



FACULTAD DE TURISMO Y FINANZAS

GRADO EN TURISMO

ANALYSIS OF INTERNATIONAL TOURISM IN SEVILLE

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Sevilla, septiembre de 2019



**GRADO EN TURISMO
FACULTAD DE TURISMO Y FINANZAS**

**TRABAJO FIN DE GRADO
CURSO ACADÉMICO [2018-2019]**

TÍTULO: ANALYSIS OF INTERNATIONAL TOURISM IN SEVILLE

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SUMMARY:

The following project consists in the analysis and delineation of a general international touristic profile of visitors to the city of Seville, in order to draw relevant, meaningful conclusions on this particular issue. To get to that point, a section essentially introductory in nature will be laid out in the first place, thus providing the necessary ground floor to grasp the fundamental aspects of the origin, development and operation of tourism in Spain, with an additional, specific focus on Seville. In turn, once the touristic profile for Seville as a thriving destination is delimited and defined, a series of measures and initiatives will be put forward which might contribute to further promotion of tourism in Seville, as well as increase international tourists' overall level of satisfaction.

KEY WORDS:

International Tourism, Touristic Profile, Motivations, Touristic Features, Touristic Initiatives.

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CHAPTER 1

INTRODUCTION

Tourism presents itself as a phenomenon which has consistently been gaining considerable importance in Spain's national economy. Over the past few years its growth has been truly remarkable, as presently the touristic sector holds 11.7% of the national input. Worldwide, Spain stands among the most visited destinations, holding third place, after France and the United States, thus showing how strong Spanish tourism really is.

Comparación del impacto del turismo en Comunidades Autónomas y España. Año 2017

	Andalucía	Canarias	Cantabria	Castilla-La Mancha	Comunitat Valenciana	Comunidad de Madrid	Galicia	Illes Balears	La Rioja	Región de Murcia	España
PIB	12,5%	35,2%	10,9%	7,4%	14,6%	6,5%	10,4%	44,8%	9,8%	9,8%	11,7%
EMPLEO (**)	11,9%	40,3%	11,4%	8,6%	15,1%	6,5%	11,0%	32,0%	10,3%	10,2%	12,8%

* Datos para Comunidad de Madrid y Castilla La Mancha relativos a 2016. Para Cantabria e Illes Balears a 2014. Datos para La Rioja relativos a 2013, para Región de Murcia a 2011, y para Andalucía relativos a 2007 (Estudios IMPACTUR). Datos para España relativos a 2017 según figuran en la CSTE (Cuenta Satélite del INE)

** Diferencias observadas entre comunidades se explican en un elevado porcentaje a los diferentes niveles de estacionalidad dado que los datos de empleo en los Estudios IMPACTUR están contabilizados en puestos de trabajo equivalentes año.

Figure 1.1 Economic impact of tourism in Spain and Regions (2017)

Source: IMPACTUR



Figure 1.2: International Ranking of Touristic demand and income (in millions of dollars)
Source: OMT-UNWTO

Regarding Andalusia, the relevance of the touristic sector is even greater, since it holds 12.5% of the region’s economic income as a whole, which is above the national average. Furthermore, this sector creates 11.9% of the remunerated positions in the Andalusian territory.

Having established the importance of tourism and the touristic sector itself, nationwide and also at the regional level, it is only natural to go on to analyze this phenomenon in greater detail, taking as reference a smaller indicator, such as the capital of Andalusia, Seville. In order to do that, the various tourist attractions that this city has to offer will be regarded, and then tested against tourists’ perception, from an international point of view, thus enabling us to draw a highly accurate picture of the situation.

Seville sits in first place in Andalusia regarding touristic demand and overnight stays. Nationwide, the city holds third place, behind Madrid and Barcelona by large. Among its main touristic values we can point out its wide historic legacy, richly shaped by the innumerable traces of the various tribes, peoples and empires which settled in this land, together with its gastronomy, privileged climate, and the relaxed lifestyle that can be breathed in as you walk around the city.

In the course of this project a deeper analysis will be carried out, integrating tourists’ motivations, expectations, level of satisfaction and any other data that might help shed some light on what tourism in Seville actually amounts to.

Puntos Turísticos	Viajeros		Pernoctaciones	Puntos Turísticos
Madrid	9.034.326	1	19.547.867	Barcelona
Barcelona	7.490.633	2	18.010.021	Madrid
Sevilla	2.529.822	3	12.692.580	San Bartolomé de Tirajana
Benidorm	1.972.195	4	11.516.982	Benidorm
Granada	1.832.764	5	10.274.734	Adeje

Figure 1.3: National Ranking of Tourists demand and overnight stays

Source: INE (Instituto Nacional de Estadística)

CHAPTER 2

OBJECTIVES, JUSTIFICATION AND METHODOLOGY

2.1. Objectives

When devising this project, the main goal was to delimit a general profile which may define tourists who visit the city of Seville, from an international point of view. However, since this objective might seem too wide, it could be broken down along the following lines:

- Get to know international tourists' motivations to come and visit Seville.
- Get to know their nationality, age and gender.
- Get to know their type of lodging, length of stay, level of expenses and level of wages (if possible).
- Learn the areas on which tourists might prefer to spend their money (restaurants, culture, sports, health, etc...)
- Get to know tourists' level of satisfaction, as well as their global valuation of Seville as a touristic destination.
- Find out features that might bring about a negative appreciation by international tourists visiting Seville.
- Identify different elements that international tourists visiting Seville might have felt as missing.
- Set up initiatives to boost the overall satisfaction of international visitors to Seville, on the basis of possible negative feedback which may be obtained during the development of the project.

At the instrumental level, this project aims to put into practice some of the knowledge and skills acquired by the author when reading the various courses integrating the curriculum of the Degree in Tourism at the University of Seville, Special mention must be made here of the three compulsory courses in English for Tourism allocated in the second, third and fourth years.

2.2. Justification

As already stated in the previous chapter, Spain, and more importantly Andalusia and Seville, hold a top spot in the national ranking of touristic income, a reason for which it seems so important to create and maintain the necessary infrastructures in order to satisfy such demand.

However, it is equally important to keep up detailed, reliable and updated information about any aspects that might have an impact on tourism. In order to ensure this, it is only necessary to carry out studies and surveys periodically that may provide all the information required.

This project intends to carry out a synthesis of all this data, which duly combined and rearranged will form a report. This report will, in the simplest possible way, explain the way tourism in Seville works. In summary, the main goal is to translate empirical data

into useful, illustrative information on Seville as a growing international tourist destination.

