



INSTO

World Tourism Organization
International Network
of Sustainable Tourism
Observatories

Observatorio Turístico de Navarra
Nafarroako Turismoaren Behatokia



Kingdom of
Navarra

ANNUAL REPORT

INSTO 2023

Observatorio Turístico de Navarra ***Nafarroako Turismoaren Behatokia***

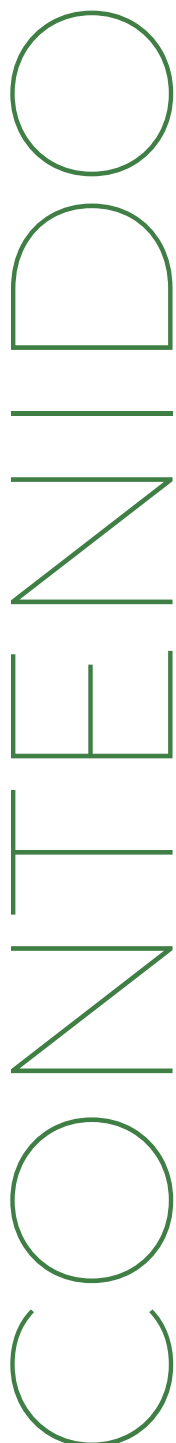
Departamento de Cultura, Turismo y Deporte
Kultura, Kirol eta Turismo Departamentua

Gobierno de Navarra
Nafarroako Gobernua



Observatorio Turístico de Navarra
Nafarroako Turismoaren Behatokia

This report contains the results from work carried out by the Government of Navarre Tourism Observatory in 2023 to monitor the development of sustainable tourism in the region of Navarre.



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EXECUTIVE SUMMARY

- ✓ Improvements in the main indicators on tourism reveal that this sector in Navarre is experiencing a period of positive growth. The post-COVID recovery expectations have been achieved and even surpassed, with the sector in a better position now than it was back in 2019.
- ✓ This is a reality confirmed by almost two million visitors and four million overnight stays during the course of the year.
- ✓ Nonetheless, this trend is not equally balanced across all forms of accommodation. Hotel establishments have yet to recover pre-pandemic figures.
- ✓ Seasonality has decreased somewhat, and this can be seen across all types of establishments except for apartments.
- ✓ Although Navarre is a region mainly visited by local tourists, travellers from overseas are starting to become one of the driving forces behind the expansion of tourism activity.

THE ROLE OF TOURISM IN THE DESTINATION

Navarre is a historic region in northern Spain, with its capital in Pamplona. It enjoys a rather special strategic location on the border with France, very close to San Sebastián and Bilbao, and with excellent links to Madrid and Barcelona. The region is home to approximately 650,000 inhabitants and it boasts some of the highest living standards in Spain.

Navarre is only a few kilometres from the Cantabrian Sea and occupies the western edge of the Pyrenees mountains. However, it also includes a continental zone to the south. This means that a wide range of different climates and landscapes can be enjoyed within a small radius. The north is home to an area of serene mountains dotted with beautiful caves and ravines. Many cosy rural homes can be found in picturesque towns and villages that have successfully preserved their architecture and traditions.





Surrounded by ancient oak and beech forests, such as those in Irati or Bertiz, visitors can discover thousands of trails to explore on foot or bicycle. Furthermore, this area offers the flavours of delicious grilled meats, mushrooms, cheeses and liqueurs.

The highly traditional French Way of St. James enters Spain via the legendary village of Roncesvalles as it weaves between the rolling hills of the Central Zone past some gorgeous monasteries and churches and over several Romanesque and Gothic bridges. Several storybook castles, such as those of Olite or Javier, can also be found nearby. The Way of St. James also crosses Pamplona. This city is world famous for its San Fermín Festival but remains a welcoming and friendly city throughout the rest of the year as well. It is a green, walled university city with a bustling cultural life and one of the liveliest old quarters to be found anywhere, in which the traditional pintxo snacks are a must.



As we continue southward, the landscape becomes one of olive groves and vineyards where wines with the Navarre appellation of origin are produced. Fertile farmlands produce the famous peppers, artichokes and asparagus from La Ribera. Rather unexpectedly and surprisingly at this latitude, this area is also home to an extensive protected natural space: the Bardenas Reales desert.



