

TOURISM ACTIVITY IN ANDALUSIA. A SET OF INDICATORS AND ITS DISTRIBUTION AND EVOLUTION

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INTRODUCTION

Tourism is at present a basic sector in Andalusia's development strategies, and it is gaining weight in regional socio-economic indicators. This is due both because of the growth of the sector itself and the various structural crises affecting other sectors like traditional agriculture and industries, mining, or fishing. Related to this, the tourism industry is one of the main factors transforming the landscape and land uses in Andalusia, both in positive —strengthening the economy, increasing infrastructures— and in negative ways —consuming natural resources, occupying land, causing environmental and landscape impacts, etc.—, and it is essential as an element explaining territorial development trends and processes.

Despite its significance, the tourism industry has traditionally lacked reliable statistics about its development, especially those with a more territorial focus. Because of this, it is necessary to establish indicators showing in detail the impact of tourism throughout space, as well as its relation with land use trends. This paper tries to bridge the gap by calculating a number of indicators for each of the 770 Andalusian municipalities.

METHODOLOGY

This paper's aim is to analyze the development of the tourism industry Andalusia by using a series of indicators intended for: a) framing Andalusia in the Spanish context; b) studying the chronological evolution of the tourism industry in Andalusia as a region c) studying the chronological evolution of the tourism industry within Andalusia. The indicators are the following:

Concerning the framing of Andalusia in the Spanish context:

- Share of tourism in the national and regional GDP, as percentage.
- Vacancies in Spain and Andalusia, 1965-2005.
- Nights spent in hotel facilities by region, 1995-2005.

Concerning the evolution of the tourism industry in Andalucía:

- Number of received tourists in Andalusia, 1996-2005
- Number of vacancies in Andalusia, 1965-2005
- Active population employed in the tourism sector and all sectors, 1990-2004

Concerning the evolution of the tourism industry within Andalusia, indicators have been structured in three parts: absolute state indicators, relative state indicators, and evolution indicators.

The absolute state indicators are:

- Number of vacancies, 2006.
- Number of secondary residences, 2001.
- Power consumption in the tourism industry, 2002, Mwh/year.

The relative state indicators are:

- Number of vacancies per 1,000 inhabitants, 2006.
- Share of secondary residences per total residences, as percentage, 2001.

The evolution indicators are:

- Number of vacancies 1991-2001.
- Number of vacancies 2001-2006.
- Number of vacancies per 1,000 inhabitants, 2001-2006.
- Share of secondary residences per total residences, as percentage, 1991-2001.
- Share of secondary residences built between 1991 and 2001, as percentage of secondary residences in 2001.
- Share of EU foreigners as percentage of total population, 2005.
- Finally, three indicators have been calculated only for coastal municipalities, most of them tourism-intensive, trying to show their focus either on commercial tourism (vacancies) or residential tourism (beds in secondary residences). These indicators are:
 - Beds in secondary residences/ vacancies ratio, 1991.
 - Beds in secondary residences/vacancies ratio, 2001.
 - Beds in secondary residences/vacancies ratio, 1991-2001.

CONCLUSIONS

- a) About statistic and methodological issues, the inadequacy of reliable and homogeneous data sources must be remarked. The most important drawback concerns secondary residences, since the official source (Censo de Población y Viviendas, Instituto Nacional de Estadística) seems to have several mistakes, especially when analysing

their evolution between 1991 and 2001. There is, therefore, a serious imbalance between the economic and spatial significance of tourism and the shortage of official data favouring a reliable and extensive knowledge about this industry.

- b) Regarding results, the important growth of the tourist offer, not only in the region as a whole but especially in the coast, must be mentioned. Despite the trouble working with statistical sources, this growth refers both to vacancies and beds in secondary residences, either owned by Spaniards or foreigners.
- c) In reference to the spatial distribution of tourism in Andalusia, indicators show that permanence and change features coexist regarding vacancies and secondary residences.

The reaffirmation of the coast as the most important focus of tourism stands out amongst permanence features, the most traditional areas being the Western Costa del Sol or West Almería. The three more established urban tourist centers, linked to the presence of monumental landmarks reflecting the historical image of Andalusia (Sevilla, Granada, Córdoba) are also reinforced, and complemented by convention and events tourism.

