



Tourist Context Analysis .Summary:

Region of Murcia: tourist presence: (data 2012)

- Number of presence, general data for 2012: **2.536.500 Nights**
- Number of nights of presence referred to national tourist: **2.096.825 Nights.**
- Main regions of origin: Madrid (25.24%), Murcia (16.84%), Valencia (15.21 %) and Andalucía (12.61%).
- Number of nights of presence referred to tourist from foreign countries: **439.675 Nights.**
- Main countries of origin: EU countries; The UK (29.13%), France (9.91%), Germany (8.14%).
- Total number of arrivals to the Region of Murcia for 2012: **1.005.540**
- National arrivals: **845.726**; main regions of origin: Murcia (23.18%), Madrid (18.76%), Valencia (19.08%) and Andalucía (13.20%).
- International arrivals: **159.814**; major countries of provenance, The UK (25.39%), France (12.93%), Germany (7.73%).

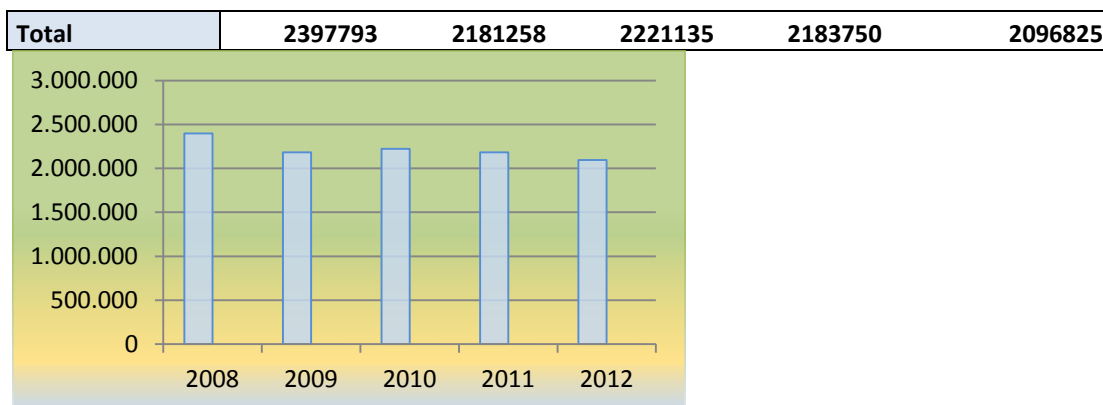
Average permanence rate/Average per head expenses.

General data 2011	Days of permanence	Average per head expenses	Expenses in €
General data 2011	2,63	General Data 2012	998,5
National Tourists	2,61	National Tourists	962 €
Foreign Tourists	4,43	Foreign Tourists	1.035 €

Tourist trends:

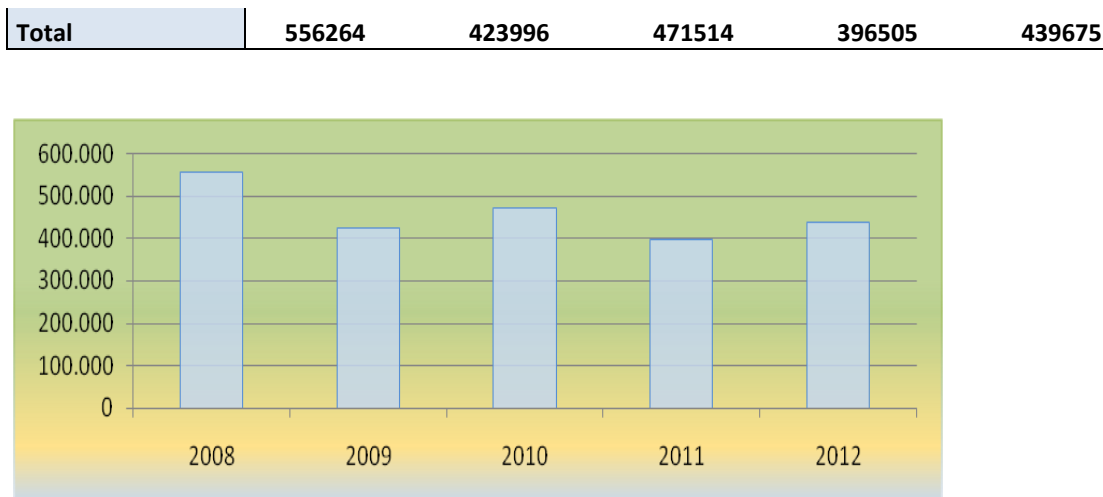
Tourist presence. Nights of presence during the last five years:

- **National Tourist**



In the national scene, there has been a fall of almost 400.000 nights since 2008 caused by the national crisis that erupted in 2008. In spite the economic situation, after the important fall of 2008, the trend has remained constant during the last five years.