With all the information which may be gathered, a thorough analysis of the behavior of international visitors in Seville will be developed, aiming to establish certain guidelines for encouraging touristic demand in Seville, as well as raising the tourists' level of satisfaction and improving the overall standard of service provided.

2.3. Methodology

During the development of this project, statistic data will be consulted from official websites, (such as Exceltur, BOE, INE, etc....) in order to obtain relevant, updated information about the different factors having an influence on tourism in Seville. Furthermore, a survey will be designed and carried out, whose purpose will be to create a profile of international tourists visiting the city. This survey will be designed in English, to make it suitable for international tourists. Through the analysis of the data obtained from the survey, a report will be elaborated aimed to define such a profile.

By way of introduction, a contextual framework will be laid to serve as ground floor for the description of Spanish tourism, and specifically, tourism in Seville. Such contextual information will help us to better understand the origin and evolution of the phenomenon.

Once the international touristic profile is defined, a thorough analysis will be carried out aiming at learning about negative experiences or feedback during the visit. Lastly, complementary initiatives will be proposed to try to eradicate negative reviews or feedback during the visitors' stay and improve Seville's overall "score" as an international tourist destination.

CHAPTER 3

BACKGROUND

In order to develop this project, it seems appropriate to start by outlining the general background of Tourism development in Spain, and in Seville in particular.

In Chapter 1 we briefly sketched the decisive role that Tourism plays in Spain's economy, a country which has progressively adapted its infrastructure to this type of service industry, and which currently offers a surprisingly solid touristic system. Therefore, we must look back in order to catch a glimpse of how this process was consolidated.

Even though there seems to be a blur while trying to define when and where tourism actually started (basically because, technically speaking, it could be argued that it is one of the oldest activities carried out by the human being through history), it could be generally agreed that it emerged as a leisure activity during the second half of the 20th century in Europe. This phenomenon was made possible on the basis of the granting of compensated holidays for workers, which from that moment on could enjoy some time off to relax and enjoy themselves with their families. This fact, along with some other concomitant developments such as the invention of the automobile and the raise in salaries due to better economies, set the pace for tourism as an industrial activity and business to grow rapidly. This lifestyle evolution originated in developed countries in Europe, as well as in The United States, which thus witnessed the birth of a new prosper middle class. With this social and economic advance, tourism became an activity not only suitable for the wealthiest, but also within the reach of middlemen. All this would only shape the beginnings of an industry which would later become an essential component of many modern economies.

According to Bayón Maríné (1999) at that time Spain was regarded as an unexploited paradisiac place, with a beautiful coastline, which was found quite attractive by international tourists. Although initially it had been a target for romantic writers and wealthy travelers during the 19th century, who were captivated by tales about such a romantic and exotic country, Spain's touristic demand was quite insignificant in actual numbers. It was not long after World War II (in the last third of the 20th century) that Spain would start to develop as a top-class touristic destination. What made the evolution of Tourism in Spain possible was basically its unique and appealing coastline together with a laidback lifestyle which encouraged a totally brand-new type of tourism, focused mainly on spending time on the beach and enjoying the sun. As a result of this, sun and sand tourism became a very popular activity, with Spain as its chief destination on the European scale, which attracted tourists that visited our country for various purposes: leisure, health and wellness, and relaxation, among others.

Even though Spain managed to become quite a popular destination, statistically speaking, tourism would only represent an insignificant profit compared to what it brings in nowadays, after long years of adaptation and creation of an immense industry to meet the ever-increasing tourist demand.



Image 3.1: Beginnings of sun and coast tourism in Spain (Playa de Las Arenas, Bilbao)

Source: <https://www.todocoleccion.net>



Image 3.2: Tourism in Benidorm in the 60s

Source: <https://www.efetur.es>

As Tourism in Spain went through considerable growth, it developed mostly in beach destinations such as Benidorm, the Costa del Sol in Málaga, and the Balearic and Canary Islands, whose tourism numbers skyrocketed overnight (as vividly depicted in Image 3.2 above). Many European countries took a long time to overcome the negative impact of World War II, and during the 70s, these countries managed to stabilize their economies and join in this fairly new touristic trend.

During those years, the strong synergy between a cluster of positive factors paved the way for Spanish Tourism. Thus, along with the overall economic improvement across the European continent came other equally important issues, such as the developments in air travel, the passing of laws aimed at ensuring a top quality touristic system in Spain, and the unstoppable rise in popularity of our country as a privileged sun and beach tourist destination.

Not only did tourists who visited Spain find our beaches and lifestyle most appealing, but also valued our health programs greatly, which were made readily available to them in spas and health resorts, from which Spain gathered favorable tourist conditions. As a result, Spain shaped a competitive touristic offer around these two central elements, focusing on offering visitors coast and leisure as well as health and tranquility. Along this development path, our country became a top class international touristic destination.



Image 3.3: Spa of Archena in the 70s

Source: <https://www.todocoleccion.net>

As Spain was rapidly turning into a tourist destination whose main asset was sunny coasts, it was soon felt though that its overall tourism offer had to diversify, so that the market could attract new types of tourists and experience reborn growth. This general feeling became common to many Spanish tourist destinations, such as Seville. As a result of this upcoming new trend, Seville deemed it necessary to provide visitors with an alternative, varied, idiosyncratic offer, which currently relies on a solid touristic framework finely tuned to satisfying the massive, diverse demand that it holds in the present moment.

