SpainTourism 2030

Financed by the European Union
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Recovery, Transformation and Resilience Plan

GOBIERNO DE ESPAÑA
MINISTERIO DE INDUSTRIA Y TURISMO
SECRETARIA DE ESTADO DE TURISMO

SpainTourism 2030

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Foreword

Tourism has been a major driving force for the transformation of the Spanish economy and society since the beginning of its development in the 1950s, serving as a lever for the advancement of social rights and democratic values. The 1978 Constitution recognised the right to rest and leisure and created an administrative structure that guaranteed not only the enjoyment of Spaniards, but also the beginnings of a democratic, multi-level tourism policy.

Today, the value of tourism as a mechanism for opening up to Europe and the world, fostering tolerance and coexistence among citizens, remains undoubted. Spain's consolidated position of leadership as a world-class destination strengthens the international position of our country.

Tourism is a complex and transversal reality that, on many occasions, must be thought of in the plural, given the diversity of forms, practices and experiences that make it up. However, all its manifestations share an essential element: displacement and the human dimension. Therefore, tourism policies must always place people, their rights and their well-being at the centre of planning and development.

Spain is today an international benchmark for tourism. In 2024, we reach historic figures: 94 million international visitors and associated spending of 126 billion euros, 16% more than the previous year. Tourism is an engine of employment and wealth; it employs 13 out of every 100 Spaniards and accounts for 12.3% of GDP.

But leadership is not only measured in numbers. True leadership is exercised when tourism is conceived as an activity at the service of citizens: of the residents who live with visitors, of the professionals and entrepreneurs who make it possible, and of the tourists themselves, who seek authentic and transformative experiences.

With this vision, Spain Tourism 2030 is born: a roadmap to reinforce our strengths and face the challenges ahead. A plan that is committed to economic, social and environmental sustainability, that promotes innovation and digitalisation, and that promotes a model of responsible, inclusive and resilient tourism.

Spain Tourism 2030 is the result of a participatory and plural process in which autonomous communities, local entities, social agents, academia and a wide range of tourism professionals have made a decisive contribution.

The result is a Government of Spain proposal built with rigour and vision for the future. Because the figures are with us, but far from being complacent, we reaffirm our commitment to permanent adaptation and continuous improvement. We aspire to consolidate a model that defends triple sustainability: economic, social and environmental.

This approach will allow us to guarantee a quality tourism product, in which the experiences and the people involved in the process take on a renewed protagonism. We stand for tourism that is fully integrated into our cities, towns and communities, that preserves their identity and guarantees the rights of residents, ensuring that they are the main beneficiaries of a fundamental economic activity for the country.

Today, we have a unique opportunity to consolidate a decisive transformation for the future of Spain as a leading country in tourism. And this road can only be travelled with the involvement of everyone: administrations, companies, workers, citizens and visitors.

That is why I invite all actors in the sector to take responsibility together to build a tourism that reflects who we are as a country. We have the capacity and the resources, but above all we have a responsibility to leave a legacy that transcends generations.

Jordi Hereu i Boher
Minister for Industry and Tourism

In 2022, the Secretary of State for Tourism initiated, based on a broad consensus with the sector's social partners and public administrations within the Spanish Tourism Council (CONESTUR), a participatory process to lay the foundations for the transformation of Spain's tourism model. Since then, this consensus, accompanied by the largest public investment in the history of the sector—3.4 billion euros from the Plan for the Modernisation and Competitiveness of the tourism sector funded by the Recovery, Transformation and Resilience Plan—has resulted in a consolidation of Spain's international leadership: sustained increase in the number of visitors, greater weight of tourism in the economy and employment, and a growing capacity to stimulate other sectors.

The culmination of this process is Spain Tourism 2030, a Spanish Government Plan designed to govern the success of Spanish tourism. It is based on an exhaustive diagnosis of the challenges and effects of tourism activity in the medium and long term and sets the necessary goals to ensure its economic, social and environmental sustainability. It also defines the actions that will make it possible to promote a more competitive and innovative tourism that generates opportunities, well-being and quality jobs, while mitigating the environmental impact and combating climate change.

This strategy is pioneering because it is the first major government plan on tourism to be conceived from a cross-cutting perspective, directly involving different ministries and agencies. Its 50 specific measures guarantee a comprehensive and coordinated vision of public policies, with a clear objective: for Spain to continue to be a world leader in sustainable tourism, not only in terms of visitor numbers, but also in terms of responsibility, innovation and quality of life.

Spain Tourism 2030 places people at the centre—entrepreneurs, workers, tourists and, especially, residents—recognising the diversity of Spanish destinations and adapting actions to the needs of each territory. It promotes a more decentralised and deseasonalised tourism that preserves the country's cultural and natural heritage. It also promotes digitalisation and artificial intelligence as essential tools to reinforce tourism management and innovation, on which our leadership is based.

In short, the Spain Tourism 2030 strategy guarantees a common roadmap for the coming years. As Secretary of State for Tourism, I would like to express my gratitude for the participation and consensus reached with all those responsible for the success of Spanish tourism—businessmen, workers, administrations and social agents—and to acknowledge the leadership and strategic vision of Minister Jordi Hereu, which have made it possible to bring this process to a successful conclusion.

Rosario Sánchez Grau
Secretaria de Estado de Turismo (Secretary of State for Tourism)

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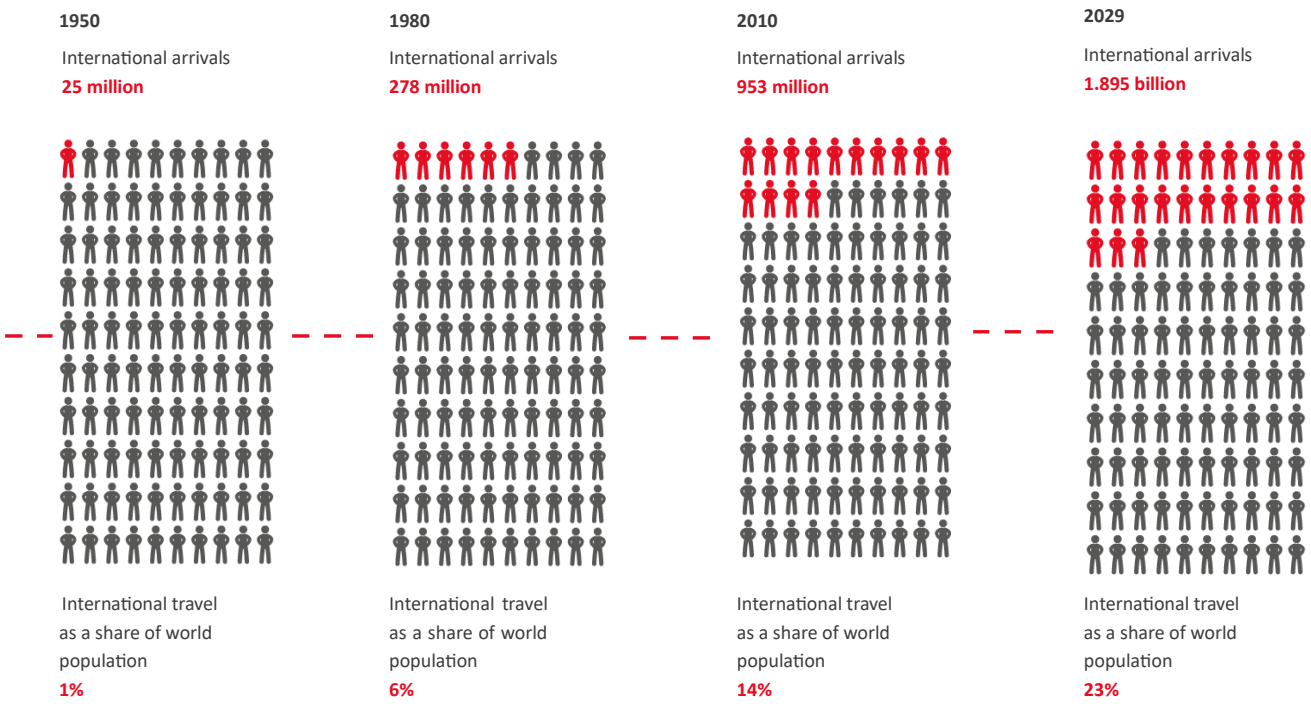
Despite the enormous heterogeneity of the activities encompassed by the concept of tourism and the great complexity of the relationships that this phenomenon maintains not only with the economic environment but also with the social and environmental contexts, many strategic reflections have been based solely on economic considerations, starting from a notion of production that disconnects the activity from its social, cultural, and environmental content and relates it only to the exchange value of tourism services[1].

The ambition of this paper is to go beyond this perspective in order to address the challenges that tourism poses to contemporary societies. However, the sustained effort to characterise the tourism sector makes it possible to present data that underline the economic importance of the activity and reflect the dynamics that characterise it in Spain.

1.1 INTERNATIONAL TOURISM: A GROWING PHENOMENON

Tourism has been growing steadily around the world since the 1950s. All the analyses carried out indicate that the growth trend will continue to be significant.

International tourism 1950-2029



Sources: UN Tourism and Global Data (projection to 2029) – international arrivals.

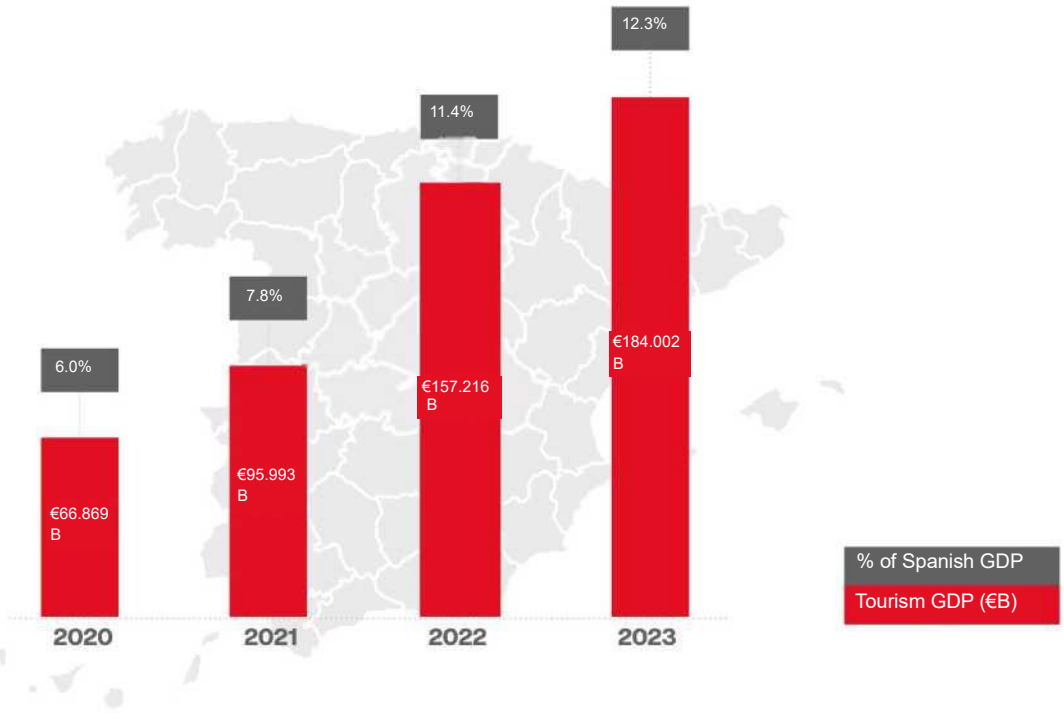
1 RIERA, A. AND AGUILÓ E. (2009). White Book of Tourism of the Balearic Islands.

1.2 TOURISM: A KEY SECTOR IN THE SPANISH ECONOMY

The tourism sector will account for around 12.3% of Spain's total GDP in 2023, with a notable increase in its importance in recent years. In the past year, it has experienced growth well above that recorded for the economy as a whole.

By sector, the services sector reached a weight of 75.2% in 2023, increasing its share by 0.7 percentage points, compared to the decline in the weight of industry and the moderate increase in agriculture and construction.

Increase in the percentage of tourism in GDP



Source: Tourism Satellite Account and National Accounts (INE).

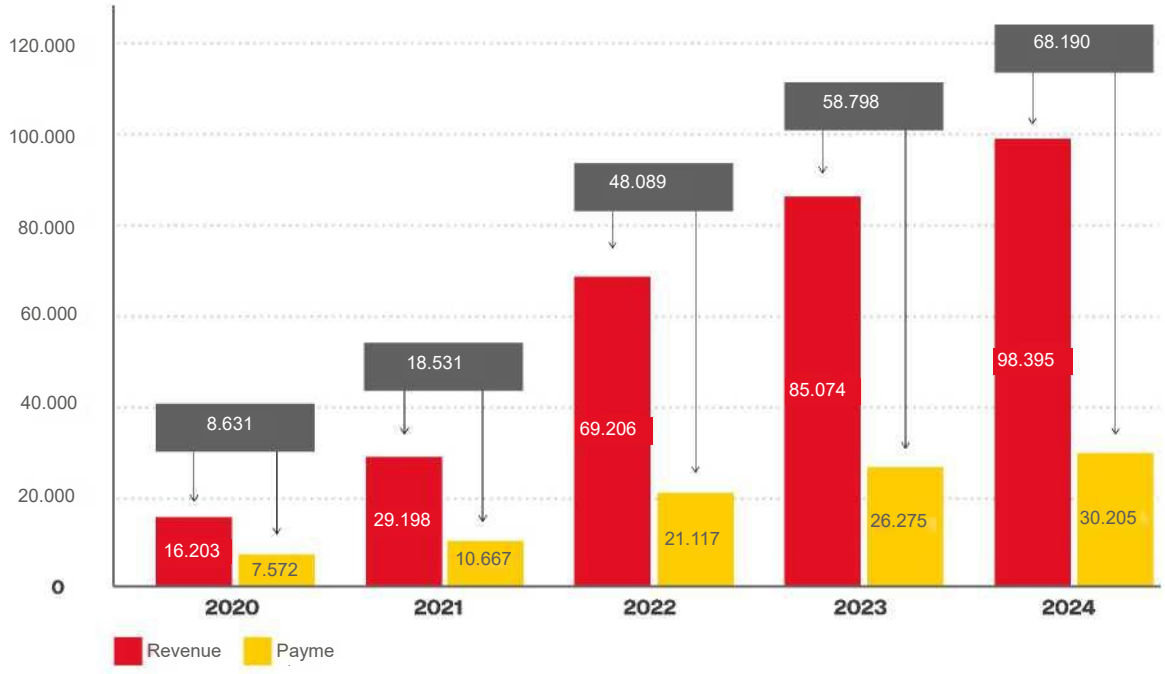
Tourism receipts in the balance of payments

Tourism revenues increased by 15.7% in 2024, maintaining the significant growth of recent years and supporting the rise in the positive balance of services associated with tourism, which in 2024 reached a surplus of more than 68 billion, providing a substantial margin for action for the trade balance and other current account services.

The rest of the goods and services current account balance also shows a positive performance, moving into surplus in the last two years mainly due to the decline in imports.

The surplus of tourism and travel in the balance of payments (EUR 68.19 billion) more than doubled the deficit in the balance of trade in goods (EUR -33.857 billion) in 2024 and contributed decisively to the total surplus of EUR 50.678 billion in the balance of payments on current account (source: Banco de España).

Balance of payments. Current account. Tourism and travel (Data in €M).



Annual variation 2023/22
22.3% Revenue
24.4% Payments
22.3% Balance

Annual variation 2024/23
15.7% Revenues
15.0% Payments
16.0% Balance

Source: Banco de España.

1.3 TOURISM: A LEADING ACTIVITY IN EMPLOYMENT GENERATION

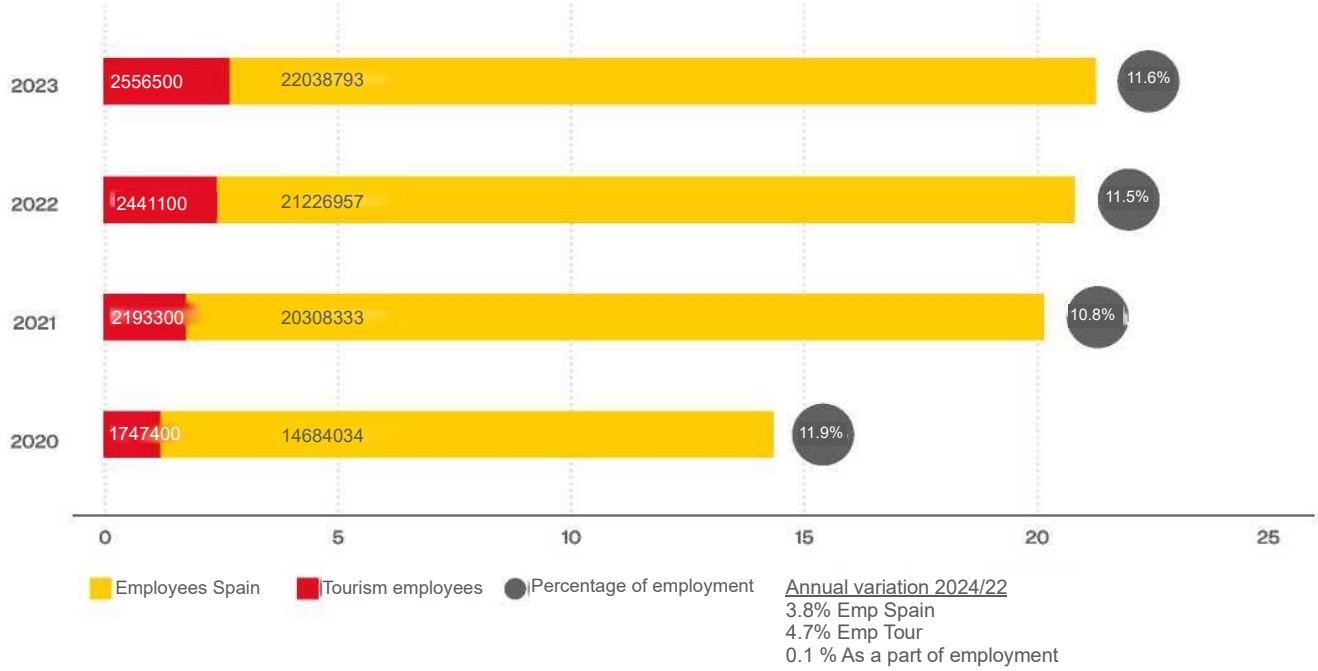
In September 2025, the number of people affiliated to Social Security in the tourism sector exceeded 2.9 million people working in the sector, which represented 13.5% of the total affiliation in Spain. (source: Note on Social Security Affiliation in Tourism – Turespaña, based on data from the Ministerio de Inclusión, Seguridad Social y Migraciones [Ministry of Inclusion, Social Security and Migration]).

The growth of affluence in the sector has also outpaced the growth in international tourist arrivals. Since 2016, arrivals have grown by 24.5% (source: FRONTUR – INE), while affiliation has grown by 26.5%.

The average number of employed persons in the tourism sector in 2024 reached 2,918,725, 13.5% of the total number of employed persons in the economy as a whole (source: Note on the LFS in the Tourism Sector – Turespaña on data from the Labour Force Survey – INE).

The services sector will account for 76.4% of employment in 2024, showing a slight decrease compared to the previous year, compared to slight increases in the weight of sectors such as industry and construction.

Percentage of tourism employment relative to total employment in Spain



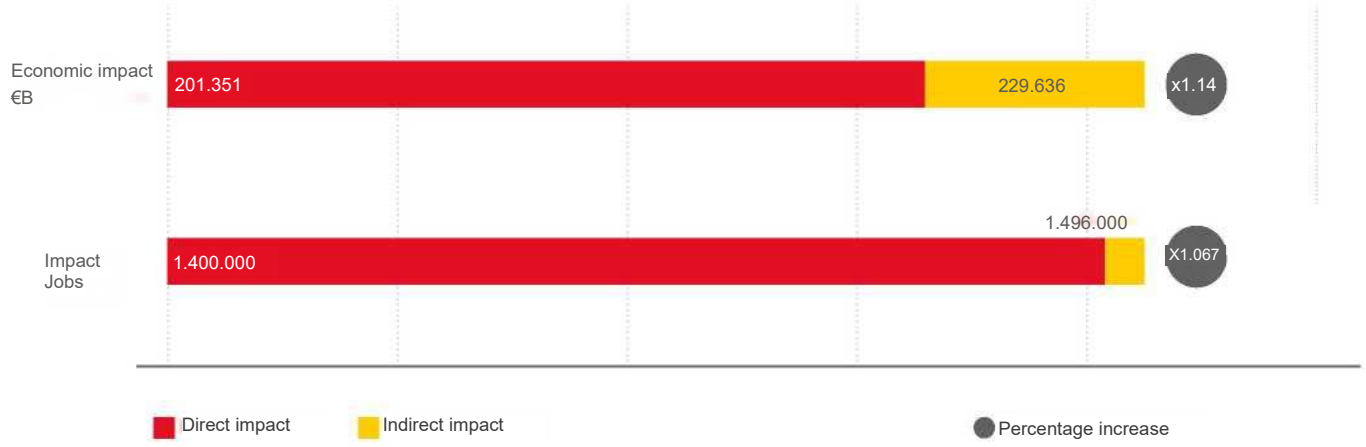
Source: Tourism Satellite Account in Spain (INE).

1.4 TOURISM: A MULTIPLIER SECTOR FOR OTHER ECONOMIC SECTORS AND EMPLOYMENT

If in 2023 the direct impact of tourism production amounted to €201.351 billion, the indirect impact (the amount associated with the demand of tourism-related industries plus the multiplier effect on the production of other sectors), together with the induced impact generated by the income produced by tourism activity, reached €229.636 billion. Therefore, for every euro generated directly by tourism activity, an extra €1.14 were generated indirectly and induced (source: Impact of tourism activity on the Spanish economy 2019-2013 – Cámara de Comercio de España [Spanish Chamber of Commerce]).

In 2023, employment generated directly by tourism activity reached 1.4 million jobs; but in addition, tourism industries indirectly generated 967,000 jobs thanks to the demand for inputs from other productive branches and how this demand was transmitted to the rest of the activities. To these figures must be added the employment induced in other sectors of activity as a result of the consumption generated by the income from tourism activity, which is estimated at 529,000 jobs. Therefore, for every 1,000 jobs generated directly by tourism activity, another 1,067 jobs were generated indirectly and induced in other activities (Source: Impact of tourism activity on the Spanish economy 2019-2023 – Cámara de Comercio de España [Spanish Chamber of Commerce]).

Direct and indirect effect in euros and people

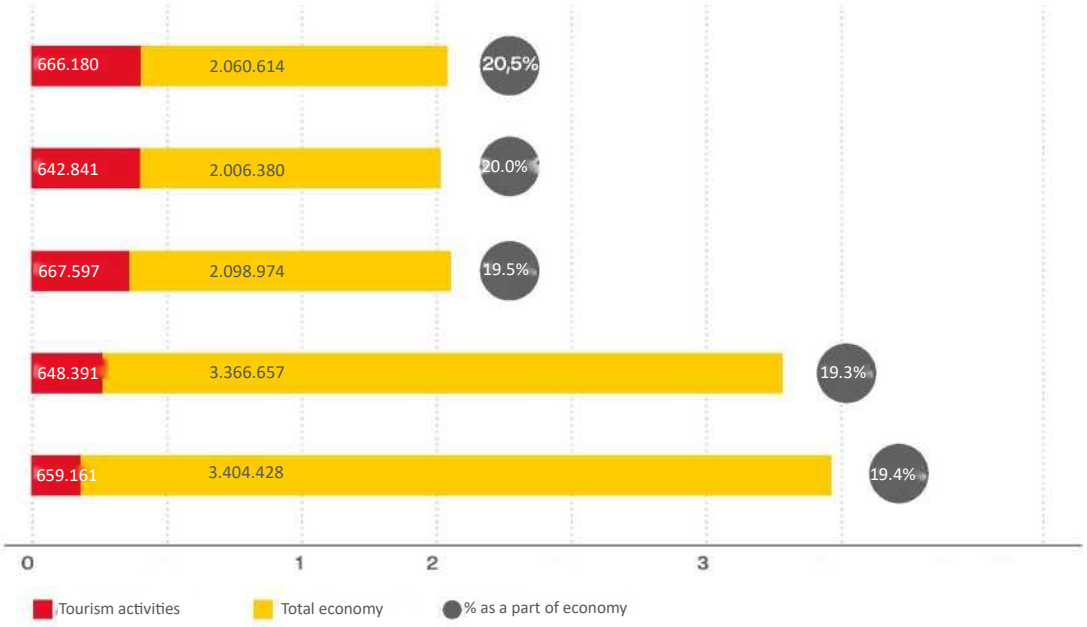


Source: Impact of tourism activity on the Spanish economy 2013-2019 – Cámara de Comercio de España).

Tourism companies in Spain

The number of companies involved in tourism-related activities will represent around 20.5% of the total number of companies in the Spanish economy in 2024. In the last year, the number of tourism enterprises has increased by 3.6%, which is higher than the number of enterprises in the total economy.

Businesses linked to tourism and their percentage of the total number of businesses



Source: Central Business Directory. INE.

1.5 SPAIN, LEADER IN OVERNIGHT STAYS BY INTERNATIONAL TOURISTS

With more than 323 million overnight stays in 2024 in hotels and similar establishments, Spain is by far the leading European country. France, with more than 100 million international tourist arrivals, had considerably less than half as many overnight stays: 138 million, also including in its statistics all overnight stays in all types of paid accommodation, i.e. also holiday dwellings (source: European Travel Commission – ETC – with official data provided by member countries).

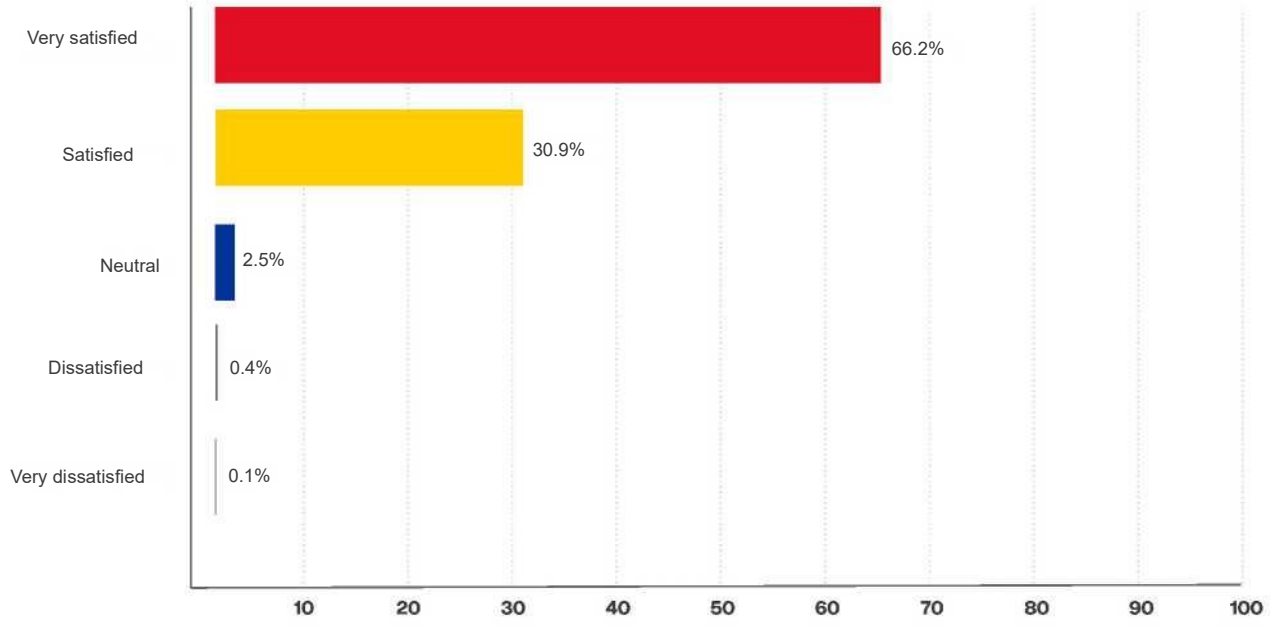
1.6 TOURIST SATISFACTION

97% of tourists say that they were satisfied or very satisfied with their trip to Spain (source: International Tourist Satisfaction Survey – Turespaña 2022-2024).

The percentage of very satisfied has been increasing each year the survey has been conducted: 62.7% in 2022, 65% in 2023 and 66.2% in 2024.

The best-rated dimension is the leisure offer (94% satisfied or very satisfied) and the lowest is still sustainability, even so, with 73% satisfied or very satisfied.

Tourist satisfaction level



Source: International Tourist Satisfaction Survey – Turespaña 2022-2024.

1.7 LOYALTY, THE KEY TO SUCCESS

It is difficult to reach 100 million international tourists, but what is valuable is that relevant figures are maintained year after year.

According to ESTI 2024, 66% of the international tourists who visited us that year intended to return to Spain in the next 12 months and 19% did not know yet. Only 15% of international tourists were sure that they would not choose Spain again in the short term.

In 2024, more than 74% of our international tourists had already visited us before and more than 38% would have visited us 10 or more times (source: EGATUR – INE).

Data on the loyalty of international tourists

Source: EGATUR – INE.

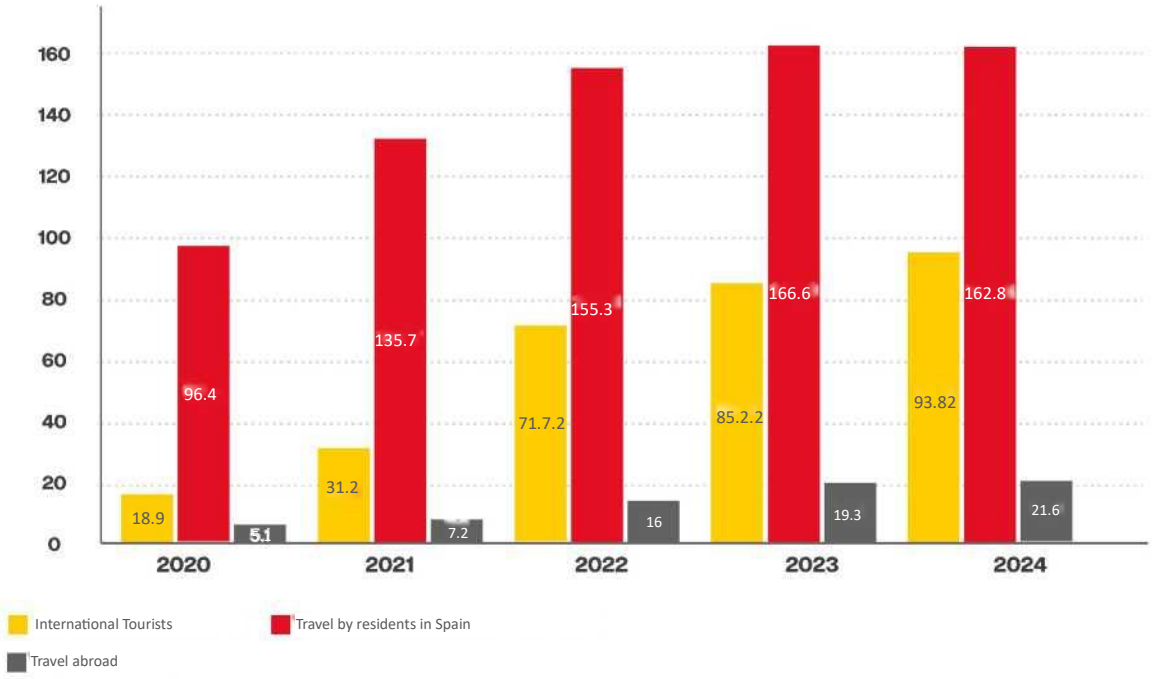
The value of this loyalty can be estimated in terms of all future revenues that can be expected, given the known level of loyalty. Based on the percentages of international tourists who report having come one, two, three... up to 10 or more times before, we can estimate since 2016 (first year of the EGATUR series) an average of at least 6.4 trips to Spain per international tourist.

Given that the average expenditure per traveller in 2024 was €1,345, we can estimate a total future value of at least €8,608 per international tourist and at least €807.317 billion of total future value in tourism expenditure of international tourists received in 2024.

1.8 THE NUMBERS OF INTERNATIONAL TOURISTS AND DOMESTIC TOURISTS

Domestic tourism, which includes international and resident tourist arrivals within Spain, has experienced steady growth over the last five years. Particularly striking is the volume of international tourist arrivals, which in 2024 increased by 10.1% compared to 2023 to over 93 million tourists. Tourism by residents within Spain decreased slightly (-2.3%) compared to an increase of 12.1% in tourism outside Spain.

International and domestic tourists, and outbound trips by nationality



Source: Frontur and ETR. INE.

According to UN Tourism data, over the last three years, Spain has ranked second in international arrivals, behind France. Likewise, the increase in 2024 (10.1%) is the largest increase in tourists among the world's main destinations.

International tourist arrivals have increased considerably in all regions of the world in recent years. Overall, world tourism increased by 12.4% in 2024 to 1.47 billion tourists (provisional).

By region, Asia-Pacific is the region that stands out the most with a strong increase in 2024 of 33.7%, continuing the trend of previous years.

1.9 ORIGIN OF THE INTERNATIONAL TOURISTS

The main international outbound markets for tourists to Spain have remained constant over the years, with the top seven accounting for 67% of the total. The United Kingdom and France top the ranking, although the notable growth of tourists from Italy (13.4%) and the United States (11.2%) stands out.

Main domestic tourist source markets. (Millions of people)

COUNTRY	2020	2021	2022	2023	2024	Annual Variation 2023/2022	Annual Variation 2024/2023
United Kingdom	3.2	4.3	15.1	17.3	18.4	14.2%	6.5%
France	3.9	5.8	10.1	11.8	12.9	16.6%	9.8%
Germany	2.4	5.2	9.8	11.0	11.9	12.5%	8.6%
Italy	0.9	1.7	4.0	4.8	5.5	20.9%	13.4%
Nordic countries	1.2	1.8	4.3	4.8	5.1	11.8%	6.9%
The Netherlands	0.9	2.0	3.9	4.3	4.8	10.1%	10.7%
United States	0.4	0.8	2.8	3.8	4.3	36.9%	11.2%
Total	**18.9**	**31.2**	**71.7**	**85.2**	**93.8**	**18.9%**	**10.1%**

Source: Frontur. INE.

1.10 WHAT ABOUT DOMESTIC TOURISTS?

Among the domestic trips made by residents of Spain, the autonomous communities that make the most trips within the country are the Community of Madrid, Catalonia and Andalusia. Between them, these three communities generated 50% of all trips in 2024. The growth observed in trips in 2024 is moderate compared to the previous year, with decreases in some cases, such as in Valencia, where 6.3% fewer trips were made.