TOURISM PERFORMANCE IN 2023

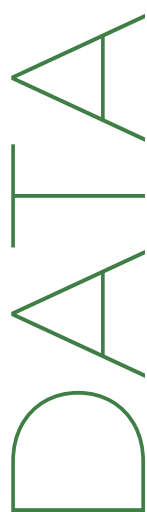
The expansion of tourism

The main indicators on tourism reveal an upward trend for the sector in 2023, surpassing even the positive results in the previous year.

A total of 1,936,653 visitors came to Navarre in 2023, which is an increase of 9.6% on the previous year. The number of overnight stays also increased at roughly the same year-on-year rate, up 9% to a total of 3,992,841. The offer of available accommodation establishments and beds also rose by 10.7% and 7.1%, respectively. The only slight decrease was recorded in the average length of stay, down 0.6%. However, when looking at this figure only in terms of the average length of stay by international visitors, there was an increase of 2.4%.

The figures reveal a positive recovery vis-à-vis the pre-pandemic period, and even show some significant improvements.

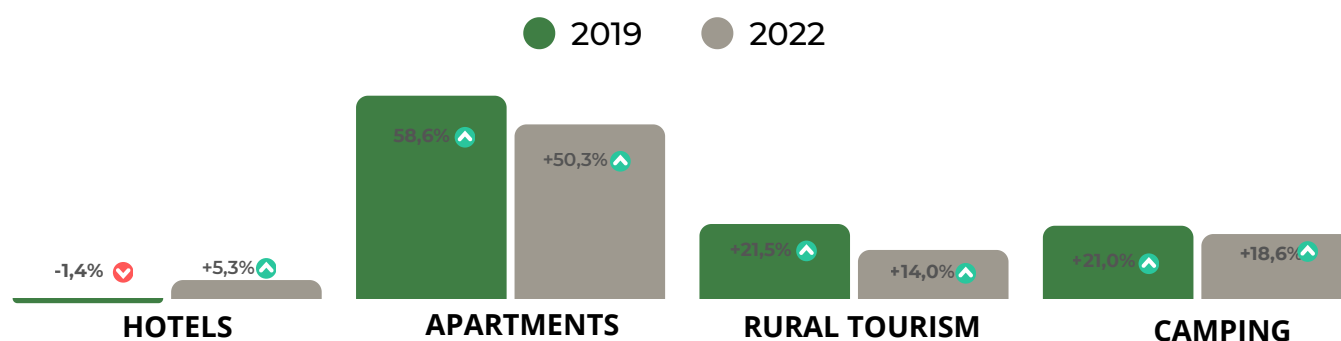
The number of inbound tourists in 2023 represents an increase of 25.1% on the corresponding figure posted in 2019. In terms of overnight stays, this percentage stands at 18.4%. In both cases, hostels have been counted using the corresponding correlation coefficients for the methodological modifications applied in 2021. The trend remains equally positive, albeit somewhat more moderate, when removing hostels from the calculation. Specifically, the number of inbound tourists increases by 6.7% while the number of overnight stays increases by 10%.