The vigour of new coastal tourism developments in emerging areas like the Western Coast of Huelva, the eastern border of Bahía de Cádiz-La Janda, or Eastern Almería are the elements of change. These developments are usually associated with urban projects considered more in agreement with current demand trends: less overcrowding, reduction of height and volume of buildings, quality offer, encouragement of complementary offer, link with golf courses, focus on foreign demand...; although their disadvantages are the fast occupation of the remaining non-built coastal areas, as it will be seen later.

Likewise, the expansion of tourism and residential-tourism land use is ascertained in areas close to the Costa del Sol (Valle del Guadalhorce, Axarquía), in a extremely fast process of drastic transformation of their territorial structures. Finally, it is noticeable the intense dynamization of inner areas with rich tourism resources, either intermediate cities linked to cultural tourism (Ronda, Arcos de la Frontera, Carmona, Antequera, Priego de Córdoba, Úbeda, Baeza, etc.) or mountain areas with high environmental and landscape quality like Sierra de Cazorla, Sierra de Segura, Alpujarras, Serranía de Ronda, Sierra de Cádiz, or Sierra de Huelva which have been the ground of the fast growth of natural and rural tourism.

- d) Tourism is an essential explanatory factor of the processes taking part in the distribution of development within Andalusia: population structure and urban system, infrastructures, employment generation, land use patterns, natural resource consumption, etc. Specifically, tourism is the leading factor accelerating the economic growth of coastal areas, and especially the Málaga coast which is the most dynamic area in Andalusia. Tourism also has an important role in local development processes in rural areas or in economic diversification in urban areas.
- e) Apart from the aforementioned advantages in the generation of rent and employment, the intensification of spatial problems derived from a fast expansion of tourism in the last years must be mentioned. Some of these problems are land occupation, increased water shortage —especially in golf-related areas—, and landscape impacts on coastal

or high environmental quality areas. As for the latter, the occupation of these areas for tourism and residential-tourism purposes is one of the most outstanding and alarming territorial features of Andalusia. From this fact there are a series of connected processes, namely:

- f) The escalation of the concentration of uses in coastal areas. In this narrow strip a high number of space-consuming activities are located: intensive agriculture, industry, harbours, fish farms, urban areas, military areas, or protected natural areas, not to mention tourism and tourism-related activities. Some of these are expanding rapidly, therefore increasing the pressure on land and its prices, and even giving cause for speculative behaviours. This situation is a fundamental explanatory factor in the analysis and assessment of present trends in the urbanization of coastal areas (PRATS, 2003; OBSERVATORIO DE LA SOSTENIBILIDAD EN ESPAÑA, 2006).
- g) The aforementioned increase in the competition for land uses has entailed a parallel increase in the pressure on natural resources of those areas, mostly due to the expansion of tourism and residential uses. This pressure has caused the depletion and degradation of these natural resources, with alarming signs regarding water, land or landscape. Apart from that, and as a consequence of the same factors, infrastructure problems still remain despite public investments in fields like water supply and sewage, roads and railroads, or waste disposal (NAVARRO, 2003).
- h) The obvious incompetence of public authorities to channel this growth through the corresponding planning and control instruments. In fact, growth rates have clearly surpassed the capacity of public authorities to become aware of the problem, assess it and take measures to solve it. All these problems arise despite the existence of planning instruments appropriate for their application on these areas, namely Planes de Ordenación del Territorio de Ámbito Subregional, currently being drawn up in nearly all coastal areas. However, the plans have inadequate writing and approval deadlines for these rapidly growing problems.
- i) There is a perception shared by various experts (REQUEJO, 2004) that, if this trend continues at the current pace and with the same pattern, all the coastal strip without an express declaration as a protected natural area will be occupied and built. This involves the high opportunity cost of consuming in only a few years potential spatial and tourism resources which could have been used more efficiently with the help of medium or long-term planning, including preserving their original uses as a formula to optimize these resources.
- j) As a final conclusion, we must emphasize the weakness of the theoretical discourse prevailing in spatial-tourism planning during the 1990s (GRUP D'ESTUDIS TURISTICS, 1998). The mixture of factors like the high profit margins of the real estate industry, the financial needs of local authorities (solved through urban growth), or the technical difficulties planning such dynamic areas have resulted in a noticeable contrast between public statements on sustainable tourism and resizing of growth and a reality in which market forces, especially real estate forces, have favoured —and still favour— unsustainable medium and long-term coastal areas occupation rates.