Main domestic tourist destinations. (Millions of people)

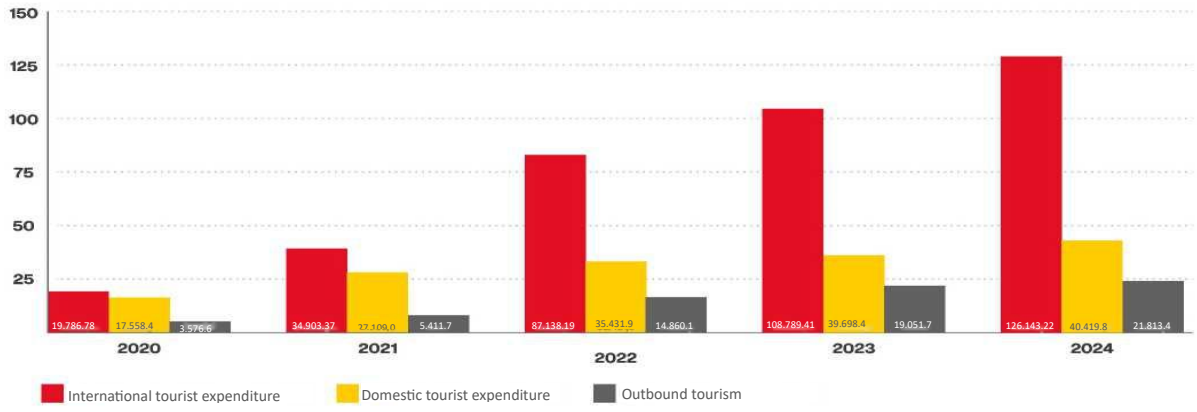
Aut. Comm.	2020	2021	2022	2023	2024	Annual Variation 2023/2022	Annual Variation 2024/2023
Community of Madrid	16.7	22.6	28.7	29.7	30.3	3.8%	1.8%
Catalonia	14.9	23.1	25.7	25.5	25.7	-0.8%	0.9%
Andalusia	16.0	21.7	23.2	26.2	25.7	12.7%	-1.9%
Valencian Community	9.9	13.8	16.1	16.4	15.4	2.0%	-6.3%
Castilla y León	5.9	7.8	8.6	9.7	9.5	12.9%	-2.5%
Basque Country	5.3	6.7	7.5	9.0	8.7	19.0%	-3.0%
Galicia	**4.6**	**7.0**	**8.0**	**8.3**	**8.5**	**4.1%**	**2.1%**
Total	**96.4**	**135.7**	**155.3**	**166.6**	**162.8**	**7.3%**	**-2.3%**

Source: ETR. INE.

1.11 TOURIST SPENDING

Spending by tourists has experienced positive growth in recent years, with a particularly strong increase in spending by international tourists, which in 2024 increased by 16% compared to 2023. Spending on tourism by residents within Spain increased slightly (1.8%) compared to a 14.5% increase in spending on trips outside Spain.

Gasto de Turistas (en M€)



SOURCE: EGATUR and ETR.

1.12 PROGRESS ON DESEASONALISATION, DECONCENTRATION AND DIVERSIFICATION

Tourism activity in Spain is showing signs of deseasonalisation. Between the last year before the pandemic (2019) and the last full year (2024), international tourist arrivals have grown twice as much in the mid and low season (16%) as in the high season (8%)—June, July, August and September[2].

On the other hand, in terms of deconcentration, the tourism policies implemented are also yielding results. For example, international tourism expenditure has grown by a high 36% in the main receiving autonomous communities in the same period, but in the northern and inland autonomous communities, the growth has been higher than 51%[3].

We also note the diversification of our tourism demand. Since the last year before the pandemic, while arrivals of travellers mainly motivated by sun and beach have grown by 7%, those motivated by study have grown by 24%, those motivated by cultural tourism by 33% and those motivated by gastronomic tourism by 36%[4].

2 FRONTUR.
3 EGATUR.
4 EGATUR.

1.13 THE RESIDENT, A KEY ACTOR

In Spain as a whole, 65% of the resident population over 18 years of age have a positive or very positive opinion of the effects of tourism on their place of residence (27% have a very positive opinion), while 15% have a negative or very negative opinion. Even in the tercile of municipalities with high intensity, the favourable or very favourable opinion remains at 63%, although negative opinion rises to 25%.

1.14 TOURISM AND SUSTAINABILITY

There is a broad consensus on the need to move towards a more sustainable tourism model in all senses of the term sustainability. One of the biggest challenges in doing so is the lack of common standards on indicators for measuring and progressing tourism sustainability.

The UN has recently approved a statistical framework for the measurement of the sustainability of tourism (MST), in the elaboration and consensus process of which Spain has been a key player as co-chair of the UN Tourism Statistics Committee. However, although this statistical framework defines what is to be measured (key concepts and international standards), it does not yet contain a catalogue of recommended indicators, so that one of the main challenges for sustainability in the coming years will be to obtain broad international agreement. The European Commission keeps a scorecard of tourism activity in Europe. In this scorecard, Spain, in 2022, with 37.22 tonnes of CO2—equivalent per million euros in gross value added—, is below the European average (which stands at 51.39 tonnes per million euros) in intensity of greenhouse gas emissions by the tourism sector (source: EU Tourism Dashboard).

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02 | Diagnosis: the sustainability of tourism

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2.1 TEN ESSENTIAL DOCUMENTS

2.1.1 UN 2030 Agenda for Sustainable Development

The 2030 Agenda for Sustainable Development is a global action plan adopted by all UN Member States in September 2015. It was adopted by UN General Assembly resolution A/RES/70/1 under the title "Transforming our world: the 2030 Agenda for Sustainable Development"[5].

The Agenda promotes a transformative vision of development that combines economic growth, social inclusion and environmental sustainability.

The main progress to date, according to the SDG Progress Report 2023[6] and in relation to poverty, is the significant reduction of people living on less than $1.90 a day, albeit with large regional disparities. There is also progress in literacy and in reducing child mortality[7]. There has been an increase in national commitments to renewable energy, energy efficiency and climate change mitigation. However, progress remains insufficient to limit global warming to 1.5°C, as set out in the Paris Agreement[8]. On the other hand, improvements have been made in women's political participation and access to education, but gender-based violence and the wage gap remain major challenges[9].

In the area of tourism, UN Tourism, through the Tourism and the SDGs (Tourism4SDGs) platform, promotes the exchange of knowledge, good practices and resources on how tourism can contribute to sustainable development at global, national and local levels. Tourism4SDGs emphasises cooperation between sectors and levels of governance to achieve tourism that benefits both local communities and the environment, in line with the 2030 Agenda.

Spain's 2030 Sustainable Development Strategy[10], approved at the initiative of the Ministerio de Derechos Sociales, Consumo y Agenda 2030 [Ministry of Social Rights, Consumption and Agenda 2030], is the national framework for implementing the UN 2030 Agenda.

2.1.2 UN Tourism One Planet Sustainable Tourism Programme

The One Planet Sustainable Tourism Programme[11] was launched in 2015 as part of the broader One Planet Network initiative, created to implement Sustainable Development Goal 12: "Ensuring sustainable consumption and production patterns". It is coordinated by UN Tourism and has the institutional support of the United Nations Environment Programme (UNEP).

One Planet's Sustainable Tourism Programme defines long-term priorities for transforming tourism through sustainable patterns of consumption and production. It acts as a multilateral platform of reference to guide public policies, alliances and international projects in tourism sustainability.

It seeks to transform the tourism sector into an engine for sustainable development through the promotion of sustainable tourism policy and governance, the adoption of sustainable consumption and production practices, and effective monitoring for poverty reduction and development.

5 UNITED NATIONS ORGANISATION (2015). Transforming our world: the 2030 Agenda for Sustainable Development (Resolution A/RES/70/1).
6 UNITED NATIONS ORGANISATION (2023). Progress towards the Sustainable Development Goals: Report of the Secretary-General.
7 UNESCO (2022). Global Education Monitoring Report 2022.
8 Intergovernmental Panel on Climate Change. (2023). Sixth Assessment Report.
9 UN WOMEN (2023). Gender snapshot 2023: Progress on the Sustainable Development Goals.
10 MINISTERIO DE DERECHOS SOCIALES Y AGENDA 2030 (2021). Spain's 2030 Sustainable Development Strategy.
11 WORLD TOURISM ORGANISATION (n.d.). One Planet | UN Tourism.

Among its most relevant initiatives, in addition to the Glasgow Declaration on Climate Action in Tourism, is the Global Tourism Plastics Initiative (GTPI)[12].

2.1.3 The European Green Deal

The European Green Deal, formally known as the European Green Deal, is the roadmap set out by the European Commission in December 2019 to transform the EU economy into a modern, resource-efficient and competitive economy, with the ultimate goal of achieving climate neutrality by 2050[13]. This pact aims to mainstream sustainability into all EU policies, promoting a just and green transition for all Member States. Its key areas include: reducing greenhouse gas emissions, boosting renewable energy, energy efficiency, circular economy, biodiversity protection and clean mobility.

It also incorporates financial support mechanisms, such as the Just Transition Facility, to ensure that no territory or collective is left behind.

As part of the European Green Deal, the "FIT for 55"[14] package is adopted, which integrates proposals to review EU climate, energy and transport related legislation and to launch new legislative initiatives with the goal of reducing emissions by at least 55% by 2030.

2.1.4 Glasgow Declaration on Climate Action in Tourism

The Glasgow Declaration on Climate Action in Tourism15 is a global initiative launched in November 2021 during the United Nations Climate Change Conference (COP26). It aims to mobilise all stakeholders in the tourism sector to accelerate climate action and achieve a significant reduction in greenhouse gas emissions. The declaration sets clear targets: to halve emissions from tourism by 2030 and to achieve net zero emissions as soon as possible, and always before 2050. To this end, signatories commit to develop and implement climate action plans within 12 months from the date of signature, aligned to five action pathways: measurement, decarbonisation, regeneration, collaboration and financing.

Since its launch, the declaration has been endorsed by more than 850 organisations around the world, including governments, tourism companies, associations and academic bodies[16]. These organisations have submitted climate action plans and annual progress reports, demonstrating an active commitment to sustainability and resilience in the sector.

The initiative has been recognised by the United Nations Framework Convention on Climate Change (UNFCCC) as a key tool for driving climate action in tourism.

2.1.5 Transition Pathway for Tourism

Framed within the European Commission's Industrial Strategy, the Transition Pathway for Tourism[17] details the measures needed to accelerate the ecological and digital transitions and improve the resilience of the European tourism ecosystem.

12 UNWTO, UNEP, & ELLEN MAC ARTHUR FOUNDATION (2020). Global Tourism Plastics Initiative.
13 EUROPEAN COMMISSION (2019). The European Green Deal.
14 EUROPEAN COMMISSION (2021). "Fit for 55" package to meet the European Green Deal.
15 UN TOURISM (2021). Glasgow Declaration on Climate Action in Tourism.
16 ONE PLANET NETWORK (n.d.).
17 EUROPEAN COMMISSION (2022). Transition Pathway for Tourism.

The document underlines the importance of a holistic approach that takes into account the economic, social and environmental dimensions of sustainability, identifying priority areas for action.

Thanks to its implementation, significant progress has been made in sustainability, digitisation and resilience of the sector. In the environmental field, initiatives have been deployed to reduce the ecological footprint of tourism, especially through improvements in mobility, energy efficiency and waste management. Many destinations and companies have also adopted circular economy practices, promoting the reuse of resources, responsible consumption and operational efficiency. These efforts are complemented by the promotion of environmental labelling and certification systems, such as green seals, which make it possible to measure and communicate the environmental commitment made by the various tourism stakeholders. In terms of digital transformation, progress is being made in the construction of common European tourism data spaces, aimed at facilitating a secure and efficient exchange of information between destinations, businesses and authorities.

According to the second monitoring report published by the European Commission in May 2025, progress is needed to overcome structural problems and persistent challenges, such as limited funding, low participation of certain sectors and the need to strengthen coordination between institutional levels.
This report is the starting point for the design of the future European Sustainable Tourism Strategy 2026[18], whose public consultation was recently closed, in order to guide more effective policies adapted to the realities of the tourism ecosystem.

2.1.6 European Agenda for Tourism

The European Agenda for Tourism 2030 is a high-level, strategic policy framework that defines the vision and priorities for European tourism until 2030 and was adopted by the Council of the European Union on 1 December 2022[19].

It establishes a multi-annual work plan composed of voluntary actions addressed to Member States, public authorities, the European Commission and other stakeholders in the tourism ecosystem.

These actions are structured around five priority areas: a favourable framework for action and effective governance, aimed at strengthening cooperation among different levels of government and stakeholders; the green transition, focused on promoting sustainable practices that reduce the ecological footprint of tourism and encourage the circular economy; the digital transition, with the goal of fostering the adoption of technologies that enhance the sector's competitiveness and the visitor experience; resilience and inclusion, centred on increasing the sector's capacity to face future crises and ensuring equity and accessibility in tourism services; and, finally, capacity building and support, through the development of key skills within the workforce to facilitate their adaptation to the challenges of sustainable and digital transformation. The actions aim to guide European tourism towards a more balanced and innovative model, aligned with the sustainable development goals.

18 EUROPEAN COMMISSION (2025). Progress report released on the Transition Pathway for Tourism.
19 COUNCIL OF THE EUROPEAN UNION (2022). European Agenda for Tourism 2030.

2.1.7 The Palma Declaration

The Palma Declaration: "The Road towards social sustainability of tourism in the EU" is a document adopted on 31 October 2023 during an informal meeting of Tourism Ministers of the Member States of the European Union, held in Palma (Mallorca) under the Spanish Presidency of the Council of the EU.

The Palma Declaration includes the commitment of the Member States of the European Union to promote a favourable environment for the development of tourism, with special attention to SMEs, micro-enterprises and agents in rural, depopulated or outermost regions. Cooperation between countries is promoted through the exchange of good practices and the implementation of cross-border projects, in coherence with the transition path for tourism and the European Agenda for Tourism 2030. Furthermore, it advocates responsible and sustainable tourism, based on integrated strategies that balance the economic, social and environmental dimensions.

The declaration also promotes research, technological innovation and the exploitation of the European tourism data space to improve the competitiveness, visitor experience and added value of the destination, always placing the well-being of local residents at the heart of tourism development. The Palma Declaration represents a significant step towards integrating social sustainability into EU tourism policies, promoting a balanced approach that benefits both local communities and the tourism sector as a whole.

2.1.8 Statistical Framework for Measuring Sustainable Tourism (MST)

The Statistical Framework for Measuring Tourism Sustainability (MST) is an international tool developed by UN Tourism in collaboration with the United Nations Statistics Division (UNSD). It aims to provide a coherent and harmonised framework for measuring the impacts of tourism on the economic, social and environmental dimensions at both national and sub-national levels. This framework seeks to overcome the limitations of traditional tourism statistics, which focused on economic indicators such as GDP, by incorporating metrics that reflect key aspects of sustainable development.

In March 2024, the 193 Member States of the United Nations formally adopted the SF-MST during the 55th session of the UN Statistical Commission[20]. This adoption marks a significant milestone in establishing an international standard for assessing the sustainability of tourism in a holistic manner.

The work began several years ago and has involved 44 countries and more than 30 international organisations. It is based on 29 pilot studies in different countries and multiple consultation rounds. Spain, through Turespaña, has co-chaired with Austria the working group that has led this work.

20 UN TOURISM (2024). Statistical Framework for Measuring the Sustainability of Tourism (SF-MST): Final Draft.

2.1.9 The Madrid Declaration – CONESTUR

The Madrid 21 Declaration, adopted on 9 October 2024 within the framework of the Spanish Tourism Council (CONESTUR), represents a joint commitment of the Spanish Government, autonomous communities, organisations, workers, professionals and companies in the sector, while establishing a roadmap to ensure that tourism:

- Continues to be an instrument for people's well-being and increase its value for the citizenship of host societies.
- Builds destinations by prioritising their inhabitants and respecting the great diversity of our country.
- Contributes to respect and be a factor in the regeneration of the planet, making our country an example of environmentally sustainable tourism.
- Improves your capacity to generate and distribute economic prosperity.
- Deepens the collaborative governance processes of all stakeholders in the tourism ecosystem.

To this end, the signatories committed to maintaining an ongoing dialogue among the different stakeholders represented in CONESTUR, working on a shared strategic agenda aligned with these goals and with the improvement of the economic, social and environmental sustainability of tourism, and advancing toward responsible and sustainable tourism in each of the country's destinations, prioritising the well-being of citizens as a non-negotiable element of Spanish tourism.

2.1.10 European Union Strategy for Sustainable Tourism

The European Commission is preparing a new EU Sustainable Tourism Strategy[22]. Three main challenges are identified. The first concerns unbalanced tourism flows: while some destinations face saturation by mass tourism, others fail to attract as many visitors as they would like. The second challenge is associated with extreme weather, inflation, wars, pandemics or natural disasters that put tourism activity at risk. And the third has to do with increasing global competition, while the EU is sustained by the domestic market.

This new Strategy also aims to align with the 2030 Agenda and is intended to serve to improve the competitiveness of the ecosystem by strengthening sustainability, capacities, financing and data. It also seeks to empower tourism management authorities and communities, as well as to strengthen communication and branding. Ultimately, the new EU Tourism Strategy will serve to underpin the EU's global leadership in tourism.

21 CONESTUR (2024) Declaration of support for responsible tourism.
22 EU 2026 Sustainable Tourism Strategy

2.2 THE SUSTAINABILITY OF TOURISM IN SPAIN

Tourism is a complex social phenomenon. It is at the same time a sector of the economy, a social practice and an individual experience. It is also deeply linked to a number of global change trends.

Tourism as an economic sector

As a sector of the economy, tourism is one of the most relevant and strategic sectors in Spain, with an important contribution to economic development, job creation and territorial and social cohesion. Moreover, it has a multiplier and knock-on effect on the Spanish economy as a whole, attracting greater investment in other sectors and the development of service and/or supply companies which, in turn, generate jobs and additional investment[23]. All the data place Spain as one of the world's main leaders in tourism, although this scenario of success coexists with important challenges. Some are global and linked to the evolution of the activity and others are challenges specific to the Spanish tourism model.

Tourism as a social practice

Tourism takes place in specific territories that we call destinations, an elusive and flexible concept, in terms of scale, and which does not always coincide with administrative boundaries. These destinations have their own dynamics linked to the lives of their residents, in addition to those generated by the occasional residents who are tourists. This explains its profound transversality: tourism mobilises an almost unlimited number of aspects that condition it and which depend on the public actors that manage the destinations, such as mobility, health, communications, infrastructure, public safety and culture, among others. Destination management organisations, according to UN Tourism, have broadened their scope of action, going beyond the traditional role of marketing and promotion to become organisations that manage their territories[24].

This complex relationship between public and private processes and between actors of different natures makes it a complex phenomenon, in which there are inevitably spaces of confluence of different values. Moreover, as the activity has evolved, it has incorporated various demanding standards that tourism must meet: it must be competitive in business and economic terms; it must be culturally, socially and environmentally sustainable; it must be intelligently managed and offer quality services and experiences that are inclusive and accessible to all; and it must allow for the participation of the whole ecosystem, including residents, in its governance.

Tourism as an individual experience

The practice and enjoyment of tourism has become the preferred consumption of the world's citizens. In this sense, the growth of the middle class in several countries explains the growth trend in tourism worldwide and its reflection in Spain. Also in our country, as their income increases, citizens allocate a growing proportion of their income to tourism[25].

23 CÁMARA DE COMERCIO DE ESPAÑA (2025). Impact of tourism activity on the Spanish economy as a whole.
24 UN TOURISM (n.d.). UN Tourism Guidelines for Strengthening Destination Management Organisations (DMOs) - Preparing DMOs for new challenges.
25 CAIXA BANK (2023). Balance and prospects for the Spanish tourism sector: solidity and resilience.

Tourism as a phenomenon linked to global change trends

This social phenomenon is deeply related to the major trends that will mark the development of the coming years. According to the analysis of the Spanish Government's National Foresight and Strategy Office, there are two factors that will have a particular impact on tourism: demographics and the distribution of the population in the territory.

The most relevant demographic trends are ageing and population growth[26]. The intensification of so-called active ageing will increase the number of people who will want to engage in leisure and tourism, but it will also imply taking into account new needs linked to the characteristics of this population profile. This trend has a clear impact on employment and therefore on tourism employment. In 2050, 1 in 3 Spaniards will be 65 years of age or older, and for every person in this age group there will be only 1.7 people of working age, compared with 3.4 today. To neutralise this loss of labour force, it will be necessary to increase the employment rates of women, young people and those over 55; to encourage legal, regulated and orderly migration; and to boost the recovery and attraction of talent[27].

It also confirms the trend of continuing and deepening the process of urbanisation and population distribution in the territory that has been observed in recent years. It is estimated that by 2050, 88% of our population will live in cities and that the proportion of the population living in urban areas will continue to increase from 80% of the current total to 88% by 2050[28]. This means an increase in pressure on urban and coastal destinations, making the coordination of tourism and demographic challenge policies key.

New values, social trends and technological changes can and are conditioning the context. This requires collectively considering how the current tourism model should evolve and which new concepts, proposals and processes will enable Spain to adapt to the needs, challenges and demands that the future presents, so it can continue along the path of global leadership that has brought so much prosperity to the country and its citizens.

Tourism as a strategic vector for Spain

Tourism is one of Spain's main calling cards in the world, a sector that not only boosts the national economy, but also projects our country's cultural identity, competitiveness and capacity for innovation. Spain's External Action Strategy 2025-2028 gives tourism a fundamental role, recognising it as an instrument of economic and cultural diplomacy closely linked to Spain's external projection[29].

Thus, as a global activity, it constitutes a strategic vector of influence and confidence-building, which amplifies Spain's soft power and strengthens its presence in the European Union and in international forums. It is therefore important not to lose sight of the fact that tourism constitutes a central axis of Spain's external action, insofar as it combines the cultural and territorial projection of our country with its economic and commercial openness.

The ability to attract international visitors not only strengthens our global position, but also multiplies the opportunities for investment, cooperation and exchange, consolidating Spain as an open, modern and competitive country. This capacity for attraction is closely linked to the broader projection of Spain and

26 OFICINA NACIONAL DE PROSPECTIVA Y ESTRATEGIA (NATIONAL FORESIGHT AND STRATEGY OFFICE) (2021) España 2050. 5th Challenge. Preparing our welfare state for a longer-living society.
27 OFICINA NACIONAL DE PROSPECTIVA Y ESTRATEGIA (2021) España 2050. 7th Challenge. Addressing the shortcomings of our labour market and adapting it to the new social, economic and technological realities.
28 OFICINA NACIONAL DE PROSPECTIVA Y ESTRATEGIA (NATIONAL OFFICE OF FORESIGHT AND STRATEGY) (2021) España 2050. 6th Challenge. Promote balanced, fair and sustainable territorial development.
29 MINISTERIO DE ASUNTOS EXTERIORES, UNIÓN EUROPEA Y COOPERACIÓN (MINISTRY OF FOREIGN AFFAIRS, EUROPEAN UNION AND COOPERATION) (2025). Spain's External Action Strategy 2025-2028

the European Union in the world, especially in the consolidation of ties with Latin America and the Caribbean, in the strengthening of relations with the Member States of the Union and in the European neighbourhood, where tourism becomes a tool for connection, confidence and visibility.

The diagnosis presented here is a succinct overview of the elements of tourism that deserve our attention. These elements are arranged according to the three dimensions of sustainability: economic, social and environmental sustainability, taking as a reference the issues included in each of them in the statistical framework for measuring sustainable tourism approved by the United Nations[30].

2.2.1 Economic dimension

As mentioned above, Spain is one of the world's leading tourist destinations, with a total of 93.76 million international tourists in 2024[31], representing an increase of 10.1% compared to 2023, and 12.3% compared to 2019. The total expenditure by international tourists who visited Spain in 2024 reached €126.143 billion, representing growth of 16% compared to 2023 and 37.2% compared to 2019[32].

The economic contribution of tourism in Spain in 2023[33] was €184.002 billion, which represents 12.3% of the country's total GDP. In 2024, the average monthly Social Security affiliation in Tourism was 2.8 million jobs, or 13.2% of total employment in the country. Several elements are identified that could help maintain this dynamic activity: the liberalisation of rail services on the Iberian Peninsula; the expected growing participation of emerging Asian economies in tourist flows; the increase in tourists from neighbouring countries and in elderly travellers, as well as those with greater availability of free time and more flexible in-person work arrangements after the pandemic.

When analysing the sectoral distribution of the flow of foreign direct investment in the year 2024, it can be seen that the tourism sector presents an investment of approximately €2.72 billion gross[34], which represents approximately 7.2% of foreign direct investment in Spain.

Finally, given its cross-cutting nature, the effects of tourism extend beyond the sector itself, driving economic diversification and fostering the growth of other sectors, such as transport, financial services, retail and cultural services, among others. This has contributed to the diversification of traditional sectors such as agriculture, fisheries, aquaculture and industry, thus increasing their competitiveness in the global market.

Reflection on the economic sustainability of the sector requires thinking about the two main pillars of tourism activity: tourism companies and destinations. In addition, it is necessary to consider other factors that influence the improvement of the economic competitiveness of both: talent, training and employee retention; the digital transition; innovation in the tourism product and the concept of experience; and connectivity, intermodality and mobility.

30 UN TOURISM (2024). Statistical Framework for Measuring the Sustainability of Tourism (SF-MST): Final Draft.
31 INE. Data from Frontur and Egatur.
32 INE. Data from Frontur and Egatur.
33 INE. CST Current data. 2023.
34 MINISTERIO DE ECONOMÍA, COMERCIO Y EMPRESA (MINISTRY OF ECONOMY, TRADE AND ENTERPRISE). DataInvex.

Tourism companies

A classic problem when talking about the tourism sector is the difficulty in establishing its boundaries. In this respect, the European Commission's work on industrial ecosystems is making progress in quantifying the interdependencies between industries and skills, using data from official statistics and the NACE rev classification. 2. On the industrial ecosystem of tourism, the concept of "tourism intensity" is proposed to explain the relationship between different activities and tourism, taking the food and beverage sector as an example, since a restaurant also offers its services to local citizens. They call these inter-industry interdependencies and propose the following intensity assigned to each of them.

Tourism intensity of tourism-related businesses

NACE_R2	Description	Quota
H49	Inland transport and pipeline transport	0.45
H50	Water transport	0.22
H51	Air transport	0.91
I	Accommodation and catering activities	1
79	Travel agencies, tour operators and other reservation services and related activities	1
N82	Administrative and support activities for offices and other business support activities.	1
R90-R92	Creative, artistic and entertainment activities; libraries, archives, museums and other cultural activities; gambling and betting activities	0.66
R93	Sports activities and leisure and recreational activities	1

Source: eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52021SC0351.

The characteristics of Spanish tourism enterprises determine the economic sustainability of the activity. In this sense, the most relevant characteristic is the small size of tourism enterprises[35]. The tourism business ecosystem is largely made up of SMEs and micro-enterprises.

35 In Spain, the following branches of activity are considered to be characteristic tourism activities according to CNAE 2009: 55 and 56 Hospitality, 491 Intercity passenger rail transport, 493 Other land passenger transport, 501 Maritime passenger transport, 503 Inland waterway passenger transport, 511 Air passenger transport, 522 Support activities for transportation, 791 Travel agency and tour operator activities, 7711 Rental of cars and light motor vehicles, 7734 Rental of water transport equipment, 7735 Rental of air transport equipment, 7990 Other reservation services and related activities, 900 Creative, artistic and entertainment activities, 910 Library, archive, museum and other cultural activities, 931 Sports activities, 932 Recreational and entertainment activities

Tourism intensity of tourism-related businesses				
	Microenterprise	**Small enterprise**	**Medium enterprise**	**Large enterprise**
Accommodation services	84.80%	12%	2.60%	0.60%
Food and beverage supply activities	95.10%	4.50%	0.30%	0.10%
Real estate activities	97.70%	2%	0.20%	0.10%
Rental of motor vehicles	92.80%	5.30%	1.30%	0.60%
Travel agency activities	93.17%	5.70%	5.70%	0.25%
Cultural industry	90.20%	8.40%	1.10%	0.30%
Sports, recreation and entertainment activities	85.80%	12.30%	1.60%	0.30%
Rail transport	0%	22.20%	33.30%	44.50%
Passenger land transport	95.70%	3.50%	0.50%	0.30%
Maritime and inland waterway transport	65.40%	21.10%	9.20%	4.30%
Passenger air transport	27.90%	25.30%	7.20%	27.90%

Source: Instituto Nacional de Estadística (National Statistical Institute) (INE, 2023).

This implies difficulties in exploiting economies of scale, fostering innovation, accessing diversified sources of finance and investing in continuous training for workers.

In 2024, 93.87% of tourism enterprises either had no staff or were micro-enterprises and only 5.43% of the total fell into the small enterprise group. The sum of medium and large companies does not exceed 0.7% of the national total[36].

36 INE (2024) Spanish Tourism Satellite Account

Percentage of enterprise size by branch of activity (2023) (Percentage)					
	Without employees	Microenterprise	Small enterprise	Medium enterprise	Large enterprise
Accommodation for visitors (H)	37.9	52.3	7.6	1.8	0.4
Accommodation for visitors (ALQ)	26.7	26.7	0.6	0.0	0.0
Food and beverage supply activities	23.2	23.2	3.9	0.3	0.1
Rental of transport equipment	57.7	39.2	2.4	2.4	0.2
Activities of travel agencies and other booking services	56.3	39.2	2.4	0.4	0.2
Creative, artistic and performance activities	80.1	17.5	2.2	0.2	00
Activities of libraries, archives, museums and other cultural activities	57.7	34.6	34.6	1.1	0.2
Gambling and betting activities	36.7	59.4	3.2	0.5	0.2
Sports, recreation and entertainment activities	40.6	50.6	7.9	0.8	0.2
Rail transport	0.0	0.0	33.3	33.3	50.0
Passenger land transport	64.4	33.9	1.3	0.2	0.1
Maritime and inland waterway transport	21.3	71.7	6.2	0.4	0.4
Passenger air transport	36.2	38.4	11.3	8.5	5.6

Source: Instituto Nacional de Estadística (National Statistical Institute) (INE, 2024).

The number of self-employed individuals operating in the sector accounted for approximately 18% of affiliates in 2024[37], a figure higher than the average share of self-employed individuals in the overall economy (16%). In turn, if we break down the self-employed persons by the main branches of activity, we can see that the Hospitality industry represents 63.8% (Accommodation services 4.6% and Food and beverage services 59.2%) and passenger transport represents 13.3% of the total, while the remaining 23% is distributed among the rest of the branches of tourism activities.

The small size of the companies may condition their capacity to respond to emerging challenges, such as digital transformation, although it is also an asset due to the sector's capacity to promote local development and boost wealth distribution, as the largest percentage of the activity is carried out by local companies. In any case, policies are needed to facilitate the adaptation of these companies to new trends and thus mitigate the risk of not having the necessary skills.

Currently, there are various initiatives promoted by the Spanish government, within the framework of the EU, to support the digital transition processes. The digital innovation centres[38], the PERTEs, or the RIS3 aim to facilitate the participation of SMEs and micro-enterprises in advanced technological processes and to address in a more structured way the challenges of costs, talent and scalability of digital solutions with a real impact on the competitiveness of the sector. The challenge is to get tourism businesses to join these programmes.

38 MINISTERIO DE INDUSTRIA, COMERCIO Y TURISMO (MINISTRY OF INDUSTRY, TRADE AND TOURISM).
39 Digital Innovation Centres.

Distinct tourist destinations

Spanish tourist destinations are very heterogeneous and present a very varied level of development, maturity and specialisation.

The needs and capacities of tourist destinations differ according to their stage of development, requiring differentiated responses. The origin of tourism growth in the 20th century was associated with holiday tourism and sun and beach tourism. On the Mediterranean coastline and in both archipelagos, several municipalities have embarked on a path of rapid growth and, since then, have followed a trajectory in which moments of consolidation and stagnation are combined in different ways with moments of redefinition, requalification or competitive repositioning. According to industry sources, sun and beach destinations attract 66.8% of the tourist demand visiting Spain and 58.5% of the traditionally regulated accommodation offer is located in them, making them the main pillar of the tourism sector[39].

These destinations started their development in a context with different values than today. In some cases, it is necessary to undertake reforms that allow them to incorporate issues demanded by today's society, such as environmental sustainability, technological or socio-cultural changes, linked to a new view of tourism or the emergence of leisure practices.

Alongside these, we find destinations that were consolidated in the 1980s, more closely linked to the idea of culture or rural tourism. And others that have appeared more recently, in other contexts.

According to their geographical and urban characteristics and main tourist resources, the following categories are proposed[40]:

Sun and beach destinations

They are pioneers of the holiday offer and have marked the positioning of Spanish tourism abroad. Despite the notable increase in other types of tourism in recent years, sun and beach destinations currently account for a very significant percentage of tourism demand in Spain. A distinction can be made between **highly internationalised sun and beach destinations and mixed/residential sun and beach destinations.**

The former, driven by strong foreign demand, constitute a model with an intense occupation of territory, high tourist density, a large presence of accommodation supply, and concentrate a large part of international tourist overnight stays with a relatively seasonal demand, depending on the region. Tour operators still play a very important role in the tourist flows to these destinations.

The latter are less oriented towards international demand. Second homes dominate the supply of accommodation. These destinations need to be reimagined to create a richer and more inclusive offering that adds value to their tourism model, allowing for repositioning and the inclusion of nearby rural inland areas in their dynamics.

39 Exceltur (2024). SolyTUR 2024.
40 Secretaría de Estado de Turismo (State Secretariat for Tourism) (2021). Tourism Sustainability Strategy in Destinations.

Rural tourist destinations

These are those where tourism activities take place in non-urban environments with the following characteristics: low population density, landscapes and land use where agriculture, livestock and forestry prevail, and with social structures and ways of life more closely linked to traditional models[41].

A better integration of this immense territory into the Spanish tourism system is decisive for the fulfilment of the objectives of tourism policy and the demographic challenge, contributing to the deseasonalisation, deconcentration and distribution of tourist income throughout the country.

Subtypes include **natural areas and high-mountain destinations**, which need to reformulate their public-use models to adjust their capacity and improve the profitability of their tourism products; **rural areas with a tourism identity**, affected by depopulation and whose main economic base is the primary sector; and **rural coastal destinations**, consisting of coastal municipalities with dispersed settlements in low-tourism coastal areas, particularly vulnerable to unplanned tourism development.

Urban destinations

Urban tourism is a type of tourism activity that takes place in an urban space with attributes characterised by a non-agricultural economy, where administration, manufacturing, trade and services are the core activities and where its position as a transport hub is a critical element[42]. They account for approximately a quarter of international tourism demand to Spain. In fact, a high percentage of tourism businesses are located in large municipalities. The cities are also the main gateways to the country through their airports.

