



Observatori del Turisme a Barcelona

ciutat i regió



INSTO

International Network
of Sustainable Tourism
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INSTO

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Barcelona Tourism Observatory

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About the observatory

The **Barcelona Tourism Observatory: city and region (OTB)** is the working platform for **statistical information on tourism, knowledge, and market intelligence** in the city of Barcelona and the rest of Barcelona province.

Its organization resides in **the joint work** of the following four institutional professional teams dedicated to the production of statistical data on tourism in the province of the following entities:

- [Barcelona City Council](#)
- [Barcelona Regional Council](#)
- [Barcelona Chamber of Commerce](#)
- [Consortium of Turisme de Barcelona](#)

Publicly presented in June 2017, the OTB was the **culmination of the joint work** initiated in 2015 by the Barcelona City Council, the Barcelona Regional Council and Turisme de Barcelona, as a **result of the synergies and the desire to promote the knowledge and market intelligence** in tourism of each of the institutions. Subsequently, the incorporation of the Barcelona Chamber of Commerce into the project in 2019 provided a wider vision, reinforcing the transversal and disseminating nature of the project.

Over the last few years, the OTB has developed a **fruitful work**, which has led to new perspectives, serving as a tool to **transfer and bring together tourism knowledge, optimising the investment** of economic and human resources, with the integration of individual projects of each of the entities into larger and shared studies. In this way, the OTB offers an **integral vision of Destination Barcelona** and the knowledge required to **manage and promote tourism**.



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Executive summary

Following the worldwide trends, Destination Barcelona (Barcelona city and Barcelona region), experienced in 2023 a **recovery of tourism activity**, registering year-on-year increases in the main performance indicators of tourist accommodation, infrastructures, economic activity and job market.

This document includes a summary of the **tourism performance in Destination Barcelona 2023** as well as an analysis of the **state of play of the indicators** included in the sustainable tourism indicators system (SITS-OTB), the final objective of which is to be used **as a decision-making tool**. Also, it can be used by companies and destinations to do **benchmark**, and to **evaluate the real impact of tourism activity** of the Destination, helping **to be more transparent** to the public opinion.

The reader of this report will find an analysis of the **latest results of the indicators** (most of them regarding 2023), according to tourism **sustainability areas and issues**. This analysis includes some **observations** about the system **weaknesses** and **challenges** that have been identified during the process of calculation, which have led the observatory to a thinking process, where several **objectives** for those indicators presenting problems have been settled:

- Finding **new sources** of data
- Creating **new indicators** (substituting old ones)
- Keep working on the **increase of the awareness** and the participation of stakeholders in the share of their data

This report ends up with a **final conclusion** on the evolution of the indicators results **linked with the evolution of tourism activity in the destination**: when tourism activity decreases, a general improvement of sociocultural and environmental indicators is experienced, while the economic benefits of tourism decrease.

1. Destination in brief

1.1. Destination Barcelona: Barcelona city and its region

Destination Barcelona is a geographical area that covers a group of 12 regions located in Barcelona province, in Catalonia, Spain. The province has an area of **7,694.3 square kilometres** and a total population of **5.7 M inhabitants**. The city of Barcelona, its capital, accounts for 1.7 million inhabitants and its nearest surroundings, around a 1.5. Being one of the four provinces of the Catalonia Autonomous Community, in Barcelona Province there are two official languages: **Catalan and Spanish**.

As a tourist destination, Barcelona province is promoted under the name of **Destination Barcelona** and the brand "**Barcelona is much more**", since although it is mainly known for its capital city, Barcelona, the area has much more to offer:

- Seaside, mountain, and inland towns and landscapes
- Natural and national parks
- Culture, traditions, and world heritage
- Gastronomy and wine tourism
- Sports events and active tourism
- MICE infrastructures and events

Destination Barcelona

8 world heritage sites and 2 intangible cultural heritage traditions

81.32 km of beaches

102,587 hectares of natural parks

In order to cover the whole territory, the Barcelona Tourism Observatory (OTB) has three geographical areas of data analysis (Figure 1: OTB Geographical areas of analysis):

- Barcelona city
- Barcelona region (Barcelona province except for Barcelona city)
- Destination Barcelona (Barcelona province as a whole)

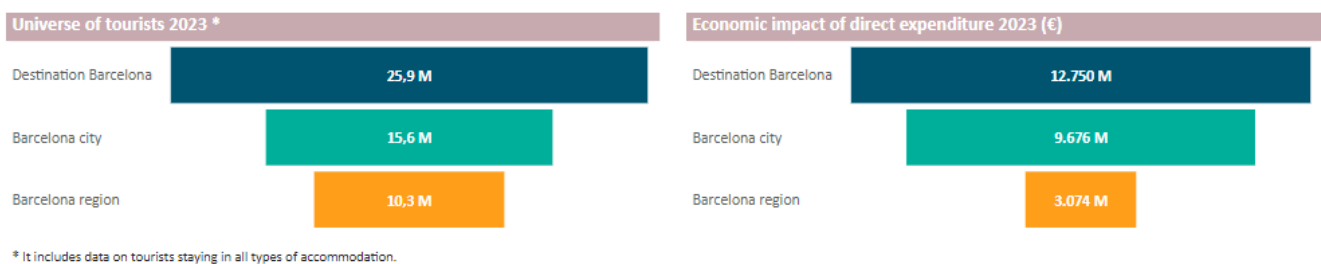
Figure 1: OTB Geographical areas of analysis



1.2. Tourism performance of Destination Barcelona 2023

According to Observatory calculations (Figure 2: Universe of tourists and economic impact of direct expenditure in Destination Barcelona 2023), in 2023 the city of Barcelona received 15.6 M tourists which, added to the 10.3 M in Barcelona region, resulted in **almost 26 M tourists in the whole of Destination Barcelona**. These figures, together with spending on accommodation and expenditure during the stay (food and drink, entertainment, internal transport, shopping, etc.) have made it possible to estimate the **economic impact of direct expenditure** of tourism activity at a total of **12,750 M euros in the Destination as a whole**. This impact is distributed in 9,676 M euros in Barcelona city and 3,074M euros in Barcelona region. These calculations include not only those people staying overnight in tourist accommodation but also those non-residents who slept in other types of accommodation, such as homes of friends and relatives.