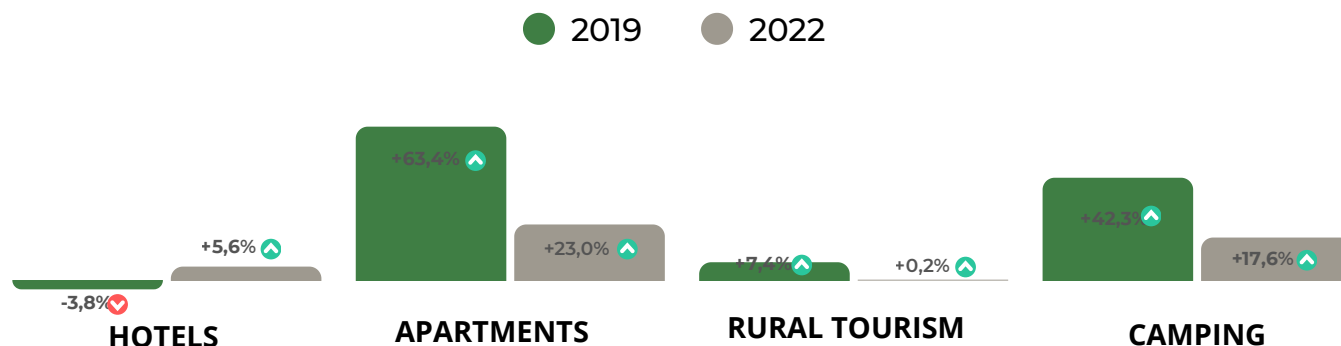
MAIN INDICATORS

	TRAVELLERS	OVERNIGHT STAYS	AVERAGE LENGTH OF STAY (days)
	1.936.653	3.992.841	2,06
	2019 2022	2019 2022	2019 2022
	+25,1% ▲ +9,6% ▲	+18,4% ▲ +9,0% ▲	-6,9% ▼ -0,6% ▼
DOMESTIC	1.245.092	2.911.855	2,34
	2019 2022	2019 2022	2019 2022
	+8,0% ▲ +7,2% ▲	+7,9% ▲ +6,3% ▲	-0,9% ▼ -0,9% ▼
INTERNATIONAL	691.559	1.080.986	1,56
	2019 2022	2019 2022	2019 2022
	+71,2% ▲ +14,3% ▲	+61,0% ▲ +17,1% ▲	-5,9% ▼ +2,4% ▲

Percentage variation of travelers



Percentage variation of overnights stay



Source: Own work using data from Occupation Surveys in Hotels, Rural Tourism, Campsites and Apartments from the National Statistics Institute (INE).

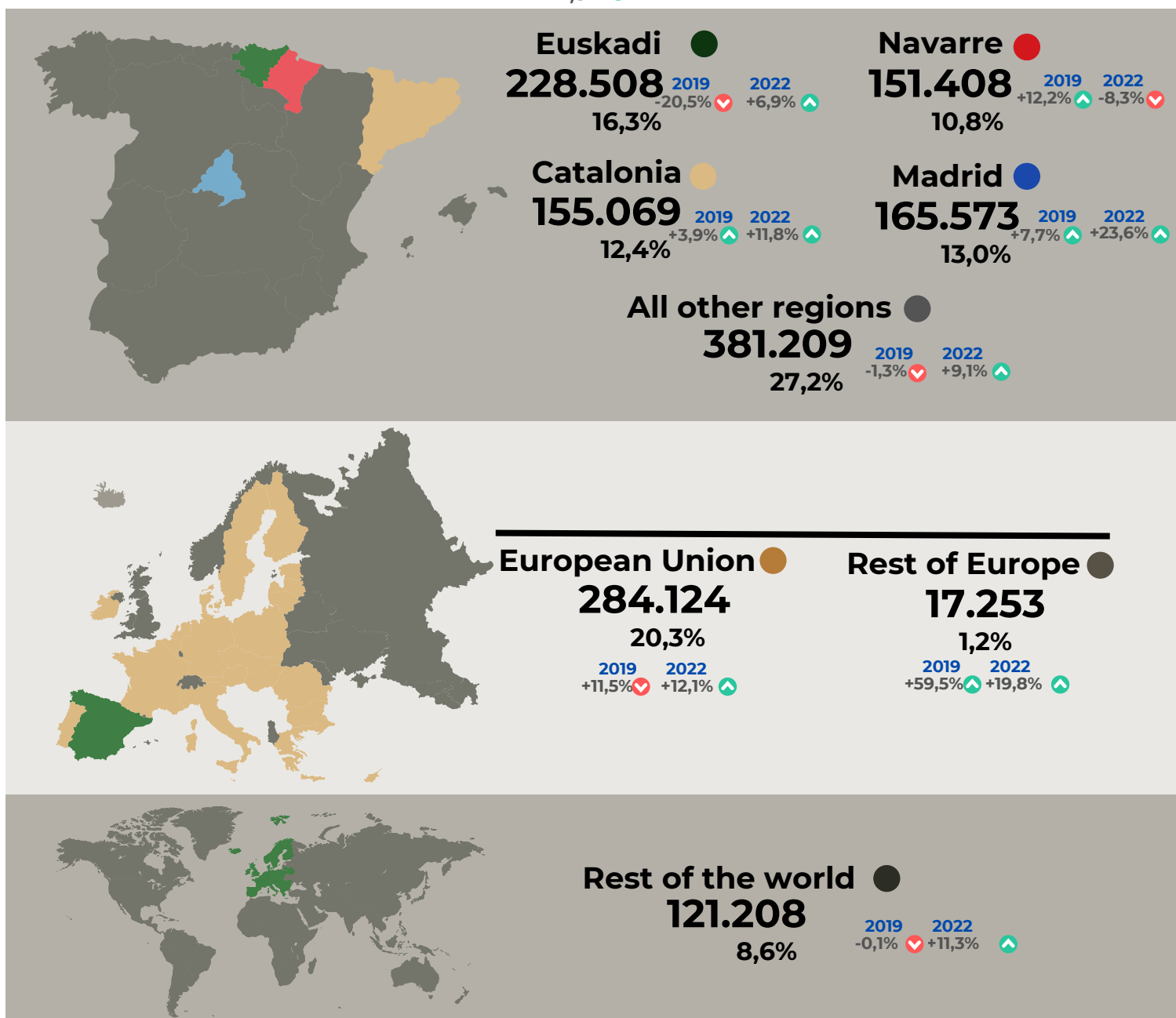
As highlighted in previous analyses, one of the main drivers of this recovery has been the significant growth of international tourism.