Within this typology, on the one hand, there are the **urban destinations** proper. These are cities of more than 150,000 inhabitants with a strong tourist profile, where it is necessary to generate and reinforce a sustainable tourist model, in accordance with their carrying capacity. On the other hand, there are **cities with a tourism identity**—destinations with a population between 20,000 and 150,000 inhabitants, with a high concentration of resources with tourism potential, which share common needs, such as intermittent congestion in the use of the city's emblematic resources or weak destination management organisations.

This diversity of destinations also conditions the actions that are promoted to govern the urban or rural environments in which tourism takes place. From the perspective of urban policies, the elaboration of strategic plans in cities and rural areas is promoted using the methodology of the Spanish Urban Agenda and includes as a specific goal "to promote smart, sustainable and quality tourism, and key sectors of the local economy" (specific goal 7.2)[43].

Safe destinations

Security is a key competitiveness factor in tourism. The Ministerio del Interior (Ministry of the Interior) promotes the Safe Tourism Plan through the Secretaría de Estado de Seguridad (Secretary of State for Security). This plan includes preventive measures aimed at both visitors and professionals in the sector,

41 UN TOURISM (2023). Product development. Rural tourism.
42 UN TOURISM (2023). Product development. Urban tourism.
43 MINISTERIO DE VIVIENDA Y AGENDA URBANA (MINISTRY OF HOUSING AND URBAN AGENDA). Spanish Urban Agenda.

with security reinforcements in areas of great affluence, information campaigns, the SATE (Services of Attention to Foreign Tourist Victims of Crime) and collaboration with police from other countries, achieving a positive impact on the protection of travellers.

In addition, temporary operational plans are developed, such as Operación Verano (Operation Summer), in destinations with a high concentration of visitors during the summer season, with the aim of intensifying prevention and guaranteeing public safety.

In any case, the increase in population movements and tourist activity requires vigilance and the adoption of measures to deal with problems such as prostitution linked to leisure activities or the sexual exploitation of children and adolescents[44].

From human capital to talent

The tourism sector is mainly characterised by the intensity of the human capital required to carry out its activity.

In the second quarter of 2025, the tourism sector in Spain directly employed more than 3 million people, which represented 13.8% of the total number of people employed in Spain, making it one of the most specialised countries in the world.

Staff costs in tourism companies account for nearly 30% of their turnover, compared to 22% in construction, 12.3% in industry and 9% in commerce[45]. This structural feature makes the sector less vulnerable to price increases in intermediate goods (e.g. energy), but more vulnerable to second round effects through wage increases.

Moreover, tourism is one of the sectors with the highest concentration of people employed in the young and low-skilled groups, which makes it more sensitive to increases in the minimum wage, which have been significant in recent years[46].

A large proportion of the workers are employed in food and beverage services, accounting for almost half of the employment volume (46.6%). Other tourism activities employ 24.2%, and transport services 11.5%[47]. At this point, it is necessary to point out the existence of other tourism jobs that are not included in the sector's statistics, such as jobs in service companies that work for the sector (e.g. marketing, consultancy, etc.) or those related to the planning and management of tourism by the different governments, in any of their organisational instruments.

Despite the volume, 42% of companies perceive the shortage of people wanting to enter the sector as a problem that negatively affects their business. This percentage is significantly higher in the hotel and catering and transport sectors, with 55% and 51% of enterprises respectively[48].

44 ECPAT (2016). Sexual Exploitation of Children in Travel and Tourism - Europe. Council of Europe. Resolution 1926 (2013) Fighting child sex tourism.

45 Banco de España (2024). Competitiveness factors of the tourism sector in Spain.

46 BANCO DE ESPAÑA (2021). "The effects of the minimum wage on employment: new evidence from Spain". Occasional Paper, 2113 .

47 INSTITUTO NACIONAL DE ESTADÍSTICA (NATIONAL INSTITUTE OF STATISTICS – INE) – Economically Active Population Survey.

48 BANCO DE ESPAÑA (2023). "Survey of Spanish companies on the evolution of their activity: fourth quarter of 2023". Economic Bulletin - Banco de España, 2023/T4, 07

One of the main measures managed by SEPE to promote employment, and more specifically in the tourism sector, has been the development of Royal Decree-Law 1/2023 of 10 January on urgent measures regarding incentives for labour hiring and the improvement of social protection for artists. Specifically, it is worth highlighting the measure established in Article 30, which supports the extension of the period of activity of workers with permanent-discontinuous contracts in the tourism, commerce and hotel and catering sectors linked to tourism[49].

In this context, it should be noted that the management of active employment policies falls to the autonomous communities, which have transferred competencies in employment and training (with the exception of Ceuta and Melilla, which are managed by the State). To this end, the corresponding economic funds are distributed annually, in accordance with the criteria approved by the Sectoral Conference on Labour Affairs, allocated to the actions and measures of active employment policies and grouped into the different blocks.

Thus, each autonomous community is empowered to distribute the allocated funds within its territory, depending on the needs of each province, and to develop the special employment plans it deems appropriate in areas particularly affected by unemployment, precariousness, temporary employment or other circumstances. Specifically, the distribution of funds to the Autonomous Communities for the exercise of these powers is regulated by Order TES/866/2025[50] of 1 August.

The challenges facing the tourism industry will require increased efforts to attract qualified personnel from abroad at all levels. This attraction of workers from other countries extends to other economic sectors closely linked to tourism, such as transport in all its forms, cultural activities, entertainment activities, and so on.

These staff from other countries not only fill staff shortages at key times such as tourist seasons, but also bring cultural dynamism, language skills and a high degree of geographical mobility. Their presence contributes to improving customer service in areas where language is key.

The attraction of workers from other countries can be carried out either by facilitating their transfer from abroad or by using any of the mechanisms provided for in the new Regulation on foreigners, approved by Royal Decree 1155/2024 of 19 November, especially with regard to socio-formal roots.

Tourism employment is affected by a number of social trends

Firstly, as mentioned above, the trends linked to demographic changes. Active ageing of the population could lead to delayed retirements, which will require business policies that address generational diversity and enable a wide range of profiles and skills to coexist. Migratory movements, both incoming and outgoing, will also mean that people from very different cultural contexts will coexist in Spanish tourism companies.

49 As established in this article, companies—excluding those in the public sector—engaged in activities within the tourism sectors, as well as in commerce and hospitality, provided they are linked to the tourism sector, generate productive activity in the months of February, March and November each year, and initiate and/or maintain during these months the employment of workers under fixed-discontinuous contracts, may apply a contribution discount in those months, under the terms established in Article 10, of €262 per month.

50 Order TES/866/2025 of 1 August, by which, for the 2025 fiscal year, labour-related funds financed from the General State Budget are territorially allocated for management by the autonomous communities with assumed competencies.

A second trend affecting tourism employment is linked to changing values and social developments. Despite the lack of systematic research, there is a large literature claiming that society's priorities, especially those of the younger generation, may be changing in relation to a number of areas, including work. It is argued that, having a solid foundational education and access to a large amount of information, they have acquired a significant ability to compare the quality of the employment opportunities they pursue. In line with this concept, the OECD[51] has been proposing for a decade a framework for analysing job quality that considers salary, labour market conditions—such as types of employment contracts—and the quality of the work environment, which includes issues such as overqualification, excessive working hours, or atypical work schedules.

Finally, tourism employment could be impacted by the Twin Transition. Regarding the green transition, the European Economic and Social Committee proposes a European green and social pact to achieve the large-scale investment needed to ensure a just transition to a climate-neutral economy and to create quality jobs in all territories[52]. For its part, the impact of the technological transition, through digitalisation or automation, will undoubtedly have an impact on the labour market and on jobs, some positive and some negative.

All these issues reflect the need to improve active employment policies and to direct public strategy toward attracting and consolidating qualified, high-value-added tourism employment, which would increase the sector's productivity and advance real convergence in per capita income in less-developed regions, as also noted in the International Monetary Fund report[53].

Training for the tourism sector

In recent years, the competences and skills required by the sector have changed, shifting from a set of technical skills to intangible characteristics related to social resources, such as emotional intelligence, conflict and problem-solving skills, teamwork and leadership. These soft skills are of enormous importance in a people-centred industry, both for operational staff and for middle and senior management. Training systems are being adapted to focus on the development of these new skills, make tourism training more interesting and increase the loyalty of people working in the sector.

In Spain, the autonomous communities are responsible for training, both for people seeking to start working in the tourism sector and for continuous training, and it is they who organise this training offer and ensure its proper implementation.

In relation to vocational training, various actions are being promoted to address the data showing that fewer and fewer young people are opting to enrol in vocational training in hospitality or tourism. Women are in the majority in the upper grades, and men in the middle and basic grades[54]. With the aim of strengthening vocational training, Component 20 of the Recovery, Transformation and Resilience Plan[55] was approved with an estimated investment of €2.076 billion, which could be key to the tourism training model.

51 OCDE (2015). Measuring and Assessing Job Quality: The OECD Job Quality Framework.
52 COMITÉ ECONÓMICO Y SOCIAL EUROPEO (EUROPEAN ECONOMIC AND SOCIAL COMMITTEE) (2020). Opinion of the European Economic and Social Committee on 'The sustainable economy we need' (2020/C 106/01). 549. Plenary Session of the CESE, 22-23 January 2020.
53 FMI (2025). Spain: Staff Concluding Statement of the 2025 Article IV Mission.
54 MINISTERIO DE EDUCACIÓN, FORMACIÓN PROFESIONAL Y DEPORTES (MINISTRY OF EDUCATION, VOCATIONAL TRAINING AND SPORTS).
55 GOVERNMENT OF SPAIN (2021). Component 20. Strategic Plan for the Promotion of Vocational Training.

With regard to dual vocational training, the Law on the Organisation and Integration of Vocational Training[56] approves a model in which training alternates between training at the educational centre and a stay in the company. Although the number of students is growing, in the 2022–2023 academic year, total enrollments amounted to 53,343, representing 1.3% of basic-level students, 4.8% of intermediate-level students, and 8.1% of advanced-level students. In the same academic year, the hotel and catering and tourism family accounted for 1.1% of students at the basic level, 7% of students at the intermediate level and 10.9% of students at the higher level[57].

The offer of university training related to tourism and its sector is closely linked to the specific capacities of the different universities and faculties where it is offered. Despite the increase in the number of degree courses on offer, the number of new students entering university degrees in tourism has also fallen by 31%, if we compare the latest available data (academic year 2023-2022) and the academic year prior to the pandemic (2019-2020)[58]. This requires an in-depth analysis to understand whether the educational offer is not adapted to the needs of the sector or whether it is the conditions of the sector that would justify a change in the students' choice.

Non-formal training offers courses that do not lead to academically or professionally recognised qualifications but are provided by training centres regulated by the educational authorities. They have greater flexibility and the possibility of customising the training they offer.

On the other hand, training for employment includes training programmed by companies for their staff, training for employed workers and training for unemployed workers[59]. The main entity in charge is the Fundación Estatal para la Formación en el Empleo (Fundae). Looking at the hospitality sector, 27% of employees were trained in 2024 and completed 5.9 million hours of training; compared to 24% who were trained in 2021 for 4.1 million hours[60].

The European Commission, through the European Skills Agenda, focuses on the participation of unemployed people in this type of training, setting the objective that by 2025 member countries should reach a participation rate of unemployed people of 20%[61].

Professional Certificates serve to accredit, in the labour sphere, the set of professional competences that a person must possess in order to carry out a specific work activity[62]. This type of certificate is of great value for the professionalisation of the sector.

Finally, the high volatility of the environment creates a constant need for workers to update their skills and to learn new abilities and competencies in areas such as technology, innovation, experiences, sustainability and others. It is therefore necessary to promote lifelong learning, facilitating access to training for employees and fostering an environment in which companies are committed to lifelong learning. This is vital to achieve greater professionalisation at all levels.

56 Organic Law 3/2022 of 31 March on the organisation and integration of Vocational Training.
57 MINISTERIO DE EDUCACIÓN, FORMACIÓN PROFESIONAL Y DEPORTES (2024). Statistics on Vocational Training in the Education System.
58 MINISTERIO DE CIENCIA, INNOVACIÓN Y UNIVERSIDADES (MINISTRY OF SCIENCE, INNOVATION AND UNIVERSITIES). Infographic of student statistics in Spanish universities.
59 Vocational Training System for Employment.
60 State Foundation for Employment Training
61 EUROPEAN COMMISSION. (2020). A European Skills Agenda for sustainable competitiveness, social fairness and resilience (COM(2020) 274 final).
62 SEPE (2023).

From product to innovative experiences

The transformation of the tourism model toward an experience-based model is a global trend and is creating an opportunity to integrate tourism activity into territories that need development opportunities. The evolution from a model based on tourism products to a model focused on experiences requires improving the connection with other activities, such as those in the primary sector, promoting new forms of networking, innovative skills and knowledge that need to be fostered.

This trend points to a shift from a standardised product model to a model of high emotional and experiential value. An experience, from a subjective perspective and from the tourist's point of view, is the sum of sensations derived from a combination of activities, places, and personal or collective interactions in which they participate, providing a memorable experience. But, from an operational point of view, a tourism experience is the set of activities, events and tourism services that are linked by various actors (public and private) to build a story and enable this experience around specific tourism products[63].

In this sense, it is necessary to innovate and transform the processes of the whole value chain of tourism experiences so that they improve their competitiveness and are oriented towards sustainability. This includes strengthening interaction with the surrounding context in which they operate and improving their marketing capacity, especially at the international level.

Spain has human capital, a business fabric, a very diverse cultural and natural heritage and an infrastructure that allows for the creation and consolidation of multiple tourism experiences. The offer should be diverse and able to be assembled in a flexible way so that the experiential tourist can design a tailor-made trip.

Main tourism products and evolution of tourists' motivations

The main tourism products in Spain are the following:

- Sun and beach or holiday tourism
- Urban tourism
- Shopping tourism
- Study tourism
- Language tourism
- Cultural tourism
- Food and wine tourism
- Rural tourism
- Nature tourism
- Sports tourism
- Business, meetings and incentives tourism (MICE)
- Religious/spiritual tourism
- Health treatment tourism
- Wellness tourism

With regard to the evolution of the motivations of international tourists, in 2024, 85% chose Spain as a tourist destination for leisure-related activities, the main motivations being: beach tourism (approximately 37% of the total), cultural tourism (around 21% of the total) and other leisure reasons (slightly more than 24% of the total)[64].

63 MINISTERIO DE INDUSTRIA, COMERCIO Y TURISMO (MINISTRY OF INDUSTRY, TRADE AND TOURISM) (2021). Spain Tourism Experiences Strategy.
64 FRONTUR-EGATUR; INE. Turespaña estimate based on microdata from the Tourist Expenditure Survey.

However, the evolution of tourist arrivals for these reasons has been uneven. Since 2016 (the first year of the INE EGATUR series), the number of beach tourists has decreased (from 39 million to 35 million in that period), although the impact in terms of total expenditure has been positive due to an increase in average expenditure (and the effect of inflation), from €1,015/tourist in 2016 to €1,364/tourist in 2024. Additionally, the duration of trips with this motivation has decreased from 8.5 days in 2016 to 7.8 days in 2024.

In contrast, both cultural tourism and other types of leisure tourism (nature, gastronomic, wine-related, and other unclassified reasons) have experienced very pronounced growth (annualised growth of 17% for cultural, 10% for nature, 20% for wine-gastronomic, and 8% for other leisure reasons, during the period 2016–2024), which has also been reflected in significant annualised growth in total expenditure. 26% for cultural tourism, 23% for nature tourism, 29% for wine-gastronomic tourism and 14% for other leisure reasons[65].

In this area, tourists travelling to Spain for academic reasons stand out, as they are the ones who spend the most money throughout their trip (€5,554/tourist in 2024). The reason for this is that the average duration of their trips is longer than for other motivations. Tourists arriving in Spain in 2024 for study purposes spent an average of around 50 days in the destination[66].

Motifs linked to religious and spiritual values are also on the rise. Pilgrimages such as the Camino de Santiago, attendance at pilgrimages or participation in cultural and religious events, such as Easter processions, stand out. They are characterised by being the second type of trips in terms of duration in Spain, exceeding 11 days on average, and with a high expenditure (€1,725/tourist in 2024)[67].

Another of the most value-added travel motivations are those related to the professional sphere. Tourists coming to Spain for business activities such as attending meetings, conferences, congresses, conventions, trade fairs or other business purposes incur an average daily expenditure of €241/tourist (30% above the average in 2024).

Tourist profile

In 2024, as mentioned above, Spain received 93.8 million international tourist arrivals while 155.7 million domestic trips (other than trips to study or work) were made. The total expenditure of international tourists was, however, 3.3 times higher than the value of domestic tourists (including transport expenditure)[68].

On the other hand, tourists from the three main countries of origin (United Kingdom, Germany and France) and more numerous in the total volume, have a lower daily expenditure than the average. For example, tourists from France spent around 34% less than the average international tourist in 2024[69].

The diagnosis highlights the sector's opportunity to reflect on ways of innovating products and experiences along the following lines: 1) increase spending by existing core tourists; 2) increase the number of tourists from distant markets with higher tourism spending; 3) promote tourists who organise their trip independently, as they have a greater economic impact on the destination; and 4) promote experiences and attract high value-added segments, beyond economic impact, that contribute to addressing country challenges, such as climate change, the demographic challenge or labour welfare.

65 Turespaña estimate based on microdata from the Tourism Expenditure Survey (FRONTUR-EGATUR); INE.
66 FRONTUR-EGATUR; INE. Turespaña estimate based on microdata from the Tourist Expenditure Survey.
67 FRONTUR-EGATUR; INE. Turespaña estimate based on microdata from the Tourist Expenditure Survey.
68 Turespaña estimate based on EGATUR and ETR microdata (Residents' Tourism Survey) - INE.
69 INE, TURESPAÑA analysis (2025).

Likewise, sociodemographic trends that will influence future demand should be considered: the increase in the global middle-class population, the growth of populations with specific needs, population aging, new demands such as the rise in pet ownership, the increase in the number of international students[70], greater tourist interest in the environment and its protection, and new, more flexible forms of work that promote remote working[71].

Connectivity, intermodality and sustainable mobility

Transport is fundamental to the social and economic development of territories, being a backbone element of them and an enabler of opportunities in other sectors. It is also essential for the development of tourism.

In relation to transport and tourism, there are three areas for consideration: connectivity, which includes the analysis of different modes of transport (air, maritime, rail, and road); intermodality, understood as the possibility of planning a trip using the most convenient modes of transport; and mobility, focused more on movements within the destination itself.

All three dimensions have to be considered from a sustainability perspective, given the significant contribution of transport to global pollutant emissions. In this regard, all actors in the transport ecosystem, from global to local players, European institutions and government, as well as business, are committed to the goals of decarbonisation and the search for alternatives to fossil fuels. The reduction of emissions and the development of an environmentally friendly transport system guide a large part of the sector's policies and initiatives. Tourism mobility in destinations is also moving towards sustainability, with an increasing awareness on the part of all stakeholders.

Connectivity of the Spanish tourist destination

In Spain, air transport is particularly relevant due to the country's geographical position, especially if we relate it to international tourism. In 2023, 82.3% of international tourists entered the country via an airport, while 15.2% entered the country by road, and only a small proportion by port or train (2.2% and 0.3% respectively)[72].

Spain has 46 airports and 2 heliports distributed throughout the country and managed by the state-owned company AENA. In 2024, the AENA network recorded 309,371,619 total passengers (adding arrivals and departures)[73], representing an increase over the previous year of 9.2% and 12.4% compared to 2019. Adolfo Suárez Madrid-Barajas Airport recorded the highest number of passengers in 2024 with 66,197,066, representing a growth of 9.9% compared to 2023. They are followed by Josep Tarradellas Barcelona–El Prat Airport, with 55,037,892 passengers; Palma de Mallorca, with 33,298,379 passengers; Málaga–Costa del Sol, with 24,924,219; Alicante–Elche Miguel Hernández, with 18,388,543; Gran Canaria, with 15,219,843; Tenerife South, with 13,741,355; and Valencia, with 10,811,963 passengers[74]. Although with a smaller volume, three other airports not integrated in the AENA network receive air passenger traffic (Castellón Airport, Lleida-Alguaire Airport and Andorra - La Seu d'Urgell Airport).

70 UNESCO, EUROSTAT AND WORLD BANK.
71 INTERNATIONAL LABOUR ORGANISATION (2021). Home-based work: from invisibility to decent work.
72 FRONTUR, INE.
73 AENA (2024) Annual reports.
74 AENA (2024) Annual reports.

Ports represent strategic infrastructures in the field of trade, logistics and transport networks[75]. According to the Strategic Framework of the General Interest Port System, passenger traffic in Spanish ports has been registering sustained growth, especially in the period 2013-2019 (+30%), with an average year-on-year rate of 4.3%, higher than that of freight traffic (3%). This trend is mainly explained by inter-island mobility in the Canary Islands and the Balearic Islands, connections through the Strait of Gibraltar, those linking the mainland with the islands, Ceuta and Melilla and the demand from cruise ships. The total number of port passengers in Spain in 2024 was 40,869,297, of which 12,848,293[76] were cruise passengers, 7% more than in 2023.

The main port authorities in terms of cruise traffic in 2023 were Barcelona, with 3,568,901 cruise passengers; the Balearic Islands, with 2,517,294; Las Palmas, with 1,511,743; Santa Cruz de Tenerife, with 1,106,173 and Valencia, with 786,588. In terms of total passengers (regular passengers + cruise passengers), the first was the Balearic Islands, with 9,889,407, followed by Santa Cruz de Tenerife, with 6,731,473; Bahía de Algeciras, with 5,541,639; Barcelona, with 5,304,144; and Las Palmas, with 3,182,357. Thus, the Mediterranean Sea area accounts for the majority of Spanish port traffic.

With regard to railways, Spain has the second largest high-speed network in the world in terms of kilometres built, second only to China[77]. The ratio of kilometres per inhabitant is the highest in the world, surpassing leading countries in this mode of transport, such as France and Germany. The commitment to rail as a means of sustainable mobility is also a way to boost the ecological transition through technological innovation. On 31 December 2023, the Spanish rail network had 15,519 km (-2.2% compared to 2022), almost all of which belonged to ADIF and ADIF-AV, which are responsible for track construction and maintenance. A large part of this network is used for both passenger and freight transport. Of the total kilometres of network managed by ADIF and ADIF-AV, 60.5% are single track and 34.3% are not electrified[78]. The company OUIGO belonging to the French SNCF and IRYO of Italian capital, have joined RENFE AVE and RENFE AVLO (the commercial brands for the high-speed and low-cost offer of Renfe Viajeros S.M.E., S.A.) in the provision of multiple routes on the main railway axes. While until 2023 these companies only operated services in Madrid-Barcelona and Madrid-Valencia, OUIGO and IRYO have expanded their operations to the Madrid-Alicante, Madrid-Málaga/Granada and Madrid-Sevilla corridors, with plans by both companies to expand services as soon as sections are adapted to international gauge (UIC), which is the gauge that their rolling stock can operate.

One of Spain's priorities in this area is to promote cross-border connections with France in order to guarantee rail connectivity with the rest of Europe, in line with the objective of achieving a single railway area in the EU. Actions and investments are focusing on completing the Atlantic corridor (which connects with France via Irun and with Portugal at two points) and the Mediterranean corridor (which connects with France via Figueres and reaches Algeciras), as part of the Trans-European Transport Network (TEN-T). This is one of the key elements to exploit the potential of the existing extensive infrastructure by promoting intermodal connectivity.

According to the Observatorio del Transporte y la Logística en España (OTLE)[79], interurban transport in Spain is mainly carried out by road. With 386.108 billion passenger-km in 2022, road transport accounted

75 STATE PORTS (2022). Strategic Framework of the Port System of General Interest.
76 STATE PORTS (2023). Annual port traffic data.
77 International Union of Railways (2024). Atlas of High Speed Rail in the world.
78 MINISTERIO DE TRANSPORTES Y MOVILIDAD SOSTENIBLE (MINISTRY OF TRANSPORT AND SUSTAINABLE MOBILITY) (2024). Observatorio del Ferrocarril en España (Railway Observatory in Spain).
79 OBSERVATORIO DEL TRANSPORTE Y LA LOGÍSTICA EN ESPAÑA (TRANSPORT AND LOGISTICS OBSERVATORY IN SPAIN – OTLE) (2024). OTLE Report 2023.

for 85.9% of the total. However, analysing the internal mobility of tourists, the growth of the air mode in 2022 stands out with an increase of 59.5% compared to 2021, followed by the rail mode, with an increase of 56.5%, while the maritime mode grows by 38.9% and road by 9.2%. Analysing the evolution of mobility since 2007, road is the only one that experienced a decrease in mobility, with a decrease of 4.7%[80].

Vehicle rental plays an important role in road transport. It is particularly relevant as a complement to the public transport network in certain locations, as well as for its ability to interconnect destinations, especially small towns and villages. The vehicle leasing sector registered 336,140 vehicles under leasing in 2024, 13.38% more than in 2023[81].

Mobility also includes the travel of residents in Spain, both within the country and to third countries. This helps to generate traffic on the routes connecting to these destinations and, consequently, creates connectivity opportunities.

The vast majority of trips made by residents in Spain are to Spain (88% of the total in 2024), slightly less than in the pre-pandemic period (2016-2019). Overseas travel peaked in 2024, accounting for 12% of total travel. In 2023 they registered a weight of 10.4%, a similar value to the one they reached in 2019[82].

The main countries to which Spaniards travelled in 2024 were France, Italy, the United Kingdom, Morocco, Germany, Andorra and the United States, coinciding to a large extent with the main countries of origin of tourists to Spain[83].

Analysing in detail trips within Spain, the main destination is Andalusia, which in 2024 received 31.6 million trips (19%), followed by Catalonia, with 24.4 million trips (14.7%); the Valencian Community, with 19.2 million trips (11.6%); and Castilla y León, which was the destination for 16.7 million trips (10.1%). This distribution has remained relatively stable over the last few years (2016-2023)[84]. The most frequently used accommodation is the hotel or aparthotel (45.2%), compared to full rented accommodation (12.5%)[85].

The means of transportation used for domestic trips by residents in Spain in 2024 was predominantly private vehicle (81.7%), followed by rail transport (5.4%) and bus (5.1%).

To conclude this section, mention should be made of the specificities of low population density areas, which are extensive in some regions of our country. These areas have less public transport infrastructure and services, which means that residents[86] and their visitors are more dependent on private vehicles. This has a direct impact on rural tourism, as access to rural destinations is highly dependent on the availability of a private vehicle for the traveller. In these areas, where transport poverty can be considered to exist due to the lack of access to alternatives to the private car, the growth potential of rural tourism may be limited precisely because of these accessibility difficulties.

80 OBSERVATORIO DEL TRANSPORTE Y LA LOGÍSTICA EN ESPAÑA (TRANSPORT AND LOGISTICS OBSERVATORY IN SPAIN – OTLE) (2024). OTLE Report 2023.
81 ASOCIACIÓN ESPAÑOLA DE RENTING DE VEHÍCULOS (ASOCIACIÓN ESPAÑOLA DE RENTING DE VEHÍCULOS) (2024).
82 INE. Resident Tourism Survey.
83 INE. Resident Tourism Survey.
84 INE. Resident Tourism Survey.
85 CIS. Tourism and Gastronomy.2024.
86 OTLE Transport Poverty Monograph.

Intermodality between Spanish tourist destinations

Intermodality is defined as the optimal integration of different transport modes, so as to provide door-to-door services that allow efficient and cost-effective use of the transport system, while favouring competition between operators[87].

The 2011 Transport White Paper[88] identifies intermodal integration as a key element in developing a Single European Transport Area. Its objectives for 2050 include: completing a European high-speed rail network, with the majority of medium-distance passenger transport to be carried out by rail; and connecting all airports in the core network to the rail network, preferably at high speed.

For intermodality to become a reality, three dimensions are necessary: infrastructural, digital and operational. With regard to infrastructures, actions should be aimed at facilitating travel within the territory by combining the different modes of transport efficiently. Second, intermodal connectivity options need to be available in digital channels, so that they are within the consumer's reach. Thirdly, the operational dimension must be addressed through a commitment to the collaboration of the different actors involved in an intermodal journey, such as a rail operator and an airline, which means a seamless travel experience.

The digital transition of companies and destinations

The digital transformation of society and its economy is the bridge between innovation, productivity and sustainability, as well as a backbone of territorial and social cohesion. This digital transformation brings economic strengths and benefits to the tourism sector, but it is also essential for improving the social and environmental sustainability impacts of tourism.

Digital transformation is a process that, beyond the implementation of technology, involves a cultural change that affects behaviours and generates opportunities and challenges. In this sense, it is necessary to improve knowledge about which technologies have a real transforming and problem-solving capacity for the tourism sector as a whole or for some of its sub-sectors or activities, reflecting on how to incorporate SMEs and micro-SMEs in this process, which is complex in terms of costs and specialised personnel.

Today, artificial intelligence offers opportunities for the tourism sector to improve efficiency, expand capabilities and generate new ways of interacting with tourists.

In the ICDS[89] index, an index that classifies the activity sectors of the Spanish economy according to their degree of digitalisation, the tourism sector is experiencing a more accelerated process than other economic activities. One of the main reasons has been precisely the digitisation of demand. As a result, three of the five economic activities that have evolved most digitally since 2017 (commerce, accommodation and transport) belong to the tourism sector.

If we analyse the reasons for the use of the Internet by the population aged 16-64, 75% of all respondents use it to find information, 65% to look for news, 64% to do certain activities and 57% to look for places to travel to, showing how the Internet has become a central tool for people looking for inspiration[90].

87 Commission Communication of 29 May 1997 on intermodality and intermodal freight transport in the European Union: a systems approach to freight transport; strategies and actions to promote efficiency, services and sustainable development.
88 EUROPEAN COMMISSION (2011). Transport White Paper - Roadmap to a Single European Transport Area: Towards a competitive and sustainable transport policy.
89 The Índice Caixabank de Digitalización Sectorial (Caixabank Sector Digitalisation Index – ICDS) is an index that classifies the sectors of activity of the Spanish economy according to their degree of digitisation (minimum value: 0; maximum value: 100).
90 INE (2023). ICT equipment and use in households.

45

E-commerce has also advanced significantly and more and more purchasing decisions are being made through the online channel. In Spain, in 2023, 95.8% of the population aged 16-74 will have used the Internet in the last three months (0.4 points more than in 2023). 56.7% have shopped online in the last three months (0.8 points more than in 2023). 66.2% have basic or advanced digital skills, according to a study by We Are Social and Hootsuite[91]. As a result, e-commerce is growing in different sectors of activity, with a particular emphasis on the tourism sector. According to data from 2024[92], tourism has five activities in the top ten branches of activity with the highest volume of e-commerce.

If the tourism sector is advancing in the process of digitalisation, it is accompanied by a tourism technology industry that has grown strongly in recent years. This is another example of the driving force of tourism in other sectors, in this case the technology sector. Many of the solutions designed by Spanish technology companies for the tourism sector are exported to different parts of the world. PRTR programmes, such as the "Last Mile" programme, have made it possible to intensify synergies and alliances between technology companies and tourism companies with the aim of advancing in the development and implementation of solutions that improve internal processes, but also marketing and the tourist experience.

The situation in Spain for tackling the digital transformation of tourism

According to the DESI[93] index, Spain is in an advantageous position in terms of digitalisation compared to the rest of the Member States. In 2024, it ranked 7th in internet usage, 6th in very high capacity network coverage (VHCN) and 5th in percentage of the population with above basic digital skills[94].

While Spain has a high performance in connectivity and has considerably improved the digital divide between rural and urban areas, there is still room for improvement. By 2024 the digital divide in rural areas compared to the national territory as a whole has been reduced to less than 10 percentage points, with the combined broadband coverage provided by fixed access networks at download speeds of 1 Gbps or higher reaching 83.9% of rural households. According to the same source, FTTH coverage reaches 86.5% of rural households, with a digital coverage gap of 8.3 percentage points; and aggregate 5G coverage (NSA+SA) reaches 80% of the rural population, having improved by 11 points compared to 2023. However, the percentage of rural population with 5G SA network coverage (12.4%) and coverage in the 3400-3800 MHz frequency band (23.2%) is lower, with a digital divide of 31.7 and 50.8 percentage points respectively[95], although the growth trend of these technologies in rural municipalities is very pronounced.

In this context, the UNICO-Rural Demand programme has been a key tool, facilitating access to ultra-fast connectivity in areas where there is no fixed network deployment. In addition to supporting the deployment of fibre and wireless technologies, the programme has incorporated satellite broadband as an immediate solution in remote areas. The aim is to ensure that no territory is excluded from digital access, which is particularly relevant for boosting the digital transformation of the tourism sector in Spain, with connectivity being a key factor.

91 We Are Social and Hootsuite.
92 CNMC (2024). E-commerce turnover.
93 The way to measure and compare the digital progress of the countries of Europe is the Digital Economy and Society Index known as DESI for short. The indicators that make up the DESI are structured along four dimensions: human capital (digital talent), connectivity (technological infrastructure), digital technology integration (use of technologies by businesses) and digital public services (online interaction between the administration, citizens and businesses). From 2023, DESI is aligned with the Digital Decade 2030 strategic agenda.
94 EUROPEAN COMMISSION. DESI Compare countries progress.
95 MINISTERIO PARA LA TRANSFORMACIÓN DIGITAL Y DE LA FUNCIÓN PÚBLICA (MINISTRY FOR DIGITAL TRANSFORMATION AND THE CIVIL SERVICE). Broadband coverage in Spain in 2024.

On the other hand, Spanish companies are among the most digitised in all European establishments (21% of Spanish companies have a high level of digitisation compared to 15% in the rest of Europe)[96]. However, while Spain's position in terms of digitisation of machines stands out (measured in terms of the use of robots in its operations[97]), it is below the European average in terms of digitisation of people (measured in terms of regular use of computers by workers to carry out their tasks)[98].

Although innovation does not refer only to digital transformation, it does give an insight into the intention of change, upgrading and progress among others. In general, there is little orientation towards investment in innovation, with between 10% and 24% of tourism enterprises, depending on the sub-sector of activity concerned, showing no interest in it. For their part, companies in the tourism sector have an average Digital Maturity Index[99] (hereafter DMI) of 31%, so they would be at a basic level[100].

The level of digitalisation of tourism SMEs is increasing. According to the second Report on the Level of Digitalisation of Spanish Tourism SMEs, it has increased by 16.4 points, having risen from 31.2% in the first report to 47.6% in the second.

Of the eight areas analysed, staff talent (54.2%) is where the level of digitalisation in tourism SMEs is highest, followed by business vision (52.7%), marketing and sales (52.5%), customer experience (47.6%), digital systems (46.8%), innovative products (45.9%), and business operations and administrative processes (40.5%). In all of them, there has been a significant increase compared to the first survey.

If we break down the analysis of the level of digitalisation by subsectors, the report shows that travel agencies are the most digitalised, with 52.6%, followed by car rental companies (50.8%), tourism activities (50.2%), passenger road transport (48.7%), accommodations (44.5%), and catering (38.9%).