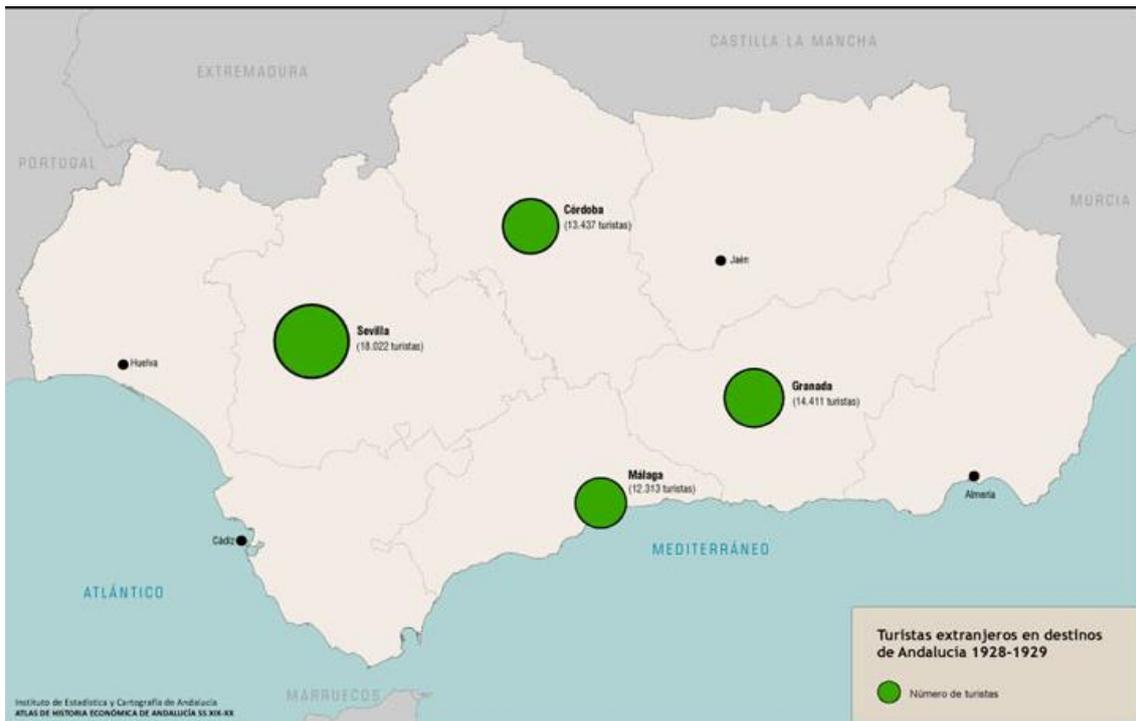


Image 3.4: Main touristic areas in Andalusia during the 1920s

Source: Instituto de Estadística y Cartografía de Andalucía

In order to account for the development of tourism in Seville, it is necessary to highlight the decisive role which “Expo 92” played in this particular aspect. That was a worldwide event, in which Seville became a host for some 112 countries and 23 international entities. This translated into 20 million visitors to the city, which, for six months, became the world’s capital, participating in many cultural activities and economic and political gatherings. This event put Seville on the map internationally speaking and launched the city onto a completely new level regarding the tourism industry. The 1992 World Exposition exceeded all expectations, with a total number of 42 million visits registered during the half year that the Expo pavilions, facilities and amusement areas were open to the public.

Previously, Seville was the recipient of a high economic boost (the largest income Seville has received from the national government), which made it possible to undertake a thorough renovation and modernization of the city. For instance, regarding transport, roads, bridges (such as “Puente del Quinto Centenario”), a new airport and a new railway system for AVE (high speed trains) were built, connecting Seville nationally

and internationally. Also, theatres and museums were built and renovated, in order to endorse Seville with a strong, magnetic cultural attraction for visitors seeking alternative tourist features. The “Teatro de la Maestranza” was also inaugurated during those years, and various infrastructural reforms were carried out in museums, such as the “Museo de Bellas Artes”. Several auditoriums which are nowadays still in use were also built, the “Auditorio Rocío Jurado” being one of the most famous. In addition, a profound rehabilitation of Seville’s most popular neighborhoods was also undertaken, converting the Andalusian capital into a city unknown and new even for the local population. Thanks to the big investment in renovations and building infrastructures carefully planned to increase tourism income, Seville developed into a top-class touristic city.

However, over the following years, Seville witnessed a touristic crisis, during which there was an obvious surplus of hotel vacancies which were not occupied (around 22,000 according to some estimates). Owing to this, many hotels had to shut down or reduce their size. Despite experts’ predictions, the atmosphere in the city after the Expo was one of uncertainty. Touristic demand also suffered a little decrease in numbers, which could be explained by the general touristic demand contraction in all the Spanish territory.

It was not until 1998 that Seville started to witness economic and touristic growth once again. It was in that year that “Isla Mágica” opened its gates. After the Expo, the vast area where it had been held slowly emptied and deteriorated, due to many businesses located there being forced to shut down, because of lack of rentability. The opening of this new theme park was regarded as a symbol of new hope for tourism in Seville, which led new business companies to occupy the Expo area (Isla de la Cartuja) making it to flourish once more.

From 1998 through 2001 Seville saw important progress regarding tourism figures again, which led many to call this period “the golden age of tourism,” with record-breaking numbers of visitors officially recorded every year. This growth in tourism could be partly explained by the innovative, functional infrastructure which had been made available for the Expo, which was felt by many in Seville to have been underused until then. With these favorable conditions, all that great infrastructure started to gain life again, and the city of Seville itself saw how some parts which were abandoned began to flourish, projecting the image a new modern kind of big urban area.

However, in 2001 there was a sudden stop in that touristic progress. The terrorist attacks in the United States on September 11th caused US visitors (the top country providing international visitors to Seville) to stop travelling to Spain because of fear. This had a marked impact on touristic demand in Seville, which would not restart its growth until 2005, after the atmosphere of fear triggered by international terrorism started to fade away.

Año	2000	2005	2010	2011	2012	2013	2014
Plazas	14.198	16.994	17.987	18.016	18.622	19.319	19.668
Pernoctaciones	3.126.627	3.252.771	3.332.866	3.605.575	3.581.089	3.718.394	4.053.429

Figure 3.5: Number of hotel vacancies and overnight stays from 2000-2014

Source: INE (Instituto Nacional de Estadística)

Año	1955	1970	1985	2000
Plazas	2.920	3.378	6.192	17.414
Pernoctaciones	s.d.	1.115.140	1.620.294	3.879.828

Figure 3.6: Number of hotel vacancies and overnight stays from 1955-2000

Source: Own elaboration from Pellejero (2006)

CHAPTER 4

INTERNATIONAL TOURISTIC PROFILE

After having established some ground floor on how Tourism in Spain and Seville developed, this project will proceed to present an approximate representation of the international tourist who visits the city of Seville.

In the first place, we will make use of statistical data in order to provide a solid background for the international touristic profile. Afterwards, we will attempt to draw up the international profile by employing essentially the same type of criteria, but only this time using the data collected from the surveys given away to tourists for them to fill up, rather than relying on already existing data. This will enable us to make a comparison between both profiles, which will be carried out later on. Before going any further, it is important to point out here that the difficulty in analyzing the touristic demand is greater than that involved in analyzing the touristic offer. This difficulty springs from the necessary reliance on surveys and the very nature of the information which may be supplied by the tourists themselves, which might lead to misinterpretation or failure to properly understand the topic under research if the information obtained should turn out to be particularly vague, imprecise or incomplete.