Figure 2: Universe of tourists and economic impact of direct expenditure in Destination Barcelona 2023



Source: Barcelona Tourism Observatory

1.2.1. Tourist accommodation demand

Demand for tourist accommodation (Figure 3: Tourist accommodation demand in Destination Barcelona 2023) (which does not include private homes or homes of friends or relatives) **increased again year-on-year** in all types of accommodation analysed, reaching the same levels as in 2019, in terms of overnight stays.

In **hotels**, the number of **tourists** in the destination as a whole exceeded **12 million** (+14.9% Var. 23/22) and **32 million overnight stays** (+12.7% Var. 23/22). Two-thirds of the demand for hotels were recorded in Barcelona city.








Guesthouses and inns, with a **year-on-year growth in tourists** of +9.1%, recorded a **lower average stay**, resulting in a **lower growth in overnight stays** (+0.9% Var. 23/22).

Campsites demand, with more than 3.2 million overnight stays, **increased** by +9.5% in overnights (Var. 23/22), well above **rural tourism establishments**, which despite registering **more nights than the previous year**, experienced more limited growth (+2.5%).

Finally, with data available only for Barcelona city, **homes for tourist** use generated **more than 20 million overnight stays** (+15.0% Var. 23/22), which meant 1 out of every 3 nights in the municipality, while **youth hostels**, **almost 2.5 million** (+9.0% Var. 23/22).

Figure 3: Tourist accommodation demand in Destination Barcelona 2023

● Barcelona city ● Barcelona region ● Destination Barcelona

	Tourists	Overnights	3ed occupancy rate ¹ (%)	Length of stay (nights)
 Hotels	7,784,070	20,211,553	70.2	2.6
	4,526,235	11,798,184	61.1	2.6
	12,310,305	32,009,737	65.8	2.6
 Guesthouses and inns	494,085	1,496,407	70.3	3.0
	116,607	365,689	27.1	3.1
	610,692	1,862,096	53.4	3.0
 Tourist apartments	172,218	568,904	52.6	3.3
	184,338	1,283,321	58.6	7.0
	356,556	1,852,225	56.8	5.2
 Homes for tourist use	2,895,843	11,664,133	55.0	4.0
	nd	nd	nd	nd
	nd	nd	nd	nd
 Campsites*	0	0	na	na
	822,054	3,224,701	51.3	3.9
	822,054	3,224,701	51.3	3.9
 Rural accommodation	0	0	na	na
	161,325	409,756	22.6	2.5
	161,325	409,756	22.6	2.5
 Youth hostels	871,768	2,498,770	74.5	2.9
	nd	nd	nd	nd
	nd	nd	nd	nd

na: not applicable / nd: not available / *Campsites: plots occupancy

Source: Barcelona Tourism Observatory

1.2.2. Mobility infrastructures

The global recovery of air capacity resulted in an **increase** in both **operations** (+12.5% Var. 23/22) and **passenger movements** (+19.9% Var. 23/22) at **Barcelona Airport**, which, despite not exceeding pre-pandemic figures (-5.3% Var. 23/19), closed the year with almost **50 million passengers** (Figure 4: Key figures of infrastructures at Destination Barcelona 2023). Particularly noteworthy was the **increase in passengers on intercontinental flights** (+34.2% Var. 23/22), due to the recovery of normality in the air market worldwide.

At **Barcelona Port**, 803 cruise arrivals and 3,274 ferry arrivals were recorded, carrying **more passengers than ever**: 3.6 million in the first case (+53.2% Var. 23/22) and 1.7 million, in the second (+9,0% Var. 23/22). As for the rail sector, the city of **Barcelona** was **directly connected by the high-speed train to 9 international and 16 domestic destinations**¹.

¹ Barcelona Tourism Observatory: city and region. (2024, 2 22). *Intercontinental passengers at Barcelona Airport grew by 34.2% year-on-year in 2023*. Retrieved from <https://www.observatoriturisme.barcelona/en/news/intercontinental-passengers-barcelona-airport-grew-342-year-year-2023>

Figure 4: Key figures of infrastructures at Destination Barcelona 2023



* Including arrivals and departures / ** Including embarking, disembarking, and in-transit passengers
Sources: AENA, Port de Barcelona, RENFE, and SNCF

1.2.3. Economic activity and job market

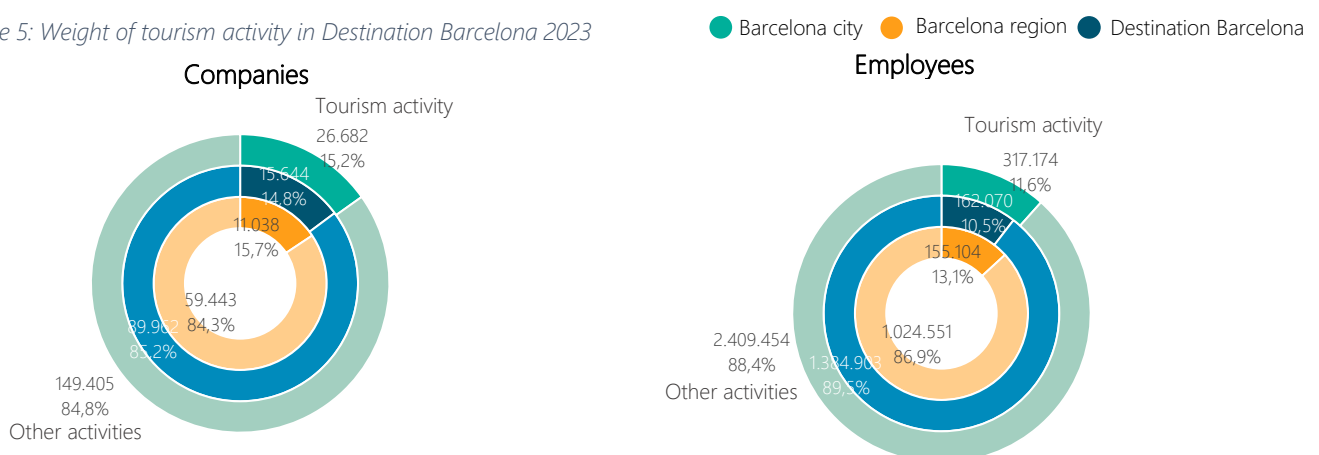
The **weight of tourism** on the economic activity continued to be **higher in Barcelona city** (15.7% in number of companies and 13.1% in employment) than in Barcelona region (14.8% in number of companies and 10.5% in employment) (See Figure 5).