Digital transformation has been most notable in road transport companies, which have increased by 23.4 points compared to the first report, followed by travel agencies, with an increase of 18.2 points.

Large companies generally have greater access to knowledge about technologies and their use cases, as well as greater resources and financial capacity to make the necessary investments to digitalise their businesses and ensure their competitiveness. Approximately 70% of companies with more than 250 employees employ ICT specialists, whereas only 2.5% of companies with fewer than 10 employees do. Moreover, the gap between large companies and SMEs increases the higher the degree of complexity of the technologies.

The main barriers faced by smaller companies in the sector, which explain the difference in the speed of adoption of new technologies, are primarily: 1) limited financial capacity and difficult access to economic resources; 2) reduced ability to attract digital talent; and 3) lack of knowledge.

The challenge is to improve understanding of which technologies provide true transformative capabilities and concrete problem-solving potential for the tourism sector as a whole, or for specific subsectors or activities, while considering how to incorporate SMEs and micro-SMEs into this process, which is complex in terms of costs and specialised personnel.

96 FUNCAS (2022). Digitalisation and work organisation in European companies: overview and comparative analysis for Spain based on the European Company Survey 2019.
97 The proportion of establishments using robots in Spain is higher than in establishments in Central Europe (3%), Southern Europe (4%), Eastern Europe (6%), and Anglo-Saxon countries (7%), with the exception of the Scandinavian countries, where the difference is similar (1%).
98 The proportion of workers using computers is lower than in establishments in Central Europe (8%), Scandinavia (10%), and Anglo-Saxon countries (6%).
99 The digital maturity index evaluates the eight strategic capabilities in which a digital company invests: Business vision, Innovative product, Customer experience focus, Marketing and sales, Business operations, Administrative processes, Talent, Digital systems. The index contains four levels of digitalisation: Very basic level: 0%-25%, Basic level: 25%-50%, Medium level: 50%-75% and High level: 75%-100%.
100 SEGITTUR (2024). Report on the Digitalisation of Spanish Small and Micro Tourism Enterprises.
101 SETUR and SEGITTUR (2022). Report on the Digitalisation of Spanish small and micro tourism enterprises.

2.2.2 Social dimension

The social dimension of sustainability has had less conceptual and, above all, programmatic development. UN Tourism defines sustainable tourism as "tourism that fully takes into account current and future economic, social, and environmental impacts to meet the needs of visitors, the industry, the environment, and host communities"[102]. The relationship of tourism with these host communities, or residents, lies at the center of reflection on the social sustainability of the activity.

Global socio-demographic trends

Urbanisation and depopulation

Spain has experienced a growing process of urbanisation, increasing from 72% urban population in the 1980s to 80% in 2024. This trend has meant a continuous loss of population in rural municipalities, especially intense during the 2010s[103].

The pandemic marked a change in this dynamic. Factors such as remote work, digitalization, and the desire for a life closer to nature have driven some recovery of the rural population. Between 2019 and 2022, municipalities with less than 10,000 inhabitants gained 150,000 residents, with a growth of 1.6%, higher than the national average. This growth has continued until 2024, driven mainly by municipalities close to large metropolitan areas[104]. However, despite this, in the coming decades, the urbanisation process will continue. It is estimated that by 2050, 88% of the population will live in cities, and rural Spain will lose nearly half of its inhabitants[105].

Meanwhile, cities have experienced decades of outward growth, extending beyond their administrative boundaries. Now, inward urban growth is emerging, known as redensification. Redensification balances urban sprawl and revives the traditional model of compact and sustainable cities[106], as advocated by the Spanish Urban Agenda.

Ageing

At the beginning of the 20th century, life expectancy at birth in Spain was only 35 years. Today, it is over 83 years old, among the oldest in the world, behind only Switzerland and Japan. This has been made possible by improvements in nutrition, hygiene, healthy habits and a modern welfare system. People are living longer and with a better quality of life[107].

However, the Spanish population is expected to age significantly in the coming decades. By 2050, it is estimated that one in three people in Spain will be aged 65 or over, second only to Portugal, Greece and Italy in the EU. And for every person in this age group, there will be only 1.7 people of working age, compared to the current 3.4. Neither improvements in the birth rate nor an increase in migration will be able to completely reverse this scenario[108].

102 UN TOURISM (2024). Sustainable tourism.
103 BANCO DE ESPAÑA (2020). Annual Report 2020. "Chapter 4. The spatial distribution of the population in Spain and its economic implications". Madrid: Banco de España; and Oficina Nacional de Prospectiva y Estrategia. Spain 2050: Rationale and proposals for a National Long-Term Strategy. Ministerio de la Presidencia (Ministry of the Presidency).
104 BANCO DE ESPAÑA (2021). Annual Report 2020. "Chapter 4. The spatial distribution of the population in Spain and its economic implications". Madrid: Banco de España; and Oficina Nacional de Prospectiva y Estrategia. Spain 2050: Rationale and proposals for a National Long-Term Strategy. Ministerio de la Presidencia (Ministry of the Presidency).
105 NATIONAL FORESIGHT AND STRATEGY OFFICE (2021). Spain 2050. Rationale and proposals for a National Long-Term Strategy. Ministerio de la Presidencia (Ministry of the Presidency).
106 NATIONAL FORESIGHT AND STRATEGY OFFICE (2025).
107 NATIONAL FORESIGHT AND STRATEGY OFFICE (2021). Spain 2050. Rationale and proposals for a National Long-Term Strategy. Ministerio de la Presidencia (Ministry of the Presidency).
108 NATIONAL FORESIGHT AND STRATEGY OFFICE (2021). Spain 2050. Rationale and proposals for a National Long-Term Strategy. Ministerio de la Presidencia (Ministry of the Presidency).

This situation poses major challenges for the welfare system and the economic sustainability of the country, but valuable opportunities will also arise if we can anticipate and adapt our society to the new demographic reality.

In fact, this ageing trend is global, so it will also have consequences for tourism demand. Tourism infrastructures and services will have to be adapted to the needs of a more senior demand. In this context, it is important to highlight the social tourism programme of the IMSERSO, led by the Ministry of Social Rights, Consumption and Agenda 2030, which offers around 900,000 places for the elderly every season.

Consumer trends

There is also a trend towards the deseasonalisation of demand. The growth of the senior and childless school-age population, together with the increased flexibility of some workers to telecommute and take holidays outside the peak season, contributes to the deseasonalisation of tourism. Demographic trends (increasing life expectancy and population ageing) and the consolidation of these new forms of work suggest that it is very likely that growth rates will continue to be stronger in the low season than in the high season.

Cohesive destinations

Tourism has to be a factor that strengthens the capacity of destinations so that people living in them enjoy spaces where equality, well-being and inclusion are promoted and opportunities are generated. It is therefore necessary to work on:

Living culture at the destination

The perception of destinations depends on the attachment to place and the very meaning that people attach to spaces. Tourism can become a factor in dynamising and strengthening the identity of destinations, but it can also be a factor in uprooting them. To this end, it is necessary to promote actions based on the enhancement of living culture processes and respect for understanding and supporting a sense of place.

In addition, it will be essential to guarantee the maintenance of the local population, avoiding the increase of the different factors that explain the processes of pressure on the housing stock, such as, in certain neighbourhoods or rural areas, the phenomenon of unregulated dwellings for tourist use. The existence of vibrant tourist destinations, with local residents, is precisely what will keep culture alive and give destinations their identity, based on the belief that *a good place to visit must be a good place to live*.

Accessibility and inclusion

Although progress is being made, there is still a need to improve accessible tourism in all destinations. Tourists with accessibility needs should also be supported to share information about accessible destinations and experiences, building confidence for other tourists to travel. Through the Tourism Sustainability Plans in Destinations Programme[109] , 195 actions are being carried out in destinations throughout Spain to improve accessibility, with a budget of 46.5 million euros. These improvements also have an impact on the accessibility of municipalities for their residents.

Tourism is also a sector committed to the employment of people with disabilities, although a specific analysis would be necessary, as there is insufficient data.

109 SECRETARÍA DE ESTADO DE TURISMO (STATE SECRETARIAT FOR TOURISM) (2021). Strategy Tourism Sustainability Plans in Destinations

Balanced coexistence

The relationship between tourists and residents must develop in a framework of respect, harmony and hospitality. That is, the relationship must be framed with respect for the languages, habits, traditions, beliefs and freedom of conscience of both tourists and residents. To this end, different issues need to be addressed.

Tourist saturation

In some destinations, or in specific areas within them, visitors and locals feel that there are too many tourists and that both the tourist experience and quality of life could deteriorate—or are already deteriorating. Certain circumstances, such as the massive and unregulated, or irregular, proliferation of tourist accommodation in formerly residential areas, or the arrival of large cruise ships, can contribute to intensifying this perception.

This situation can lead to the saturation of public services, infrastructure, and transport systems. And although difficulties in accessing housing cannot be attributed solely to tourism, the effect on major destinations, often overlapping with areas with a stressed residential market, such as large cities, is undeniable. These municipalities are clearly affected by the withdrawal of housing from the residential market to be dedicated to tourist rentals. This phenomenon, linked to the global rise in tourism worldwide, requires reflection and research efforts to propose more sophisticated management systems, some based on industrial technologies and others on social technologies, including the possible implementation of restrictions and fees.

It is necessary to determine the carrying capacity of tourist destinations which, according to the literature, is defined as the maximum number of people who can visit a destination simultaneously without causing destruction to the physical, economic, or sociocultural environment, and without generating an unacceptable decrease in visitor satisfaction.

Awareness and responsible tourists

All stakeholders share responsibilities when engaging in tourism activities. Tourists also have significant potential to generate positive impacts through their actions. In relation to visitor education and awareness, it is essential to provide visitors with information and resources to enable them to make responsible choices. Regarding visitor education and awareness, it is essential to provide them with information and resources that allow them to make responsible decisions.

Tourist accommodation

The spread of information technologies and social networks has enabled the development of a new model of accommodation. So-called Tourist Use Housing (TUH) was initially concentrated in urban areas, but it has gradually expanded to other areas, such as small rural towns. The use of TUHs generates impacts on coexistence in some environments, which cannot be ignored, so it will be essential to put in place some actions to address this dimension of the social sustainability of tourism.

According to the INE, the evolution of the supply of accommodation in Spain in recent years has shown significant growth in all types of accommodation. The current regulatory framework of the Autonomous

Communities on the regulation of tourist accommodation in dwellings is characterised by heterogeneity in the definition and in the basic aspects that should govern the regulation of tourist accommodation in dwellings, as well as in the requirements for providing the activity and by an excessive variety of criteria and requirements[110].

The Spanish Government has taken a step forward in the regulation of tourist rentals, being the first country to adopt Regulation (EU) 2024/1028 of the European Parliament and of the Council, dated 11 April 2024, and the implementation of Royal Decree 1312/2024, dated 23 December, even before the date foreseen by the legal text. This regulation establishes the procedure for the Single Registry of Leases and provides for the creation of a Digital One-Stop-Shop for Leases. The new system will facilitate the collection and exchange of information on short-term rental services in order to promote greater transparency, sustainability, eradicate illegal supply and improve access to housing.

Already in its first months of application, this regulation and the Register created are making it possible to identify and expel from the market dwellings dedicated to irregular tourist rentals. This demonstrates the importance of a regulation such as the one approved and reinforces the need for the Autonomous Communities and local authorities, which are competent in tourism planning and town planning, to carry out more ambitious regulations regarding the requirements for access to the provision of tourism services in dwellings and to commit themselves to carrying out sufficient inspections to clean up the market.

This commitment to regulation and inspection is essential if the main tourist towns are to have regular residents and thus continue to act as quality and sustainable tourist destinations.

Responsible leadership and ESG

Many citizens are interested in promoting commitments to improve the favourable social impacts of tourism. The aim is therefore to encourage the mobilisation of strong and responsible tourism leadership, through programmes that have a positive social impact on tourism in their destinations.

Corporate social responsibility and ethics is becoming an increasingly important aspect of business. The business fabric of the Spanish tourism sector is no stranger to this reality, which is why it is faced with the need to assume a firm ethical and socially responsible commitment in its operations and in its relations with its stakeholders.

ESG actions (environmental, social and governance sustainability), as well as due diligence in the tourism sector, can be understood as those behaviours and situations in which companies go beyond compliance with their legal obligations and engage in actions that promote social good, beyond the interests of the company.

It is essential to promote the adoption of ESG actions in companies, through support and dissemination campaigns to benefit both the companies themselves and the regions where they carry out their activities, thus guaranteeing a social return and an optimal environment for the sustainable development of the sector.

Fair working conditions

One of the main positive externalities of the tourism sector is the volume of employment it generates. However, it is crucial to make tourism employment conditions more attractive, attracting the best talent and ensuring labour welfare, equality, accessibility and inclusion. In fact, tourism being an activity based

on people-to-people contact, it is necessary to reflect on how the competent administrations and companies can improve the relationship between the tourism labour market and society.

In this regard, reference may be made to the Resolution of 20 January 2023, of the Directorate-General for Labour, which registers and publishes the 6th Labour Agreement for the Hospitality Sector (ALEH VI). This Agreement includes provisions to improve working conditions and attract more workers to the sector, as well as a commitment to social dialogue. According to Article 83.3 of the recast text of the Workers' Statute, approved by Royal Legislative Decree 2/2015 of 23 October, the social partners are granted regulatory powers to develop agreements on specific matters, which has made it possible to promote areas of particular importance such as employment, vocational training, and the resolution of labour disputes.

Job stability

The seasonality of demand in the tourism sector constitutes one of the main factors affecting employment instability in the sector. Thus, until 2022, the tourism sector in Spain concentrated a large share of temporary contracts in the central months of the year, reaching 37.8% of workers affiliated with the sector, well above the 27.5% observed in the rest of the economy[111].

However, with the entry into force of the 2021 labour reform, a decreasing trend in the number of temporary contracts[112] is beginning to emerge. The reform led to a 5.54% reduction in the annual number of contracts in the Spanish labour market as a whole, due to the priority given to permanent hiring over temporary contracts. In tourism, temporary hiring has also decreased while permanent hiring has increased, and, unlike the overall trend, the sector has achieved an 11.54% increase in total hiring (SEPE, 2023:32).

In the second four-month period of 2024, 83.9% of workers in the tourism sector had a permanent contract, compared with 84% in the rest of the Spanish economy[113]. Furthermore, to promote job stability in the sector, and in line with the new labour reform, permanent seasonal contracts are considered an optimal option.

Another highly relevant variable in this analysis of working conditions is the duration of the working day. This variability in demand, even within the same day, led to part-time contracts in the tourism sector exceeding 20.6% in 2022, well above the 13.6% observed in other sectors, with food and beverage services[114] standing out at 32%.

The nature of tourism activity implies the complexity of seasonality or variation in working hours throughout the day or week. While for certain groups these types of contracts can be a useful tool for balancing work with other activities, for others they may pose a difficulty.

111 INSTITUTO NACIONAL DE ESTADÍSTICA (INE) (Jun 2021-Dec 2022).
112 Royal Decree Law 32/2021 of 28 December on urgent measures for labour reform, the guarantee of employment stability and the transformation of the labour market (BOE of 30 December 2021).
113 TURESPAÑA. Economically Active Population Survey (EAPS).
114 INSTITUTO NACIONAL DE ESTADÍSTICA (INE).

Wage conditions

The average gross annual wage in the tourism sector is below the national average, a difference that is closely related to the business structure of the sector, characterised by the high presence of micro-enterprises and SMEs. In larger business segments, wage conditions tend to be more favourable; for example, the same position, such as waiter or waitress, earns on average 32% more in medium or large companies than in micro-enterprises[115].

Impact of the green and digital transition on tourism employment

As mentioned above, the green and digital transition is impacting on the evolution of the skills of professionals in the sector and the emergence of new jobs.

On the other hand, the way in which companies interact with and train their human capital has evolved as new technologies emerge and are adopted. Thus, there is greater flexibility of access to training for employees.

Technological advances and their contribution to improving the working environment are clear, but proper change management and talent development are key to ensuring success.

The Spanish Government considers this training and re-qualification of workers in the tourism sector as a strategic pillar for competitiveness and sustainability. For this reason, together with employers and trade unions, it promotes an environment of trust and adaptation to productive changes, as well as various specific actions[116] for the sector and others of a more general nature that are useful for improving professional skills.

Through the SEPE, national calls and public grants have been developed to improve skills, especially those linked to digital transformation. Driven by FUNDAE, Vocational Training in Hospitality and Tourism offers a wide range of certificates, programs, and courses that, starting in the 2024–2025 academic year, incorporate modules on employability, digitalisation, and sustainability, while a Royal Decree with 678 micro-trainings is being prepared. Alongside this, the Anfitriones[117] project of the State Secretariat for Tourism seeks to strengthen the quality of employment in the tourism sector.

The Digitalízate Space[118], the result of public–private collaboration, offers free technological training to improve digital skills.

In the context of training, the role of industrial and technological innovation as a driver of employment transformation is key and requires strengthening collaboration between companies, training centres, and innovation ecosystems (clusters, digital hubs, technology centres) to anticipate the demand for new skills.

Formal employment

The informal economy and informal employment are areas that, by remaining outside institutional protection, generate clearly negative impacts. It is necessary to promote actions that make it possible to distinguish between processes that arise from social innovation, such as new business models, and others that take shelter in innovation as a way to bring back informal-economy practices.

115 INSTITUTO NACIONAL DE ESTADÍSTICA (INE).
116 Such as the Call for the acquisition and improvement of professional skills of employed workers in the tourism sector, aimed at facilitating their adaptation to changes in the production system and to the opportunities for professional advancement and personal development of workers".
117 https://www.turismo-formacion.com/
118 https://digitalizateplus.fundae.es/digitalizate/1

Well-being at work and work-life balance

Workers' motivation is increasingly oriented toward the development of company programs that meet the personal, family, and professional needs of employees, improving their quality of life and their work-life balance.

The fact that the tourism sector offers great diversity in its job opportunities means that not all measures aimed at promoting work-life balance can be applied in the same way. Nevertheless, tools for flexible scheduling can be implemented, such as flexible start and end times, shift work, part-time schedules, or flexible vacation arrangements. Although many tourism-related jobs must be performed in person, others allow for spatial flexibility and the option of remote work. In addition, companies can support their staff's work-life balance by providing services such as childcare, administrative assistance or activities for school-free days.

Gender and equality

The progressive incorporation of women into the labour market over the last decades has significantly helped boost the sector, such that today, from a quantitative standpoint, women represent 47.2% of those employed in tourism (LFS, 2nd quarter of 2024). The hospitality subsector stands out, where 55.5% of employed persons are women[119].

The hospitality sector (5.5%) and the transport and storage sector (-2.4%), which is closely linked to tourism, are those with the smallest gender pay gap, below the average for all economic activities, and even negative in the case of transport and storage[120].

However, differences in working conditions persist. Traditional gender roles and stereotypes continue to influence the division of tasks in the sector, and the feminisation of precarious positions remains a reality. Only 33% of management committee positions are held by women[121], still a low figure, but representing an 8-percentage-point increase compared to 2018.

Diversity, integration and inclusion

The tourism sector plays a very important role in facilitating access to the labour market for groups of the population facing greater difficulties and specific barriers, such as people with disabilities, migrants, or LGBTQ+ individuals[122].

The sector offers a wide variety of job positions, allowing the hiring of people with very different profiles—from waitstaff to directors of large hotels—requiring diverse knowledge and levels of training.

Many institutions clearly prioritise incorporating talent that reflects the diversity characterising our societies today. Having a variety of perspectives means that society is better prepared to face challenges and, therefore, is more sustainable.

119 INSTITUTO NACIONAL DE ESTADÍSTICA (INE).
120 INSTITUTO NACIONAL DE ESTADÍSTICA (INE).
121 WOMEN LEADING TOURISM AND DELOITTE (2023)
122 UNIVERSITY OF ALICANTE, AGUAS DE ALICANTE CHAIR OF SOCIAL INCLUSION. The labour integration of people with disabilities in the tourism sector.

Companies can identify the jobs most suitable for each type of profile and adapt both the identified positions and the work environment so that professionals can perform their functions without physical or skill-related barriers.

In addition, companies can collaborate with organisations involved in integrating vulnerable people and those at risk of social exclusion. Hiring these groups should be facilitated through the design of specific recruitment policies, the development of diversity attention plans, internship programs, and/or onboarding plans that include guidance, training, and individualised follow-up. The Laboratorio de Políticas de Inclusion (Laboratory of Inclusion Policies)[123] of the Ministerio de Inclusión, Seguridad Social y Migraciones (Ministry of Inclusion, Social Security and Migration) describes pilot projects that can inspire action in this direction.

In conclusion, it is necessary to strengthen the link between tourism competitiveness and working conditions, promoting quality employment standards, gender equality in the sector and work-life balance measures.

Partnerships for Collaborative Innovation: Governance

The specific characteristics of the tourism phenomenon—cross-cutting, multi-actor, and complex—make it necessary to strengthen coordination, communication, collaboration and international positioning, including all actors, structures, and public cooperation bodies involved in tourism governance. Likewise, it is crucial to promote consensus-building and the consolidation and optimisation of spaces and tools for collaboration between public and private actors in the tourism sector in Spain. Regarding collaboration within the private sector itself, mechanisms and working structures that enhance cooperation and joint efforts should continue to be strengthened in order to generate synergies that increase competitiveness.

The European Union itself produces a White Paper on European Union Governance[124], in which it states that good governance is based on five cumulative principles: openness, participation, accountability, effectiveness and coherence. These principles aim to improve trust in institutions by sharing decisions with other interested actors, or stakeholders, who take joint responsibility for specific actions and share information transparently. In any case, public actors are a fundamental part of driving this process.

Public actors: coordination and cooperation in a multi-level government

Tourism governance in Spain has a multi-level character. This stems from the distribution of competencies among different territorial entities, and at different territorial levels we find traditional political-administrative structures as well as executive structures.

Traditional political-administrative structures in the field of tourism in Spain are identified at all levels of government:

- Central government: Ministerio de Industria y Turismo (Ministry of Industry and Tourism), Secretaría de Estado de Turismo (Secretary of State for Tourism).
- Autonomous Communities: tourism departments of the autonomous governments.
- Local bodies: provincial councils, town councils and island councils.
- Local level: tourism departments/councils of local authorities.

123 Inclusion Policy Lab - Ministerio de Inclusión, Seguridad Social y Migraciones.
124 EUROPEAN COMMISSION (2021). European governance: a white paper.

Executive structures depend on the aforementioned bodies (organizationally, functionally, or financially) to fulfil their objectives. These are the tourism agencies and bodies of the autonomous communities, provincial councils and local authorities. These are usually set up as entities and companies of different legal nature of the Tourism Departments responsible for tourism at each administrative level. As for the central government, we find Turespaña, Paradores de Turismo and SEGITTUR.

There are also other administrative bodies that respond both to the need for internal coordination across different levels of government, linked to the cross-cutting nature of tourism activity, and to the necessary cooperation between territorial levels with competencies in the tourism sector. The main ones are the Interministerial Tourism Commission and the Sectoral Tourism Conference.

Cooperation between public and private actors

The nature of collaboration between public and private actors is highly diverse. It can be framed as a mechanism for developing a long-term strategy or linked to the management of a specific, temporary programme. Collaboration can pursue very different objectives: the development of tourism strategies, creation of actor networks, joint investment in marketing campaigns, promotion of quality and certification management, or fostering the training of tourism human resources at the destination, among others.

The mechanisms that support collaboration are also varied: cooperation networks, public-private partnerships (PPPs), or collaboration through participation in a Destination Management Organisation, which is the most institutionalised model. At the national level, the Spanish Tourism Council (CONESTUR) and the Spanish Chamber Network stand out.

Collaboration among private actors

The tourism sector has a wide range of associations and federations, which can be of different types and respond to different needs depending on the actors that form them. Thus, there are sectoral associations and federations, as well as multisectoral and representative associations and federations.

2.2.3 Environmental dimension

The discussion on the relationship between tourism and environmental sustainability has advanced significantly in recent years and revolves around four debates: first, climate change and the efforts the sector can make toward decarbonisation and strengthening its adaptation and resilience capacity; second, the role of ecosystems as the spaces where tourism activities take place, including the role of biodiversity in tourism; third, resource consumption and the pursuit of circularity-based models to reduce it; and fourth, the adoption of sustainable mobility models, also linked to decarbonisation policies.

European, national, regional and local regulations are already in place to promote a transition to a more sustainable model. Awareness of the centrality of environmental sustainability in the tourism ecosystem has also increased markedly. However, it remains necessary to work on developing concrete proposals and processes for different actors in the tourism sector.

Climate change

Rising temperatures and temporal and spatial redistribution of demand

Globally, 2024 was the first year to exceed the 1.5°C warming threshold above the pre-industrial era. The evolution of the annual average temperature in Spain shows the trend towards a generalised increase in temperatures, especially during the last decade. 2024 was the third warmest year in the historical series in Spain, which began in 1961. It was extremely warm, as were 2022 and 2023, the first and second warmest years, respectively. The annual average temperature in Spain has risen by 1.69°C since the reference period. The average seawater temperature off the Spanish coast reached 20°C, with 2024 being the second warmest year[126].

In Spain, heat waves have increased in frequency, duration and intensity over the last six decades[127]. These phenomena, along with widespread increases in average temperatures, extreme temperatures, or a rise in tropical nights, can significantly alter the tourism model by affecting the thermal comfort of visitors. This may cause a temporal and spatial redistribution of tourism demand, not only due to changes in destination temperatures but also due to new climate scenarios in the country of origin. Moreover, the ability of tourists to adapt to new climate conditions is also influenced by sociodemographic factors such as age, gender or country of residence.

In this context, the *National Plan for Preventive Actions against the Effects of Extreme Temperatures on Health*[128], promoted by the Ministerio de Sanidad (Ministry of Health), is particularly important as a key tool for protecting public health. This Plan includes measures for surveillance, prevention and response to epidemiological heat waves, especially aimed at the most vulnerable groups, such as the elderly, children and people with chronic illnesses.

Deterioration, scarcity or disappearance of key tourism resources

Some tourism resources, mainly natural and scenic, may be altered by a new climate scenario. Numerous studies point to the reduction of snow availability (days and surface area) in ski resorts; the reduction of the surface area of beaches; the intensification of drought periods that may lead to water consumption restrictions for tourist uses; or the loss of biodiversity and landscape quality.

Climate change is having a major impact on the loss of forest hectares or the regression of glaciers. Likewise, the great wealth of biodiversity that characterises Spain faces different risks, the greatest of which is the increase in temperatures. In the last century, at least 17 animal species and 24 plant species have become extinct in our country. On the other hand, higher temperatures can also influence the proliferation of diseases, mosquitoes, algae, jellyfish or other species that may be a nuisance to tourists.

Tourism destinations that are more dependent on these natural resources are more vulnerable to climate change, such as sun and beach destinations or snow destinations. However, all types of tourism destinations are affected by climate change. Therefore, all will need to implement adaptation and mitigation measures to ensure their future sustainability.

125 WMO (2025). State of the Global Climate 2024.
126 AEMET (2025). State of the Climate Report 2024.
127 MITECO (2024). CLIVAR-SPAIN report on climate in Spain.
128 National Plan of preventive actions against the effects of excessive temperatures on health.

Sea level rise

The rate of sea level rise in Spain has doubled in the last 30 years, and since 1993, the sea level has risen by 2.8 millimetres every year[129]. In Spain, the rise in sea level has been particularly noticeable in the area of the Strait of Gibraltar, the Canary Islands and the Atlantic coast.

This rise of the sea could have serious consequences for our country, considering the large extension of its coastline. More specifically, it could lead to the retreat of the coastline and the loss of available beach area, as well as effects on border activity and a greater impact of storms on infrastructure close to the coastline[130]. It will be yet another factor of pressure on beaches, whose increasing loss is related to the deficit of sediments aggravated by human interventions (ports, breakwaters, canalisations, destruction of dunes...).

Drought

Drought, accentuated by climate change, is a serious problem for Spain and for the tourism sector in particular, as it concentrates the highest volume of tourists in the summer season, when water reserves decrease due to high temperatures and lower rainfall.

However, the situation differs between territories. Although, in general, 2024 was a wet year in much of the Iberian Peninsula in terms of precipitation, it was a very dry year in the far southeast of the peninsula and in the Canary Islands. In fact, the archipelago suffered the driest year of the entire series[131].

Extreme weather events

Climate change is causing greater intensity and frequency of extreme weather events, such as heatwaves, floods, storms, torrential rains, and wildfires[132].

In October 2024, the most severe torrential rainfall event in recent decades occurred, causing irreparable human losses and severe material damage in the province of Valencia. Other provinces were also affected by this event, associated with a DANA: Cuenca, Albacete, Murcia and Málaga.

Additionally, three heatwaves were recorded in 2024. The second and third heatwaves lasted ten and nine days, respectively, making them the fifth and sixth longest heatwaves since 1975[133].

This situation will require updates to risk and emergency plans, as well as improvements in alert and prevention systems, and may also influence the expansion of insurance coverage. Furthermore, it can affect potential tourists' perception of risk.

Adaptation and mitigation

Strategies to combat the challenge of climate change must act in two directions. On one hand, implement adaptation measures to ensure the future continuity of tourism activity under new climate scenarios; on the other, promote mitigation strategies to reduce and offset greenhouse gas emissions generated by tourism. Spain has a National Climate Change Adaptation Plan (PNACC 2021–2030) and, in terms of mitigation, the National Integrated Energy and Climate Plan (PNIEC 2021–2030).

129 INSTITUTO NACIONAL DE OCEANOGRAFÍA (NATIONAL INSTITUTE OF OCEANOGRAPHY) (2023).
130 INSTITUTO NACIONAL DE OCEANOGRAFÍA (2023).
131 AEMET (2025). State of the Climate Report 2024.
132 IPCC (2021). Intergovernmental Panel on Climate Change. 133 AEMET (2025). State of the Climate Report 2024.
133 AEMET (2025). State of the Climate Report 2024.

In this sense, it is necessary to combine approaches with a global approach to mitigation actions, with other adaptation actions at a local scale and adapted to the vulnerability and risks to which each destination or tourism company is exposed. More specifically, mitigation measures are concerned with calculating, reducing and offsetting greenhouse gas emissions. Adaptation measures are very diverse, e.g. restoration of ecosystems, improvement of risk prevention and management systems or diversification of the tourism offer towards products that are less dependent on climatic conditions.

Technological innovation is an opportunity for mitigation solutions in the tourism sector, such as the use of sustainable materials, clean technologies applied to buildings or mobility, or digital tools for carbon footprint monitoring. Adaptation strategies can also rely on technological and nature-based solutions.

Ecosystems as places where tourism activity takes place

The diversity and richness of biodiversity in Spain is a great tourist attraction and the activity of many of our tourist destinations is based on the use of natural resources such as, for example, the coast or inland rural areas. The environment is not only the means of production, but also a place of tourism and leisure consumption. At the same time, environmental quality is a determining factor for satisfying an increasingly aware demand.

In this context, government, planning, and tourism management cannot be dissociated from environmental management or spatial planning. This issue is addressed through several instruments: the State Strategic Plan for Natural Heritage and Biodiversity to 2030[134], which promotes the conservation, sustainable use and restoration of heritage, terrestrial and marine natural resources, biodiversity, and geodiversity; the National Strategy for Green Infrastructure and Ecological Connectivity and Restoration (ENIVCRE) (Order PCM/735/2021), which regulates the implementation and development of Green Infrastructure in Spain; and the Sectoral Plan for Nature and Biodiversity Tourism, promoting, among other actions, the recognition system for the sustainability of nature tourism within the Natura 2000 Network and fostering strengthened collaboration on nature and biodiversity tourism with the Secretariat of State for Tourism.

At the European level, the EU has a Sustainable Blue Economy policy[135], which provides a framework for economic activities related to seas and oceans, one of the main tourism resources of our country. Moreover, the European Union Integrated Maritime Policy[136] (IMP) offers a holistic approach that coordinates various EU policies related to the sea, such as fishing, transport, the environment and tourism, so that they work together to generate greater benefits from the sea with fewer negative impacts. In the tourism sector, this policy seeks to develop maritime and coastal tourism sustainably, coordinating policies across different sectors and ensuring a balanced development of these activities to protect the marine environment and coastal communities. The key objectives of the IMP for tourism are sustainable development, sectoral coordination, heritage protection and economic benefit generation.

134 MINISTERIO PARA LA TRANSICIÓN ECOLÓGICA Y EL RETO DEMOGRÁFICO (MINISTRY FOR ECOLOGICAL TRANSITION AND THE DEMOGRAPHIC CHALLENGE). State strategic plan for natural heritage and biodiversity to 2030.
135 Sustainable Blue Economy Policy of the European Union.
136 Integrated Maritime Policy of the European Union.

Circularity applied to tourism

Water resources management

In Spain, rainfall is unevenly distributed due to physical factors, dividing the peninsula into a humid Spain and a dry Spain[137]. The main indicator of the water situation is the volume of water stored in reservoirs.

Although precise and high-quality data on water consumption are available from official sources, it is not possible to determine what percentage of consumption is allocated to tourism, as part is recorded under "supply" (e.g., accommodations or private swimming pools), while another part falls under the "industrial" category (recreational and leisure uses). Nonetheless, the topic is generating increasing interest across all subsectors.

In this context of risk of water scarcity, desalination plants are presented as a viable solution to guarantee access to drinking water. However, the desalination process is costly and energy intensive. In addition, the process can have negative environmental impacts.

In addition, the sector is making progress in the implementation of systems for the reduction of water use and water reuse. Technology and nature-based solutions play a key role in optimising water consumption linked to tourism.

It is necessary to advance in water reuse systems (for irrigation or street cleaning, through the recovery of greywater in accommodations, etc.) and in improving water use efficiency in tourism consumption. This requires measuring and tracking tourism-related water consumption with specific indicators (litres per overnight stay, audits, leakage reduction).

Food waste

The catering sector is one of the main subsectors of tourism, making it essential to promote sustainable practices, with reducing food waste as a priority.

In Spain, most waste occurs during the production of food and beverages and in households, each accounting for 33% of total food waste. The tourism sector has potential for improvement, as there are still habits or factors, such as overproduction, inventory management and consumption habits, that can be addressed.

In January 2023, the Law on the Prevention of Food Loss and Waste came into force[140], aiming to promote proper management of surpluses.

Plastics and packaging

In 2019, the EU implemented new measures to combat marine pollution caused by plastics, focusing on the ten most common single-use plastic products. The legislation sets targets for the use of recycled plastic in bottles: 25% by 2025 and 30% by 2030.

137 MINISTERIO PARA LA TRANSICIÓN ECOLÓGICA Y EL RETO DEMOGRÁFICO (2023). Water Uses in Spain.
138 ITH (2025) Study of good practices in water management in hotels.
139 For more details, see section 3.1.3 "Consequences for tourism".
140 MAPA (2024). Action on food waste.