- Country of residence

Even though the international touristic profile is the one being subject to study here, it is substantial to point out though that national visitors hold almost 60% (59.7%) of the total number of tourists visiting Seville. From an international standpoint, the ranking of the countries which provide most visitors would unfold as shown below (taking as a reference point the number of visitors staying in hotels during their visit):

1. France: 79,319 visitors
2. United States: 63,682 visitors
3. Italy: 58,287 visitors
4. United Kingdom: 55,289 visitors
5. Germany: 42,054 visitors

Also, while reviewing these figures, the need to point out China as a major potential source for international tourists seems obvious. Even though it sits in eighth place in the world ranking, it is really a young country regarding external tourism, which has witnessed outstanding potential growth in the past few years. China has grown, if compared to last year's data, by around 40% regarding visitors to Seville, which can only indicate how important the Asiatic nation may become in this particular trend in the future.

Viajeros (2017)

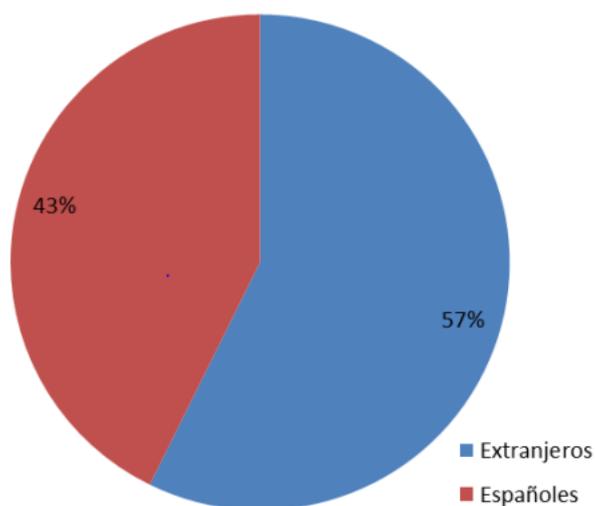


Figure 4.1: National and international percentage of visitors in Seville (2017)

Source: Class notes from the course "Sistema Turístico de Sevilla" (Prof. Arsenio Villar Lama)

PAÍSES (20 principales mercados)	Viajeros	Tasa variación	Cuota mercado	Pernoctaciones	Tasa variación	Estancia media
Francia	185.814	-4,75	12,31	447.945	-3,64	2,41
Estados Unidos	173.961	14,89	11,53	371.776	16,55	2,14
Italia	153.607	9,69	10,18	355.182	9,13	2,31
Reino Unido	133.666	5,72	8,86	331.519	4,76	2,48
Alemania	90.643	12,27	6,01	194.595	11,53	2,15
República China	61.865	35,73	4,10	88.773	40,33	1,43
Portugal	59.195	4,53	3,92	107.049	6,15	1,81
Países Bajos	56.849	8,47	3,77	141.447	9,44	2,49
Bélgica	41.721	13,93	2,76	106.156	11,81	2,54

Figure 4.2: International ranking of countries sending tourists to Seville (2017)

Source: Centro de Datos Turísticos

- Duration of visit (number of nights spent)

According to the data provided by the “Centro de Datos Turísticos”, the average time which tourists spend when visiting Seville is 3 days (2 nights spent). The national tourist average sits a little below 2 nights per visit (1.78), while the international tourist average is 2.16 nights per visit.

The international ranking of countries whose visitors spend more time in Seville is as follows:

1. United Kingdom: average length of visit: 4.69 days
2. France: average length of visit: 4 days
3. Germany: average length of visit: 3.30 days
4. Italy: average length of visit: 3.27 days
5. United States: average length of visit: 2.87

Pais de procedencia	Estancia media (en días)
Reino Unido	4,69
Francia	4,00
España	3,64
Alemania	3,30
Italia	3,27
Estados Unidos	2,87
Total*	3,48

*La estancia media total se corresponde con la totalidad de los países de los turistas encuestados

Figure 4.3: International ranking of most time spent while visiting Seville (2018)

Source: Centro de Datos Turísticos

- Months preferred

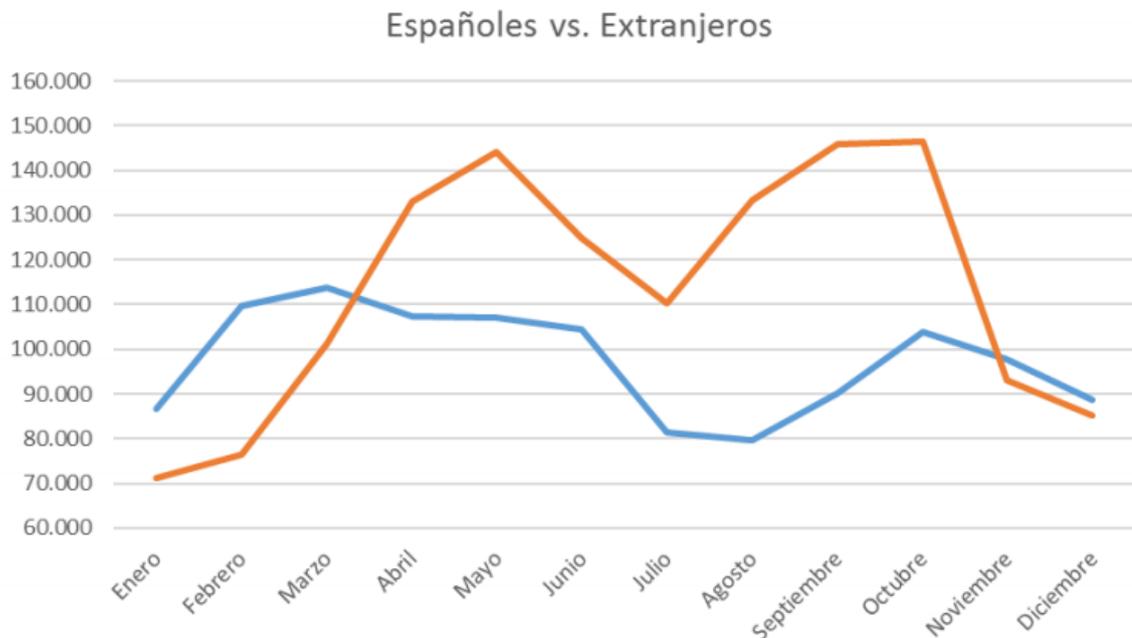


Figure 4.4: Graph comparing the evolution through the year of national (blue line) and international (brown line) touristic income (2018)

Source: Class notes from the course "Sistema Turístico de Sevilla" (Prof. Arsenio Villar Lama)

This point could be best understood with the help of the graph shown above. Even though it compares national and international features, the data of real interest for us here is only the international trend, which exceeds the national one throughout most of the year.