- **International Tourists**



Given the European financial situation, in the international context the figures are similar to the national one; with a dramatic fall from 2008 to 2009 and then the trend steadily rises a little till 2012.

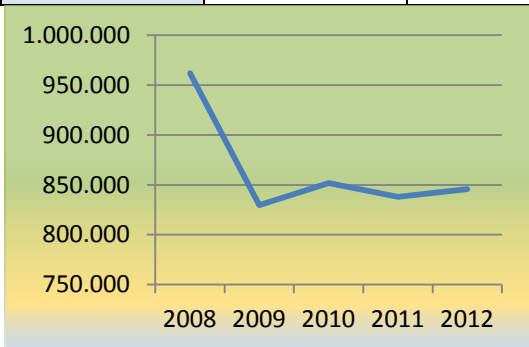


The UK experimented the foremost deepening of the demand, with a fall of over 100.000 demands of nights in the hotelier establishments. The other countries have maintained a constant demand of hotelier facilities.

Tourist arrivals. Trend in last five years referred to Tourists Arrivals:

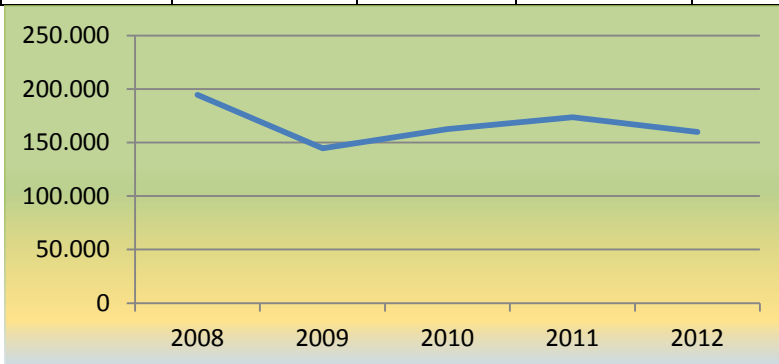
- **National Tourists**

Total	961720	829511	851679	837901	845726
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- **International tourists**

TOTAL	194647	144561	162599	173506	159814
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Given the economical scene, both national and international Tourism have maintaining a negative trend since 2008 in the arrival of tourist to the Region of Murcia.

The fall in the international context is motivated by the decreased in the demand by the UK citizens, whilst the rest of the EU countries keep a steady trend.

Average permanence rate

Trend in last 5 years, general data

Presence/Arrivals

	2008	2009	2010	2011	2012
Permanence	2,52	2,62	2,62	2,63	1,96

	2008	2009	2010	2011	2012
National tourist	2,49	2,63	2,61	2,61	2,48

	2008	2009	2010	2011	2012
Foreign tourist	2,86	2,93	2,90	2,29	2,75

Tourist profile

The average tourists in the Region are middle-class families, aged less than 45 who come for a period that excess the two weeks and dwelling in their own accommodations.

Main focus of origin: Madrid for National Tourists and The UK for the International Tourists.

Accommodation facilities .Accommodation structures:

	2008	2009	2010	2011	2012
Trend of number of hotels in last 5 years	229	229	227	225	221
Trend of the number of accommodation structure in last 5 years	2391	2349	2357	2437	2518
Trend of the number of accommodation structures in last 5 years (referred to other typologies of accommodation)	6	6	6	10	12

Sleeping accommodation

	2008	2009	2010	2011	2012
Trend of the number of sleeping accommodation in last 5 years	19893	20138	20165	20404	20482
Trend of the number of sleeping accommodation in last 5 years (referred to hotels)	166	166	166	261	292
Trend of the number of sleeping accommodation in last 5 years-referred to other typologies of accommodation	10179	10018	10030	10356	10665