In 2022, the Commission presented a proposal for a packaging regulation, which was adopted in 2024. It requires member countries to reduce packaging waste generation per person by 5% by 2030, 10% by 2035 and 15% by 2040. In addition, certain single-use plastic packaging will be banned from 2030, and by 2029 90% of plastic and metal beverage containers up to three litres[141] will have to be collected separately. In this sense, there is a potential for collaboration to be explored between the packaging industry and sectors such as tourism to facilitate investment in technological solutions aligned with the new European regulation.

The generation of packaging waste in Spain in 2022 was below the EU average, at 182.9 kilos per capita, compared to the EU average of 186.5 kilos per capita. Regarding packaging recycling, the EU average is 121.9 kilos per capita, and the Spanish average is 119.7[142].

Circular economy models in the Spanish tourism sector

Compared to the traditional or linear economy model, which can be summarised as a "take, use, and dispose" approach, the circular economy model promotes economic development by reducing resource consumption, extending product lifespans, and encouraging use rather than consumption[143].

The Spanish Circular Economy Strategy, España Circular *2030*[144], lays the foundation for promoting a new model of production and consumption in which the value of products, materials, and resources is maintained in the economy for as long as possible, reducing waste generation and making the most of unavoidable waste.

In May 2022, SEGITTUR presented the Practical Guide for the Application of the Circular Economy in the Tourism Sector in Spain[145], along with two manuals outlining the roadmap and best practices for tourist destinations and businesses. According to this guide, the environmental issues most related to tourism are energy use and CO_2 emissions, water use, excessive consumption, waste generation and biodiversity loss. The transport and accommodation subsectors have the greatest environmental impact, followed by tourist activities and the hospitality sector.

Transition towards environmentally sustainable tourism mobility

It is necessary to reduce the environmental impact of tourist transport, as transport is one of the main sources of emissions contributing to climate change, air pollution and noise. Transport is the sector with the largest share of total greenhouse gas (GHG) emissions in Spain, accounting for 32.4% of the total in 2023. Road transport is the most significant component in this context, representing 30.1% of the total inventory, although it decreased by 2.7% compared to 2022. Domestic air transport accounts for 1.2% of total emissions in Spain, although, compared to 2022, it increased by 8.0% in absolute terms.

Overall, emissions associated with transport in Spain decreased by 0.8% compared to 2022[146]. However, the 2024 inventory update reports a year-on-year increase of 2.1%, so the decline may not accurately reflect short-term trends.

141 How to reduce plastic waste: EU measures.2025.
142 EUROSTAT (2024). Packaging waste statistics.
143 SEGITTUR (2023) Practical guide for the application of the circular economy in the tourism sector in Spain.
144 Government of Spain. Estrategia Española de Economía Circular. España Circular 2030.
145 SEGITTUR (2023) Practical guide for the application of the circular economy in the tourism sector in Spain.
146 MINISTERIO PARA LA TRANSICIÓN ECOLÓGICA Y EL RETO DEMOGRÁFICO (2025). Spain, GHG Inventories Report 1990-2023.

The available information on aggregated emissions from tourism transport corresponds to global data. It is projected that by 2030, transport-related emissions (excluding cruise ships) will account for 23% of total projected transport emissions and 5.3% of overall emissions[147], with these ratios having remained relatively stable over the past decade.

Raising awareness, measuring, and publishing emissions related to tourism activities, as well as defining empirically based targets, are crucial. Additionally, optimising instruments and strategies to scale mitigation measures across all tourism actors who have a role to play is essential.

Environmental sustainability in air transport

Air travel is the predominant mode of transport in international tourism[148]. Furthermore, it is expected that between 2016 and 2030, the proportion of international travel by air will increase from 59% to 61%. By 2030, tourist arrivals by air (both international and domestic) are projected to account for 33% of total arrivals, generating 56% of associated emissions.

This scenario has prompted a strong response from both government authorities and the aviation industry, with concrete measures being adopted to advance toward a more sustainable air transport model. Spain has demonstrated a solid and proactive commitment to this transition.

At the global level, the Carbon Offsetting and Reduction Scheme for International Aviation (CORSIA) of the International Civil Aviation Organization (ICAO), in which Spain has been actively participating since 2021, is noteworthy. This plan requires airlines to monitor and offset their international emissions, marking a decisive step toward decarbonising the sector.

At the national level, Aena leads with its Climate Action Plan 2021-2030, which includes ambitious measures to mitigate the effects of climate change. Thanks to these actions, Aena anticipates achieving carbon neutrality by 2026, as an intermediate step toward the goal of net-zero emissions by 2030[149]. Similarly, ENAIRE incorporates the Green Sky Plan in its strategic plan[150], aiming to contribute to sustainable mobility in the aviation sector by minimizing environmental impact and promoting decarbonisation.

One of the initiatives with the greatest transformative potential is the development and adoption of Sustainable Aviation Fuel (SAF), a key technology that could reduce sector emissions by up to 65% by 2050[151]. Although currently the consumption of SAFs represents 0.05% of total consumption in the aviation sector, their promotion is strategic for the decarbonisation of air transport. The argument in favour of SAF is its efficiency, because it can be used in existing aircraft and airport infrastructures without requiring any transformation, and its impact, because it represents a real reduction in emissions, in life-cycle terms, ranging from 60% to 90%, depending on the type of PBS (biological or synthetic origin).

In Europe, the European Commission has established the regulatory framework through Regulation (EU) 2023/2405, relating to ensuring a level playing field for sustainable aviation (ReFuelEU Aviation), included in Fit-for-55[152]. This regulation obliges fuel suppliers to guarantee a minimum proportion of SAF at EU

147 WORLD TOURISM ORGANISATION AND INTERNATIONAL TRANSPORT FORUM (2020). CO2 emissions from transport in the tourism sector - Modelling of results.
148 WORLD TOURISM ORGANISATION AND INTERNATIONAL TRANSPORT FORUM (2020). CO2 emissions from transport in the tourism sector - Modelling results .
149 AENA (2024). Aena renews the certification of its airports in the Airport Carbon Accreditation programme, advancing toward carbon neutrality.
150 Green Sky focuses its efforts on five main lines of action: reducing atmospheric emissions by improving in-flight efficiency, reducing noise levels around Spanish airports, improving the environmental management of its own centres and facilities, environmental responsibility and excellence.
151 IATA (2025). Developing Sustainable Aviation Fuel (SAF).
152 https://www.consilium.europa.eu/en/policies/green-deal/fit-for-55/

airports, starting at 2% in 2025, 6% in 2030, and progressively increasing to a minimum of 70% by 2050[153]. The ultimate objective is that 70% of the fuel supplied at EU airports is SAF, of which at least 35% must be synthetic fuels.

Commitment to sustainability is also reflected in airlines' fleet renewals, incorporating more efficient and less polluting aircraft with lower fuel consumption and CO_2 emissions[154], as well as the development of electric or hydrogen-powered engines[155]. In this context, the Green Hydrogen for Aviation Alliance[156], a national initiative launched in 2023, stands out, positioning Spain as a benchmark in sustainable innovation. At the European level, the Zero Emission Aviation Alliance, launched by the European Commission in 2022, also includes active participation from Spain.

Environmental sustainability in road transport: automobiles

By 2030, the automobile is expected to remain the preferred mode of transport for domestic travellers, with 42% using it. For its part, international arrivals by car are expected to account for 26% of the total[157].

The main current line of action is the electrification of the vehicle fleet. Electric mobility is essential to achieve the transport decarbonisation targets for 2050. The National Energy and Climate Plan (PNIEC) 2023-2030[158] includes measures to promote electric vehicles. Through the instruments of the Recovery, Transformation, and Resilience Plan (PRTR), registrations of electric and electrified vehicles, including cars, vans, motorcycles, and buses, have grown significantly in recent years. It is expected that fleet renewal will accelerate the pace of electrification, supported by the extensive deployment of the public charging network, as established in Regulation (EU) 2023/1804, which governs the deployment of alternative fuel infrastructure and repeals Directive 2014/94/EU. Improvements in price factors, battery range, and charging infrastructure will be central to increasing the electric vehicle fleet.

Environmental sustainability in rail transport

In the European Union, rail transport accounts for less than 0.5% of greenhouse gas emissions associated with transport[159]. Greenhouse gas emissions from rail in 2023 decreased by 7.2% compared to the previous year[160]. This positions rail in a privileged role as a sustainable mode of transport. Consequently, rail connectivity, especially international connectivity, is being strongly promoted by European institutions and the Government of Spain, as in the case of the Trans-European Transport Network (TEN-T). In this way, progress is being made toward a sustainable mobility model that prioritises rail as a strategic axis to reduce emissions and meet the European Union's climate targets.

153 IATA. Fact Sheet: EU and US policy approaches to advance SAF production. 2021
154 GLOBAL COMPACT (2023). Global Compact - Spanish Network. Flight Plan: Sustainability.
155 For hydrogen to be a carbon-neutral fuel, green hydrogen—that is, hydrogen produced using renewable energy—must be used.
156 Members of the alliance include the Ministry of Transport, Mobility and Urban Agenda (MITMA), the airport operator AENA, the State Aviation Safety Agency (AESA), the Airline Association (ALA), the Spanish Association of Defence, Security, Aeronautics, and Space Technology Companies (TEDAE), the Spanish Association of Petroleum Product Operators (AOP), the National Hydrogen Centre (CNH2), Gasnam-Neutral Transport, the National Institute for Aerospace Technology (INTA), the Spanish Aerospace Technology Platform (PAE), and the Spanish Hydrogen Technology Platform (PTeH2).
157 WORLD TOURISM ORGANISATION AND INTERNATIONAL TRANSPORT FORUM (2020). CO2 emissions from transport in the tourism sector - modelling of results.
158 MINISTERIO PARA LA TRANSICIÓN ECOLÓGICA Y EL RETO DEMOGRÁFICO (2024). Plan Nacional Integrado de Energía y Clima (National Integrated Energy and Climate Plan – PNIEC) 2023-2030.
159 MITMA (2021). Getting to know the railway.
160 MINISTERIO PARA LA TRANSICIÓN ECOLÓGICA Y EL RETO DEMOGRÁFICO (2025). National Greenhouse Gas Emissions Inventory Document.

Environmental sustainability in maritime transport

In the field of maritime connectivity, the decarbonisation of tourist cruises is currently one of the sector's priorities. Reducing the environmental impact of this type of tourist transport is crucial for the sustainability of tourism.

The decarbonisation process of maritime transport for passengers involves the use of new fuels with zero or very low atmospheric emissions[161], as well as the electrification of docking points in ports to allow cruise ships to connect to the grid while berthed. This scenario requires coordination of the current strategy with the Maritime Strategy of Spain 2025-2050[162] and with the Strategic Framework of the Port System of General Interest.

Studies call for, among other measures, stricter actions at both national and international levels. However, the sector is making progress, as reflected in the Cruise Lines International Association (CLIA) commitment to achieve zero carbon emissions from cruise ships by 2050. In addition to regulatory measures, it is essential to promote industrial innovation to develop clean maritime technologies, such as alternative fuels, vessel electrification, or onboard carbon capture systems.

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Urban mobility

In addition to travel between origin and destination, tourist mobility also includes movements within the destination. Often, mobility within the destination coincides with urban mobility.

In this context, the Climate Change and Energy Transition Law[164] establishes a fundamental obligation for urban mobility. In 2023, municipalities with more than 50,000 inhabitants (149 in Spain), island territories, and municipalities with more than 20,000 inhabitants when they exceed pollution limit values[165], must establish Low Emission Zones (LEZs). The law defines LEZs as areas where access, circulation, and parking of vehicles are restricted to improve air quality and mitigate greenhouse gas emissions, according to vehicle classifications based on their emission levels. These restrictions are accompanied by the promotion of public transport, electric mobility, travel by bicycle, scooters, or other micromobility means, and walking.

In conclusion, the increase in the scale of the tourism phenomenon requires attention to the negative externalities that tourism, like any economic activity, generates. As academic literature affirms, the growth of tourism activity is associated with the development of the platform economy, which overcame

161 Regulation (EU) 2023/1805 on the use of renewable and low-carbon fuels for maritime transport and amending Directive 2009/16/EC and Regulation (EU) 2023/1804 on the deployment of alternative fuels infrastructure, repealing Directive 2014/94/EU. 162 DIRECCIÓN GENERAL DE LA MARINA MERCANTE 162 (DIRECTORATE-GENERAL OF THE MERCHANT NAVY) (2025). Spain's maritime strategy.
163 In line with the 2023 Strategy of the International Maritime Organization (IMO) for the reduction of greenhouse gas (GHG) emissions from ships.2025.
164 Law 7/2021 of 20 May on climate change and energy transition.
165 Pollutant limit values are regulated in Royal Decree 102/2011 of 28 January on the improvement of air quality.

the control of traditional accommodation supply and led to the emergence of the short-term rental phenomenon (VUT), as well as with a significant reduction in transport costs due to the rise of low-cost travel. The upward trend of tourism worldwide is also explained by a new form of consumption among global citizens, closely linked to processes driven by social media.

Mitigation and compensation of these impacts require, according to the relevant literature, the intervention of public authorities through instruments tailored to each specific context.

Environmental externalities are related to various factors. On one hand, tourism involves mobility and the global increase in passenger traffic, which generates global CO2 emissions. If transport does not internalise the negative externalities generated by these emissions, there is an excess of activity relative to the equilibrium that would be achieved under an optimal competitive system.

On the other hand, tourism activity involves the consumption of natural resources, such as water, landscapes, and land. It also generates waste and exerts pressure on natural spaces and marine and terrestrial ecosystems. For these reasons, it is necessary to move toward circular and regenerative models to reduce and compensate for potential negative externalities.

The social externalities generated by tourism activity are also varied and can be linked both to the growth of the activity and to the incorporation of new areas into the tourism dynamic. When tourism was concentrated only in locations specifically designed for it, its externalities were not perceived in the same way as they are today, as noted by multiple studies.

Tourism saturation is defined by UN Tourism as “the impact of tourism on a destination, or parts of it, that excessively and negatively affects the perceived quality of life of residents and/or the quality of visitor experiences.” Saturation affects territories of different types and scales, and not all areas are impacted uniformly. It is a complex concept that combines a physical dimension with a perceptual dimension. Therefore, not only the number of visitors is important, but also the differences in how tourists and residents use shared spaces. Leisure patterns, noise and even the ways in which tourists move through spaces can lead to perceptions of tourism saturation among residents.

Perceptions of saturation are heightened when spaces are adapted for tourism use, leading to the loss of other functions associated with traditional uses. Businesses shift from serving residents to catering to tourists, leading to the disappearance of traditional structures and the transformation of urban spaces in particular. Housing, whose issues extend far beyond short-term rentals, experiences tourism as an additional source of pressure, especially in areas with high tourist demand. The increase in visitors is also associated with occasional congestion in public services.

All these factors can lead to the displacement of residents and substantial demographic changes in the territorial structure.

The internalisation of these types of externalities must be addressed based on the specific characteristics of each location and implemented at the levels closest to the problem. It must also be done with the understanding that correcting market failures cannot involve turning tourism into an activity reserved only for the highest-income groups.

01 | Facts to understand tourism in 2025

02 | Diagnosis: sustainability of tourism

03 | Sustainable Tourism Strategy

04 | Spain Tourism 2030 Plan

05 | Acknowledgements

3.1. THE PATH TOWARDS A SUSTAINABLE TOURISM STRATEGY

The recovery of tourism in Spain after the impact of the COVID-19 pandemic cannot be understood without the mobilisation of resources from the European Next Generation EU instrument, which has played a key role in the reactivation and transformation of the sector.

In response to the drastic 77% drop in international arrivals during 2020 and the plunge in income and employment[166], the Government of Spain directed a substantial part of the funds of the Recovery, Transformation and Resilience Plan (RTRP) to tourism, allocating more than €3.4 billion from the Recovery and Resilience Mechanism (RRM) to the implementation of the *Tourism Sector Modernisation and Competitiveness Plan* in its Component 14[167].

Component 14 proposed different instruments and actions that should comply with the following commitments and cross-cutting principles required by the European Commission:

- Contributing to the green and digital transitions.
- Provide transformative or innovative value, without reproducing previous schemes.
- Respect the principle of no significant damage to the environment.
- Promote social and territorial cohesion, with attention to vulnerable groups, rural areas or areas with less economic development.

The actions were aimed at transforming the tourism model towards sustainability, promoting digitalisation and intelligence for destinations and the tourism sector, deploying tourism resilience strategies for extra-peninsular territories and implementing various actions in the field of competitiveness.

The *Tourism Sector Modernisation and Competitiveness Plan* itself included the elaboration of a Sustainable Tourism Strategy for Spain, building a national tourism agenda to face the challenges of the sector in the medium and long term, promoting the three pillars of sustainability: social, economic and environmental.

Since 2022, various actions have been promoted that have allowed progress to be made in a joint process of reflection to address the future of Spanish tourism.

Thus, for more than two years, the Secretaría de Estado de Turismo (State Secretariat for Tourism) designed and conducted a participatory process that has made it possible to incorporate the concerns, perspectives and contributions of various actors in the sector. The objective was to gather complementary views and contributions for the understanding, reflection and discussion of future challenges and opportunities, considering that only through collective intelligence will we be able to address ambitious goals and generate innovative responses.

166 Instituto Nacional de Estadística (National Institute of Statistics). (2021). Tourism Satellite Account for Spain. Year 2020. https://www.ine.es
167 https://planderecuperacion.gob.es/politicas-y-componentes/componente-14-plan-de-modernizacion-y-competitividad-del-sector-turistico

The discussion and debate process has included a broad territorial representation of public, private sector and civil society actors, through different formats. Thus, the following have been carried out:

- Individual interviews with tourism experts to incorporate knowledge, vision and inspiring good practices.

- Debate sessions with round-table discussions with specialists in the topic under discussion who have contributed their technical knowledge.

- Working groups made up of representatives of the Spanish Tourism Council (CONESTUR) in which its members have incorporated perspectives, exchanged opinions and generated proposals on different components of the document.

Although the process of dialogue and listening has been maintained throughout the process of drafting the Strategy, it intensified during the first phase of work, reaching out to almost 300 entities and involving more than 195 in active work spaces.

In the final phase of the elaboration of the Strategy framework, the participatory process has pursued two main objectives. The first objective was to determine the instruments that will respond to the different strategic goals. To this end, several groups were held with experts in different instruments and not only from the tourism sector, as the aim was to broaden the scope to successful solutions in other areas that could be inspirational in facing the challenges of tourism.

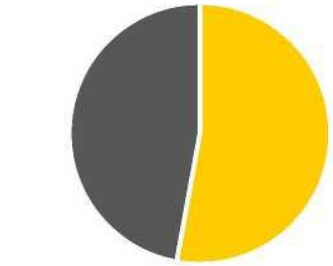
In these groups, different proposals have been discussed, good practices applied in the tourism sector as well as in other economic sectors have been identified, and possible obstacles and solutions for their implementation have been detected.

The second objective has been to incorporate the perspective of the younger generations, who will be the future tourists and professionals in the tourism sector. At the same time, the aim was to facilitate a space for debate and reflection between young people and experts in a final phase of the elaboration of this Strategy

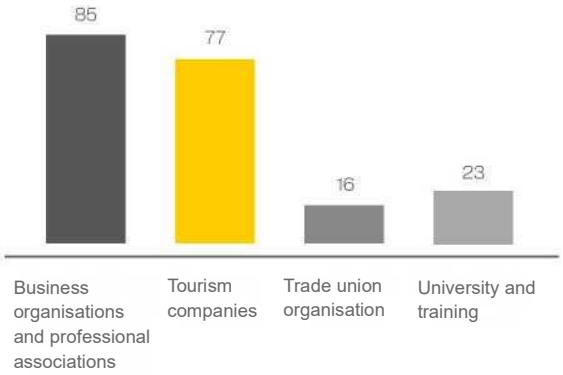
DATA ON THE PARTICIPATION PROCESS IN THE FIRST PHASE

296 individuals were contacted, with 195 final participants

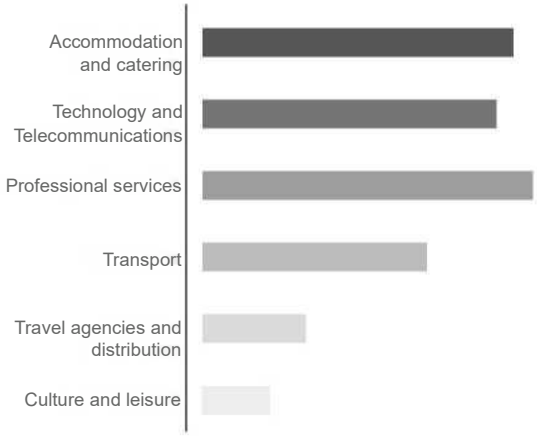
Public-private representation



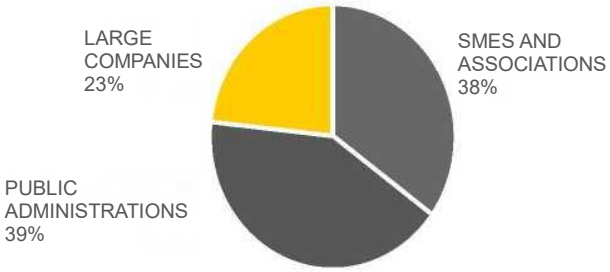
Diversity of areas



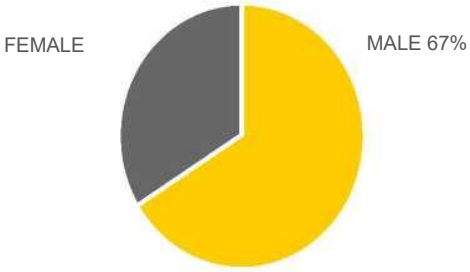
Businesses, from the value chain as a whole



Size of participating organisations



Participation of women and men



Representatives from all over the country

Public, private and civil society representatives from the 17 autonomous communities and the 2 autonomous cities.

Within CONESTUR, which met on 9 October 2024, the guiding principles that would articulate the Sustainable Tourism Strategy, the vision and mission of the Strategy and the table of goals that was the result of the extensive process of debate and listening that preceded it were presented.

Proposals were also discussed in this same forum on which goals should be prioritised for the public and private sectors and on possible lines of action to complement those initially planned.

These guiding principles, the vision, the general objective and the common goals of the Spanish Sustainable Tourism Strategy are set out below.

3.2 GUIDING PRINCIPLES

The Spanish Sustainable Tourism Strategy is based on two principles that help to structure the debates and organise the different visions and challenges, giving them a coherent meaning. Both principles guide all actions.

1. Putting people at the centre

The expression "tourism is people" has a profound meaning that underlines the human and social character of the tourism phenomenon. This phrase, often used in institutional, academic and professional settings, points to the idea that tourism is first and foremost about interactions between human beings.

Based on this idea, it is intended that all the lines of action derived from the present strategy should have as their starting point the target audience of any action implemented, people with different roles in the tourism ecosystem.

The role of people and the value of their talent is the pillar on which the tourism sector is built and it is, therefore, from where Spain's Sustainable Tourism Strategy must be constructed.

People who make destinations

There are people who design, plan, manage and protect tourist destinations. Public decision-makers (local, regional and national), technicians in territorial planning or heritage, institutional operators and local development actors. Its role is to ensure that tourism can develop in the best way and that it is articulated coherently in the territory in a sustainable manner, consistent with local identity and for the benefit of all residents.

People who create jobs

Hundreds of business people, entrepreneurs and investors generate employment and boost the productive fabric of the sector. Through their business activity—in accommodation, catering, transport, technology, culture, leisure or experiences—they contribute to the generation of wealth, innovation and economic opportunities, both in consolidated destinations and in emerging rural areas, depopulated or in transition. Its leadership is key to the development of a competitive tourism model with added value.

People who work

This group encompasses tourism professionals in all branches of the tourism sector: they are the visible face of tourism and the daily driving force of the tourism experience. Their qualifications, working conditions and motivation have a direct impact on the quality, authenticity and sustainability of the destination. Promoting their continuing education and employment with prestige is essential for the future of the sector.

People who host people

Destinations are territories where people reside. Local residents and communities live with tourism and participate in the hosting experience. Their attitude, hospitality, traditions and way of life shape the

authentic character of the destinations. For tourism to be truly sustainable, it is essential that the people who live in the destinations feel that they are involved, heard and benefit from it. Resident-friendly tourism promotes social cohesion, rootedness and coexistence.

People who travel

They are the point of departure and arrival of the tourist phenomenon. Travellers, beyond being consumers, are also actors with ethical and environmental decision-making capacity. Promoting responsible and informed tourism strengthens the tourism experience and reduces negative impacts on the environment and residents.

2. Interrelationship between the economic sustainability of the sector and the social and environmental sustainability of destinations

Since the 1980s, sustainability in tourism has been the subject of attention and debate, consolidating itself as a guiding principle in policy and institutional discourse. However, despite advances in conceptualisation and strategy formulation, effective implementation of sustainable practices in the tourism sector has been limited.

One of the barriers to this progress has been to consider that it was possible to work in parallel on the three dimensions that make up the concept. But sustainability in tourism is a single concept consisting of three interconnected levels.

Thus, economic sustainability depends on the social sustainability of the activity and both on the environmental sustainability of the territory. In other words, the economic sustainability of the tourism sector depends on the social and environmental sustainability of the destinations where the activity takes place. This concept of nested sustainability points to the necessary connection between the different dimensions.

3.3 MISSION AND VISION OF THE SUSTAINABLE TOURISM STRATEGY SPAIN 2030

Based on these principles and considering that the Spain 2030 Sustainable Tourism Strategy seeks to strengthen the sustainability and improve the resilience of the Spanish tourism model as a whole so that it can adapt adequately, efficiently and quickly to the changing factors that condition its future, it is established as a shared mission:

Mission

To turn Spain into a world benchmark for sustainable tourism, putting people at the centre of the ecosystem and placing responsibility and balance as the values that guide the activity.

The mission of the Spain 2030 Sustainable Tourism Strategy is configured around the main objective to be achieved by 2030.

Vision

Consolidate tourism as an engine of responsible economic development, boosting its competitiveness, economic contribution, capacity for distributing prosperity in the territories and generating opportunities for society and citizens.

3.4 STRATEGIC GOALS

The fulfilment and success of a sustainable tourism strategy for Spain is based on all public and private actors in the tourism ecosystem developing and leading their own policies, plans and programmes oriented towards common goals.

The two principles that structure the strategy—the people who, from different roles, shape tourism, and the interrelationship between the economic sustainability of the sector and the social and environmental sustainability of destinations—together with the stated mission and overall objective, make it possible to advance toward a set of goals that organises the many current debates and establishes a clear framework from which each level of government (national, regional, and local), as well as businesses and civil society organisations, can propose concrete lines of action.

Thus the goals represented in the following table combine, on the vertical axis, the roles that people assume in tourism, building destinations, creating jobs, working, hosting other people or travelling. And horizontally, the more economic, social or environmental emphasis on sustainability.

COMMON GOALS FOR SPAIN'S TOURISM ECOSYSTEM

		SUSTAINABILITY		
		Economic	**Social**	**Environmental**
PEOPLE	People who shape destinations **DESTINATIONS**	**Goal 1** Transform Spanish Tourist Destinations	**Goal 2** Promote Collaborative Governance	**Goal 3** Green and Blue Tourism
	People who create jobs **BUSINESSES**	**Goal 2** Competitive Innovation	**Goal 5** Responsible Businesses	**Goal 6** Circular Economy
	People at work **TALENT**	**Goal 7** Talent	**Goal 8** Labour Equity	**Goal 9** Twin Transition and tourism employment
	People who welcome others **RESIDENTS**	**Goal 10** Social Cohesion	**Goal 11** Living Culture and Cultural Heritage	**Goal 12** Environmental Commitment
	People who travel **TOURISTS**	**Goal 13** Responsible Marketing	**Goal 14** Social Awareness	**Goal 15** Environmental Awareness

These fifteen goals, common to Spain's tourism ecosystem, are defined as follows.

Goal 1. Transforming Spanish tourist destinations

the sustainability of Spanish tourism depends, to a large extent, on the destinations and their capacity to manage the tourism phenomenon. It is therefore necessary to strengthen local tourism management organisations by supporting teams and creating knowledge-sharing networks.

It is also essential to recognise the diversity of destinations that coexist in our country and to deploy differentiated strategies for investment, renovation and promotion in accordance with their particular characteristics. Tourist destinations are nothing more than towns, cities and territories, with urban, rural and territorial policies. In this sense, the articulation between policies aimed at tourism management and other sectoral policies that affect residents and the territory must be coordinated with each other.

Thus, the regeneration of sun and beach destinations should be proposed in alignment with urban policies that include infrastructure renewal and innovative financing. In addition, it is key to intervene in urban destinations with improvements in the physical environment and in the coexistence of urban and tourist functionalities.

In parallel, specific actions are needed in rural and natural areas to foster territorial cohesion and promote ecotourism and ensure full coherence of tourism activity with environmental objectives and the conservation, restoration and sustainable use of ecosystems and biodiversity.

Goal 2. Collaborative governance

The characteristics of tourism activity itself make it essential to move towards the consolidation of a collaborative governance model based on the alignment and cooperation of the actors in the ecosystem. There is a need to strengthen internal collaboration at all levels of government, to reflect on public-private governance spaces, incorporating expert advice and citizen participation, and to strengthen private partnerships that facilitate intra- and inter-sectoral cooperation.

At the territorial level, it would also be necessary to promote cooperation networks between destinations and consolidate intermediate entities and to connect tourism with other economic activities through territorial programmes and exchange initiatives.

Goal 3. Green and blue tourism

It is crucial to move forward together in the fight against climate change through the reduction of emissions, the implementation of adaptation measures and the efficient management of resources, integrating circularity throughout the value chain.

Tourism activity must also take into consideration its impacts and dependencies on biodiversity and contribute to the objectives of conservation and restoration of biodiversity and ecosystems, which are the fundamental basis for tourism activity.

In this sense, reaching an agreement between all players in the tourism ecosystem to achieve a gradual decarbonisation of the sector and consolidate its commitment to the fight against climate change is a crucial goal for the year 2030. It is also necessary to integrate the management of the sea and the coast into tourism planning, given its undeniable role in Spanish tourism.

Goal 4. Competitive innovation

The future sustainability of Spain's tourism involves boosting the sector's competitiveness through innovation, digitisation and quality. The strategic use of digitalisation will enable the generation of greater tourist intelligence, understanding behaviours and preferences. In turn, the adoption of tourism intelligence and innovation by SMEs and micro-SMEs should favour their modernisation and reduce the digital divide. In addition, innovative entrepreneurship can be an important lever for growth in the tourism sector, as it allows destinations and services to be differentiated in a highly competitive market.

Competitive innovation would also need to improve the regulatory environment by simplifying the compliance map.

Another key objective for competitiveness is to reach a consensus on a tourism experience model that goes beyond the idea of the product and is operationally useful and marketable, as well as to redesign tourism processes and services in terms of sustainability and digitisation.

Goal 5. Responsible companies

It is necessary to support and communicate ESG (environmental, social and governance) and due-diligence actions within the tourism sector in order to improve understanding of its ability to generate well-being in the territories where it creates jobs and to promote diverse working environments.

It would also be desirable to encourage dialogue between tourism and other sectors to address common challenges of the territory and share experiences.

Goal 6. Circular economy

The tourism sector is key in the fight against climate change. Companies in the sector are already contributing to emissions reductions and promoting the circular economy throughout the tourism value chain. But this goal must be pursued further, as it is a crucial step towards environmentally responsible tourism and a commitment to the preservation of our planet.

It is essential to implement circular economy practices that allow a more efficient management of resources and lower consumption, through waste management plans, reduction of food waste, consumption of local and local products, or incorporation of the sector into international initiatives on plastics.

The adaptation of transport modes to European standards should also be supported through sectoral roadmaps for decarbonisation and the development of alternative fuels.

Goal 7. Talent

It is essential to continue to value the people who work in the sector, as they are an essential element for its economic sustainability. This requires a variety of actions to be put in place to guide and support at different stages. For the initial processes, vocational trend analysis and recruitment processes need to be addressed. Improving talent retention requires advancing attractive career plans, which is more complex in the case of SMEs, and welfare-to-work measures. Generational coexistence and relay programmes are also important.

Training is a key part of the system, which requires further progress in dual training and collaboration in the updating of content at different educational levels. Also in the case of training, innovation and digital transformation, included in the modules associated with transversal skills and abilities (digitalisation and sustainability applied to the productive sector, personal itinerary for employability and professional English), are key.

Goal 8. Tourism labour equity

Agreements to ensure good working conditions and welfare in the tourism sector should be promoted. There is also a need to improve the prestige of tourism employment by strengthening its public image and a deeper understanding of the professional diversity of the sector.

A fundamental axis is to guarantee equal opportunities and the inclusion of people with disabilities and other vulnerable groups in tourism employment in order to improve the perception of tourism as an attractive and sustainable professional option.

Goal 9. Twin transition and tourism employment

The Twin Transition, green and digital, has a direct impact on tourism employment. We need to understand how these transformation processes impact on existing and emerging professionals and how to prepare them to cope with these changes. The aim is to protect employability, promote job matching and avoid inequalities in access to new opportunities within the sector.

In short, it would be a matter of accompanying tourism workers towards a more sustainable and technologically advanced model without leaving anyone behind.

Goal 10. Social cohesion

The goal is to strike a balance between the development of tourism and the preservation of the social environment of the residents.

In this sense, technologies could help in the measurement and control of the carrying capacity of tourist destinations and enclaves, favouring coexistence between visitors and residents. Another central objective is to reinforce the regulation and control of tourist accommodation, guaranteeing its compliance with regulations and avoiding negative impacts on destinations.

It is also necessary to promote tourism development in areas facing demographic challenges, as a way of boosting the local economy and combating depopulation. Finally, it addresses the need to make tourist destinations more accessible, integrating accessibility criteria throughout the sector's value chain.

Goal 11. Living culture and cultural heritage

Culture is a dynamic process, in constant transformation, produced by the interaction of people in their environment. Local culture is not a static set of traditions, but a living network of expressions that evolve with the residents themselves. The preservation and promotion of local cultural practices is of critical importance for the sustainability of tourism as a phenomenon deeply linked to the curiosity to know and understand others.

Tangible and intangible cultural heritage assets are also increasingly appreciated by visitors, which is why it is necessary to improve the incorporation of tourism use in management plans aimed at their conservation and rehabilitation.

Goal 12. Environmental commitment

Joint care between residents and the tourism sector for the environmental sustainability of destinations can develop an emotional connection and commitment to the activity that enhances awareness, reputation and responsibility.

Goal 13. Responsible marketing

Marketing strategies should be designed and implemented based on an understanding of the destination as a space for tourists and residents to live together, collaborating with companies committed to sustainability and promoting the responsible behaviour of tourists at the destination.

From the perspective of international demand, these strategies should prioritise the attraction of segments that optimise the social and economic profitability of tourism activity, making progress in improving the perception of Spain as a destination committed to sustainability among international tourists.