As can be seen from the chart, international tourists show greater motivation for visiting Seville during the months of February, March, April and May. After May, with the coming of summer, a sudden drop is noticeable, which can be accounted for by the high temperatures in the city. This trend goes on until almost August. Then there is an upturn in the flow of international tourism which keeps steady until October, the month which exhibits the highest peak of the year (near 150,000 visitors), slightly above the month of May (somewhat over 140,000 visitors).

Then, from October through February there is again another blunt drop, which means it is low season in Seville.

- Type of lodging

The major type of lodging provided for international tourists in Seville are hotels (54%), with an estimation for the year 2018 of 1,643,218 tourists lodged in. Within the hotel trend, the most popular category would be 4-star hotels, which can accommodate in total 12,127 visitors at once, followed by 5-star hotels and 3-star hotels.

The second most popular lodging type, following hotels by far, would be guest houses, which put up 218,072 visitors, followed by touristic apartments (154,839 visitors).

The problem faced when keeping track of the real number of visitors staying in touristic apartments is the current lack of legal regulation in the sector, making it especially difficult to obtain reliable information regarding this particular kind of lodging. Furthermore, this situation seems to be having a very negative effect on tourism economy, since for many lodging providers the owners of touristic apartments are simply "breaking the rules of the game".

Nº ALOJADOS

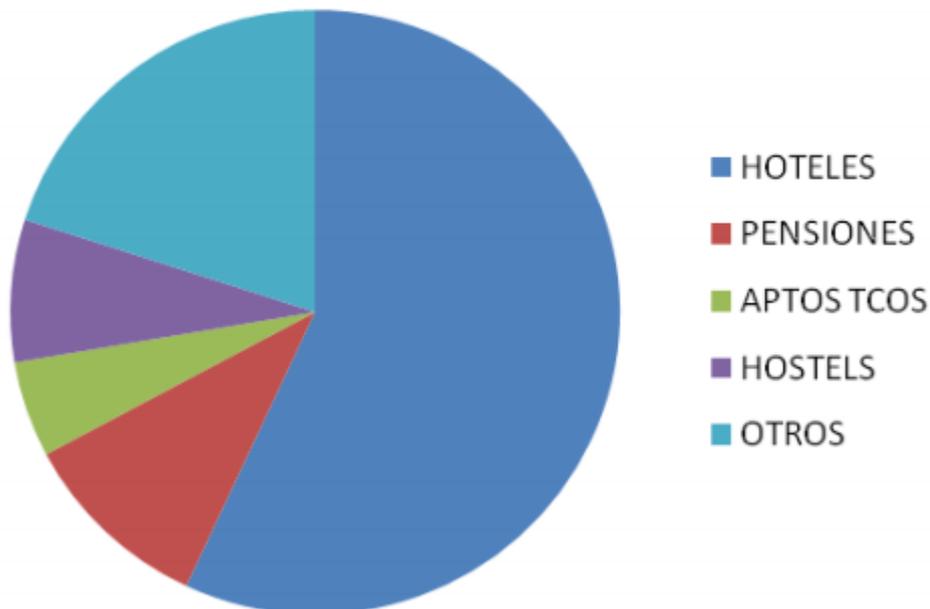


Figure 4.5: Most popular types of lodging in Seville for international tourists (2018)

Source: Class notes from the course "Sistema Turístico de Sevilla" (Prof. Arsenio Villar Lama)

- Leisure

Among the activities whose main purpose is the visitor's amusement, one of the most popular in Seville is visiting the numerous cultural monuments the city boasts. The sites registering most visits per year in Seville are concentrated in the historic old town, where we can find such beautiful landmark monuments as the Cathedral and the Real Alcázar (a fortified Muslim palace). These two monuments register by far the highest number of visits paid, having hosted 1,075,890 and 945,757 visitors respectively in the first semester of 2018, according to the data supplied by the "Centro de Datos Turísticos."

Besides monuments, one other frequently visited feature in Seville are museums. These, however, stand far behind in numbers. The top visited museum would be the Real Maestranza de Caballería, which specializes in the bullfighting world, followed by the Sea Museum located in the well-known Torre del Oro.

1 ^{er} Semestre 2018	VISITAS MUSEOS Y MONUMENTOS		
	Nº	Tasa Variación 2017	Tasa Variación 2016
Catedral de Sevilla	1.075.890	8,42%	28,30%
Real Alcázar	945.757	7,88%	18,47%
Real Maestranza de Caballería	178.080	18,12%	--
Iglesia Colegial del Divino Salvador	167.073	29,93%	--
Rutas Casas Palacio-SWR*	120.872	--	--
Museo Marítimo Torre del Oro	83.827	27,52%	21,83%
Centro del Mudéjar (Palacio de los Marqueses de la Algaba)	22.679	73,19%	--
Palacio de Lebrija	21.244	-3,34%	17,38%
Castillo de San Jorge	12.727	-24,80%	299,59%
Centro Cerámica Triana	10.388	-3,33%	--

Figure 4.6: Most visited monuments and museums in Seville (2018, 1st semester)

Source: Centro de Datos Turísticos

There are other important features in Seville which are as popular among international visitors as those shown above, but whose number of visits per year cannot be registered. This is basically explained by the fact that these are open areas, lacking a surveilled entrance, so it is virtually impossible to record the exact number of tourists visiting them. Some representative examples of these areas are Plaza de España, Barrio de Santa Cruz, Plaza Nueva, and Parque de M^a Luisa.

CHAPTER 5

INTERNATIONAL TOURISTIC PROFILE II

After having analyzed second-hand data in order to delimit a general international touristic profile of visitors to Seville, taking into considerations such parameters as country of residence, duration of the visit, and type of lodging, among others, it is equally important to compare and contrast that second-hand information with first-hand information, so that some meaningful conclusions can be drawn on the issue under study here.

Thus, a survey was specially designed for that particular purpose, 30 samples of which were handed out to international visitors in Seville, who were then asked to fill them up (the survey has been included at the end of the project, in the Annex section). Once the surveys had been completed and handed back, the following procedure was implemented: the same issues already analyzed in the previous chapter were reanalyzed on the basis of the evidence collected from the survey, with special regard to international tourists' behavioral patterns, all of which will be addressed below.

- Country of residence

Surprisingly, the new data obtained from the surveys seem to indicate that the top country regarding the number of international visitors is no longer France. Looking at the numbers, Italy sits at the top of the list, being the country of residence of 30.4% of the total amount of visitors surveyed. The following countries in the ranking, with a significant difference in their relative percentages, would be England and the United States, both holding 17.4% of the statistical sample. Next would come Ireland, with 13.04% and then, at the bottom of the ranking, Denmark, Mexico, Philippines and France with 8.7%, 4.3%, 4.3% and 4.3% respectively. Also, the United States is surpassed by Italy, causing a switch of spots between both countries. Furthermore, Germany, a country sitting among the top-5 countries on the scale, does not even appear on the new ranking provided by the surveys.