Accommodation Facilities, current picture. Accommodation structures

Number of accommodation structures in 2012	2518
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Región de Murcia
Jóvenes Empresarios

Number of hotels in 2012	221
Number of accommodation-other typologies of structures (2012)	12

Sleeping accommodation

Number of sleeping accommodation (2012)	20482
Number of hotels accommodation in 2012	292
Number of sleeping accommodation in other typologies of structures (2012)	10665

*Main source of information and studies about the tourism in the Region of Murcia:
Instituto de Turismo de la Región de Murcia :*

[http://www.carm.es/web/pagina?IDCONTENIDO=22762&IDTIPO=100&RASTRO=c820\\$m22726](http://www.carm.es/web/pagina?IDCONTENIDO=22762&IDTIPO=100&RASTRO=c820$m22726)

Services and Infrastructures

Roads

The Region of Murcia counts with a strategic infrastructure of means of transports, connecting all the points of the Community within minutes thanks to a huge network of highways and National Roads.

There are three major highways in the Region of Murcia; the Coastline highway, the Inner highway and the Madrid Highway. These highways, along with the networks of National Roads, connect the several towns of the Regions very quickly and hence with the rest of the Regions of Spain.

Bus

All the towns are connected with Murcia's Bus Station, and from there, there are plenty of destination available for the travelers both within and out of the Region. Currently there are 15 bus stations in the whole Region.

Train

The Region of Murcia is crossed by two train lines; the interior one, which comes straight away from Madrid; and the Mediterranean one, that cross all the Mediterranean Arch, linking Murcia with the most important cities of the Mediterranean coastline such Alicante, Valencia and Barcelona among others and continues to France and hence the rest of Europe.

Airports

Currently there are two airports in the Region of Murcia, one located in San Javier, in one of the most important touristic destination. And the other one in Corvera, closer to

the City of Murcia, but this one has not been open yet. From San Javier Airport operate the most important European airlines, including low cost.

More information: http://www.murciaturistica.es/es/turismo.como_llegar

Cooperation in tourism sector and their responsibility

Currently there are six clusters that involve all the towns of The Region. The objective is to allow the several towns to work together and get specialized in those matters where the area has a competitive advantage over the rest of the Region.

1. Consortium for Cultural and touristic development of Lorca,
2. “La Manga” Consortium, 3. Consortium of “Cartagena,
4. Puerto de Culturas”,
5. Consortium of the Green Railway of the North-East,
6. Consortium of “Desfiladero de Almanedes”,
7. Consortium of “Marina de Cope.

More information about the tourism clusters:

[http://www.carm.es/web/pagina?IDCONTENIDO=11150&IDTIPO=100&RASTRO=c820\\$m22726_22762](http://www.carm.es/web/pagina?IDCONTENIDO=11150&IDTIPO=100&RASTRO=c820$m22726_22762)

Attractions, facilities and key tourist issues

Hiking: there are three main hiking routes in the Region of Murcia located in “Calblanque y Mar Menor”, “Sierra Espuña” and “Sierra de la Pila”. These three areas conform what had been called “The Natural Footpath Net of the Region of Murcia”

Cycling: More than 1.952,35 biking kilometers available linking all the towns of the Region.

More information about Sierra Espuña: <http://sierraespuna.com/>

More information about Calblanque and Mar Menor:

http://www.cartagenaturismo.es/publicas/conoce_cartagena/playas/detalle_playas/ T411Yq_uqUPT0wzqttPtc-b-iiW5r6ceu

Vía Verde del Noroeste : <http://www.viaverdedelnoroeste.com/>

Tourism development strategies for next years



Región de Murcia
Jóvenes Empresarios

Currently there are in the Region of Murcia three long-term touristic projects on:

- “Lorca, Taller del Tiempo” (Lorca, Time’ Workshop)
http://lorcatallerdeltiempo.es/PORTAL/iya.cns_lorca.web?idi=1
- “Cartagena, Puerto de Culturas” (Cartagena, Cultures’ Harbor)
<http://www.cartagenapuertodeculturas.com/>
- “Caravaca Jubilar” (Caravaca Jubilee) <http://www.caravacajubilar.com/>

Main laws/regulation in tourist sector

For all kind of tourist industries is mandatory to get a permission from the Tourism Affairs Division from the Regional Government

Professional Certificate issued by the National Government that allows the workers to perform the activity that they usually carry on. Hotel Manager Certificate, Active Tourist Assistant Certificate, Outdoor Activities Manager Certificate.