Goal 14. Social awareness

It is important to develop communication aimed at informing and raising awareness among visiting international tourists about their impact on the destination and the importance of adopting responsible practices and behaviour in the social environments that host them.

Goal 15. Environmental awareness

It is also necessary to develop communication aimed at raising awareness among national and international tourists visiting our country of the need to adopt responsible practices and behaviour, as well as to disseminate among them the achievements and good practices in terms of social and environmental responsibility developed by our tourism offer, highlighting how these behaviours contribute to improving their tourism experience in Spain.

01 | Facts to understand tourism in 2025

02 | Diagnosis: sustainability of tourism

03 | Sustainable Tourism Strategy

04 | Spain Tourism 2030 Plan

05 | Acknowledgements

The framework of the Spanish Sustainable Tourism Strategy sets out an inspiring scenario for the country as a whole. It is conceived as a shared agenda for public, private and civil society actors to face the challenges of the sector in the medium and long term.

The shared mission of making Spain the global benchmark for sustainable tourism, placing people at the centre of the ecosystem and adopting responsibility and balance as the values guiding activity, requires the involvement of a wide range of stakeholders with complementary leadership.

Progress towards this involves a commitment to:

- The three levels of government—the central government, the autonomous communities, and local entities—both through their organisations directly linked to tourism and through others with competencies essential for advancing along this path.
- The tourism business community as a whole, including large companies, SMEs, micro-SMEs and the self-employed.
- And the social agents and third sector organisations, associations and foundations that generate and contribute value to tourism.

Each of the institutions and organisations dedicated to tourism in this country can contribute to advancing the collective objective of consolidating tourism as a driver of responsible economic development, enhancing its profitability and its capacity to distribute prosperity across territories, and generating opportunities for society and citizens.

The fifteen goals established articulate the debates and enable the different actors of the tourism ecosystem to advance autonomously towards their fulfilment, from their respective social positions, spheres of competence and institutional objectives, thus contributing to the coherence and effectiveness of the strategy as a whole.

With the aim of contributing to the shared agenda described above and advancing towards the 15 common goals, the Government of Spain proposes the Spain Tourism 2030 Plan.

The Spain Tourism 2030 Plan takes up the investment and transformative power of Component 14, analyses the challenges arising from the shared diagnosis and their relationship with the 15 agreed goals, and projects a new stage in which the sustainability of tourism becomes the backbone of all actions. And, as tourism is a deeply cross-cutting phenomenon, the Spanish government is promoting an integrated approach to tourism policy that strengthens coordination and cooperation.

To this end, the Spain Tourism 2030 Plan proposes 5 programmes, 20 objectives, 50 measures and 148 actions, in line with our vision of the future and in accordance with different central government competences.

4.1 THE RECOVERY, TRANSFORMATION AND RESILIENCE PLAN (RTRP) TO BOOST THE SUSTAINABILITY OF THE SPANISH TOURISM MODEL

The Recovery, Transformation and Resilience Plan (RTRP) is configured around four cross-cutting axes, which bring together ten lever policies and 30 components that articulate investment programmes and reforms to move towards a greener, more digital, cohesive and egalitarian country. The investments and reforms contained in and promoted by this Plan are therefore relevant to all the sectors that make up the Spanish economy since, although many of the components are of a cross-cutting nature, others are specifically aimed at stimulating certain economic sectors, such as mobility and transport, culture, trade and tourism, among others.

Within the RTRP, Component 14, Plan for the Modernisation and Competitiveness of the tourism sector is earmarking more than €3.4 billion for the implementation of actions that are already making progress on some of these objectives.

The design of innovative actions and the implementation of new lines of work are already part of the progress in the change of model promoted by the Spanish government.

COMPONENT 14, RECOVERY, TRANSFORMATION AND RESILIENCE PLAN €3.4 BILLION			
TRANSFORMATION OF THE TOURISM MODEL TOWARDS SUSTAINABILITY	**DIGITALISATION AND INTELLIGENCE FOR DESTINATIONS AND THE TOURISM SECTOR**	**TOURISM RESILIENCE FOR EXTRA-PENINSULAR TERRITORIES**	**SPECIAL ACTIONS IN THE FIELD OF COMPETITIVENESS**
Sustainable Tourism Strategy	Digitisation of Companies, "Last Mile" programme	Actions for the modernisation and conversion of tourism infrastructure, diversification and transition to a digital and green economy in the Balearic Islands, Canary Islands, Ceuta and Melilla	Spain Tourism Experiences
Sustainability plans in destinations	ITD digitisation		Impulsa Patrimonio Cultural Programme
SICTED and Host Evolution	Smart Destination Platform		Plans to support commerce in areas with a high tourist influx
Social Sustainability Plans	Open Innovation Platform		Energy efficiency and circular economy programme
€1.923 B	**€337 million**	**€220 million**	**€920 million**

Sustainability Strategy in Destinations and Sustainability Plans in Destinations

Coordinated action among the three levels of government—the General State Administration, the autonomous communities and local entities—to shape in each territory and destination a specific response tailored to its reality. The programme brings together more than 7,400 actions throughout the country that are improving the sustainability of the tourism model in social, environmental and economic terms.

168 Annex I analyses the opportunity and relationship derived from the different components of the RTRP for Spanish tourism, since its cross-cutting nature means that many of the components and reforms defined in the Plan affect it, to a greater or lesser extent.
169 https://planderecuperacion.gob.es/politicas-y-componentes/componente-14-plan-de-modernizacion-y-competitividad-del-sector-turistico

Developments in SICTED and Host programmes

Various actions to promote the evolution of working methodologies and support tools so that destinations can work with their nearby business ecosystems. In addition, awareness-raising and capacity-building activities are planned, which has involved updating the Host training programme. Social Sustainability Plans.

Programme transferred to the Autonomous Communities to carry out actions to promote the social sustainability of tourism in a broad sense. For example, awareness-raising campaigns or good practice guides have been developed.

Digitisation of tourism companies "Last Mile"

Aid programme to advance the digital transition of tourism companies, with special emphasis on SMEs, benefiting almost 500 companies. This line has allowed the strengthening of synergies between technology and tourism companies to develop innovative technological solutions and to implement technological solutions already on the market in tourism companies. The ultimate goal of digital transformation projects is to improve the management of companies in their customer relations, profit management and brand positioning.

ITD digitisation

Line of support for projects with technological and innovative content that promote the digitisation of the full members of the Network of Smart Tourist Destinations. Almost 50 tourist destinations have benefited, which, among other actions, have implemented smart systems to manage and process information, improving the efficiency and quality of key destination services, such as mobility and security.

Smart Destination Platform (SDP)

Evolution of the ITD model and implementation of the SDP. To this end, a line of support is being promoted for a first group of destinations to work on the initial phase of the SDP by developing their own platforms and use cases to join the central node. It is a pioneering project worldwide in the sharing of tourism data and the application of artificial intelligence to improve sustainable destination management and tourism governance.

Open Innovation Platform (OIP)

Development of a platform that complements the SDP to offer Spain's technology and tourism sector a space for sharing tourism data by enabling experimentation spaces (sandboxes). The aim is to generate applications and services for the entire tourism value chain.

Grants to research and knowledge dissemination organisations for R&D projects to meet the challenges facing tourist destinations

Programme to promote quality scientific research to advance tourism knowledge and offer solutions to environmental, economic and technological challenges, improving the competitiveness and resilience of destinations in Spain. It has also promoted the dissemination, transfer and applicability of the knowledge generated to destinations for use by the destination's public managers, especially at the local level.

Actions to modernise and reconvert tourism infrastructure, diversification and transition towards a digital and green economy in the Balearic Islands, Canary Islands, Ceuta and Melilla

Specific funding line for the two archipelagos, the Balearic Islands and the Canary Islands, and the two autonomous cities, Ceuta and Melilla. In the first case, the actions are aimed at the modernisation and reconversion of tourism services and infrastructures, training, diversification and deseasonalisation strategies and management of tourism pressure. In the second case, the measures promote the promotion of tourism in Ceuta and Melilla, enhancing the historical and cultural heritage and creating and improving tourism infrastructures and services.

Spain Tourism Experiences

A pioneering and highly innovative programme whose aim is to strengthen the networks of actors working on the creation or adaptation of experiences at the national level, as well as to increase and improve the sustainability of the supply of tourism experiences in Spain, encouraging their international promotion. More than 400 public and private entities grouped in more than 70 projects have participated in this programme, contributing to a more sophisticated and diversified offer.

Impulsa Patrimonio Cultural Programme

This combines maintenance, restoration and revaluation of the cultural heritage with tourist use and assets of cultural interest in Paradors. Actions for the maintenance, restoration and enhancement of cultural heritage are combined with the tourist use of cultural assets and properties of cultural interest in Paradores.

Plans to support commerce in areas with a high tourist influx

Investments under this line of aid are aimed at strengthening commercial activity in areas of high tourist influx, financing projects to boost competitiveness, innovation and modernisation of the local commercial offer, linked to the arrival of visitors to these commercial areas.

Energy efficiency and circular economy programme

Line of aid transferred to the autonomous communities to improve energy efficiency and the circular economy of tourism companies. Each autonomous community has adapted the calls to its sectoral reality. The thermal envelope of tourist establishments or the energy efficiency of heating and cooling installations are being improved; promoting photovoltaic installations; replacing equipment and household appliances with more efficient ones; automating and making the control of energy and water consumption more sophisticated and designing actions for waste management.

The following table describes the actions that, with resources from the RTRP component 14, linked to the EU Next Generation Fund, are being implemented by various actors in the tourism ecosystem.

RELATIONSHIP BETWEEN C14 PROGRAMMES AND OBJECTIVES OF THE SPAIN TOURISM 2030 PLAN

SPAIN TOURISM 2030 – GOVERNMENT OF SPAIN PLAN	COMPONENT 14, RECOVERY, TRANSFORMATION AND RESILIENCE PLAN			
OBJECTIVES	TRANSFORMATION OF THE TOURISM MODEL TOWARDS SUSTAINABILITY	DIGITALISATION AND INTELLIGENCE FOR DESTINATIONS AND THE TOURISM SECTOR	TOURISM RESILIENCE FOR EXTRA-PENINSULAR TERRITORIES	SPECIAL ACTIONS IN THE FIELD OF COMPETITIVENESS
	€1.923 B	€337 million	€220 million	€920 million
TOURISM 2030 – DESTINATIONS				
Increase destination management capacities, improving the decision-making process		■		
Promote the improvement and prosperity of different types of destinations	■			
Strengthen the resilience of destinations to various crises	■		■	
Promote improvements in collaborative tourism governance systems	■			
Move towards destinations that are committed to environmental sustainability and more resilient, safe and prosperous in the new climate context	■		■	
International leadership and cooperation				
TOURISM 2030 – BUSINESS				
Boost the digital transformation of tourism businesses		■		
Address more effectively the barriers related to the size of tourism businesses and a complex regulatory environment				
Consolidate sustainable and marketable tourism experiences abroad				■
Improve the communication of tourism companies' ESG sustainability actions				
Accelerate the green transition of tourism enterprises by implementing effective circular economy actions				■
TOURISM 2030 – TALENT				
Improve the processes of attracting and retaining talent in companies in the tourism sector		■		
Enhance the occupational well-being of tourism talent				
Optimise training for the Twin Transition	■	■	■	
TOURISM 2030 – RESIDENTS				
Strengthen the social cohesion of tourist destinations and promote balanced coexistence		■		
Encourage processes of local living culture and the maintenance and enjoyment of tangible and intangible cultural heritage assets				
Revalue the public's perception of destinations by recognising the environmental sustainability actions of the tourism sector	■	■	■	
TOURISM 2030 – TOURISTS				
Turn tourism marketing into a tool for sustainability		■		
Communicate values to those who visit us in order to promote a good development of the activity				
Increase the contribution of tourists to the environmental sustainability of the activity				■

4.2 CHALLENGES AND OBJECTIVES

Spain Tourism 2030 Plan is based on the diagnosis carried out to detect the priority challenges that emerge from it and which are presented in the following table.

KEY CHALLENGES BY DIMENSION		
ECONOMIC	**SOCIAL**	**ENVIRONMENTAL**
Enterprises: predominance of micro-enterprises (93.8% are micro-enterprises or self-employed). This generates local wealth, but means lower productivity and difficulties with innovation and digitalisation processes. **Differentiated destinations:** Weakness of management bodies and little digitalisation of decision-making Destinations with a high level of tourism development: these are mainly sun and beach destinations, with a high concentration of demand (66.8%) and which require sustainable reconversion processes. Also some consolidated urban destinations, with risk of pressure on services and public space. Destinations with a low level of tourism development: these are generally rural destinations and tourism is an opportunity for these territories, especially for those facing the demographic challenge. **Talent:** labour shortage (42% of companies affected), labour quality problems and need to adapt training (lack of soft skills training and high volatility of knowledge). **Supply:** higher-value products are growing and experiences are gaining ground. **Demand:** responsible marketing. **Responsible connectivity:** Air transport (progress is being made with the SAF); Road transport (electrification in progress, with some problems); Rail (the cleanest option, but with limitations); Cruise ships (with the highest comparative environmental impact).	**Balanced coexistence:** Saturation problems at some destinations. Pressure on housing (expanding tourist housing, now more controlled with the Single Registry of Rentals). Increasing urbanisation process (88% of the population will live in cities by 2050), which will increase pressure on some destinations. **Tourism employment:** Bias persists, due to the dynamics of the activity. Women account for 47.2% of tourism employment, but only 33% in managerial positions. The ageing process will affect tourism employment. **Inclusion:** it would be necessary to better understand the role of tourism employment as a tool for inclusion of vulnerable groups and to improve mechanisms. Improved **communication effort in ESG actions** of tourism companies. **Living culture:** processes of loss of sense of place can occur. **Governance:** multi-level model; greater coordination and public-private partnerships are urgently needed. **Raising** tourist awareness of the values of the territories.	**Climate change:** Tourism generates greenhouse gas emissions that intensify climate change and new climate scenarios affect the sustainability of many destinations. Rising global temperatures have effects on the spatial and temporal distribution of demand. They also affect the country of origin. Extreme weather events (e.g. heat waves, droughts, floods, fires, etc.) are expected to become more frequent and intense, requiring improved management and prevention systems. The most vulnerable destinations are those most exposed to impacts and those most dependent on resources that can be altered (e.g. beach, climate, snow...). **Reduction of tourist consumption of natural resources:** There is a lack of data on tourism consumption of water, energy and other resources. Processes must be improved to reduce consumption in the different sub-sectors. Problems with biodiversity protection. **Circularity:** need to improve the implementation of circularity processes in all sub-sectors and actors. **Sustainable mobility:** The decarbonisation of transport, the contribution of which to national GHG emissions is 32.4% and is expected to increase further in the short term, is central. There is a lack of sustainable urban mobility plans for tourist destinations. **Commitment** to climate emergency by all actors, including tourists. **Improving training** for talent to adapt to the green and digital transitions.

These challenges are linked to the 15 goals described above and are ordered according to the guiding principles of the Strategy.

KEY CHALLENGES BY DIMENSION			
Persons	Economic	Social	Environmental
People who make destinations DESTINATIONS	**Goal 1** Transforming Spanish tourist destinations	**Goal 2** Enhancing collaborative governance	**Goal 3** Green and blue tourism
	Differentiated destinations • Weakness of the managing entities and little digitalisation in decision-making. • Destinations with a high level of tourism development: these are mainly sun and beach destinations, with a high concentration of demand (66.8%) and requiring sustainable reconversion processes. Also some consolidated urban destinations, with risk of pressure on services and public space. • Low-level tourism development destinations: they are rural and tourism is an opportunity for these territories, especially for those facing the demographic challenge.	**Governance:** Multilevel model, more coordination and public-private partnerships are urgently needed.	**Climate change:** • The average temperature has risen by +1.7°C. This has direct effects on tourism. • Droughts are increasing, with an impact on water governance. • Extreme events and rising sea levels are intensifying. **Sustainable mobility:** • There is a lack of sustainable tourism mobility in destinations.
People who create jobs COMPANIES	**Goal 4** Competitive innovation	**Goal 5** Responsible companies	**Goal 6** Circular economy
	Enterprises: predominance of micro-enterprises (>90%): local wealth, but lower productivity, innovation and digitalisation. **Supply:** higher-value products are growing and experiences are gaining ground. **Demand:** responsible marketing.	Improved **communication effort** in ESG actions of tourism companies.	**Circularity:** circularity processes applied to all sub-sectors and actors. **Responsible connectivity** • air transport (progress is being made with the SAF); • road transport (electrification in progress, with some problems); • rail (cleaner but with limitations); • cruise ships (with the highest comparative environmental impact).
People who work TALENT	**Goal 7** Talent	**Goal 8** Labour equity	**Goal 9** Twin transition and tourism employment
	Talent: labour shortage (42% of companies affected), labour quality problems and need to adapt training (lack of soft skills training and high volatility of knowledge).	**Employment:** Bias persists due to the dynamics of the activity. Women account for 47.2% of tourism employment, but only 33% in managerial positions. The ageing process will affect tourism employment.	Improving training for **talent** to adapt to the **green and digital transitions.**

KEY CHALLENGES BY DIMENSION			
Persons	Economic	Social	Environmental
People who host people **RESIDENTS**	**Goal 10** Social cohesion	**Goal 11** Living culture and cultural heritage	**Goal 12** Environmental commitment
	Balanced coexistence: Saturation problems at some destinations. Pressure on housing (expanding tourist housing, now more controlled with the Single Registry of Rentals). Increasing urbanisation process (88% of the population will live in cities by 2050), which will increase pressure on some destinations. **Inclusion:** it would be necessary to better understand the role of tourism employment as a tool for inclusion of vulnerable groups and to improve mechanisms.	**Living culture:** risk of loss of sense of place.	**Few collaborative initiatives between tourism businesses and citizens:** improving sustainability and reputation.
People who travel **TOURISTS**	**Goal 13** Responsible marketing	**Goal 14** Social awareness	**Goal 15** Environmental awareness
	Demand: attracting segments that optimise the social and economic profitability of tourism activity. Supply: destinations and companies **committed to sustainability.**	**Awareness-raising:** values of the territories and promoting responsible behaviour of tourists at the destination.	**Commitment:** from all actors, including tourists, climate emergency.

In order to meet these challenges, five programmes are being promoted for the five target groups. The programmes aim to take advantage of existing opportunities and support capacity building, proposing actions that can induce changes to reorient the contexts, processes and practices of the different people who, from their roles, build tourism and its sector.

SPAIN TOURISM 2030 PLAN 5 PROGRAMMES			
People who make destinations **DESTINATIONS**	**Goal 1** Transforming Spanish tourist destinations	**Goal 2** Enhancing collaborative governance	**Goal 3** Green and blue tourism
	PROGRAMME DESTINATIONS		
People who create jobs **COMPANIES**	**Goal 4** Competitive innovation	**Goal 5** Responsible companies	**Goal 6** Circular economy
	PROGRAMME COMPANIES		
People who work **TALENT**	**Goal 7** Talent	**Goal 8** Labour equity	**Goal 9** Dual transition and tourism employment
	TALENT PROGRAMME		
People who host people **RESIDENTS**	**Goal 10** Social cohesion	**Goal 11** Living culture and cultural heritage	**Goal 12** Environmental commitment
	RESIDENT PROGRAMME		
People who travel **TOURISTS**	**Goal 13** Responsible marketing	**Goal 14** Social awareness	**Goal 15** Environmental awareness
	TOURISTS PROGRAMME		

For each of these programmes, targets are set to change the challenges described above. The objectives are as follows.

SPAIN TOURISM 2030 PLAN 20 OBJECTIVES
TOURISM 2030 – DESTINATIONS
OBJECTIVES
Increase the management capacities of destinations, improving the decision-making process.
Promote the improvement and prosperity of different types of destinations.
Strengthen the resilience of destinations to various crises.
Promote improvements in collaborative tourism governance systems.
Move towards destinations committed to environmental sustainability and more resilient, safe and prosperous in the new climate context.
International leadership and cooperation.
TOURISM 2030 – BUSINESS
OBJECTIVES
Boost the digital transformation of tourism companies.
Tackle more effectively the barriers related to the size of tourism enterprises and to a complex regulatory environment.
Consolidate sustainable and marketable tourism experiences abroad.
Improve the communication of tourism companies' ESG sustainability actions.
Consolidate sustainable and marketable tourism experiences abroad.
Accelerate the green transition of tourism businesses, promoting decarbonisation and their adaptation to the new climate context, increasing their resilience.
TOURISM 2030 – TALENT
OBJECTIVES
Improve the processes of attracting and retaining talent in companies in the tourism sector.
Increase the occupational well-being of tourism talent.
Optimise training for the development of skills and competences to respond to the twin transition and foster a new culture of prevention and response.
TOURISM 2030 – RESIDENTS
OBJECTIVES
Strengthen the social cohesion of tourist destinations and promote a balanced coexistence between residents and visitors.
Encourage processes of local living culture and the maintenance and enjoyment of tangible and intangible cultural heritage assets.
Revalue the public's perception of destinations through the recognition of environmental sustainability actions in the tourism sector.
TOURISM 2030 – TOURISTS
OBJECTIVES
Turn tourism marketing into a tool for sustainability.
Communicate values to those who visit us in order to promote a good development of the activity.
Increase the contribution of tourists to the environmental sustainability of the activity.

These objectives are articulated in measures and instruments that engage different bodies[170].

The measures, the instruments, the entities responsible for each of them and the expected timeframe are described below, in order of importance for each of the programmes.

170 All commitments arising from the implementation of the Strategy are subject to the budgetary availabilities in the current and subsequent years, in accordance with the fiscal consolidation path set by the Government. In the case of actions for which the Autonomous Communities and Local Corporations are competent, the provisions of the Strategy will be optional. All this in compliance with the provisions of section 3 of Article 7 of Organic Law 2/2012 of 27 April, on Budgetary Stability and Financial Sustainability, which regulates the principle of efficiency in the allocation and use of public resources.

4.3 DESTINATION PROGRAMME

The **DESTINATIONS PROGRAMME** pursues six objectives: to increase the capacities of destinations, improving the decision making of managers; to promote the improvement and prosperity of different types of destinations; to promote improvements in the systems of collaborative governance of tourism; to move towards destinations committed to environmental sustainability and more resilient, safe and prosperous in the new climate context and to maintain Spain's international leadership in the field of tourism.

OBJECTIVE INCREASE DESTINATION MANAGEMENT CAPACITIES, IMPROVING THE DECISION-MAKING PROCESS		
MEASUREMENTS	**INSTRUMENTS**	**RESPONSIBLE**
What	**How**	**Who**
1 **Strengthen destinations and their tourism management organisations to improve their resilience**	Support for destination management teams by means of accompanying systems and expanding their capacities, with the ITD, SICTED and Smart Destination Platform (SDP) methodologies integrated into the Integrated Sustainability and Tourism Intelligence System (SSTI).	Secretaría de Estado de Turismo (Secretary of State for Tourism) and Segittur
	Creation of a Smart Tourism Community to foster knowledge-sharing networks that offer destination teams the opportunity to share experiences, best practices and lessons learned.	Secretaría de Estado de Turismo and Segittur
2 **Review of the definition of the concept of tourist municipality**	Review of the definition of the concept of tourist municipality.	Secretaría de Estado de Turismo and Secretaría de Estado de Hacienda (Secretariat of State for Finance), Ministerio de Hacienda (Ministry of Finance)
3 **Improve understanding of the impact of activity on public services**	Carrying out a detailed analysis of the effects of tourism on health systems, both public and private, especially in areas with a high influx of visitors.	Secretaría de Estado de Turismo and Secretaría de Estado de Sanidad (Secretariat of State for Health)

OBJECTIVE PROMOTE THE IMPROVEMENT AND PROSPERITY OF DIFFERENT TYPES OF DESTINATIONS		
MEASUREMENTS	**INSTRUMENTS**	**RESPONSIBLE**
What	**How**	**Who**
4 **Renewing and boosting Spanish sun and beach destinations**	Conduct studies to understand current challenges and design new tourism policies accordingly.	Secretaría de Estado de Turismo
	Progress in destination regeneration programmes, aimed at the conversion of specific areas, the renovation of tourist establishments and infrastructures and environmental regeneration, within the framework of the Strategy for Sustainable Tourism in Destinations.	Secretaría de Estado de Turismo and Ministerio de Vivienda y Agenda Urbana (Ministry of Housing and Urban Agenda)
	Promote innovative financial instruments for the refurbishment and rehabilitation of destinations.	Secretaría de Estado de Turismo

5 **Enhancing cohesive urban destinations**	Encouragement and support for the development of actions to improve the urban environment in tourist destinations and their articulation with the urban and territorial policies of each municipality, within the framework of the Strategy for Sustainable Tourism in Destinations.	Secretaría de Estado de Turismo and Ministerio de Vivienda y Agenda Urbana
	Incorporation of the concept of urban landscape in cities.	Secretaría de Estado de Turismo and Ministerio de Vivienda y Agenda Urbana
	Promoting new technological tools for decision-making on the spatial impacts of tourism.	Secretaría de Estado de Turismo, Segittur and local authorities
6 **Consolidate rural destinations as an engine for the redistribution of tourist income and the fight against depopulation**	Integration of the Demographic Challenge perspective in the deployment of tourism policies in line with the principle of rural proofing, and incorporation of positive discrimination criteria for these territories.	Secretaría de Estado de Turismo and Ministerio de Transición Ecológica y Reto Demográfico
	Development of initiatives with the Network of Territorial Innovation Centres.	Secretaría de Estado de Turismo and Ministerio de Transición Ecológica y Reto Demográfico
	Support programmes for the construction of intersectoral actions in rural territories, supporting collaborative initiatives between municipalities, groups and Rural Development Groups or Local Action Groups.	Secretaría de Estado de Turismo, Paradores de Turismo, Segittur, Ministerio de Transición Ecológica y Reto Demográfico and Ministerio de Agricultura, Pesca y Alimentación
	Adaptation and rehabilitation of nature trails for tourist use, making improvements in terms of accessibility and reducing the environmental impact by increasing the number of cycle routes and promoting a communication campaign.	Secretaría de Estado de Turismo and Ministerio de Agricultura, Pesca y Alimentación
7 **Focus on nature destinations that are leaders in ecotourism**	Development of joint planning tools in natural areas that incorporate the vision of all actors involved in the value chain of nature tourism destinations.	Secretaría de Estado de Turismo and Ministerio de Transición Ecológica y Reto Demográfico
	Promoting the development of ecotourism clusters and networks, which foster collaboration between stakeholders and support the growth of sustainable ecotourism.	Secretaría de Estado de Turismo
	Analysis of mechanisms to promote tourist support for biodiversity conservation and maintenance of protected areas.	Secretaría de Estado de Turismo
8 **Improve internal and external connectivity, fostering coordination and favouring the geographical redistribution of tourist flows**	Improve strategic coordination for tourism connectivity.	Secretaría de Estado de Turismo, Turespaña and Ministerio de Transportes y Movilidad Sostenible
	Promotion of destination connectivity studies.	Secretaría de Estado de Turismo, Turespaña and Ministerio de Transportes y Movilidad Sostenible
	Promoting the use of new technologies in connectivity management	Secretaría de Estado de Turismo, Turespaña and Ministerio de Transportes y Movilidad Sostenible

OBJECTIVE STRENGTHEN THE RESILIENCE OF DESTINATIONS TO VARIOUS CRISES		
MEASUREMENTS	**INSTRUMENTS**	**RESPONSIBLE**
What	**How**	**Who**
9 **Improve resilience and responsiveness to a range of crises**	Creation of an early response committee for tourism crises and protocols for action.	Secretaría de Estado de Turismo
	Development of crisis management plans in tourist destinations to improve prevention and response, through their inclusion in the Integrated Tourism Sustainability and Intelligence System (SSITI) and the design of action protocols in collaboration with the Ministry of the Interior's Safe Tourism Plan programme.	Secretaría de Estado de Turismo, Segittur and Ministerio de Interior
	Use of the State Financial Fund for Tourism Competitiveness (FOCIT) to support in crisis situations.	Secretaría de Estado de Turismo

OBJECTIVE PROMOTE IMPROVEMENTS IN COLLABORATIVE TOURISM GOVERNANCE SYSTEMS		
MEASUREMENTS	**INSTRUMENTS**	**RESPONSIBLE**
What	**How**	**Who**
10 **Improving collaborative governance between tourism stakeholders**	Promotion of the Interministerial Commission on Tourism.	Secretaría de Estado de Turismo
	Creation within CONESTUR of a working group for the innovation of the body, including citizen participation.	Secretaría de Estado de Turismo
	Promotion of stable collaboration networks between destinations to strengthen relations and generate synergies between destinations of different types.	Secretaría de Estado de Turismo
	Boost the governance of Turespaña and Segittur.	Secretaría de Estado de Turismo
	Actions for knowledge transfer and sharing of good practices in destinations, to promote collaboration between destinations and joint management.	Secretaría de Estado de Turismo

OBJECTIVE MOVE TOWARDS DESTINATIONS THAT ARE COMMITTED TO ENVIRONMENTAL SUSTAINABILITY AND MORE RESILIENT, SAFE AND PROSPEROUS IN THE NEW CLIMATE CONTEXT		
MEASUREMENTS	**INSTRUMENTS**	**RESPONSIBLE**
What	**How**	**Who**
11 **Establish environmental sustainability indicators for tourism applicable to all destinations**	Contribution to a proposal for common indicators to assess the environmental impact of destinations in a transparent and comparable way.	Secretaría de Estado de Turismo
	Technological development and adoption of artificial intelligence models to measure and analyse data on the environmental sustainability of tourism activity.	Secretaría de Estado de Turismo and Segittur
	Promotion of a catalogue of recognition and accreditation systems that enable the green transition to progress at different speeds for different types of companies and destinations.	Secretaría de Estado de Turismo and Segittur

12 **Promote mitigation and adaptation to climate change in tourist destinations, within the framework of the State Pact for Climate Emergency**	Promotion of a Platform for Adaptation of tourism to climate change in Spain.	Secretaría de Estado de Turismo
	Encourage the implementation of Climate Action Plans for different types of destinations.	Secretaría de Estado de Turismo and Ministerio para la Transición Ecológica y Reto Demográfico
	Support to tourism destinations to improve risk management linked to climate change.	Secretaría de Estado de Turismo and Ministerio para la Transición Ecológica y Reto Demográfico
	Generation of technologies for the calculation of the environmental footprint of tourism at destination level, promoting the use of the MITECO Carbon Footprint Register.	Secretariat of State for Tourism, Segittur and the Ministry of Ecological Transition and Demographic Challenge
	Pilot project to analyse mitigation and adaptation in the hotel sector.	Secretariat of State for Tourism and Paradores de Turismo
13 **Increase the contribution of tourism activity to the reduction of natural resource consumption**	Encouraging the implementation of mechanisms to reduce water consumption.	Secretaría de Estado de Turismo and Ministerio para la Transición Ecológica y Reto Demográfico
	Promoting local pacts for self-sufficiency in tourist destinations.	Secretariat of State for Tourism and local authorities.
	Analysis of financial instruments that favour the implementation of self-sufficiency pilot projects in tourist destinations.	Secretaría de Estado de Turismo and Ministerio para la Transición Ecológica y Reto Demográfico
	Forum for collaboration between experts and companies in the sector on the reduction of consumption and regeneration of natural resources.	Secretaría de Estado de Turismo
	Promote a study of the potential ESG impacts for the tourism sector to prioritise actions to mitigate risks.	Secretaría de Estado de Turismo
14 **Support alternative sustainable tourism mobility solutions at destinations**	Promotion of alternative mobility in line with mitigation strategies.	Secretaría de Estado de Turismo and Ministerio de Transportes y Movilidad Sostenible
	Establishment of a carbon footprint offset programme in line with mitigation strategies.	Secretaría de Estado de Turismo and Ministerio de Transportes y Movilidad Sostenible
	Promotion of actions to encourage alternative tourist mobility at the destination, in line with mitigation policies.	Secretaría de Estado de Turismo
15 **Integrate tourism strategies in the management of the sea and coastline**	Promotion of sustainable nautical tourism and reduction of environmental impact in line with the Spain Maritime Strategy 2025-2050.	Secretary of State for Tourism and Ministry of Transport and Sustainable Mobility
	Cooperate with the Ministry of Ecological Transition and Demographic Challenge in the deployment of measures related to tourism activity on the coast.	Secretaría de Estado de Turismo and Ministerio para la Transición Ecológica y Reto Demográfico
	Destinations Guardians of the Sea Programme, within the framework of the Tourism Sustainability Strategy in Destinations.	Secretaría de Estado de Turismo y Ministerio de Agricultura, Pesca y Alimentación y Ministerio de Transición Ecológica y para el Reto Demográfico
16 **Make digitalisation the main tool for advancing the environmental and social sustainability of destinations**	Use of the SDP and the OIP to advance in the generation of simple tools to advance sustainability objectives in destinations.	Secretaría de Estado de Turismo and Segittur
	Implementation of innovative technologies, including AI, to advance the implementation of processes that advance the environmental and social sustainability of tourist destinations.	Secretaría de Estado de Turismo, Segittur and Turespaña

OBJECTIVE ESPAÑA LIDERA		
MEASUREMENTS	**INSTRUMENTS**	**RESPONSIBLE**
What	**How**	**Who**
17 **International leadership and cooperation**	Support for the internationalisation of Spanish tourism companies and the Spain brand.	Ministerio de Economía, Comercio y Empresa, Secretaría de Estado de Turismo, Turespaña and Segittur
	Promotion of a Plan for the dissemination of initiatives to support tourism by the Spanish Government.	Secretaría de Estado de Turismo, Turespaña and Segittur
	Development of cooperation actions in the field of tourism.	Ministerio de Asuntos Exteriores, Unión Europea y Cooperación

4.4 BUSINESS PROGRAMME

The objectives of the **ENTERPRISE PROGRAMME** are: to boost the digital transformation of tourism companies; to tackle more effectively the barriers related to their size and to a regulatory environment that needs to be simplified; to consolidate networks of sustainable tourism experiences that can be marketed abroad, to improve the communication of corporate social responsibility actions and to accelerate the green transition by implementing effective circular economy actions.