Both, the number of **companies in tourism** and the **employees' increased year-on-year** in Destination Barcelona (+3.5% and +6.3%, respectively). In the latter case, in Barcelona city recorded a higher increase in employment (+8.1%) than in Barcelona region (+4.7%), which experienced a lower impact on tourist occupancy during the pandemic.

After some years of growth in the hiring in the tourism activity core, and with the entry into force of the new hiring regulations in 2022, which lead to an increase in permanent contracts, in 2023 **hiring experienced a downward trend**. In this sense, **temporary contracts decreased the most** year-on-year (-24.9%), while permanent contracts fell by a smaller proportion (-4.9%).

On the other hand, **registered unemployment decreased** by -1.4% year-on-year².

Figure 5: Weight of tourism activity in Destination Barcelona 2023



Source: Barcelona Tourism Observatory, based on data of Idescat and INSS

² Barcelona Tourism Observatory: city and region. (2024, 5 23). *Destination Barcelona municipalities' tourist rating remains at 8.6 in 2023*. Retrieved from <https://www.observatoriturisme.barcelona/en/news/destination-barcelona-municipalities-tourist-rating-remains-86-2023>



2. SITS - OTB: The OTB Sustainable Tourism Indicators System

2.1. Stakeholders

The **stakeholders** that have actively taken part in the definition and calculation of the SITS-OTB indicators (See Annex 1: SITS – OTB, the creation of a new sustainable tourism indicators system) are **those entities by which the observatory is formed**. Besides, the OTB has been supported by the know-how and experience of the **University of Barcelona** and it also has taken into account various **data providers** to update the results of the indicators. All of them have been considered stakeholders of the system (See Figure 6: SITS-OTB stakeholders).

Figure 6: SITS-OTB stakeholders

Barcelona Tourism Observatory core stakeholders

- Barcelona City Council
- Barcelona Regional Council
- Barcelona Chamber of Commerce
- Consortium of Turisme de Barcelona

University stakeholders

- Facultat de Geografia. Universitat de Barcelona
- CETT. Universitat de Barcelona

Data providers stakeholders

- Agència Catalana de l'Aigua (ACA)
- Agència Catalana de Residus (ACR)
- Departament de Mediambient i Sostenibilitat (Generalitat de Catalunya)
- Direcció General del Turisme (Generalitat de Catalunya)
- Institut Català d'Energia (ICAEN)
- Institut d'Estadística de Catalunya (Idescat)
- Instituto Nacional de Estadística (INE)
- Ministerio de Inclusión, Seguridad Social y Migraciones (Gobierno de España)
- Ministerio del Interior. Secretaría de Estado de Seguridad (Gobierno de España)

Source: Barcelona Tourism Observatory

2.2. Checklist

The following is summary table of the **final list of issues and indicators** monitored by the Barcelona Tourism Observatory, according to their **availability**.

Figure 7: Checklist on issues and indicators

Issue	Name of the indicator	Status
Climate change	I01: Average distance travelled by tourists from origin to destination	Available
Noise pollution	I02: Tourist opinion about noise	Available
Air pollution	I03: Number of annual air pollution episode days	Available
Wastewater and solid waste management	I04: Percentage of treated wastewater to, at least, a secondary level	Available
	I05: Solid waste generated per capita	Available
Energy and water management	I06: Water consumption per capita	Available
	I07: Energy consumption per capita	Available
	I08: Percentage of energy produced from renewable sources	Available
Mobility	I09: Percentage of tourists arriving by sustainable collective vehicles	Available
	I10: Percentage of tourists moving actively at the destination	Available
	I11: Percentage of tourists moving by public transport at the destination	Available
Sustainability and environmental management policies and practices at tourism businesses	I12: Percentage of tourism companies with sustainability certifications	Available
Development control	I13: Availability of current plans or strategies of sustainable tourism at the destination	Available
Tourism seasonality	I14: Maximum and minimum monthly overnight stays in accommodation ratio	Available
Destination economic impact	I15: Tourist average expenses during the stay (per person and night)	Available
	I16: Euros received from the tax on stays in tourist establishments per inhabitant	Available
Employment	I17: Percentage of tourism employment	Available
	I18: Average salary of tourism activity and average salary of the rest of the activities ratio	Available
Tourist activity performance	I19: Length of stay	Available
Accessibility	I20: Tourist opinion about motor accessibility	Available
Effects of tourism in the community	I21: Percentage of tourists to residents (Tourist pressure)	Available
Governance	I22: Percentage of good governance instruments	Available
Gender equality	I23: Average salary of women and men in the tourism activities ratio (Gender salary gap)	Available
Marketing for sustainable tourism	I24: Percentage of tourism marketing actions that apply sustainability criteria	Not available
Local satisfaction with tourism	I25: Percentage of residents that consider that tourism is rather beneficial for the destination	Available
	I26: Percentage of residents that consider that the destination is reaching the limits of its capacity to absorb tourism	Available
Tourist satisfaction	I27: Tourist global evaluation of the municipality	Available
Public safety	I28: Tourism opinion about public safety	Available
	I29: Percentage of tourists who have been victims of a crime or a crime attempt in their person or vehicle	Available
Tourist security	I30: Security at the destination (Counter-terrorism alert level in Spain)	Available

Source: Barcelona Tourism Observatory

2.3. Analysis of the evolution of the latest indicators results

As it can be consulted in the Annex 2: SITS – OTB results table, in 2024 the OTB has been able to **update** the results of 26 of the 30 indicators of the Sustainable Tourism Indicators System (SITS –OTB) with 2023 data, and 2 other indicators have been updated with 2022 data. This action is carried out periodically depending on the availability of data and the results are published periodically in the Sustainability Results section of the OTB’s website³.

As for the analysis of the results, **the majority remained quite stable** compared to the previous year, yet in some cases significant changes were observed. The following is a **summary of the published results** according to the tourism sustainability area and issue of the indicators, which also includes some **observations** such as **weaknesses, challenges** and **real uses** of these indicators.

2.3.1. Environmental area

Issue 1: Climate change

The last update of the **average distance travelled by tourists from origin to destination** (I01) shows a **remarkable increase** in the number of kilometres travelled to reach all the analysed geographical areas. This is because of the growth in **international tourism** registered during 2023: in Destination Barcelona this distance has increased from 2,830 km to 3,360. Besides, due to the higher prevalence of international tourists in Barcelona city, the results of this indicator in Barcelona city (3,770 km) are higher than those of Barcelona region (2,350 km).