Italy	30,4%
England	17,4%
United States	17,4%
Ireland	13,0%
Denmark	8,7%
France	4,3%
Mexico	4,3%
Philippines	4,3%
Australia	4,30%

Figure 5.1: Ranking of countries of residence of international tourists in Seville

Source: Own elaboration from the surveys

- Duration of visit

Before reaching any sound conclusions regarding this matter, an important detail should be noted here: many of the visitors surveyed responded to this question by writing down the total number of days spent, not only in Seville, but also in surrounding cities on the coast such as Cádiz and Huelva, or even abroad, in Morocco in particular. Therefore, the representativeness of this data may not be accurate.

The most recurrent pattern concerning the duration of the visit is a stay of 7 days in total. However, once again, it should be noted that this does not necessarily correspond with the number of days spent in Seville. The overall average duration of the stay obtained from the visitors surveyed is 5.79 days spent, an average much higher than the one displayed by official statistic organizations, such as INE, EXCELTUR, FRONTUR, etc. Shown in the chart below are the results of this section of the survey:

1 day	8,3%
2 days	12,5%
4 days	12,5%
5 days	8,3%
6 days	8,3%
7 days	37,5%
8 days	4,2%
14 days	8,3%

Figure 5.2: Duration of visit from international tourists surveyed

Source: Own elaboration from the surveys

Furthermore, also with regard to the previous parameter, it seemed likewise interesting to make a comparison between country of residence and duration of visit, in order to draw some conclusions and try to establish a relational pattern.

By comparing countries of origin and the average duration of the stay we found that visitors from Ireland and Italy are the ones that spend more time when visiting Seville as tourists (9.33 and 7.28 days, respectively). Other countries such as Mexico, Australia and Denmark also exhibit a relatively long stay in our city; the sample of visitors surveyed coming from these countries, however, is not enough to attempt to draw a representative pattern.

Ireland	9,33 days
Italy	7,28 days
Denmark	7 days
Australia	7 days
Mexico	6 days
France	5 days
United States	4,83 days
England	3,25 days
Philippines	2 days

Figure 5.3: Ranking of countries regarding duration of visit (obtained from the visitors surveyed)

Source: Own elaboration from the surveys

- Type of lodging

It has already been established that the type of lodging preferred by the tourists visiting Seville is without doubt hotels, holding 54% of the overall lodging demand. However, the detailed analysis of the answers to the surveys clearly displays an even stronger preference for hotels, since up to 69.20% of the visitors surveyed mention hotels as the lodging type of their choice. The rest of lodging categories show a much lower percentage of the total of visitors, covering a maximum of 7.7% of the touristic demand. It should be remarked here that this new average obtained from the surveys pertains to exclusively international tourists, this being possibly the reason why the total average is then higher than that registered in the official statistics integrating both national and international tourists (54%), which was presented in Chapter 4.

Hotel	69,2%
Touristic Apartment	7,7%
Friends or family	7,7%
Hostel	7,7%
Guesthouse	3,8%
Others	3,8%

Figure 5.4: Ranking of lodging modalities preferred by international tourists in Seville

Source: Own elaboration from the surveys

As well as in the previous variable, it seemed appealing to draw a similar comparison, establishing a pattern between countries of residence and type of lodging preferred (as far as the empirical representation of the survey may allow).

The examination of this new pattern shows that visitors coming from Italy display more fluctuation when it comes to the choice of lodging (hotels, touristic apartments, hostels and guest houses). On the other hand, tourists from Australia, Philippines, Denmark and Ireland clearly prefer spending the night in hotel facilities.

Country	Hotel	Hostel	Guesthouse	Touristic Apartments	Friends and Family	Cruise
France	-	-	-	100,00%	-	-
Mexico	100,00%	-	-	-	-	-
Denmark	100,00%	-	-	-	-	-
Australia	100,00%	-	-	-	-	-
Philippines	100,00%	-	-	-	-	-
Ireland	100,00%	-	-	-	-	-
United States	80,00%	-	-	-	20,00%	-
Italy	57,14%	14,28%	14,28%	14,28%	-	-
England	50,00%	-	-	-	-	50,00%

Figure 5.5: Distribution of lodging modalities preferred according to nationality

Source: Own elaboration from the surveys

Lastly, when deciding on which hotel to stay in, tourists coming from countries such as Ireland or the USA tend to prefer luxurious 5-star and 4-star hotels, such as “Alfonso XIII”, “Hotel Doña María”, “Hotel EME Catedral” or “Gran Meliá Colón”.

- Daily expense

Calculating the daily expense from all the visitors surveyed, the average daily expense turns out to be 117,70€. Also, to analyze this other parameter a bit deeper, the same combinatory approach to the data was taken, picking out the country of residence as the term for the comparison, similarly to the sections above. By far, tourists coming from the Philippines feature the highest average daily expense (300€); however, this is not highly representative, as the number of tourists surveyed coming from this country is relatively low. The same problem is found with countries such as Australia, Mexico or Denmark. On the other hand, the country with the lowest average daily expense is Italy (93.57€). Nevertheless, in this particular case, the amount of tourists surveyed is high enough to support representative data.

Country	Average Daily Expense
Philippines	300 €
United States	142,50 €
Mexico	130 €
Denmark	125 €
France	115 €
Australia	110 €
England	105 €
Ireland	100 €
Italy	93,57 €

Figure 5.6: Average daily expense according to country of residence

Source: Own elaboration from the surveys

- Level of salary

When analyzing this information, it was virtually impossible to draw an average figure, since the survey was designed dividing up the levels of salary into various intervals (500-1,000€, 1,000-1,500€, 1,500-2,000€ and above 2,000€). The chart in Figure 5.7 below features the relational pattern between the level of salary and the percentage of international visitors in each salary range.

Level of Salary	Percentage of Surveyed visitors
500-1000€	11,53%
1000-1500€	15,38%
1500-2000€	50%
above 2000€	23,07%

Figure 5.7: Level of salary of the visitors surveyed

Source: Own elaboration from the surveys

The data reflected in the chart indicate that 73.07% of the total number of tourists surveyed have a level of salary of 1,500 € or higher, which may imply that the international tourists who come to Seville have a relatively high standard of living. This pattern could be further paired with the one regarding average daily expense.

