INTERNAL COMMUNICATIONS
QUALIFICA PLAN: Revitalization, Diversification of products, Revitalization of tourist centres, Communication and Management.

MUNICIPALITIES: Environmental Quality of the Destinations, revitalization, Training and skills development and professional qualification.

COMPANIES: Modernization of companies and products, Diversification of products.
COSTA DEL SOL. QUALIFICA PLAN

9. GESTIÓN DEL PLAN QUALIFICA
8. ESTRATEGIA DE COMUNICACIÓN
7. ESTRATEGIA DE CUALIFICACIÓN DEL EMPLEO Y FORMACIÓN
6. ESTRATEGIA DE INNOVACIÓN Y NUEVAS TECNOLOGÍAS
5. MEJORA DE SERVICIOS E INFRAESTRUCTURAS PÚBLICAS
4. DIVERSIFICACIÓN Y DIFERENCIACIÓN DE PRODUCTOS
3. MODERNIZACIÓN DE LAS EMPRESAS Y PRODUCTOS TURÍSTICOS
2. CALIDAD MEDIOAMBIENTAL DEL DESTINO
1. REVITALIZACIÓN DE CENTROS Y ESPACIOS TURÍSTICOS

PLAN QUALIFICA
OTRAS AGENCIES
INICIATIVA PRIVADA
## ESTRATEGIAS

<table>
<thead>
<tr>
<th>Estrategia</th>
<th>Presupuesto</th>
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<tbody>
<tr>
<td>1. REVITALIZACIÓN DE CENTROS Y ESPACIOS TURÍSTICOS</td>
<td>25.878.003</td>
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<td>2. CALIDAD MEDIOAMBIENTAL DEL DESTINO</td>
<td>38.120.587</td>
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<td>3. MODERNIZACIÓN DE LAS EMPRESAS Y PRODUCTOS TURÍSTICOS</td>
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<td>4. DIVERSIFICACIÓN Y DIFERENCIACIÓN DE PRODUCTOS</td>
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<td>8. ESTRATEGIA DE COMUNICACIÓN</td>
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<td>9. GESTIÓN DEL PLAN QUALIFICA</td>
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<tr>
<td><strong>PRESUPUESTO</strong></td>
<td><strong>117.155.440</strong></td>
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</tbody>
</table>
Sustainable Tourism General Plan.
Concha Gil Díaz 2012. EUSA
1. Encompass the growth rate of the carrying capacity of tourist space with overnight stays and improve their level of use.

2. Maintain and improve the natural and cultural attractions of Andalusian tourist destinations.

3. Differentiate Andalusian tourism products from Andalusian tourism destinations in order to decouple the race competitive pricing downwards.


5. Reduce fragmentation of territorial brand identification and production structure.