In the case of Navarre, this type of tourism has gained increasing importance, now accounting for 36% of the total. This rise is largely due to the strengthening of rural tourism, which is characterized by its proximity to natural environments and the absence of overcrowding—segments where international tourism has a strong presence.

The tourist profile based on where they come from has changed significantly:

Travellers by place of origin

Total: 1.561.757 2019 2022
-0,1% ▼ +11,3% ▲



AREAS MONITORED

1. Indicator Checklist

AREA	DESCRIPTION	STATUS
Local satisfaction with tourism	-Assessment of the contribution from tourism to the local area based on the survey conducted on the local population as part of the study entitled "Perception among the Population of Navarre on tourism development in the Provincial Region of Navarre", Navarre Tourism Observatory, 2020. -Overnight stays by tourists per inhabitant (SDG tracking in Navarre).	Study to be conducted in 2025 Available
Economic benefits in the destination	-Distribution of the business fabric in tourism (Inforeyno, a register kept by the Regional Government of Navarre). -Spending by travellers on tourism and excursions, both domestic and international (Egatur, ETR).	Available
Employment	-People registered with the Social Security system and recorded unemployment in the branches of tourism (Spanish Social Security). -Snapshot of tourism-related employment in Navarre: gender, age, activity, regime, contract hours (Spanish Social Security). -Contribution from tourism to employment (Spanish Social Security). -Recorded unemployment in tourism activities (Navarrese Employment Service).	Available
Seasonality	-Distribution of travellers and overnight stays across the months of the year (Occupancy surveys) -Gini index for travellers/overnight stays, international travellers and per accommodation type (Occupancy surveys). -Proportion of overnight stays by tourists in the two months of maximum occupancy compared to the total overnight stays by tourists (SDG tracking in Navarre).	Available

Energy management	-Energy consumption per sector and consumption per capita (Navarre Energy Report). -Energy consumption based on tourist means of arrival (Frontur). -Use of renewable energy (Navarre Energy Report). -Charging stations (Energy transition portal).	Available
Water consumption	-Total water consumption per inhabitant per day (LifeNadapta). -Estimated water consumption by tourism (overnight stays/consumption Klina consumption). -Water conditions in Navarre (Report on the condition of water bodies).	Available
Waste water management	Waste water treatment per regions of Navarre (Nilsa Report).	Available
Solid waste management	-Domestic and commercial waste generation, total and per inhabitant (Navarrese Waste Plan tracking) -Percentage of waste recycled (Navarrese Waste Plan tracking). -Data on global selective collection (Navarrese Waste Plan tracking).	Available Available
Governance	-Regional Tourism Sustainability in Destinations Plan 2023-2025. -“Next Generation” Funds Management. -Budget allocated to tourism by the Regional Government of Navarre.	Available

Climate action	-Floods, damage and self-protection plans. Forest fires (LIFE NAdapta). -Tonnes of CO₂ emissions avoided by generating electricity using renewable sources. Renewable energy in transport (Navarre Energy Report). -Tonnes of GHG emissions per capita (Klina). -CO₂ emissions from air transport (GHG inventory). -Number of accommodation establishments registered with the Ecolabel seal of quality (EU Dashboard). ECST seal of quality (European Charter for Sustainable Tourism in Protected Spaces).	Available Not available for 2023 No change
Accessibility	-Number of training activities -Accessibility improvement actions under the 2023 Operational Plan on Accessibility -Accessible tourism companies (Equalitas Vitae). -Tourism establishment accessibility categorisation (booking platform web scraping)	Available