Although it is not an indicator of carbon footprint, this indicator is being used to get an approach to it until a better indicator or a better way to measure the contribution of tourism to air pollution. Besides, some DMMOs are making marketing **actions to attract domestic tourism and other near source markets to reduce carbon footprint**, so this indicator is being tracked to measure the results of these actions.

Issue 2: Noise pollution

In 2023, the **tourist opinion about noise** (I02) has shown a certain **stagnation**, scoring 7.13 (on a scale of 0 to 10) in Destination Barcelona as a whole. Barcelona city (6.69), which usually is the geographical area with the lowest score in noise pollution, has worsened its results year-on-year (-0.14 points), while Barcelona region, with a highest score (7.79), has not registered major changes.

Historically, the noise in Destination Barcelona has been **one of the aspects with the lowest ratings** given by tourists, so this has been a topic of special interest at a destination level.

³ Barcelona Tourism Observatory: city and region. (2024, 6 4). *Sustainability - SITS-OTB results*. Retrieved from <https://www.observatoriturisme.barcelona/en/sustainability-sits-otb-results>

Issue 3: Air pollution

The number of **annual air pollution episode days** in Destination Barcelona (I03) in 2023 was **zero**, as one year before.

It must be said that this indicator is **not exclusive of tourism** activity and that there are no major differences in the results of the different geographical areas analysed, as pollution episodes tend to occur at the same time everywhere. Therefore, this indicator is **subject to change** if a better indicator is found.

Issue 4: Wastewater and solid waste management

Wastewater is being monitored through the **percentage of treated wastewater to, at least, a secondary level at the destination** (I04). In this case it must be said that in Catalonia, the treatment of these waters at this level is **compulsory** through treatment plants, and therefore, **any place in Destination Barcelona achieves 100%** in the result of this indicator, which means it won't change over the time.

On the other hand, to monitor solid waste, the OTB is calculating the **solid waste generated per capita** (I05). The results of this indicator have been updated now with the latest available data, from 2023. The latest results of this indicator show a **downward trend in the generation of waste** in Destination Barcelona, being lower than in 2018-2019.

As in the previous issues, these two indicators are **not exclusive for tourism** activity, so they are also **subject to change** if better indicators are found.

Issue 5: Energy and water management

A **downward trend in water consumption per capita** (I06) was also observed in Destination Barcelona in 2023, below pre-pandemic levels. This fall in the hydric consumption is framed in a context of **drought in Catalonia**, which begins to take on particular importance from 2023 onwards. As for geographical areas, Barcelona city continues to show, on average, lower values than Barcelona region. This is mainly due to a higher water consumption by economic activities, which have a greater weight outside the city of Barcelona.

Being 2020 the latest available data, the **energy consumption per capita** (I07), **decreased year-on-year**, especially in Barcelona city. This is mainly due to higher energy consumption by economic activities and own sources, which once again have a greater weight outside of Barcelona city. However, it should be noted that domestic consumption per person in Barcelona region increased during 2020.

Finally, the percentage of **energy produced from renewable sources** (I08) remained **stagnant** at 15.73% in 2023, and since 2022, it even registered the **lowest values of the series**.

Once again, it should be borne in mind that the indicators used to measure this issue are **not exclusive to tourism activity**, as they include consumptions of domestic and other economic activities in the tourist destination. Besides, in the case of I06 and I07, the updates of these data are made with a **significant delay**, and in I08, the data is only **available at a national level**, so the results cannot be compared between regions. For these reasons, all of them are **subject to change** if better indicators are found.

As seen, issue 4 and 5 indicators **aren't still tourism-related** as data provided by the public organisms is not enough disaggregated, so it is not possible to get to know the exact performance data of tourism activity.

In the past few years, the **increase in the cost of basic supplies** and the **scarcity of water in Catalonia** have directly impacted not only the **budget of private companies** (increase in economic costs), but also the **way tourism activity is perceived** as a big consumer of energy, water, and other public resources, which altogether does not help tourism to be seen as a sustainable activity. Private companies are more and more conscious about how responsible actions may improve their public image as well as their costs management and they are now putting efforts to reduce their consumption. However, these actions have not been accompanied by a public monitoring of the improvements achieved in this area so the **lack of private companies' data** has led the Barcelona Tourism Observatory to find other ways to measure environmental sustainability in the area of Destination Barcelona, although they do not measure tourism activity exclusively.

In order to take a step forward on this point, the Barcelona Tourism Observatory, together with the sustainability areas of each of the entities that is formed of, is working to get a better approach to tourism sustainability through data collection of companies certified in Biosphere Responsible Tourism. These **companies are being required to share their data on some environmental issues: energy and water consumption**.

After some months of discussions and planning on how to gather the information from a sample of **more than 1,000 companies**, the **first results** of this initiative **have not been as successful as expected**: some companies find it difficult to find the information required or are simply not enough aware of the importance of this action. The OTB and all the entities involved in it hope that, with the help of the Biosphere assessment agents, this situation will improve within the next year.

Issue 6: Mobility

The recovery of international tourism in 2023, especially in Barcelona city, caused the **percentage of tourists arriving by sustainable collective vehicles** (I09) to get to the **city** (12.85%) **to fall year-on-year** (-2.03pp), which means that the energy efficiency in terms of mobility to reach the destination was negatively affected. On the other hand, in Barcelona **region**, with more domestic tourism, 12.31% used this type of arrival transport, **without major year-on-year changes**.

On the other hand, in terms of internal mobility, although the **percentage of tourists moving actively at the destination** (I10) (on foot, by bicycle, skateboard, roller skates...) remained **fairly stable** in **Barcelona city** (39.75%), in **Barcelona region** (66.67%) it **increased** year-on-year (+3.93pp).

However, the **percentage of tourists who used public transport as the most frequent means of internal transport** (I11), which kept being more prominent in Barcelona city (40.33%) than in Barcelona region (8.58%), remained almost at the **same level than in 2022**.

These indicators, which the OTB has been able to update with 2023 thanks to the Survey of Profile and Habits of Tourists in Destination Barcelona, have been used by many DMMOs and city councils of the **destination to measure the results of the actions carried out to reduce visitors' footprint and to foster sustainable mobility** within the Destination, such as promoting the use of public transport by reducing prices.