In the following chart, a comparison between country of residence and level of salary is drawn, as already done for the other previously described sections. The chart shows that the country with a wider range of salary is Italy. On the other hand, the Philippines and France exhibit the highest level of salary, which, however, cannot be averaged since the range is above 2000€, making the calculation of the average impossible.

Country of residence	500-1000€	1000-1500€	1500-2000€	Above 2000€
England	25,00%	-	50,00%	25,00%
United States	-	-	60,00%	40,00%
Australia	-	-	100,00%	-
Philippines	-	-	-	100,00%
France	-	-	-	100,00%
Mexico	-	-	100,00%	-
Denmark	-	50,00%	50,00%	-
Ireland	-	33,00%	33,00%	33,00%
Italy	14,28%	28,57%	57,14%	-

Figure 5.8: Level of salary according to country of residence

Source: Own elaboration from the surveys

- Areas visited during the stay

In this part of the survey the existence of empirical limitations should be recognized. While analyzing the answers provided by the tourists surveyed, finding that such a low percentage of tourists visited the main touristic areas seemed highly unlikely. For instance, according to the answers registered, only 7.69% of the visitors surveyed had visited the Jardines de Murillo, which are located in the city centre and illustrate an area with a great flow of people. Another example of this is that, apparently, less than 70% of the tourists questioned had visited the “Alcázar de Sevilla” or the “Barrio de Santa Cruz”, which are two sights which every tourist in Seville may want to visit, without a doubt. Despite the seemingly low representation of the answers, a chart has been elaborated displaying the percentage of visitors surveyed who have visited Seville’s most popular tourist areas.

Regarding the places visited during the stay, a pattern comparing the percentage of visitors and the country of residence seemed pointless, since there was no significant difference recorded in the places visited according to the nationality of the tourists.

Area visited	Percentage of visitors
Catedral de Sevilla	80,76%
Alcázar de Sevilla	61,53%
Barrio de Santa Cruz	53,84%
Plaza de España	42,30%
Triana	23,07%
Torre del Oro	19,23%
Alameda de Hércules	19,23%
Prado de San Sebastián	15,38%
Río	11,53%
Jardines de Murillo	7,69%
Alfalfa	7,69%
Arenal	7,69%
San Bernardo	3,84%

Figure 5.9: Percentage of tourists visiting Seville’s most popular areas

Source: Own elaboration from the surveys

- Main motivation to visit Seville

As far as the motivations of international visitors to come to Seville are concerned, the answers obtained from the tourists surveyed seem to suggest that the two main attractions for deciding to visit Seville are our culture and our gastronomy (of the total number of visitors surveyed, 84.61% and 65.38% respectively made Seville their choice because of these two reasons). Features which could be relevant to other city tourist destinations, such as health, business, the practice of sports or studying seem to be almost non-existent for international tourists visiting Seville. Note, as well, that the answers to the survey are limited and represent just a little part of the reality of tourism in Seville. The chart in figure 5.10 gathers all the information obtained regarding tourists' motivations. Also, due to the possibility of selecting more than one answer for this specific parameter of the survey, the total percentage may be over 100%.

Main motivation	Percentage of visitors
Culture	84,61%
Gastronomy	65,38%
Visiting Friends	15,38%
Studying	7,69%
Health	3,84%

Figure 5.10: Main motivations for tourists to visit Seville

Source: Own elaboration from the surveys

Even though there are more features and parameters contained in the survey, the rest of them will be used mainly as evidential support for the development of the various topics to be dealt with in the next chapter.

CHAPTER 6

SOME INITIATIVES TO IMPROVE SEVILLE'S EXISTING TOURISM OFFER

In this chapter several touristic measures will be proposed focusing on issues which may help improve Seville's existing international tourism offer. Such initiatives can be conceived of as the result of the detailed analysis of second-hand information (Chapter 4, together with some relevant, recent news about tourism in the city) and first-hand information obtained through the survey (Chapter 5).

If compared to other major touristic Spanish cities, such as Barcelona or Madrid, one feature which seems to be lacking in Seville is a greater development of the overall transport system. While these other cities exhibit a very solid and efficient underground network, perfectly complemented with public buses, Seville has just a single underground route, which leaves many areas of Seville uncovered. Also, the bus system has limited schedules and, similarly to the underground system, leaves some urban areas virtually inaccessible.

Furthermore, the information regarding public transport and how to get around the city can be at times relatively hard to find, and quite often tourists can be confused and forced to ask local people which bus route to take or where to get off in order to visit certain places. This particular problem could be overcome, in the first place, by making available in various forms and channels, and by publicly displaying, a larger amount of information concerning public transport routes and timetables. For example, the format of the maps showing the routes in bus stops may lead to confusion, especially for tourists. If the maps were displayed in a simpler way, indicating which specific bus lines tourists should take in order to get to certain sites or monuments, tourists would go back home with a different image of Seville, the image of a city that worries and thinks about tourists as much as about local people.

Also, in order to expand the city's transport system, a much higher budget would be required. Every large city with touristic relevance must have a solid transport network, containing at least 3 or 4 major routes, including a round route circling the city centre. This, however, is a difficult task, since accomplishing it calls for large amounts of time and money, but in the long run that would certainly be a great benefit and a most valuable asset for the tourism industry in the city.

Furthermore, there is another issue which is quite similar to the lack of information about public transport. This issue is signposting. Once more, while visiting other major cities, no matter where you are, signposts will always display useful information and point visitors the right direction in order to reach whatever area, monument, museum or famous place that they may be interested in visiting. This is again something lacking in the city of Seville, as specifically pointed out by many tourists who come to visit us. While walking around the historic centre, it is not infrequent at all to be approached by lost tourists trying to find their way towards the "Plaza de España", for instance. As in the case of the lack of proper information about public transport, this other problem could be easily solved by displaying a larger amount of signposts, especially in the most visited areas of the city. In this way, no matter where tourists are located, they will be able to find their way around and not depend on local people to get around the city.

According to some national newspapers such as ABC, another negative issue which is becoming a worldwide trend is the over-exploitation of lodging infrastructures, especially touristic apartments. Quite recently, there has been a shift in the way that landlords manage their own properties. With the advent of relatively recent innovative business ideas such as Airbnb, landlords have found it more profitable to let their properties to tourists that visit the city for just a few days, rather than to local neighbours, who cannot compete with the high wages of foreign visitors. This has forced many families and all-time neighbors to leave their homes because they cannot afford to pay a high rent. This situation has given way to great complaining and discomfort among the local population in some cities, Barcelona being the finest example of the problem.