2. Studies, Projects, Actions and Partnerships

Actions

The Directorate-General for Tourism, Trade and Consumer Affairs carried out the following actions on sustainable tourism and inclusive tourism under its Tourism Training Plan 2020-2024 in 2023:

Training Actions

INCLUSIVE TOURISM

- Design and organisation of accessible-inclusive events (course and tutorials)
- How to communicate and do business in inclusive tourism while applying a gender-based perspective (course)
- Equalitas Vitae informative session

SUSTAINABLE TOURISM

- Seminar - Webinar on energy efficiency projects and the circular economy at tourism companies
- Design and organisation of sustainable events (course + tutorials)
- Sustainability and the circular economy at tourism companies
- Discover how to save money by improving energy efficiency
- Design of sustainable gardens for tourism accommodation establishments
- Waste management at tourism accommodation establishments in the Northern Zone
- Sustainable management of your tourism accommodation establishment (Turismo Bikaina -Turismo de 10) 2nd edition
- Waste management at tourism accommodation establishments in Montejurra
- Technology for energy efficiency at sustainable accommodation establishments (domotics, apps, sensors, etc.)
- Waste management at tourism accommodation establishments in the Southern Zone
- How to communicate the sustainability of your tourism company

COMPETITIVENESS-MANAGEMENT

- Get to know the other Ways of St. James in Navarre through their history and legends
- Big Data on the Ways of St James in Navarre
- The importance of interior design and decoration at rural tourism accommodation establishments + tutorials
- The importance of interior design and decoration at urban tourism accommodation establishments + tutorials
- Learn to know your tourism clientèle
- Attract your ideal tourism clientèle with the best communication techniques
- Cost saving strategies for your tourism company
- The 5 most popular apps for controlling the finances of your tourism business (NOT COMPLETE)
- Inscription and amendment in the Navarrese Tourism Register
- Orienteering and use of GPS
- New Consumer and User Protection Act (Ley de Consumidores y Usuarios). The main changes and additions for the tourism industry
- The 4 Ps of marketing. The keys to success in doing business (Commercialisation)
- Marketing communication plan for associations? NOT COMPLETE
- Your next sale awaits you on the Internet (Commercialisation)
- How to steal reservations from Booking and increase direct bookings (Commercialisation)
- Strategies for selling more and better in Tourism (Commercialisation)
- Rule N° 1: "Get to know your staff ". Creation of the Buyer Persona and Customer Journey (Commercialisation)
- How to create a marketing plan for my tourism business
- How to design and market tourism experiences in low season
- Marketing opportunities in the German tourist market
- How to find intermediaries for my tourism business
- Tourism platforms for doing business in France
- Discover how to market your cycle tourism products
- Tourism marketing opportunities
- Surprise your clients with genuine zero-kilometre gourmet breakfasts
- Keys to developing resilience in the tourism business
- Discover who can help you with all tourism management issues in your region (UGET)
- Design of sustainable gardens for tourism accommodation establishments
- Waste management at tourism accommodation establishments in the Northern Zone
- Sustainable management of your tourism accommodation establishment (Turismo Bikaina -Turismo de 10) 2nd edition
- Waste management at tourism accommodation establishments in Montejurra
- Technology for energy efficiency at sustainable accommodation establishments (domotics, apps, sensors, etc.)
- Waste management at tourism accommodation establishments in the Southern Zone
- How to communicate the sustainability of your tourism company
-

DIGITALISATION

- Digital marketing at a glance. The four pillars of any basic strategy: website + landings + e-mail + social media, as well as a few other tools.
- The keys to promoting your tourism business on Tik-Tok
- Cybersecurity in the tourism sector
- Create your social media communication plan to attract and build loyalty among tourists.
- What is a landing page? Why I need them in my strategy as a tourism company and how to create them.
- Elementor: the ideal plugin to create attractive landing pages and articles with WordPress
- What are the Lead Magnets and sales funnels in digital marketing?
- SEO for Google: an overview and what you can do with your website without needing to be a web developer
- Local SEO for Google: Google My Business and reviews
- Google SEARCH Console: the tool that only SEOs know and you should use as an essential accessory to Analytics.
- Google Analytics: the tool for analysing your website and how to measure the 10 things you need to know about your website.
- Google ADS: create ads for Google searches and link your account to Google Analytics and Google Search Console
- Create articles on your website in WordPress with Google SEO positioning in mind.
- What is the Facebook and Instagram BUSINESS MANAGER and how to configure it.
- FACEBOOK: design your strategy.
- INSTAGRAM: design your strategy for the gallery, stories and reels.
- Loyalty on social media
- Creating Photos for social media
- Creating Videos for social media
- QR codes: what they are, what they do, how to create and customise them.
- Advertising on Facebook and Instagram to attract the tourist who chooses you.
- Analytics on social media