Issue 7: Sustainability and environmental management policies and practices at tourism businesses

With 2023 data, the **percentage of tourism companies with sustainability certifications** (I12) **increased** to 26.23% in Barcelona city (+2.3pp year-on-year) and to 40.52% in Barcelona region (more than +2.35pp year-on-year).

Although the universe of tourist companies is difficult to monitor, **only a sample** of them is being analysed. In this case, the Barcelona Tourism Observatory takes into account those companies that are members of Turisme de Barcelona and the Barcelona Regional Council Circle. Besides, as there are no public lists of the various sustainability certificates, only those holding the **Biosphere Responsible Tourism Certification** count as certified.

In any case, this indicator is being used by DMMOs and councils to measure the **commitment for a sustainable tourism** of the public and private sectors, as the acquisition of these certifications indicates the willingness of tourism stakeholders to improve environmental management and/or the quality of their services.

2.3.2. Economic area

Issue 8: Development control

The **availability of current plans or strategies of sustainable tourism at the destination** (I13) is considered as a sign of **commitment of the destinations** to develop this activity responsibly.

In this sense, the OTB considers the **Strategic Tourism Plan 2020 of Barcelona city**, which was presented in 2017 and it's based on the sustainability of tourism activity in the city, as valid since its actions are still being applied.

In parallel, the different tourism management and promotion entities of Destination Barcelona work in line with the **2030 Agenda**, which promotes responsible and sustainable tourism activities in both the Barcelona city and Barcelona Region through various Sustainable Development Goals (SDGs). In this regard, also in 2017, the Barcelona City Council,

the Barcelona Chamber of Commerce, the Barcelona Regional Council and the Consortium Turisme de Barcelona continued working on the **Commitment to Sustainable Tourism Barcelona**. This strategy encourages tourism companies, services and destinations to meet a set of requirements that promote the work around the 17 SDGs. Companies, services and destinations that meet the criteria of the Commitment to Sustainable Tourism Barcelona can achieve the certification in Biosphere Responsible Tourism. With 5 certified destinations and another 54 distinguished in 2023, and near a thousand companies certified, the commitment on this issue is not only proved, but also getting stronger year-on-year.

Issue 9: Tourism seasonality

As for the indicator that shows the distribution of stays throughout the year, SITS-OTB is including the **ratio between the maximum and minimum monthly overnight stays in accommodation** (I14). In 2023 this indicator decreased to 3.10 in the Destination as a whole, which indicates **less tourism seasonality than the previous year** (-19.11% Var. 23/22). By geographical areas, seasonality is more evident in Barcelona region than in Barcelona city, with a ratio of 5.96 in 2023 vs 2.53.

This indicator, the improvement of which can have positive impact in both the quality of jobs and the social cost of tourist activity, is being used to measure the actions that are being carried out by the DMMOs to **minimize seasonality of tourism activity such as attracting events off-season** (cultural, sportive, business... etc.).

Issue 10: Destination economic impact

The **average expense during the stay** per tourist per day (I15) **increased**, especially in **Barcelona city**, where for the first time it exceeded €90 per person per day (+8.63% Var. 23/22). In **Barcelona region**, it remained **stable** at over €40 (+0.34% Var. 23/22). However, the differences recorded were not significant enough, especially if the increase in the CPI is taken into account, which was about +3.6% year-on-year. This indicator is usually used to calculate the **total economic direct impact during the stay** of tourism in the destination.

In contrast, the **tourist tax income per inhabitant** (I16) clearly **increased**, especially in the city of Barcelona, where its result reached €28.57 in 2023 per person (+23.04% Var. 23/22). Also, in Barcelona region, there was a year-on-year growth, with a more modest result of €2.70 per person, but still with a remarkable variation (+16.81% Var. 23/22).

Issue 11: Employment

In the field of employment, 11.63% of the people who worked at Destination Barcelona did so in the tourism activity, a **stable proportion** compared to the previous year (I17: **Percentage of tourism employment**).

In this same issue, the salary gap compared with other economic activities, the **ratio between the average salary of tourism activity⁴ over other activities** (I18), **increased** year-on-year: with the latest data available for the year 2022, for each euro of the gross salary of a person working in other activities, one in the tourism activity received 0.73 (+0.09 points Var. 22/21). This indicates that although there are still important differences between the salaries of the different activities, **this inequality was reduced**.

This last indicator is being used by DMMOs and councils to **measure actions that promote better working conditions** in tourism.

Issue 12: Tourist activity performance

The **average length of stay** (I19) **remained stable** at 3.82 nights (-0.12 nights Var. 23/22). This indicator is being used by private companies, DMMOs and councils because it is considered that if the result of this indicator grows, so does the **possibilities for the destinations to decentralize and diversify their tourist offer** and the **possibilities for the average expenditure to be higher**, so that tourism activity can **benefit more agents**. This indicator is then used, to measure the **efforts of the destinations to diversify the tourist offer**, so they can increase the length of stay.

2.3.3. Sociocultural area

Issue 13: Accessibility

The SITS-OTB approaches to the accessibility of the destination by monitoring the tourists' opinions on this subject: I20: **Tourist opinion about motor accessibility**. In this sense, the results of 2023 show **stability** compared to the previous years, with a score at 7.88 out of 10.

This is a provisional indicator **subject to change** depending on the availability of new sources of information that measure tourist accessibility more objectively. As in the consumption of resources (see Environmental area), the objective of the OTB is to be able to **collect data from private companies and other services** of tourism to have a **better approach** on this issue in the future.

Issue 14: Effects of tourism in the community

From 2022 to 2023, the **percentage of tourists to residents** (Tourist pressure) (I21) **increased** once again in **Barcelona city**, from 9 to 10 tourists per 100 residents. In contrast, in **Barcelona region** the indicator of tourist pressure (2.5 tourists per 10 residents) remained **fairly stable**. The result of this indicator is frequently being used in order to identify the

⁴ Barcelona Tourism Observatory: city and region. (2024, 6 27). The average gross salary per capita in tourism activities in 2022 in Destination Barcelona was €22,467. Retrieved from <https://www.observatoriturisme.barcelona/en/news/average-gross-salary-capita-tourism-activities-2022-destination-barcelona-was-%E2%82%AC22467>

most **overcrowded areas** at the destination and to apply **corrective measures**, as they are clearly affecting public opinion (see Issue 18: Local satisfaction with tourism).