The general permissions and requirements for ordinary businesses. Registration, mandatory insurance, environmental adequacy, tax payment registration and so on.

On this website we can find all the requirements, both Regional and European to start a new activity in tourism:

[http://www.carm.es/web/pagina?IDCONTENIDO=616&IDTIPO=140&RASTRO=c176\\$m](http://www.carm.es/web/pagina?IDCONTENIDO=616&IDTIPO=140&RASTRO=c176$m)

Other

Country reputation

Spain got the sixteenth place in the global ranking. The Spanish lifestyle is envied by the vast majority of inhabitants of the world’s most industrialized countries, who also see Spain as a prime example of the welfare state (just one notch below the Scandinavian countries) and as a responsible and respectable member of the international political scene.

Foreseen projects related to tourist sector

Currently there are three important projects of dynamization of the tourist industry in the Region:

The Paramount Theme Park

Marina de Cope Project

And as the major road infrastructure, the RM-1.

Cool hunting

- The new trends in tourism sector in the Region of Murcia:

a) Wine Tourism: This newly kind of tourism is something else than going for a wine tasting trip. It's to spend some days or even weeks living on a winery cottage in the countryside far away from the city and making all the synergies related to the wine environment.

b) Increasingly presence on the digital platforms: Companies based their projects on digital platforms available as apps for smartphones and web sites.

c) New Vanguard Architecture: New trends in the designing of hotels facilities, enabling the guests to interact with the environment.

Identification of Best Practices of innovative services and companies with the application of new 2.0 technologies to tourist sector

We highlight the "Suite 45", a joint project carried out by The Regional Tourism Affairs Division and the "Young Businessmen Association of the Region of Murcia" (AJE Región de Murcia).

The aim of this project is the setting up of new innovative and viable tourist companies in the Region of Murcia, in order to back the tourist sector in the Region of Murcia through innovative new practices in the Tourism Industry.

After the first leg of the project, fourteen companies were selected for the next round of the competition. This fourteen newly businesses were awarded as the best practices of innovative services and companies in the Region of Murcia.

Suit 45: <http://www.ajemurcia.com/es/inicio/emprende/Lasuite45.aspx>

Sustainability

- "Q of Quality Tourism", The Q is a standard issued by the Spanish Government which warranty quality, reliability and professionalism of the tourist facility awarded by it.

http://www.calidadturistica.es/motor.php?id_pagina=home

- "Directive 94/43/EU". This European Directive set up two pillars of protections: "Natura Network" and "Special Birds Protection Areas".

<http://www.murcianatural.carm.es/web/guest/red-natura-2000>

- "Eco", from 2009 the Regional Government has grouped the several initiatives about eco-efficiency, low Co2 emissions and environmental responsibility in what has been called "ECO".

<http://murciaciudadesostenible.es/es/>



Conclusion and General Issues for Entrepreneurship in tourism in the Region of Murcia

According with the information we have gathered along this report, we are going to give a general overview of tourist sector following a SWOT approach of the Region of Murcia in the tourist industry.

Strengths	Opportunities
<ul style="list-style-type: none">- Idyllic geographical location of the Region of Murcia; with gentle Mediterranean' climate circumstances and high temperatures. The weather conditions allow the practice of any type of outdoor activities and sports during the whole year, not only in summer season.- The existence of 73 km of coastline including the largest salty lagoon in Europe (El Mar Menor)- Beautiful orography of the mainland which offers wonderful landscapes for the tourists who seeks not only sun and beach but also hike around one of the most stunning Mediterranean scenes in the World.- Strategic situation of the Region, within the Spanish Mediterranean Corridor, well connected to the main cities in Spain such Madrid, Valencia and Barcelona.- The Region counts with a newly international airport which besides Alicante airport, link the Region with the whole continent properly.- A remarkable Regional Health-Care System which ensure the well-being of the visitor of the region in case of illness, accident or any health inconvenient.	<ul style="list-style-type: none">- Spain is the second Country in the world in number of foreign visitors, and the Region of Murcia is the tenth Region within Spain.- The Region of Murcia holds the eighth spot in the national visitors ranking.- Lower prices of the Region of Murcia' tourist's products than the rest of Regions, and especially lower prices than other international competitor such France and Italy.- The recovery of the European Economy, which will raise the number of European visitor to the Murcia Community.- The building-up of new infrastructure in tourist sector and a huge theme park.- Fostering of the Health-care tourism.