The controversy with touristic apartments and the parallel increasing shortage of homes for rental have become such a big issue that there is growing resentment at tourists among local citizens. This particular problem is spreading rapidly, and there have been attested some cases of it in Seville already. Not only are neighbors feeling strongly against this situation, but also hotels and lodging businesses are. In order to compete in the lodging market, hotels are subject to strict laws and regulations, which do not seem to apply likewise to this new type of lodging generated by Airbnb. Airbnb uses private properties as if they were lodging facilities, which can in a certain way be seen as dishonest competition. No laws yet restrict the operation of this modern branch of business, or have proper control over how much profit the owners of Airbnb touristic apartments make. This is the main reason why hotels' owners and managers are angered by these practices. However, this issue can only be addressed by passing certain laws that may regulate the renting of those private properties, forcing Airbnb hosts to register them and take out the necessary licence and permissions which hotels are actually required to have (as well as paying the corresponding taxes). The main advantage in finding a ready solution to this problem would be the maintenance of the sustainable practice of tourism, keeping the balance between economic gain and proper respect for the city's infrastructures and the local population.

Another issue which has been causing trouble in recent times, in the broader context of the upcoming problem of preserving the environment, is the considerable amount of litter that tourism produces. It would obviously be unfair to point fingers only at visitors coming to Seville, since surely local people are also to blame for this. However, by directly addressing this issue, the same problem may be eradicated on both sides. As the 21st century becomes an era of waste of massive proportions, experts are constantly warning of the certain negative outcome of the present situation: the virtual destruction of the planet. For this reason, some countries are finding ways to reduce the consumption of plastic and other materials damaging the environment, as well as recycling as much as they possibly can. Spain has seemingly fallen behind in this sustainable trend, which would only require an individual effort made by everyone. Tourism as a world-scale phenomenon seems to have a big responsibility in this overall pollution issue, since millions of travellers carelessly make the wrong use of the environment, using it as if it were a trash can. This problem may be solved in two ways: raising awareness in everyone that global warming is already a menacing fact, and increasing the public budget towards recycling and cleaning up litter in the streets, parks, and other areas of high people flow. This is certainly a matter of utmost urgency, since if we continue to damage the planet like that, soon we may even run out of cities and other destinations worth visiting.

CONCLUSIONS

Before deciding on the specific topic for this project, I already had in mind the idea to engage in a reflection on what tourism in Seville actually amounts to, and the truth of it as seen from the eyes of both visitors and the local population. Since tourism is such a big, complex, far-ranging issue nowadays, I deemed it both methodologically and empirically advisable to narrow down the scope of the project and focus my attention on trying to reveal a smaller part of it. This is the reason why I chose international tourism as the main topic for study here, since I feel that I am in constant contact with it, and in my opinion it may well be regarded as the very essence of tourism in Seville. Also, I was also interested in providing, from the international and local insights alike, new ways to improve the overall touristic framework in the city, after conducting statistical research into the behavioral patterns exhibited by international tourists.

In the first place I saw it necessary to briefly describe the process by which Seville became the important tourist destination that it can be considered at present. Prior to that, I also presented the general lines along which tourism originated and developed in Spain, because it can be argued that, in a sense, national tourism had an influence on the shaping of Seville's own distinctive tourist offer.

Through the analysis of second-hand data in the first place, I was able to somewhat set up a general idea of how international tourists behave, and create a general international touristic profile of them, showing its basic, defining features. However, to me this did not seem to be enough, so I decided to obtain data of my own on the issue under study, to eventually compare and contrast my own profile to the previous one and attempt to draw some relevant, meaningful conclusions. In order to do all this, I specifically designed a survey for international tourists, featuring questions on essentially the same issues which had been previously analyzed on the basis of the second-hand data. After comparing both kinds of data, I discovered similarities, which at first I was certain I would not find, such as country of residence and level of salary, since I opted for giving away the surveys in only one area of the city ("Calle Mateos Gago"), hoping this would provide me with some alternative answers. But I also found out meaningful differences concerning, among other things, the country of origin of international tourists in Seville and the sites and areas which they actually visited during their stay in our city.

As a result of my empirical, statistical research -obviously limited in its descriptive scope given the very nature of this kind of academic work-, I think that I have been able to delimit and delineate a general touristic profile of international visitors to Seville, having the special value of reflecting their own perception of themselves as tourists and of the city of Seville as the travel destination of their choice.

Later, drawing on the two international touristic profiles defined on the basis of the second- and first-hand data examined over the course of the project, I proposed some measures and initiatives intended to improve Seville's existing tourist offer. Among them are a greater development of the city's overall transport network, the underground system in particular; the supply of adequate tourist-friendly information about public transport lines, routes and timetables; the display of a much larger amount of touristic signposting, especially in the areas most frequently visited by international tourists; proper legal regulation of the touristic apartment offer, of the Airbnb kind in particular; raising awareness of tourist practices damaging the environment, and fostering new sustainable forms of travel and tourism.

Lastly, I would like to stress the fact that given the reduced size of my empirical, statistical research, in conjunction with the limited scientific scope of the present type of academic work, this project may be understood as a first step or pilot scheme for broader, more ambitious, scientifically sounder research into Seville as an ever-growing, highly attractive destination for international tourism. New directions for such research may be, for instance, considerably enlarging the universe of future statistical surveys, with more qualitative questions items included as well, or trying to extend the average stay of international visitors in Seville by making attractive to them other valued destinations in the province with great historic, artistic and cultural heritage, such as Carmona, Écija and Osuna, among others.

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ANNEX

Touristic Profile in Seville

Descripción del formulario

Name of the respondent

Texto de respuesta corta

Country of residence

Texto de respuesta corta

Duration of the visit

Texto de respuesta corta

Family trip

Yes

No

Type of lodging

- Hotel
- Aparthotel
- Touristic apartment
- Hostel
- Guesthouse
- Camping
- Friends or family
- Others

Location of lodging

Texto de respuesta corta

Daily expense

Texto de respuesta corta

Level of salary (Optional)

- 500-1000€
- 1000-1500€
- 1500-2000€
- Superior a 2000€

Areas visited during the stay

Texto de respuesta corta

Main motivation to visit Seville

- Gastronomy
- Culture
- Business
- Health
- Visiting friends or relatives
- Practicing sports
- Studying

Indicate if your expectations have been satisfied regarding the following matters
(In case they haven't, please briefly explain)

1. Gastronomical quality
2. Culture
3. Atmosphere
4. Architecture
5. Prices
6. Local treatment
7. Transport network
8. Signposting
9. Infrastructure

Level of expectations regarding the following matters (low, medium, high)

1. Gastronomical quality
2. Culture
3. Atmosphere
4. Architecture
5. Prices
6. Local treatment
7. Transport network
8. Signposting
9. Infrastructure