Issue 15: Governance

According to the United Nations, the participation, the rule of law, the transparency, the sensitivity, the consensus orientation, the equity, the effectiveness and efficiency, the accountability, and the strategic vision are considered **good governance principles** of public institutions. The existence of promotional campaigns for participation, the existence of regulations to prevent discrimination, the availability of accessible tourism statistics (open data), the existence of mechanisms to receive complaints and suggestions, and the use of new technologies in the management of the destination are some of the instruments used to achieve these principles and to monitor **I22: Percentage of good governance instruments**.

The monitoring of this indicator shows that in **Barcelona city** all the instruments considered by the United Nations for good governance have been in place **since before 2018**, while in **Barcelona region**, **since 2020**. This indicator **does not apply to Destination Barcelona** because each institution in both geographical areas (Diputació de Barcelona for Barcelona region and Turisme de Barcelona for Barcelona city) has its own governance instruments.

Issue 16: Gender equality

With data from 2022, **the ratio between women's and men's wages in tourism activity** (indicator to calculate the gender wage gap (I23) remained **below 1** for the Destination as a whole, and therefore, on average, women continued to receive **gross wages below men**. Specifically, for every euro that men received from tourism activity, women received 0.75 (2 ents more than the previous year). This indicates that the gender wage gap⁵ was reduced, yet the results of this indicator are still far from the desired ideal value (=1). ents more than the previous year). This indicates that the gender wage gap⁶ was reduced, yet the results of this indicator are still far from the desired ideal value (=1).

Issue 17: Marketing for sustainable tourism

The indicator that measures this issue (I24: **Percentage of tourism marketing actions that apply sustainability criteria**) **has never been calculated**, since the stakeholders involved in this operation, the Consortium of Turisme de Barcelona and the Barcelona Regional Council Tourism Department, are not sure about how to proceed. Despite both DMMOs are required to operate under the umbrella of sustainability, sometimes it is **not so easy to determine what an action**

⁵ Barcelona Tourism Observatory: city and region. (2024, 6 27). The average gross salary per capita in tourism activities in 2022 in Destination Barcelona was €22,467. Retrieved from <https://www.observatoriturisme.barcelona/en/news/average-gross-salary-capita-tourism-activities-2022-destination-barcelona-was-%E2%82%AC22467>

⁶ Barcelona Tourism Observatory: city and region. (2024, 6 27). The average gross salary per capita in tourism activities in 2022 in Destination Barcelona was €22,467. Retrieved from <https://www.observatoriturisme.barcelona/en/news/average-gross-salary-capita-tourism-activities-2022-destination-barcelona-was-%E2%82%AC22467>

that applies sustainable criteria is: what is an environmentally sustainable action may not be economically or socially sustainable, and what is economically sustainable may not be environmentally friendly. Therefore, and waiting to see how this issue is solved, the indicator is **still to be handled properly**: a better indicator to measure the sustainability of marketing actions should be found, or at least, specific criteria on what a tourism marketing action that considers sustainability is should be defined.

Issue 18: Local satisfaction with tourism

The analysis of the indicators of citizen opinion is of great importance to evaluate the tolerance or aversion of the **citizenry towards tourist activity**. In this sense, the various SITS-OTB indicators measuring this issue showed quite **different year-on-year evolutions**.

In Barcelona, the **percentage of residents who considered** tourism to be rather beneficial **for the city** (I25) (70.80%) **increased** compared with the previous year (+4.00pp Var. 23/22), but at the same time the proportion of **those who considered that the city was reaching the limit of its capacity to host tourism** (I26) also **increased** (61.50%, +5.90pp Var. 23/22). This could be a **consequence of the increase in the tourism pressure indicator** (I21).

In **Barcelona region**, it must be said that the 2023 **results of I25 are not available** due to a change in the question being asked at the survey. However, the indicator of **citizen opinion** on whether the limit for hosting tourism is being reached (28.50%) did not register **any notable differences** compared to 2022.

Issue 19: Tourist satisfaction

Tourist satisfaction⁷, which is being monitored thanks to the Survey of Profile and Habits of Tourists in Destination Barcelona is being measured with the **overall evaluation of the municipality of stay** (I27). In this case, the result of this indicator did not experience major differences and **remained at a score of 8.59** out of 10.

Issue 20: Public safety

The same survey is being used to monitor public safety, by asking tourists the **opinion on the safety in the different municipalities of the Destination** (I28). Also in this case, the score of this question **remained stable** year-on-year, with a rating of 8.23 out of 10.

As in the case of Issue 13: Accessibility, this could be a provisional indicator **subject to change** depending on the availability of new sources of information that measure public safety more objectively.

⁷ Barcelona Tourism Observatory: city and region. (2024, 5 23). *Destination Barcelona municipalities' tourist rating remains at 8.6 in 2023*. Retrieved from <https://www.observatoriturisme.barcelona/en/news/destination-barcelona-municipalities-tourist-rating-remains-86-2023>

Issue 21: Tourist security

In order to measure this issue, SITS-OTB has included two indicators: the **percentage of tourists who were victims of a crime or attempted crime** (I29) and the counter-terrorism alert level in Spain (I30).

According to the Survey of Profile and Habits of Tourists in Destination Barcelona 2023, the results of the first indicator **remained at 2.63% in Barcelona city** (the same as in 2022). It must be highlighted that before the pandemic this percentage was much higher, with 3.90% of the tourists being victims of a crime or attempt of a crime (2019 data). As for **Barcelona region**, with data available since 2020, the results of this indicator are lower than in Barcelona city, with **less than 1% of cases**.

Finally, the **counter-terrorism alert level in Spain** has been at a **4 out of 5 level since 2018**, without experiencing changes since then. This information is **only available at a national level**, so the results cannot be compared between regions.

3. Conclusions

Taking into account the data presented in Tourism performance of Destination Barcelona 2023, in which the **recovery in tourism activity** at the Destination has been confirmed, the analysis of the **performance of the SITS-OTB indicators** with 2023 data shows that this recovery has impacted on their result in different ways, depending on the area analysed: while **economic indicators have significantly improved** during the last year, some **sociocultural** and environmental indicators have **experienced** just the **opposite**.