Weaknesses	Threats
<ul style="list-style-type: none">- High unemployment rate in the Region and the persistence of the Economic Crisis.- Low degree of knowledge of foreign languages.- Lack of standard during the setting up of the traditional touristic infrastructure in the coast and overbuilt of the coastline.- High seasonality of the demand of touristic products of the Region of Murcia.	<ul style="list-style-type: none">- Neighboring Regions with better infrastructures than the Region of Murcia offering similar products such Catalonia, Valencia Community and Andalucía Region.- The thriving of new destination in the Mediterranean Area which threatens the hegemony of Spain.- The Economic situation in Spain and Europe

As we have seen along this report, the Region of Murcia is a unique environment to run a touristic business given its own strengths, geography, the presence of Mediterranean shore and its weather conditions.

The Region of Murcia Coastline has been a traditional destination for British Tourist and in less extent for the rest of Northern European Countries.

The challenge for the Region of Murcia is to lure visitors from the rest of the Northern European Nations, who indeed come to Spain regularly but they choose other destination such Valencia Community, Andalucía and Catalonia.

Currently there are no major legal restrictions in the Region of Murcia for entrepreneurship as a tourist business. As in any other industry, general requirements are compulsories such:

- Treasury Registration
- Administrative permission to start out the business
- Insurance policy
- In any given sector such active tourism, which may involve some risk for customers and commodities, special qualification issued by the Regional government are needed.

Major Problems of the touristic sector:

Nowadays, the overall problem of the Region of Murcia in tourism affairs **is the lack of national and international appreciation**, motivated by the absence of invests in this strategic sector for the Region during the last decades.

We already know that the demand exists, both within Spain and abroad, and the Region offers plenty of possibilities for the creation of new innovative business and practices in the Tourist Sector.

The goal for new entrepreneurs in the Region is to overcome this boundary; to make the foreign tourists to get to know the Region as a unique destination of the Mediterranean Sea.

The new trends of the Regional Government Policies are oriented to evolve to a high standing tourism, based on golf, nautical and health-care tourism to bring down the seasonality of the demand.

SOURCES OF INFORMATION:

- Murcia turística: <http://www.murciaturistica.es/es/turismo.inicio>
- Regional tourism authority: Instituto de Turismo de la Región de Murcia.
[http://www.carm.es/web/pagina?IDCONTENIDO=22762&IDTIPO=100&RAS_TRO=c820\\$m22726](http://www.carm.es/web/pagina?IDCONTENIDO=22762&IDTIPO=100&RAS_TRO=c820$m22726)
- Cartagena turismo: <http://www.cartagenaturismo.es>
- Lorca tourism information:
http://lorcatallerdel tiempo.es/PORTAL/iya.cns_lorca.web?idi=1
- Region de Murcia digital information, complete information about the different areas of the Region: <http://www.regmurcia.com>
 - History: <http://www.regmurcia.com/servlet/s.SI?sit=c,373>
 - Art and culture: <http://www.regmurcia.com/servlet/s.SI?sit=c,371>
 - Nature: <http://www.regmurcia.com/servlet/s.SI?sit=c,365>
 - Typical food: <http://www.regmurcia.com/servlet/s.SI?sit=c,543>
 - Patrimony: <http://www.regmurcia.com/servlet/s.SI?sit=c,522>
 - Local and regional parties:
<http://www.regmurcia.com/servlet/s.SI?sit=c,369>
 - Economy: <http://www.regmurcia.com/servlet/s.SI?sit=c,24>
 - Law and administration: <http://www.regmurcia.com/servlet/s.SI?sit=c,98>
 - Social information for citizens:
<http://www.regmurcia.com/servlet/s.SI?sit=c,570>