OBJECTIVE BOOST THE DIGITAL TRANSFORMATION OF TOURISM BUSINESSES		
MEASUREMENTS	**INSTRUMENTS**	**RESPONSIBLE**
What	**How**	**Who**
18 **Using new technologies to generate more tourist intelligence**	Establishment of a governance model for tourism data collection and analysis.	Secretaría de Estado de Turismo and Segittur
	Development of a code of good practice for the use of data related to tourist intelligence.	Secretaría de Estado de Turismo and Segittur
	Exploitation of the Smart Destination Platform (SDP) as a tool for common knowledge and interaction with tourists at the destination and data capture.	Secretaría de Estado de Turismo and Segittur
19 **Strengthen the adoption of mature and innovative technologies by the tourism sector, especially SMEs and micro-SMEs**	Tools for bridging the digital divide.	Secretaría de Estado de Turismo and Ministerio de Transformación Digital y Función Pública
	Enabling digital advisory programmes and boosting the adoption of innovative technologies.	Secretaría de Estado de Turismo, Segittur, Secretaría de Estado de Industria and Ministerio de Transformación Digital y Función Pública
	Dissemination of digital initiatives promoted by companies and destinations in the sector.	Secretaría de Estado de Turismo
	Development of innovation recognition mechanisms.	Secretaría de Estado de Turismo and Ministerio de Transformación Digital y Función Pública

OBJECTIVE ADDRESS MORE EFFECTIVELY THE BARRIERS RELATED TO THE SIZE OF TOURISM BUSINESSES AND A COMPLEX REGULATORY ENVIRONMENT		
MEASUREMENTS	**INSTRUMENTS**	**RESPONSIBLE**
What	**How**	**Who**
20 **Foster business cooperation, integration or convergence processes**	Promotion of incentives and programmes to stimulate business cooperation, integration or convergence processes.	Secretaría de Estado de Turismo and Secretaría de Estado de Sanidad
	Foster collaboration for the generation of clusters that promote cooperation and act as platforms for collaborative innovation between industry, SMEs, technology centres and the administration.	Secretaría de Estado de Turismo and Secretaría de Estado de Sanidad
	Strengthening of SME collaboration platforms.	Secretaría de Estado de Turismo and Secretaría de Estado de Sanidad

21 **Improve and simplify the regulatory environment for tourism activities**	Establishing a public-private working group to simplify the regulatory environment	Secretaría de Estado de Turismo and Ministerio de Economía, Comercio y Empresa.
	Revitalisation of the Tourism Legislation Observatory (LEGISTUR) and elaboration of a Tourism Skills Map.	Secretaría de Estado de Turismo
	AI project to improve understanding and compliance with the regulatory environment.	Secretaría de Estado de Turismo and Segittur

OBJECTIVE
CONSOLIDATE SUSTAINABLE AND MARKETABLE TOURISM EXPERIENCES ABROAD

MEASUREMENTS	INSTRUMENTS	RESPONSIBLE
What	**How**	**Who**
22 **Consolidate networks of actors into sustainable operational and marketable experiences**	Training and digitisation programmes for SMEs and micro-SMEs on the shift from product to experience.	Secretaría de Estado de Turismo and Segittur
	Experiencias Turismo España aid programme.	Secretaría de Estado de Turismo
	Design and implementation of communication plans and marketing campaigns for the specific promotion of renewed tourism experiences.	Secretaría de Estado de Turismo and Turespaña
	Promotion of tourism typologies involving other ministries (e.g. astro-tourism or food and wine tourism).	Secretaría de Estado de Turismo, Ministerio de Ciencia, Innovación y Universidades and Ministerio de Transición Ecológica y Reto Demográfico. Ministerio de Agricultura, Pesca y Alimentación
	Promote experiences aimed at people with special needs and training programmes for tourism staff to provide them with the right care.	Secretaría de Estado de Turismo and Ministerio de Inclusión, Seguridad Social y Migraciones

OBJECTIVE
IMPROVE COMMUNICATION OF THE ENVIRONMENTAL, SOCIAL AND GOVERNANCE ASPECTS OF TOURISM ENTERPRISES

MEASUREMENTS	INSTRUMENTS	RESPONSIBLE
What	**How**	**Who**
23 **Promote ESG sustainability and due diligence of Spanish companies and other shared responsibility tools**	Timely transposition of Directive (EU) 2024/1760 on sustainability due diligence, applying the corresponding obligations in the tourism sector to companies exceeding the thresholds, under the supervision of a national supervisory authority.	Secretaría de Estado de Turismo and Ministerio de Economía, Comercio y Empresa
	Support for SMEs in the sector through the support framework provided for in European legislation and Commission guidelines, avoiding disproportionate burdens.	Secretaría de Estado de Turismo and Ministerio de Economía, Comercio y Empresa
	Strengthening of existing support systems and programmes, such as SICTED or ITD, and the development of new complementary services aimed at promoting responsible leadership.	Secretaría de Estado de Turismo and Segittur
	Implementation of a catalogue of responsible tourism certifications following the criteria of Directive (EU) 2024/825.	Secretaría de Estado de Turismo
	Generating partnerships with international bodies to ensure alignment of quality standards with globally recognised practices.	Secretaría de Estado de Turismo and Turespaña

24 **Create cross-cutting networks and forums for dialogue with actors from other sectors to jointly address common challenges**	Promoting actions between agents in the tourism sector and agents in other sectors that introduce incentives for cooperation between the two.	Secretaría de Estado de Turismo
	Organisation of dialogue forums to address common challenges between different economic sectors.	Secretaría de Estado de Turismo and Turespaña

OBJECTIVE **ACCELERATE THE GREEN TRANSITION OF TOURISM BUSINESSES, PROMOTING DECARBONISATION AND THEIR ADAPTATION TO THE NEW CLIMATE CONTEXT, INCREASING THEIR RESILIENCE**		
MEASUREMENTS	**INSTRUMENTS**	**RESPONSIBLE**
What	**How**	**Who**
25 **Boost the circular economy around tourism**	Development of a prototype waste management plan for the tourism sector.	Secretaría de Estado de Turismo and Ministerio para la Transición Ecológica y Reto Demográfico
	Encourage the reduction of food waste, in line with Law 1/2025 on the prevention of food losses and food waste and the Estrategia Nacional de Alimentación (National Food Strategy – ENA).	Secretaría de Estado de Turismo and Ministerio de Agricultura, Pesca y Alimentación
	Pilot project for tourist destinations and establishments supported by the Integrated Tourism Sustainability and Intelligence System.	Secretaría de Estado de Turismo, Segittur and Paradores de Turismo
	Industry membership of the Global Initiative on Tourism and Plastics.	Secretaría de Estado de Turismo
26 **Support SMEs and micro-SMEs to implement climate change mitigation and adaptation actions**	Development of guidelines to speed up the implementation of actions to reduce environmental impact.	Secretaría de Estado de Turismo and Ministerio para la Transición Ecológica y Reto Demográfico
	Encourage tourism businesses to calculate their carbon footprint and offset residual emissions through the MITECO Carbon Footprint Register.	Secretaría de Estado de Turismo and Ministerio para la Transición Ecológica y Reto Demográfico
	Promotion of sustainability training for SMEs and micro-SMEs.	Secretaría de Estado de Turismo and Segittur
	Actions to boost investment in energy efficiency and circular economy measures with a return in the medium/long term.	Secretaría de Estado de Turismo and Ministerio para la Transición Ecológica y Reto Demográfico (IDAE)
27 **Encourage tourism entrepreneurship in the most disadvantaged regions, promoting twin transition and territorial balance**	Review of regional incentives applied to tourism activity.	Secretaría de Estado de Turismo and Ministerio de Hacienda
28 **Support the adaptation of the different means of transport to the new sustainability regulations and promote the development of alternative transport systems**	Alignment of a decarbonisation roadmap for transport companies providing mainly tourist mobility services.	Secretaría de Estado de Turismo and Ministerio para la Transición Ecológica y Reto Demográfico
	Development of a communication campaign on sustainability in the tourism industry to make visible the efforts implemented and planned and its commitment to decarbonisation.	Secretaría de Estado de Turismo and Turespaña
	Promotion of a policy that facilitates R&D&I and the production of PAS at national level as a key strategic pillar for the future of Spain's tourist mobility.	Ministerio para la Transición Ecológica and Reto Demográfico y Ministerio de Industria y Turismo

4.5 TALENT PROGRAMME

The objectives of the **TALENT PROGRAMME** are: to improve the processes of attracting and retaining talent in companies in the tourism sector; to increase the well-being at work of tourism talent and to optimise training as a tool for developing skills and competences and for adapting workers in the sector to the twin transition and fostering a new culture of prevention and reaction.

OBJECTIVE IMPROVE THE PROCESSES OF ATTRACTING AND RETAINING TALENT IN COMPANIES IN THE TOURISM SECTOR		
MEASUREMENTS	**INSTRUMENTS**	**RESPONSIBLE**
What	**How**	**Who**
29 **Capture the best talent and putting people at the centre**	Impact analysis of new vocational trends in the sector.	Secretaría de Estado de Turismo and Ministerio de Educación, Formación Profesional y Deportes
	Review of measures and tools put forward by other economic sectors and other countries to attract talent, in line with the European Commission's Union of Skills Strategy.	Secretaría de Estado de Turismo
	Implementation of pilot actions for innovation and good working practices.	Secretaría de Estado de Turismo and Ministerio de Trabajo y Economía Social
	Awareness-raising actions on facilitating inclusion mechanisms for vulnerable groups in the sector.	Secretaría de Estado de Turismo and Ministerio de Trabajo y Economía Social
30 **Improve the ability to attract talent to the tourism sector**	Improve and promote career development in the sector.	Secretaría de Estado de Turismo and Ministerio de Educación, Formación Profesional y Deportes
	Support interaction and dialogue to identify good practices related to sustainable employment.	Secretaría de Estado de Turismo, Ministerio de Trabajo y Economía Social and Ministerio de Educación, Formación Profesional y Deportes
	Promotion of programmes to support generational transition.	Secretaría de Estado de Turismo, Ministerio de Trabajo y Economía Social and Ministerio de Educación, Formación Profesional y Deportes
	Facilitation of the development of occupational risk prevention actions by companies in the sector.	Secretaría de Estado de Turismo and Ministerio de Trabajo y Economía Social

OBJECTIVE INCREASE THE OCCUPATIONAL WELL-BEING OF TOURISM TALENT		
MEASUREMENTS	**INSTRUMENTS**	**RESPONSIBLE**
What	**How**	**Who**
31 **Draw up and approve a Pact for the Labour Welfare of Workers in the Tourism Sector**	Establishment of spaces for consultation and negotiation that allow for the exchange of information and debate in order to generate consensus in the drafting and approval of a Pacto por el Bienestar Laboral de las Personas (Pact for People's Well-being at Work).	Ministerio de Trabajo y Economía Social with the collaboration of the Secretaría de Estado de Turismo
	Open repository of all collective agreements affecting the sector signed in different territories.	Secretaría de Estado de Turismo
32 **Promote reputational change by improving the prestige of tourism employment and awareness of tourism professions**	Raise society's awareness of the diversity and relevance of tourism employment.	Secretaría de Estado de Turismo
	Creation of a Platform of Tourism Communicators.	Secretaría de Estado de Turismo
33 **Promote mechanisms to help achieve equality, accessibility and inclusion of talent in the sector**	Design of a pilot programme to attract and retain female talent.	Secretaría de Estado de Turismo and Ministerio de Igualdad
	Development of guidelines to facilitate gender mainstreaming in tourism employment.	Secretaría de Estado de Turismo and Ministerio de Igualdad
	Design of programmes to support diversity in the workplace.	Secretaría de Estado de Turismo, Ministerio de Derechos Sociales, Consumo y Agenda 2030 and Ministerio de Inclusión, Seguridad Social y Migraciones
	Collaboration with associations that facilitate job creation for people with disabilities.	Secretaría de Estado de Turismo and Ministerio de Derechos Sociales, Consumo y Agenda 2030
	Promote analyses that allow for a better understanding of tourism employment, taking into account a gender approach and an explicit intersectional approach.	Secretaría de Estado de Turismo and Ministerio de Igualdad
	Draw up catalogues of good practices for the inclusion of vulnerable groups in tourism employment.	Secretaría de Estado de Turismo and Ministerio de Derechos Sociales, Consumo y Agenda 2030
	Promote responsible public procurement with social criteria in the procurement processes of the Secretariat of Secretaría de Estado de Turismo and dependent bodies.	Secretaría de Estado de Turismo

OBJECTIVE OPTIMISE TRAINING FOR THE DEVELOPMENT OF SKILLS AND COMPETENCIES TO RESPOND TO THE TWIN TRANSITION AND TO FOSTER A NEW CULTURE OF PREVENTION AND RESPONSE		
MEASUREMENTS	**INSTRUMENTS**	**RESPONSIBLE**
What	**How**	**Who**
34 **Improve training by participating in it**	Collaboration in the innovation of training content related to tourism at all educational levels.	Secretaría de Estado de Turismo
	Promotion of dual vocational training in the tourism sector, guaranteeing the availability of a sufficient number of companies for its correct implementation.	Secretaría de Estado de Turismo, Paradores de Turismo and Ministerio de Educación, Formación Profesional y Deportes
	Incorporation of instruments to promote dual training among SMEs, ensuring that there is an adequate number of participating companies to meet the demand for training.	Secretaría de Estado de Turismo and Ministerio de Educación, Formación Profesional y Deportes
	Promotion of the "Hosts" multichannel training programme to improve the skills of the different profiles of the tourism ecosystem.	Secretaría de Estado de Turismo and Segittur
	Promotion of training actions financed by the European Social Fund Plus (ESF+) aimed at Reskilling and Upskilling of employed people in SMEs.	Secretaría de Estado de Turismo and Secretaría de Estado de Sanidad
	Turespaña Scholarship Programme.	Secretaría de Estado de Turismo and Turespaña
35 **Promote actions to minimise the impact of the twin transition on tourism employment**	Launch of research to understand the impact of the twin transition on tourism employment.	Secretaría de Estado de Turismo
	Design of training programmes to enable tourism workers to adapt to the twin transition, including the need for training in climate risk prevention and response.	Secretaría de Estado de Turismo, Ministerio de Educación, Formación Profesional y Deportes and Ministerio de Trabajo y Economía Social
36 **Improve training in digital technologies applied to the tourism sector**	Development of training plans in digital skills.	Secretaría de Estado de Turismo and Segittur
	Dissemination of training plans aimed at improving the digital skills demanded in the sector.	Secretaría de Estado de Turismo and Ministerio de Transformación Digital y Función Pública
	Development of digital training plans for tourist service staff.	Secretaría de Estado de Turismo and Segittur
	Design of communication actions on job profiles related to tourism technologies.	Secretaría de Estado de Turismo

4.6 RESIDENT PROGRAMME

The objectives of the **RESIDENTS PROGRAMME** are: to strengthen the social cohesion of tourist destinations by confronting the factors that generate tension and promoting balanced coexistence; to build bridges to promote actions that favour living culture processes and allow for the maintenance and enjoyment of tangible and intangible cultural heritage assets; and to revalue the public perception of destinations by recognising the environmental sustainability actions carried out by the sector.

OBJECTIVE STRENGTHEN THE SOCIAL COHESION OF TOURIST DESTINATIONS AND PROMOTE BALANCED COEXISTENCE		
MEASUREMENTS	**INSTRUMENTS**	**RESPONSIBLE**
What	**How**	**Who**
37 **Improve technologies to measure and manage the carrying capacity of tourist destinations and sites**	Promotion of technological solutions to help manage flows of people in the territories and to monitor and manage the carrying capacity at different points.	Secretaría de Estado de Turismo and Segittur
	Implement or, where appropriate, design carrying capacity methodologies applicable to public services linked to the tourism sector.	Secretaría de Estado de Turismo and Segittur
	Establish social and inclusion indicators applicable to all destinations by implementing the Statistical Framework for Measuring Tourism Sustainability.	Secretaría de Estado de Turismo
38 **Strengthen mechanisms to regulate tourist accommodation**	Promotion of the Single Registry of Short-term Rentals and the Digital One-Stop Shop for the management and control of tourist accommodation.	Secretaría de Estado de Turismo and Ministerio de Vivienda y Agenda Urbana
	Creation of a Tourist Housing Observatory.	Secretaría de Estado de Turismo and Ministerio de Vivienda y Agenda Urbana
39 **Promote the revitalisation of areas facing demographic challenges through tourism**	Analysis of financial instruments for the implementation of tourism projects in areas at demographic risk.	Secretaría de Estado de Turismo and Ministerio para la Transición Ecológica y Reto Demográfico
	Revitalisation of rural tourism to promote economic development and the fight against depopulation.	Secretaría de Estado de Turismo and Ministerio para la Transición Ecológica y Reto Demográfico
40 **Promote the universal accessibility of Spanish tourist destinations**	Elaboration of accessibility guides for the different sub-sectors of the tourism value chain.	Secretaría de Estado de Turismo and Ministerio de Derechos Sociales, Consumo y Agenda 2030
41 **Offset the negative externalities of tourism**	Systematisation and promotion of tools for the compensation of negative externalities.	Secretaría de Estado de Turismo

OBJECTIVE
ENCOURAGE PROCESSES OF LOCAL LIVING CULTURE AND THE MAINTENANCE AND ENJOYMENT OF TANGIBLE AND INTANGIBLE CULTURAL HERITAGE ASSETS

MEASUREMENTS	INSTRUMENTS	RESPONSIBLE
What	How	Who
42 **Build bridges with the cultural systems of the destinations and support local cultural and creative economy processes**	Implementation of collaboration programmes with local cultural ecosystems, supporting spaces for networking, ideas, experiences and proposals from citizens and professionals in the culture and tourism sector.	Secretaría de Estado de Turismo and Ministerio de Cultura
	Promotion of cultural activities that favour the cultural expression of residents, including the recognition of festivals of national and international tourist interest.	Secretaría de Estado de Turismo
	Support for local creative economy projects and their inclusion as points of interest for visitors.	Secretaría de Estado de Turismo
	Promote sponsorship and cultural patronage actions by tourism companies.	Secretaría de Estado de Turismo
	Development of models to support markets and local trade.	Secretaría de Estado de Turismo and Ministerio de Economía, Comercio y Empresa
	Include the cultural and creative economy in the ITD Model.	Secretaría de Estado de Turismo, Segittur and Ministerio de Economía, Comercio y Empresa
43 **Improve the incorporation of tourism functionality into tangible and intangible cultural heritage assets**	Promote the elaboration of a National Cultural Heritage Plan on the tourist use of cultural heritage assets.	Secretaría de Estado de Turismo and Ministerio de Cultura
	Draw up master plans for the management of cultural assets for tourist use by Paradores de Turismo and the conservation and refurbishment of Parador buildings.	Secretaría de Estado de Turismo, Turespaña and Paradores de Turismo.

OBJECTIVE
REVALUE THE PUBLIC'S PERCEPTION OF DESTINATIONS BY RECOGNISING THE ENVIRONMENTAL SUSTAINABILITY ACTIONS OF THE TOURISM SECTOR

MEASUREMENTS	INSTRUMENTS	RESPONSIBLE
What	How	Who
44 **Revalue the public's perception of destinations in a comprehensive manner on the basis of tourism sustainability**	Development of local tourism pacts.	Secretaría de Estado de Turismo and local authorities
	Design of prototypes to incorporate the resident in the planning of resources (water, territory, energy...).	Secretaría de Estado de Turismo and Ministerio de Vivienda y Agenda Urbana
	Promote exchange actions to improve communication on the positive aspects and impacts of tourism activity in destinations.	Secretaría de Estado de Turismo
45 **Promote joint work programmes between tourist companies and residents to care for the environment**	Encourage collaborative partnerships between tourism businesses and residents to protect, regenerate and enhance the natural, cultural and social environment of the destination.	Secretaría de Estado de Turismo
	Mixed volunteering programmes through ESG actions and/or actions promoting climate change mitigation and adaptation, fostering a new civic culture of prevention and reaction in line with the State Pact on Climate Emergency.	Secretaría de Estado de Turismo

4.7 TOURIST PROGRAMME

The objectives of this **TOURISTS PROGRAMME** are to turn the country's accumulated knowledge on tourism marketing and communication into a tool for the sustainability of tourism. Specifically, to convert tourism marketing into a tool for transforming the tourism model towards sustainability; to foster co-responsibility in the development of tourism activities among tourists, companies and agents in the sector, to favour coexistence and mutual respect in destinations and to promote behaviour among tourists, companies and agents in the sector that minimises the environmental impact of tourism activities.

OBJECTIVE TURNING TOURISM MARKETING INTO A TOOL FOR SUSTAINABILITY		
MEASUREMENTS	**INSTRUMENTS**	**RESPONSIBLE**
What	**How**	**Who**
46 **Boost the image and international positioning of destinations with potential for development**	Promote the image and international positioning of undiscovered destinations, boosting their marketing and especially their digital presence, so that the development of tourism activity becomes a driver of new opportunities for economic and social development.	Secretaría de Estado de Turismo and Turespaña
47 **Preserve the international reputation of the best-known destinations by guiding their evolution towards more sustainable and profitable models**	Preserve and strengthen the international reputation of consolidated destinations, promote their repositioning and diversify their marketing towards a more sustainable and profitable model, encouraging alternative experiences and activities and promoting secondary destinations, avoiding indiscriminate growth in the number of visitors.	Secretaría de Estado de Turismo and Turespaña
48 **Promote Spain's leadership in tourism products with high added value**	Strengthen the positioning and consolidate Spain's leadership in key products due to their high added value.	Secretaría de Estado de Turismo and Turespaña

OBJECTIVE COMMUNICATE VALUES TO ENHANCE RESPONSIBLE MARKETING		
MEASUREMENTS	**INSTRUMENTS**	**RESPONSIBLE**
What	**How**	**Who**
49 **Promote co-responsibility in the development of tourism activities between tourists, companies and agents of the sector, in order to favour coexistence in the destinations**	Develop communication aimed at informing and raising awareness among the international tourists who visit us and the professionals in the sector about their impact on the destination and the importance of adopting responsible practices and behaviours within the social environments that host them.	Secretaría de Estado de Turismo and Turespaña

OBJECTIVE INCREASE THE CONTRIBUTION OF TOURISTS TO THE ENVIRONMENTAL SUSTAINABILITY OF THE ACTIVITY		
MEASUREMENTS	**INSTRUMENTS**	**RESPONSIBLE**
What	**How**	**Who**
50 **Promote behaviours among tourists, companies and agents of the sector that minimise the environmental impact of tourism activities**	Develop a communication aimed at international tourists that disseminates the achievements and good environmental practices of the Spanish tourism offer and promotes their awareness and participation in decarbonisation, in line with mitigation policies.	Secretaría de Estado de Turismo and Turespaña
	Analyse the adaptive capacity of outbound markets and strategic segments in the face of climate change and promote the development of tools for measuring environmentally sustainable tourism standards, especially in relation to key tourism segments or areas of activity.	Secretaría de Estado de Turismo and Turespaña

4.8 IMPLEMENTATION OF THE SPAIN TOURISM 2030 PLAN

The implementation of Spain Tourism 2030 Plan requires the active participation of different actors of the Spanish Government whose sphere of competence has a substantial impact on the tourism sector. To this end, a governance model is defined to guarantee joint decision-making and the establishment of instruments to ensure the correct development of the Plan.

The Ministerio de Industria y Turismo (Ministry of Industry and Tourism) is expected to delegate the implementation and monitoring of the Spain Tourism 2030 Plan to the Secretaría de Estado de Turismo. The Secretaría de Estado de Turismo will set up two workspaces with complementary functions.

Monitoring Committee Spain Tourism 2030 Plan

The Monitoring Committee of the Spain Tourism 2030 Plan will be chaired by the Secretaría de Estado de Turismo and will be made up of the Dirección General de Políticas Turísticas (Directorate-General for Tourism Policy) and Turespaña, Segittur and Paradores. Its objectives will be to:

- Act as the main monitoring body to ensure the successful implementation and management of the Plan.
- Design biannual action plans.
- Follow up the implementation of the actions taken by the Dirección General de Políticas Turísticas (Directorate General for Tourism Policies), Segittur and Turespaña.
- Generate an annual monitoring report on the implementation of actions and progress in meeting objectives.
- Propose cooperation and communication actions with different bodies, forums and actors to disseminate and collect valuable information to improve the progress of the Plan.

Inter-ministerial Commission *Spain Tourism 2030 Plan*

Royal Decree 6/1994 of 14 January 1994 establishing the Inter-ministerial Commission on Tourism provides for the possibility of setting up working groups related to the objectives of the Commission.

A specific working group will be set up to monitor the implementation and follow-up of the Plan.

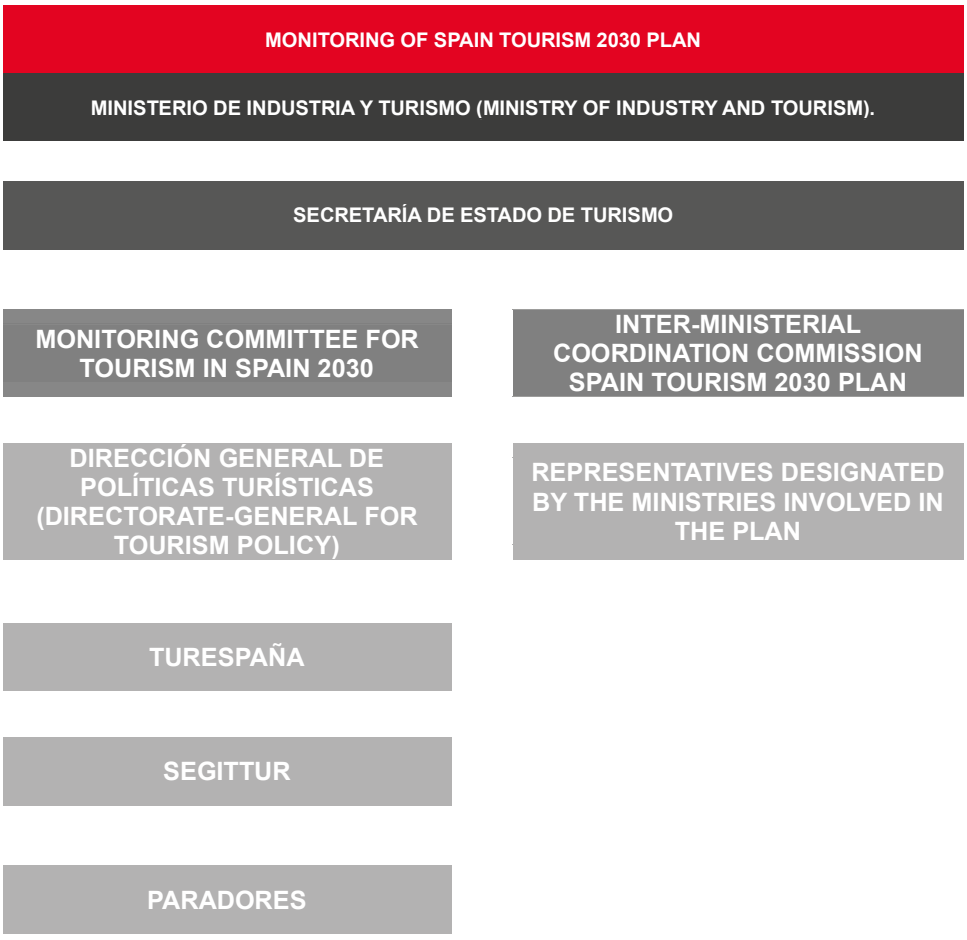
Its objectives will be to:

- Follow up on the actions taken by each agency.

- Review the biannual action plans as a planning mechanism in which the instruments to be implemented by the different Secretariat of States involved are defined.

- Provide annual data and information to be included in the annual monitoring report to assess the progress of the Plan.

- Prepare documents that can be taken to the plenary session of the Interministerial Tourism Commission, associated with Spain Tourism 2030 Plan.



4.9 FOLLOW-UP AND EVALUATION OF SPAIN TOURISM 2030 PLAN

A monitoring system is established based on the elaboration of biannual action plans and the preparation of an annual monitoring report on the implementation of the strategy and on the progress made in achieving the objectives, allowing decisions to be taken in the event of major deviations.

A mid-term evaluation and a final evaluation will be carried out, in compliance with Law 27/2022 on the institutionalisation of the evaluation of public policies in the General State Administration.

For the evaluation of Spain Tourism 2030 Plan and its impact, two sets of indicators will be used.

The first set of indicators are follow-up indicators and are intended to monitor the deployment and fulfilment of the proposed actions during the five years of implementation.

A second, more synthetic set will make it possible to observe whether the measures are having an impact on the phenomenon, through tourism metrics based on official and currently existing sources, to allow for comparison.

Both are described below.

Indicators for monitoring the implementation of the Plan

OBJECTIVES	MEASUREMENTS	INDICATORS AND METRICS
Increase destination management capacities, improving the decision-making process	**1. Strengthen destinations and their tourism management organisations to improve their resilience.**	• Increase in the number of destinations obtaining ITD or SICTED recognition (Source: own data) • No. of destination managers who exceed specific training at one of the Host campuses (Source: own data) • Number of tourist destinations participating in the SDP (% of total) (Source: own data)
	2. Improve the definition of the concept of tourist municipality.	• Development of new proposal
	3. Improve understanding of the impact of activity on public services.	• Preparation and presentation of the study
Promote the improvement and prosperity of different types of destinations	**4. Renew and promote Spanish sun and beach destinations.**	• Analysis and presentation of a study of the social, environmental and economic impact of public investment in pioneering sun and beach destinations • "Future Destination" proposal for the regeneration and renovation of pioneering sun and beach destinations
	5. Enhance cohesive urban destinations.	• Adapting the ITD model to urban agenda indicators applicable to urban destinations • No. of destinations using SDP technology tools for decision-making on tourism impacts (Source: own data)

	6. Consolidate rural destinations as an engine for the redistribution of tourist income and the fight against depopulation.	• No. of actions promoted by SETUR incorporating the principle of "rural proofing" (campaigns and promotional actions, training courses, technological tools, etc.) (Source: own data) • Territorial distribution (at the municipal level) of tourism employment (Source: social security) • No. of actions in collaboration with the Territorial Innovation Centre Network and local action groups (Source: own data)
	7. Focus on nature destinations that are leaders in ecotourism.	• Adaptation of the ITD model for wilderness areas • Improvement in the tourism indicators of the Caminos Naturales programme for tourist use (Source: data from Observatorio Caminos Naturales) • Increase in the number of entities joining the ecotourism network (Source: own data)
	8. Improve internal and external connectivity, fostering coordination and favouring the geographical redistribution of tourist flows.	• Daily population (Source: Ministerio de Transportes y Movilidad Sostenible). • No. of coordinated actions on tourism connectivity (Source: own data) • Studies on tourism mobility management • No. of destinations using SDP technology tools for tourism mobility management (Source: own data)
Strengthen the resilience of destinations to various crises	**9. Improve resilience and capacity to respond to various crises.**	• Establishment of the Tourism Early Response Committee (CRT-Tur) • Development of CRT-Tur action protocols • Use of FOCIT by companies located in crisis areas (Source: own data)
Promote improvements in collaborative tourism governance systems	**10. Improve collaborative governance between the different tourism stakeholders.**	• No. of meetings of the Inter-ministerial Commission on Tourism and of the working groups established • Number of meetings of the Advisory Council of Turespaña and Segittur • Increased participation in the ITD Network (Source: own data)
Move towards destinations that are committed to environmental sustainability and more resilient, safe and prosperous in the new climate context	**11. Establish environmental sustainability indicators for tourism applicable to all destinations.**	• Develop, for Spain, the proposal of environmental indicators foreseen in the Statistical Framework for Measuring Sustainability in Tourism (UN Tourism) • Accelerate decarbonisation of ITD destinations by reducing greenhouse gas emissions (Source: National Emission Inventory and the European Commission's Covenant of Mayors) • No. of establishments in the sector that are registered in the MITECO Footprint Register • No. of destinations using SDP technology tools for decision-making on environmental impacts of tourism (Source: own data)

	12. Promote mitigation and adaptation to climate change in tourist destinations, within the framework of the State Pact for Climate Emergency.	• GHG emissions by main tourism sectors (Source: INE – Cuentas Ambientales de España) • No. of ITD destinations with approved mitigation and adaptation plans (Source: own data) • No. of awareness-raising actions on risk management linked to climate change (Source: own data)
	13. Increase the contribution of tourism activity to reducing the consumption of natural resources.	• Develop a water consumption index for tourism (Source: INE – Estadística sobre el suministro y saneamiento del agua [Statistics on water supply and sanitation]) • Proposed prototype Local Pact for energy self-sufficiency in emerging destinations • No. of participation actions in forums and meetings on reduction of consumption and regeneration of natural resources • % Km protected areas (Source: Base de Datos Mundial sobre Áreas Protegidas [World Database on Protected Areas])
	14. Support alternative sustainable tourism mobility solutions at the destination.	• No. of ITD destinations with a bicycle rental system for tourists (Source: own data) • Development of carbon footprint offsetting tool for tourists
	15. Integrating tourism strategies in the management of the sea and coastline.	• No. of entities joining networks of experiences linked to the coast and the coastline
	16. Make digitisation the main tool for advancing the environmental and social sustainability of destinations.	• No. of training actions on technologies or AI applied to improve social and environmental sustainability • No. of destinations and companies using SSTI System services to improve environmental and social sustainability
Spain leads	**17. International leadership and cooperation.**	• No. of actions accompanying Spanish tourism companies in internationalisation actions (Source: own data) • No. of cooperation actions (Source: own data) • ITD and SDP model implementation in destinations outside Spain (Source: own data) • Image of Spain linked to tourism (Source: Barómetro de la Imagen de España, Instituto Elcano)
Boost the digital transformation of tourism businesses	**18. Use new technologies to generate greater tourist intelligence.**	• No. of destinations and companies using SDP and OIP services for tourist intelligence (Source: own data) • Presentation of a code of good practice on the use of tourist intelligence data • Increased use of SDP as a common knowledge tool
	19. Strengthen the adoption of mature and innovative technologies by the tourism sector, especially SMEs and micro-SMEs.	• No. of awareness-raising and training actions on technologies aimed at SMEs and micro-SMEs (Source: own data) • Incorporation of tourism companies in Digital Innovation Centres, PERTE or RIS3 • Analysis of the processes of adapting technologies in tourism SMEs • Level of digital maturity of SMEs and micro-SMEs (Source: DESI index and Segittur Report)

Address more effectively the barriers related to the size of tourism businesses and a complex regulatory environment	**20. Promote business cooperation, integration or convergence processes.**	• Number of companies using SDP and OIP (Source: own data) • Approval of tourism data governance model • Impact of awareness-raising campaigns to promote the adoption of digital technology in the tourism sector
	21. Improving and simplifying the regulatory environment for tourism activities.	• Setting up a working group • Activación Observatorio de Legislación de Turismo (Tourism Legislation Observatory) • Promote AI project on regulatory environments of the different tourism sub-sectors
Consolidate sustainable and marketable tourism experiences abroad	**22. Consolidate networks into sustainable, operational and marketable experiences.**	• Number of experiences redesigned with a focus on profiles with specific needs (senior citizens, people with disabilities or those travelling with their pets), which contribute to deseasonalisation, and/or others • No. of training actions and scope to improve care for people with special needs, by type of tourism experience (Source: own data) • Impact of communication plans and marketing campaigns on sustainable tourism experiences (number of tourists reached) • Shift in consumer trends towards more sustainable experiences (Source: INE and Barómetro CIS)
Improve the communication of ESG (environmental, social and governance) aspects of tourism enterprises	**23. Promote ESG sustainability and due diligence of Spanish companies and other shared responsibility tools.**	• Catalogue of seals aligned with Directive (EU) 2024/825 • Number of destinations and enterprises certified in tourism environmental sustainability systems in line with Directive (EU) 2024/825 (Source: own data) • Increase of actions with international organisations for the dissemination of sustainability criteria • Dissemination of the European Commission's Sustainability Due Diligence Guidelines for SMEs. • Increased participation in the SICTED programme
	24. Create cross-cutting networks and dialogue forums with actors from other sectors to jointly address common challenges.	• No. of dialogue forums promoted (Source: own data)
Accelerate the green transition of tourism businesses, promoting decarbonisation and their adaptation to the new climate context, increasing their resilience	**25. Boost the circular economy around tourism.**	• No. of destinations that promote circularity plans in destinations through the different SSTI tools • No. of publications and communication actions to improve the application of circularity processes in different sub-sectors (Source: own data) • Food Waste in Tourism Index (Source: based on the Food Waste Index) Publication of prototypes for various tourism sub-sectors