When looking at series of data of the SITS-OTB, in most of the cases since 2018, a general conclusion has been observed: **when tourism activity decreases**, a **general improvement of sociocultural and environmental indicators** is experienced (reduction of carbon footprint, fall in the primary resources use, decrease in the tourist pressure, increase in the citizens' satisfaction...), while the **economic benefits of tourism decrease** (less tourism taxes income and tourist expense, reduction of salaries in the tourism activity, growth of tourism seasonality...).

Now, the final questions are: Is it possible to improve all the areas of tourism sustainability in a destination at the same time? Is it possible to find a proper balance of economic and sociocultural benefits of tourism at a destination level?

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Annexes

Annex 1: SITS – OTB, the creation of a new sustainable tourism indicators system

In the new social, economic and environmental paradigm, sustainability has become the backbone of everyday life, becoming relevant not only in governmental but also in business actions. Within the framework of the goals established by the **2030 Agenda** at a global level, the **17 Sustainable Development Goals (SDGs)** have been introduced transversally in tourism sustainability policies and analysis systems.

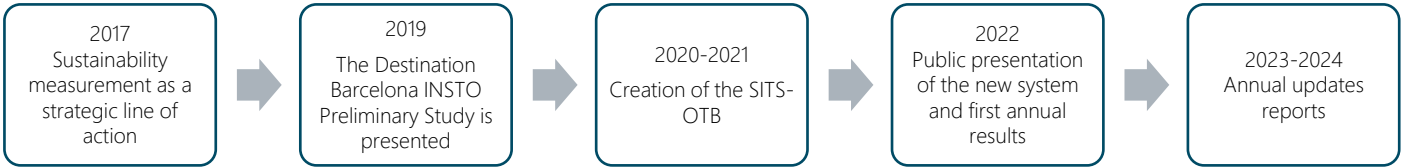
With this premise, and taking into account **SDG12b** "to develop and to apply instruments to monitor the effects of sustainable development, with the aim of achieving sustainable tourism that generates jobs and promotes culture and local products", the **Barcelona Tourism Observatory (OTB)** established as a strategic line of action, the **creation of an indicators system to measure the sustainability of tourism activity in Destination Barcelona**. The creation of this system, named **OTB Sustainable Tourism Indicators System (SITS - OTB)**, was carried out after studying and **analysing the state of play** of the previous use of indicators in sustainable tourism in Destination Barcelona. This study, the details of which can be found on the **Destination Barcelona INSTO Preliminary Study** was presented in December 2019 and it allowed the observatory to **join the INSTO observatories network** in March 2020.

In 2020, a committee made up of the OTB core stakeholders and the University of Barcelona **started a process of purification, selection and transformation of the indicators** that had been identified in the previously mentioned study, with the aim of configuring the new sustainable tourism indicators system.

The indicators included in this system had to follow these criteria:

- They had to be calculable for **any geographical area**: municipal, regional, Barcelona region, and Destination Barcelona.
- They had to be **general** in order **to avoid generating variations** due to the intrinsic characteristics of each destination.
- They had to be capable of **being individually understood**.
- A **reliable and stable source** had to be available over time in order to update the data periodically.
- The final list of indicators (Figure 7: Checklist on issues and indicators) had to be **equitable** in terms of representation of:
 - The most important sustainability **issues** in Destination Barcelona
 - All **Sustainable Development Goals (SDGs)**
 - The **three areas of tourism sustainability**: economic, sociocultural and environmental

After two years of debate, the SITS – OTB was **officially presented in a public webinar in March 2022**ⁱ. Since then, **three annual updates** (2021, 2022 and 2023) have been released and presented on the Sustainability section of Barcelona Tourism Observatoryⁱⁱ.



ⁱ Barcelona Tourism Observatory: city and region. (2022, 3 14). *The OTB presents the OTB Sustainable Tourism Indicators System: SITS – OTB*. Retrieved from <https://www.observatoriturisme.barcelona/en/news/otb-presents-otb-sustainable-tourism-indicators-system-sits-%E2%80%93-otb>

ⁱⁱ Barcelona Tourism Observatory: city and region. (2024, 6 4). *Sustainability - SITS-OTB results*. Retrieved from <https://www.observatoriturisme.barcelona/en/sustainability-sits-otb-results>

Annex 2: SITS – OTB results table

● Barcelona city ● Barcelona region ● Destination Barcelona

Area	Issue and indicator name	2018	2019	2020	2021	2022	2023	
ENVIRONMENTAL	Issue 1: Climate change							
	I01	Average distance travelled by tourists from origin to destination (km)	3,807.82	3,883.91	3,050.91	2,332.75	3,259.07	3,770.92
			2,432.62	2,574.81	1,790.78	1,307.76	2,038.12	2,354.09
			3,333.93	3,445.89	2,589.81	1,949.09	2,829.77	3,261.81
	Issue 2: Noise pollution							
	I02	Tourist opinion about noise (on a scale of 0 to 10)	6.81	6.89	6.82	6.68	6.83	6.69
			7.62	7.65	7.84	7.83	7.81	7.79
			7.07	7.14	7.34	7.20	7.22	7.13
	Issue 3: Air pollution							
	I03	Number of annual air pollution episode days (days)	3.00	5.00	5.00	7.00	0.00	0.00
			3.00	5.00	5.00	7.00	0.00	0.00
			3.00	5.00	5.00	7.00	0.00	0.00
Issue 4: Wastewater and solid waste management								
I04	Treated wastewater to, at least, a secondary level (%)	100.00	100.00	100.00	100.00	100.00	100.00	
		100.00	100.00	100.00	100.00	100.00	100.00	
		100.00	100.00	100.00	100.00	100.00	100.00	
I05	Solid waste generated per capita (kg/person/year)	488.85	483.65	431.46	446.66	458.18	451.70	
		477.78	476.42	481.26	482.31	463.65	440.40	
		476.69	474.64	462.72	469.87	461.75	443.63	
Issue 5: Energy and water management								
I06	Water consumption per capita (m ³ /person/year)	61.48	60.31	56.27	55.52	59.33	58.36	
		67.43	67.65	66.79	66.96	66.57	62.12	
		65.70	65.52	63.72	63.63	64.49	61.05	
I07	Energy consumption per capita (kWh/person/year)	4,261.74	4,150.06	3,618.84	3,684.60	3,869.50	nd	
		5,162.63	5,048.63	4,702.09	4,732.18	4,652.23	nd	
		4,900.65	4,787.29	4,386.01	4,427.29	4,425.32	nd	
I08	Energy produced from renewable sources (%)	20.81	16.06	19.55	17.00	14.14	15.73	
Issue 6: Mobility								
I09	Tourists arriving by sustainable collective vehicles (%)	13.27	12.74	27.03	25.11	14.88	12.85	
		10.67	10.81	17.11	12.92	11.48	12.31	
		12.41	12.11	21.91	19.62	13.51	12.63	
I10	Tourists moving actively at the destination (%)	nd	nd	60.62	48.51	40.28	39.75	
		nd	nd	55.10	62.46	62.74	66.67	
		nd	nd	57.77	54.76	49.88	50.42	
I11	Tourists moving by public transport at the destination (%)	nd	nd	23.79	32.93	40.80	40.33	
		nd	nd	3.55	4.59	8.20	8.58	
		nd	nd	13.35	20.19	27.74	27.75	
Issue 7: Sustainability and environmental management policies and practices at tourism businesses								
I12	Tourism companies with sustainability certifications (%)	nd	nd	nd	16.86	20.60	nd	
		nd	nd	nd	31.22	40.54	nd	
		nd	nd	nd	22.57	29.55	nd	

Area	Issue and indicator name	2018	2019	2020	2021	2022	2023	
ECONOMIC	Issue 8: Development control							
	I13	Availability of current plans or strategies of sustainable tourism at the destination	Yes	Yes	Yes	Yes	Yes	Yes
			Yes	Yes	Yes	Yes	Yes	Yes
			Yes	Yes	Yes	Yes	Yes	Yes
	Issue 9: Tourism seasonality							
	I14	Maximum and minimum monthly overnight stays in accommodation ratio	2.10	2.25	10.77	3.89	3.04	2.53
			nd	nd	nd	10.17	6.37	5.96
			nd	nd	nd	6.16	3.83	3.10
	Issue 10: Destination economic impact							
	I15	Tourist average expenses during the stay (per person and night) (€)	79.57	82.32	69.23	71.87	84.42	91.71
			39.38	44.11	37.12	40.31	41.77	41.91
			66.21	69.93	52.74	57.50	67.34	71.94
	I16	Euros received from the tax on stays in tourist establishments per inhabitant (€)	18.59	21.14	6.88	4.81	23.22	28.57
			2.03	2.10	0.67	0.79	2.31	2.70
			6.84	7.64	2.48	1.96	8.33	10.11
	Issue 11: Employment							
	I17	Tourism employment (%)	13.42	13.58	12.28	11.65	12.48	13.15
			10.70	10.76	9.95	9.91	10.35	10.48
			11.88	11.98	10.95	10.66	11.28	11.63
I18	Average salary of tourism activity and average salary of the rest of the activities ratio	nd	0.72	0.57	0.67	0.76	nd	
		nd	0.71	0.57	0.62	0.75	nd	
		nd	0.73	0.56	0.64	0.73	nd	
Issue 12: Tourist activity performance								
I19	Length of stay (nights)	3.97	3.92	3.99	4.16	4.03	4.02	
		nd	nd	nd	3.60	3.81	3.64	
		nd	nd	nd	3.82	3.94	3.82	
SOCIOCULTURAL	Issue 13: Accessibility							
	I20	Tourist opinion about motor accessibility (on a scale of 0 to 10)	nd	7.86	7.87	7.76	7.92	7.94
			nd	7.32	7.48	7.64	7.81	7.77
			nd	7.68	7.69	7.71	7.88	7.88
	Issue 14: Effects of tourism in the community							
	I21	Percentage of tourists to residents (Tourist pressure)	10.06	10.79	2.87	4.03	9.04	10.13
			nd	nd	nd	1.39	2.47	2.50
			nd	nd	nd	2.16	4.35	4.68
	Issue 15: Governance							
	I22	Percentage of good governance instruments	100.00	100.00	100.00	100.00	100.00	100.00
			88.89	88.89	100.00	100.00	100.00	100.00
			na	na	na	na	na	na
	Issue 16: Gender equality							
I23	Average salary of women and men in the tourism activities ratio (Gender salary gap)	nd	0.85	0.75	0.72	0.75	nd	
		nd	0.71	0.65	0.70	0.73	nd	
		nd	0.80	0.73	0.73	0.75	nd	

Area	Issue and indicator name	2018	2019	2020	2021	2022	2023
	Issue 17: Marketing for sustainable tourism						
I24	Tourism marketing actions that apply sustainability criteria (%)	nd	nd	nd	nd	nd	nd
		nd	nd	nd	nd	nd	nd
		nd	nd	nd	nd	nd	nd
	Issue 18: Local satisfaction with tourism						
I25	Residents that consider that tourism is rather beneficial for the destination (%)	83.70	72.90	nd	71.40	66.80	70.80
		92.00	92.30	87.80	85.10	84.60	nd
		89.59	86.66	nd	81.11	79.50	nd
I26	Residents that consider that the destination is reaching the limits of its capacity to absorb tourism (%)	58.60	61.30	nd	nd	55.90	61.50
		32.60	27.90	32.60	24.70	27.80	28.50
		40.16	37.61	nd	nd	35.85	37.95
	Issue 19: Tourist satisfaction						
I27	Tourist global evaluation of the municipality (on a scale of 0 to 10)	8.80	8.79	8.71	8.69	8.74	8.70
		8.27	8.27	8.32	8.45	8.44	8.42
		8.63	8.62	8.51	8.58	8.62	8.59
	Issue 20: Public safety						
I28	Tourism opinion about public safety (on a scale of 0 to 10)	8.14	8.05	7.90	7.79	8.03	7.96
		8.44	8.41	8.27	8.60	8.57	8.64
		8.24	8.16	8.09	8.16	8.25	8.23
I29	Tourists who have been victims of a crime or a crime attempt in their person or vehicle (%)	3.60	3.90	1.72	2.33	2.63	2.63
		nd	nd	1.04	0.92	0.90	0.74
		nd	nd	1.37	1.70	1.94	1.87
	Issue 21: Tourist security						
I30	Security at the destination (Counter-terrorism alert level in Spain, on a scale of 1 to 5)	4.00	4.00	4.00	4.00	4.00	4.00

na: not applicable / nd: not available

Source: Barcelona Tourism Observatory



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