	26. Support SMEs and micro-SMEs to implement climate change mitigation and adaptation actions.	• No. of SMEs and micro-SMEs reached in dissemination and training actions on actions designed for climate change mitigation and adaptation (Source: own data) • Supporting guides • No. of companies in the SSTI with adaptation and mitigation plans
	27. Support adaptation of the different means of transport to European guidelines and new sustainability regulations.	• % reduction in CO2 emissions per passenger-kilometre (Source: ICAO and Ministerio de Transición Ecológica [Ministry of Ecological Transition]) • % of renewed aircraft fleets per airline operating in Spain • Flight occupancy factor (% of seats occupied) • Number of Spanish airports accredited in the Airport Carbon Accreditation programme and classification by levels (Source: Airport Carbon Accreditation programme)
	28. Encourage the development of alternative fuel systems.	• Investment (in EUR) of financial support for research into alternative fuel systems • Consumption of SAF (in million tonnes) by airlines operating in Spain
Improve the processes of attracting and retaining talent in companies in the tourism sector	**29. Capture the best talent and put people at the centre.**	• Publication of report on new vocational trends and tourism • Percentage of employees in the sector with permanent contracts • Design of a prototype programme for the management of intergenerational coexistence in the workplace
	30. Improve the ability to attract talent to the tourism sector	• Increase in quality of tourism employment (Source: index based on OECD employment quality criteria and Travel & Tourism Development Index indicators) • Rate of reduction of sick leave in tourism companies implementing Employee Support Plans Employee • Ease of finding qualified employees in the local labour market (Source: Travel & Tourism Development Index, data from Spain)
Enhance the occupational well-being of tourism talent	**31. Develop and approve a Pact for the Welfare at Work of Tourism Workers.**	• Pact for the Labour Welfare of Workers in the Tourism Sector • Tourism collective agreements repository • Improving the social protection of tourism talent (Source: Travel & Tourism Development Index, indicator: Expenditure on social protection, % of GDP)
	32. Promote reputational change by improving the prestige of tourism employment and awareness of tourism professions.	• Sustainability analysis of tourism in Spain • Programmes to improve knowledge about tourism
	33. Promote mechanisms to help achieve equality, accessibility and inclusion of talent in the sector.	• Gender parity in tourism employment (Source: Travel & Tourism Development Index) • Study on tourism employment for vulnerable groups • Percentage of employment of people with disabilities in the tourism sector

Optimise training for the development of skills and competencies to respond to the twin transition and foster a new culture of prevention and response	**34. Improve training by participating in it.**	• Map of training needs of the different tourism labour ecosystems • Number of dual training curricula in tourism / number of dual training curricula in other sectors with similar business fabric (Source: Observatorio Formación Profesional [Vocational Training Observatory] and data Secretaría General de Formación Profesional [Secretariat-General for Vocational Training]) • Average investment of tourism enterprises in employee training (Source: FUNDAE) • Increased use of the Hosts programme (Source: own data)
	35. Promote actions to minimise the impact of the twin transition on tourism employment.	• Analysis of competences and skills to be strengthened to adapt talent to the Twin Transition, according to sub-sectors • Number of hours of training given on new processes linked to improving social and environmental sustainability (Source: own data and FUNDAE) • Training actions for the prevention and response culture of the tourism sector and destinations
	36. Improve training in digital technologies applied to the tourism sector.	• Analysis of digital profiles in tourism employment • Hours of training delivered in digital skills in the tourism sector (% of total hours of training delivered in the sector)
Strengthen the social cohesion of tourist destinations and promote balanced coexistence	**37. Improve technologies to measure and manage the carrying capacity of tourist destinations and sites.**	• Develop, for Spain, the proposal of social indicators foreseen in the Statistical Framework for Measuring Sustainability in Tourism (UN Tourism) • Evolution of the density of the supply of tourist vacancies (vacancies offered / 1,000 inhabitants) • Seasonal population (by month) (Source: Ministerio de Transportes y Movilidad Sostenible) • Design of technological services to assist in the management of carrying capacity at various destinations • Concentration of visits to cultural and natural resources in Spain (Source: Travel & Tourism Development Index)
	38. Strengthen mechanisms to regulate tourist dwellings.	• Increase in irregular TUVs detected by the Single Registry of Short-term Accommodation (Source: Ministerio de Vivienda y Agenda Urbana)
	39. Promote the revitalisation of areas facing demographic challenges through tourism.	• Variation rate of overnight stays in regulated accommodation in inland provinces (except Madrid) and in the north of Spain. (Source: INE [EOH-EOAT])
	40. Promote the universal accessibility of Spanish tourist destinations.	• No. of actions promoted by SETUR incorporating universal accessibility principles (promotional campaigns and actions, training courses, technological tools...) (Source: own data) • % ITD destinations with accessibility improvement plans (Source: own data)

Encourage processes of local living culture and the maintenance and enjoyment of tangible and intangible cultural heritage assets	**41. Build bridges with the cultural systems of the destinations.**	• No. of collaborative actions between local cultural and tourism ecosystems promoted by SETUR • Nª SETUR actions aimed at highlighting the role of living culture in tourism in Spain (promotional campaigns and actions, training courses, technological tools...) (Source: own data)
	42. Support local cultural and creative economy processes.	• Guides to support local fair trade in tourist destinations • No. of promotion actions focused on creative economy processes (Source: own data)
	43. Improve the incorporation of tourism functionality in tangible and intangible cultural heritage assets.	• Number of master plans that incorporate a tourism management plan for the property in the BICs under the auspices of SETUR (Source: own data)
Revalue the public's perception of destinations by recognising the environmental sustainability actions of the tourism sector	**44. Revalue the public's perception of destinations in a comprehensive manner on the basis of tourism sustainability.**	• Resident satisfaction survey (Source: Turespaña) • Promoting the local tourism pact model
	45. Promote joint work programmes between tourist companies and residents to care for the environment.	• Dissemination of good practices of joint actions between tourism entrepreneurs and residents of destinations to improve social and environmental sustainability
Turn tourism marketing into a tool for sustainability	**46. Boost the image and international positioning of destinations with development potential.**	• Percentage of promotion actions linked to sustainability (Source: own data) • Increase in average tourist expenditure by main purpose of the trip (Source: INE) • Tourists who value sustainability as a key criterion in their travel choice (% of total). (Source: INE and tourist satisfaction survey)
	47. Preserve the international reputation of the best-known destinations, guiding their evolution towards more sustainable and profitable models.	• International repositioning actions of destinations committed to sustainability (Source: own data)
	48. Promote Spain's leadership in tourism products with high added value.	• International repositioning actions of destinations committed to sustainability (Source: own data)
Communicate values to those who visit us in order to promote a good development of the activity	**49. Encourage co-responsibility in the development of tourism activities between tourists, companies and agents in the sector, in order to favour coexistence in the destinations.**	• No. of tourists impacted by social sustainability messages (Source: own data) • Increase of ethical codes in ITD destinations (Source: own data)
Increase the contribution of tourists to the environmental sustainability of the activity	**50. Promote behaviours among tourists, companies and agents of the sector that minimise the environmental impact of tourism activities.**	• Tourist perception of sustainability in the destination (Source: Tourist Satisfaction Survey) • No. of information campaigns on the individual contribution to the reduction of impacts related to tourism activity

IMPACT INDICATORS

1. Tourist income

Income under the tourism and travel category in the current account balance of payments (millions of euros).

Source: Banco de España (Balance of Payments)

2. Seasonality

Variation rate of arrivals in low and mid-season months (percentage).

Source: INE (FRONTUR)

3. Quality of tourism employment

Percentage of those employed in the tourism sector with an open-ended contract out of the total (percentage).

Source: INE (EPA)

4. Diversification of source markets

Total arrivals of the three main source markets as a percentage of total arrivals (percentage).

Source: INE (FRONTUR)

5. Perception of sustainability of destination Spain

Percentage of tourists satisfied or very satisfied with the sustainability dimension.

Source: Turespaña (ESTI)

6. Socio-economic revitalisation of rural areas

Variation rate of overnight stays in regulated accommodation in inland provinces (except Madrid) and of northern Spain.

Source: INE (EOH-EOAT)

7. Protection of historical, artistic and cultural heritage

Number of cultural assets for tourist use benefiting from public investment.

Source: Secretaría de Estado de Turismo

8. Digitisation of tourism activity

Number of destinations adhering to the Smart Destination Platform and/or the Network of Smart Tourism Destinations.

Source: Segittur

9. Environmental indicators

Tonnes of CO2 per million euros in gross value added compared to the European average.

Source: European Commission (EU Tourism Dashboard)

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10. Survey of resident satisfaction with Tourism

Percentage of the resident population aged 18 and over who have a positive or very positive opinion.

Source: Turespaña (EORT)

01 | Facts to understand tourism in 2025

02 | Diagnosis: the sustainability of tourism

03 | Sustainable Tourism Strategy

04 | Plan España Turismo 2030

05 | Acknowledgements

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Acciona

ACEVIN (Asociación Española Ciudades del Vino – Spanish Association of Wine Cities)

ACH (Agrupación de Cadenas Hoteleras – Association of Hotel Chains)

ACI-LAC (Airports Council International – Latin America and the Caribbean)

ADIF (Administrador de Infraestructuras Ferroviarias – Administrator of Railway Infrastructures)

Advanced Leisure Services

AECIT (Asociación Española de Expertos
Científicos en Turismo – Spanish Association of Experts

Scientists in Tourism)

AEDIVE (Asociación Empresarialpara el Desarrollo e Impulso del Vehículo Eléctrico – Business Association for the Development and Promotion of the Electric Vehicle)

AEFV (Asociación Española de Empresas Ferroviarias de Viajeros – Spanish Association of Passenger Railway Companies)

AEHM (Asociación Empresarial Hotelera de Madrid – Madrid Hotel Business Association)

AENA

AFYDAD (Asociación Española de Fabricantes y Distribuidores de Artículos Deportivos – Spanish Association of Manufacturers and Distributors of Sporting Goods)

ALA (Asociación de Líneas Aéreas – Association of Airlines)

Alianza municipios de Sol y Playa

Alojamientos Rurales La Pumarada de Limés

Amadeus IT Group

AMETIC (Asociación representante del sector de la industria digital en España – Association representing the digital industry sector in Spain)

ANAVE (Asociación Navieros Españoles – Spanish Shipowners' Association)

ANETA (Asociación Nacional de Empresas de Turismo Activo – National Association of Active Tourism Enterprises)

APCE (Asociación de Promotores Constructores de España – Association of Spanish Construction Developers)

Apple Leisure Group

ARTIEM

ASENORG (Asociación de empresarios turísticos Sierra Norte de Gredos – Association of Tourist Entrepreneurs Sierra Norte de Gredos)

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Asociación Saborea España

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ATUC (Asociación de Transportes

Públicos Urbanos y Metropolitanos – Association of Urban Transport and Metropolitan Public Utilities)

Balearia

Banco de Sabadell

Basque Culinary Center

BIOSPHERE

br1 Creative

BRUMA

Cámara de Comercio de España

Caro Hotel

CCOO (Comisiones Obreras)

CEAV (Confederación Española de Agencias de Viaje – Spanish Confederation of

Travel Agencies)

CEHAT (Confederación Española de Hoteles y Alojamientos Turísticos – Spanish Confederation of Hotels and Tourist Accommodation)

CEHE (Confederación Empresarial de Hostelería de España – Spanish Confederation of Hotel and Catering Businesses)

CEHTA (Confederación de Empresarios de Hostelería y Turismo de Aragón – Confederation of Hotel and Tourism Entrepreneurs of Aragon)

CEIM (Consejo de Turismo de la Confederación Empresarial Independiente de Madrid – Tourism Council of the Independent Business Confederation of Madrid)

Centro Superior de Hostelería de Galicia

CEOE (Confederación Española de Organizaciones Empresariales – Spanish Confederation of Business Organisations)

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Spanish Committee of Representatives of People with Disabilities)

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Autonomous City of Melilla

Ciudad de las Artes y las Ciencias

Civitatis

CIDEC

COFECE (Comisión Federal de Competencia Económica – Federal Commission for Economic Competition)

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Autonomous Community of Navarre / Nafarroako Gobernua

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Costa Cruceros

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ECOTURISMO (Ecotourism Association) Empresa Municipal Turismo Santander ENAIRE (Public business entity, provider of Air Navigation services)

ESCP Business School

Europarc España (Federation of Nature and National Parks of Europe)

EvoSocial SOFT

EXCELTUR (Alliance for Excellence in Tourism)

FEEC (Federación Española de Campings – Spanish Federation of Campsites)

FEHR (Spanish Hotel and Catering Industry)

FENEVAL (Federación Nacional de Vehículos de Alquiler – National Federation of Rental Vehicles)

FETAVE (Federación Empr.de Asociaciones Territoriales de Agencias de Viajes Española – Spanish Federation of Territorial Associations of Travel Agencies)

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Global Sustainable Tourism Council

Globalia

Government of Aragon

Government of the Canary Islands

Government of Cantabria

Government of La Rioja

Basque Government / Eusko Jaurlaritza

Google

Government of the Balearic Islands

Grupo Piñero

Grupo Viajes El Corte Inglés

HIDRIA

Hosteltur

Hotel Jardín Tecina

Hotel Rural L'Abadia de Sieste

Hotelbeds

IAG7 (International Assistance Group)

IATA (International Air Transport Association)

Iberia

Iberostar

IKEA

ILUNION

Impulsa Igualdad

inAtlas

INECO (Ingeniería y Economía del Transporte)

Innobasque

Innovaris SL

Instituto Tecnológico Hotelero - ITH

Jumbo Tours

Junta de Andalucía

Junta de Castilla y León

Junta de Comunidades de Castilla-La Mancha

Junta de Extremadura

Les Roches

MasterCard

Meliá Internacional

Microsoft

MINSAIT (Minds, Innovation and Solutions for Advanced Information Technologies)

Ministerio de Agricultura, Pesca y Alimentación

Ministerio de Asuntos Exteriores, Unión Europea y Cooperación

Ministerio de Ciencia, Innovación y Universidades

Ministerio de Cultura

Ministerio de Defensa

Ministerio de Derechos Sociales, Consumo y Agenda 2030

Ministerio de Economía, Comercio y Empresa

Ministerio de Educación, Formación Profesional y Deportes

Ministerio de Hacienda

Ministerio de Igualdad

Ministerio de Inclusión, Seguridad Social y Migraciones

Ministerio de Industria y Turismo

Ministerio de Juventud e Infancia

Ministerio de la Presidencia, Justicia y Relaciones con las Cortes

Ministerio de Política Territorial y Memoria Democrática

Ministerio de Sanidad

Ministerio de Trabajo y Economía Social

Ministerio de Transportes y Movilidad Sostenible

Ministerio de Vivienda y Agenda Urbana

Ministerio del Interior

Ministerio para la Transformación Digital y de la Función Pública

Ministerio para la Transición Ecológica y el Reto Demográfico

Museo del Prado (The Prado Museum)

NEORIS

NH Hotel Group

ILO (International Labour Organization)

ISTO (International Social Tourism Organization)

Oficina Nacional de Prospectiva y Estrategia
(National Office of Foresight and Strategy)

UN TOURISM (World Tourism Organisation)

ONCE

ORANGE

Paradores de Turismo

PREDIF (Plataforma Representativa Estatal
de Personas con Discapacidad Física – State
Representative Platform of People with Physical Disabilities)

Presidencia del Gobierno

Principado de Asturias

State Ports

Red Española de Desarrollo Rural (Spanish Rural Development Network)

Red Española de Desarrollo Sostenible (Spanish Sustainable Development Network)

Red Necstour (Necstour Network)

Red2Red

Region of Murcia

RENFE

RIU

SEGITTUR

Sixt Rent a car

Surrey University

Taktic

Telefónica

TIDES

TMR Experience

Travel Tech
TURESPAÑA
Turijobs
UGT (Unión General de Trabajadores – General Union of Workers)
Universidad Antonio de Nebrija
Universidad Autónoma de Madrid
Universidad Complutense de Madrid
Universidad de Alcalá de Henares
Universidad de Alicante
Universidad de Baleares
Universidad de Castilla La Mancha
Universidad de Extremadura
Universidad de Jaén
Universidad de La Laguna
Universidad de Málaga
Universidad de Sevilla
Universidad Politécnica de Valencia
Universidad de Valencia
Universidad de Zaragoza
Universitat de Barcelona
Universitat de Girona
Universitat Rovira i Virgili
Verne Tourism Experts
Viajes Carrefour
Xunta de Galicia

ANNEX I

SUMMARY OF THE NATIONAL RECOVERY, TRANSFORMATION AND RESILIENCE PLAN AND ITS RELATIONSHIP TO TOURISM

COMPONENT	OBJECTIVE	DIRECT IMPACT	INVESTMENTS	RESPONSIBLE PERSONS
Component 01: Shock plan for sustainable, safe and connected mobility in urban and metropolitan areas	Promote the decarbonisation of urban mobility and the improvement of air quality, as well as the promotion and optimisation of urban and metropolitan transport	HIGH	• Transformation of urban and metropolitan transport (€2.916 B) • Incentives for the installation of recharging points, the purchase of electric and fuel cell vehicles and innovation in electromobility, recharging and green hydrogen (€2 B) • Improving the quality and reliability of the Cercanías service (€1.620 B)	• Ministerio de Transportes, Movilidad y Agenda Urbana • Ministerio para la Transición Ecológica y el Reto Demográfico
Component 02: Housing rehabilitation and urban regeneration plan	Activate rehabilitation to decarbonise and improve the quality and comfort of the building stock, promote the construction of social rental housing and integrate renewable energy sources	HIGH	• Social and economic rehabilitation in residential environments (€3.42 B) • Construction of social rental housing (€1 B) • Energy rehabilitation of buildings (€300 M) • Regeneration and demographic challenge (€1 B) • Rehabilitation of public buildings (€1.08 B) • Pilot projects for local action plans of the Spanish Urban Agenda (€20 M)	• Ministerio de Transportes, Movilidad y Agenda Urbana • Ministerio de Hacienda y Función Pública • Ministerio para la Transición Ecológica y el Reto Demográfico
Component 03: Environmental and digital transformation of the agri-food and fisheries system	The aim is to improve the sustainability, competitiveness and resilience of the agri-food and fisheries sectors, from an economic, environmental and social point of view	MEDIUM	• Social and economic rehabilitation in residential settings (€3.42 B) • Construction of social rental housing (€1 B) • Energy rehabilitation of buildings (€300 M) • Regeneration and demographic challenge (€1 B) • Rehabilitation of public buildings (€1.08 B) • Pilot projects for local action plans of the Spanish Urban Agenda (€20 M)	• Ministerio de Agricultura Pesca y Alimentación

COMPONENT	OBJECTIVE	DIRECT IMPACT	INVESTMENTS	RESPONSIBLE PERSONS
Component 04: Conservation and restoration of ecosystems and their biodiversity	Achieve good conservation status of ecosystems and reverse biodiversity loss, ensuring sustainable use of natural resources and the preservation and enhancement of their ecosystem services	MEDIUM	• Plan for the improvement of efficiency and sustainability in irrigation (€563 M) • Plan to boost the sustainability and competitiveness of agriculture and livestock (€355 M) • Digitisation Strategy for the Agri-Food, Forestry and Rural Sector (€38 M) • Plan to promote sustainability, research, innovation and digitalisation of the fisheries sector (€95 M)	• Ministerio de Agricultura Pesca y Alimentación
Component 05: Preservation of coastline and water resources	Strengthening water policy in three areas: water planning, regulatory change to introduce the new water policy and investments to implement the new water policy	MEDIUM	• Digitisation and knowledge of natural heritage (€137.8 M) • Conservation of terrestrial and marine biodiversity (€551.6 M) • Ecosystem restoration and green infrastructure (€551.5 M) • Sustainable Forest Management (€401.1 M)	• Ministerio para la Transición Ecológica y el Reto Demográfico
Component 06: Sustainable, safe and connected mobility	The aim is to decarbonise the economy and respond to climate change, the emergence of new technologies and the challenges posed by the increasing concentration of population in large cities	HIGH	• Wastewater treatment, sanitation, efficiency, savings, reuse and infrastructure safety actions (€642 M) • Monitoring and restoration of river ecosystems, recovery of aquifers and flood risk mitigation (€800m) • Digital transition in the sector (€380 M) • Adaptation of the coast to climate change (€269 M)	• Ministerio de Transportes, Movilidad y Agenda Urbana
Component 07: Renewable energy deployment and integration	Development of renewable electricity generation, promotion of integrated renewable generation in the building, industrial and transport sectors, appropriate territorial and environmental integration of renewables	MEDIUM	• Development of innovative renewable energies, integrated into buildings and production processes (€2.365 B) • Sustainable energy on islands (€700 M)	• Ministerio para la Transición Ecológica y el Reto Demográfico • Ministro de Transportes, Movilidad y Agenda Urbana (Minister of Transport, Mobility and Urban Agenda)

COMPONENT	OBJECTIVE	DIRECT IMPACT	INVESTMENTS	RESPONSIBLE PERSONS
Component 08: Electricity infrastructures, promotion of smart grids and deployment of flexibility and storage	The development of a more flexible energy system, the development of new innovative business models and the participation of new actors in the electricity system and a more agile and adaptable regulatory framework	LOW	• Ministerio para la Transición Ecológica y el Reto Demográfico • Ministro de Transportes, Movilidad y Agenda Urbana	• Ministerio para la Transición Ecológica y el Reto Demográfico
Component 09: Renewable hydrogen roadmap and sectoral integration	It aims to position Spain as a technological benchmark in the production and use of renewable hydrogen, creating innovative value chains	LOW	• Renewable hydrogen: a country project (€1.555 B)	• Ministerio para la Transición Ecológica y el Reto Demográfico
Component 10: Strategy for a Just Transition	Minimise the impact of the cessation of activities such as coal mining or coal-fired power plants or nuclear power plants as their closure is agreed upon	MEDIUM	• Environmental restoration plan for mining operations (€150 M) • Plan for environmental, digital and social infrastructures in municipalities and territories in transition (€100 M) • R&D&I projects in energy storage and energy efficiency (€30 M) • Support plan for the professional requalification and labour insertion of workers and population affected by the energy transition (€20 M)	• Ministerio para la Transición Ecológica y el Reto Demográfico

COMPONENT	OBJECTIVE	DIRECT IMPACT	INVESTMENTS	RESPONSIBLE PERSONS
Component 11: Modernisation of public administrations	The modernisation of all public sector agents, the renewal of their equipment with energy efficiency principles and the modernisation of processes, as well as the training of all public employees	MEDIUM	• Modernisation of the General State Administration (€960 M) • Digitisation projects of the General State Administration (€1.205 B) • Digital Transformation and Modernisation of the Ministerio de Política Territorial y Función Pública and the Administrations of the Autonomous Communities and Local Entities (€1.000 B) • Energy Transition Plan in the General State Administration (€1.07 B) • Transformation of the Administration for the Implementation of the RRP (€79.785 B)	• Ministerio de Asuntos Económicos y Transformación Digital (Ministry of Economic Affairs and Digital Transformation) • Ministerio de Sanidad, Consumo y Bienestar Social (Ministry of Health, Consumer Affairs and Social Welfare) • Ministerio de Justicia (Ministry of Justice) • Ministerio de Trabajo y Economía Social • Ministerio de Inclusión, Seguridad Social y Migraciones • Ministerio de Asuntos Exteriores, Unión Europea y Cooperación • Ministerio de Defensa (Ministry of Defence) • Ministerio del Interior • Ministerios de Consumo y Bienestar Social
Component 12: Política Industrial España 2030 (Industrial Policy Spain 2030)	The objective will be to boost the modernisation and productivity of the Spanish industry-services ecosystem, through the digitalisation of the value chain, boosting productivity, competitiveness and improving the energy efficiency of key strategic sectors in the green transition and digital transformation	HIGH	• Sectoral data spaces (contribution to key projects for the digitisation of strategic productive sectors) (€400 M) • Programme for the Promotion of Industrial Competitiveness and Sustainability (€2.5315 B) • Plan to support the implementation of waste legislation and the promotion of the circular economy (€850 M)	• Ministerio de Asuntos Económicos y Transformación Digital • Ministerio de Industria, Comercio y Turismo (Ministry of Industry, Trade and Tourism) • Ministerio para la Transición Ecológica y el Reto Demográfico

COMPONENT	OBJECTIVE	DIRECT IMPACT	INVESTMENTS	RESPONSIBLE PERSONS
Component 13: Boosting SMEs	Facilitate the creation of companies, their growth and restructuring, improve the business climate, and continue promoting the significant processes of productivity increase through digitalisation, innovation, and internationalisation. The objective will be to drive the modernisation and productivity of the Spanish industry-services ecosystem through the digitalisation of the value chain, the enhancement of productivity and competitiveness, and the improvement of energy efficiency in the key strategic sectors for the ecological transition and digital transformation.	HIGH	• Entrepreneurship (€328.795 B) • Growth (€498 M) • Digitalisation and Innovation (€3.547986 B) • Trade Support (€317.719 B) • Internationalisation (201.85 B)	• Ministerio de Industria, Comercio y Turismo • Ministerio de Asuntos Económicos y Transformación Digital
Component 14: Plan for the modernisation and competitiveness of the tourism sector	The component aims to transform and modernise the tourism sector in Spain through sustainability and digitalisation, increasing its competitiveness and resilience	HIGH	• Transformation of the tourism model towards sustainability (€1.923 B) • Digitalisation and intelligence programme for destinations and the tourism sector X (€337 M) • Tourism resilience strategies for extra-peninsular territories (€220 M) • Special measures in the field of competitiveness (€920 M)	• Ministerio de Industria, Comercio y Turismo • Ministerio de Asuntos Económicos y Transformación Digital
Component 15: Digital connectivity, boosting cybersecurity and 5G deployment	The promotion of connectivity and means of communication with the required security is a key factor for the modernisation and digitisation of the business fabric, especially SMEs	MEDIUM	• Ultra-fast broadband roll-out (€745 M) • Reinforcement of connectivity in reference centres, socio-economic drivers and sectoral digitisation projects (€400 M) • Connectivity vouchers for SMEs and vulnerable groups (€10.45 M) • Rollout of cross-border digital infrastructures (€500 M) • 5G rollout (€1.405 B) • Cybersecurity (€524 M)	• Ministry of Foreign Affairs • Economic and Digital Transformation
Component 16: National Artificial Intelligence Strategy	Position Spain as a leading country in Artificial Intelligence and lead the world in the use of the Spanish language in AI	LOW	• National AI Strategy (€500 M)	• Ministerio de Asuntos Económicos y Transformación Digital

COMPONENT	OBJECTIVE	DIRECT IMPACT	INVESTMENTS	RESPONSIBLE PERSONS
Component 17: Institutional reform and strengthening of the capabilities of the national system of science, technology, and innovation	The objective is to address the country's economic and social recovery, and for the SECTI to serve as a key instrument in tackling major challenges such as a fair ecological transition, digitalization, and the demographic challenge	MEDIUM	• Complementary Plans with the Autonomous Regions (€282.166 B) • Strengthening the capacities, infrastructures and equipment of SECTI actors (€445.19 M) • R&D&I projects (€1.16707 B) • Scientific career (€294.02 M) • Knowledge transfer (€402.29 M) • Health (€490.47 M) • Environment, climate change and energy (€98.88 M) • PTAS (R&D&I in sustainable automotive) (€40 M) • Aerospace sector (€160 M)	• Ministerio de Ciencia e Innovación (Ministry of Science and Innovation)
Component 18: Renewal and expansion of the National Health System's capacities	Have a more robust, flexible and resilient health model. A model that consolidates public health as an essential pillar of the Welfare State, but which also spearheads social development	LOW	• Plan for investment in high-tech equipment in the National Health System (€792.1 M) • Actions to strengthen prevention and health promotion (€62.050 B) • Increasing capacities to respond to health crises (€80.910 B) • Training of health professionals and resources for knowledge sharing (€13.140 B) • Plan for rationalisation of pharmaceutical consumption and promotion of sustainability (€20.8 M) • Health data lake (€100 M)	• Ministerio de Sanidad

COMPONENT	OBJECTIVE	DIRECT IMPACT	INVESTMENTS	RESPONSIBLE PERSONS
Component 19: Plan Nacional de Competencias Digitales (National Digital Skills Plan)	The aim is to ensure digital inclusion, leaving no one behind in the digitalisation process and advancing in the development of basic citizenship skills	MEDIUM	• Digital transversal competences (€735.2 M) • Digital Transformation of Education (€1.412 B) • Digital skills for employment (€1.2558 B) • Digital professionals (€190 M)	• Ministerio de Asuntos Económicos y Transformación Digital • Ministerio de Educación y Formación Profesional • Ministerio de Asuntos Exteriores, Unión Europea y Cooperación • Ministerio para la Transición Ecológica y el Reto Demográfico • High Commissioner on Child Poverty
Component 20: Plan estratégico de impulso de la Formación Profesional (Strategic Plan for the Promotion of Vocational Training)	The transformation and modernisation of the vocational training system so that it becomes one of the backbones of a new knowledge-based economic model	HIGH	• Reskilling and upskilling of the labour force linked to vocational qualifications (€1.220267 B) • Digital Transformation of Vocational Education and Training (€256.1 M) • Innovation and internationalisation of vocational training (€598.998 B)	• Ministerio de Educación y Formación Profesional
Component 21: Modernisation and digitisation of the education system, including early childhood education for 0-3 year olds	Modernisation and digitisation of the education system to move towards a personalised, inclusive and flexible model that adapts to the needs of each student	MEDIUM	• Programme to boost enrolment in the first cycle of pre-school education (€670.99 M) • Programme for Guidance, Advancement, and Educational Enrichment in Schools with High Educational Complexity (€320 M) • Creation of Personal and Family Accompaniment and Guidance Units for educationally vulnerable students (€124.71) • Education and training of teaching and research staff (€383.121 B) • Improving university digital infrastructures, equipment, technologies, teaching and assessment (€146.88 M)	• Ministerio de Educación y Formación Profesional • Ministerio de Universidades (Ministry of Universities) • Ministerio de Asuntos Económicos y Transformación Digital

COMPONENT	OBJECTIVE	DIRECT IMPACT	INVESTMENTS	RESPONSIBLE PERSONS
Component 22: Shock plan for the care economy and reinforcement of inclusion policies	The modernisation and reinforcement of all social services, with special attention to the long-term care model, promoting innovation and a Person-Centred Care model	MEDIUM	• Long-term care and support plan (€2.1 B) • Plan for the Modernisation of Social Services (€899.1 M) • Plan España País Accesible (Spain Accessible Country Plan) (€157.5 M). • Plan España protects you against the Increasing the capacity and efficiency of the reception system for asylum seekers (€190 M)	• Ministerio deDerechos Sociales y Agenda 2030 • Ministerio de Igualdad • Ministerio deInclusión, Seguridad Social y Migraciones
Component 23: New public policies for a dynamic, resilient and inclusive labour market	Promoting inclusive and economically and socially sustainable growth and ensuring legal certainty	HIGH	• Empleo Joven (Youth Employment) (€765 M) • Empleo Mujer (Employment Women) and gender mainstreaming in public policies to support activation for employment (€105 M) • Acquisition of new skills for digital, green and productive transformation (€434.5 M) • New territorial projects for rebalancing and equity (€555 M) • Governance and boosting policies to support activation for employment (€105.5 M) • Integral plan to boost the Social Economy to generate an inclusive and sustainable economic fabric (€100 M) • Promoting inclusive growth by linking social inclusion policies to the Minimum Living Income (€298 M)	• Ministerio de Trabajo y Economía Social • Ministerio de Inclusión, Seguridad Social y Migraciones
Component 24: Revaluation of the cultural industry	Encouragement of investment that promotes the diversification, consolidation and improvement of the cultural offer in the territory	HIGH	• Boosting the competitiveness of cultural industries (€110.875 B) • Revitalisation of culture throughout the territory (€141.065 B) • Digitalisation and promotion of major cultural services (€73.06 M)	• Ministerio de Cultura y Deporte

COMPONENT	OBJECTIVE	DIRECT IMPACT	INVESTMENTS	RESPONSIBLE PERSONS
Component 25: Spain audiovisual hub of Europe Spain AVS Hub	Boost the audiovisual sector through internationalisation, fostering innovation and improving regulation to position Spain as a centre of reference for audiovisual production and the video game and e-Sports sector	MEDIUM	• Programme for the promotion, modernisation and digitisation of the audiovisual sector (€200 M)	• Ministerio de Asuntos Económicos y Transformación Digital • Ministerio de Cultura y Deporte • Ministerio de Industria, Comercio y Turismo
Component 26: Plan for the promotion of the sport sector	The dynamisation, restructuring and modernisation of the sector, adapting it to the new socio-economic reality through the processes of digital transformation and ecological transition	MEDIUM	• Promotion of Sport – Digitalisation Plan for the Sport Sector (€75.6 M) • Promotion of Sport – Green Transition Plan for Sport Facilities (€146.5 M) • Promotion of Sport – Social Plan for the Sport Sector (€77.8 M)	• Ministerio de Cultura y Deporte
Component 27: Measures and actions to prevent and combat tax fraud	Modernise our tax system by making it more efficient, so as to prevent and combat tax fraud and strengthen the revenue-raising capacity of the tax system	LOW	• Regulatory changes and promotion of cooperative models (not applicable)	• Ministerio de Hacienda y Función Pública
Component 28: Adapting the tax system to the realities of the 21st century	Make the tax system more equitable, progressive and fair, while at the same time deepening the design of green taxation, incorporating the gender perspective and promoting public policies of general interest, such as health protection	LOW	• Regulatory changes and promotion of cooperative models (not applicable) • Promotion of tax measures (not applicable) • Establishment of committees (not applicable)	• Ministerio de Hacienda y • Función Pública
Component 29: Improving the efficiency of public spending	Improving evaluation in the field of public administration	LOW	• Alignment of the General State Budgets with the Sustainable Development Goals of the 2030 Agenda and the ecological transition (not applicable)	• Ministerio de Hacienda y Función Pública

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Recovery, Transformation and Resilience Plan

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