Accessibility Improvements

Under the Operational Plan on Universal Accessibility of the Regional Government of Navarre 2023, the Directorate-General for Tourism, Trade and Consumer Affairs has created a series of measures to:

“Guarantee universal accessibility from tourism establishments and services in the Provincial Region of Navarre”

- Provision of training courses and tutorials on accessibility for the tourism sector
- Refurbishment work to include accessibility measures at the Urbasa campsite (bathrooms, multiple occupancy rooms, acoustic improvements in the restaurant, NaviLens system)
- Study of accessibility measures that could be adopted at the Hotel Torre de Uriz, a site managed under the Directorate-General for Tourism, Trade and Consumer Affairs.
- Installation of signs for people with disabilities in the buildings belonging to the Directorate-General for Tourism, Trade and Consumer Affairs

“Update and broaden the accessible offer in Navarre on the Tourism portal”

- Creation of 5 routes and maintenance of the offer on the 5 landing pages of the website. Procurement of images from the segment, as well as a benchmark advertising campaign on the portal for travellers with disabilities
- Gradual technical adjustments to make the tourism portal and the various communication channels more accessible for people with disabilities
- Further development of manuals containing guidelines for activities companies that raise awareness about universal accessibility in the sector

Subsidies

·Over the course of 2023, two calls for applications were managed in the field of energy efficiency for tourism establishments and public buildings for tourism use:

Call for applications to select tourism establishments to receive consultancy on energy efficiency

Purpose: To select tourism establishments to benefit from consultancy on energy efficiency (in the form of audits and energy certifications) from the companies contracted by the Directorate-General for Tourism.

·53 tourism establishments benefited in total, which received audits and energy certifications at a total cost of 72,055.94 euros.

Call for applications to select the public buildings for tourism use to receive consultancy on energy efficiency

Purpose: To select the public buildings for tourism use owned by the local council authorities of Navarre to benefit from consultancy on energy efficiency (in the form of audits and energy certifications) from the companies contracted by the Directorate-General for Tourism.

·Six local council authorities of Navarre benefited in total, which received audits and energy certifications at a total cost of 9,561.44 euros.

Partnerships and Projects

Via a project overseen by the OECD, four Spanish regions (Andalusia, Catalonia, Navarre and the Region of Valencia) are developing a common set of indicators to measure and monitor sustainability in tourism. This project is being carried out under the Spanish Recovery and Resilience Plan and the EU Technical Support Instrument.

The ultimate goal of the project is for the various regions to have a set of common indicators and a similar measurement protocol. Being a small region with only one province and inland tourism, Navarre is representing all other regions of a similar nature in this project.

Over the course of the project, the Navarre Tourism Observatory has taken part in preparing the methodology by cooperating with the other regions and highlighting the limitations that arise when monitoring an economic activity that accounts for 5.4% of GDP and that therefore lacks the statistical breakdown and development of other industrial activities

The project was launched in 2022 and continued in 2023, and the indicators are being calculated as from 2019. The intention is to study the indicators annually. These indicators will serve to compare regions and to highlight trends over the years.

Some of the issues addressed in this project were used to produce the indicators underpinning this report.

The following symbol will be used in such cases



NECSTouR
European Regions for
Competitive and Sustainable Tourism

CONCLUSIONS

✓ By producing this report, most of the indicators that make up the sustainable tourism sector monitoring system in our region have been consolidated.

✓ The year reflected by the indicators, 2023, shows excellent performance by tourism. The figures on visitors and overnight stays are higher than during the pandemic and highlight the sector as one of the driving forces in the Navarrese economy.

✓ Furthermore, and despite an increase in visitors, the indicators on sustainability indicate that the situation has not declined in terms of energy consumption or waste generation. The data on seasonality, tourism pressure, satisfaction, etc. were also unaffected.

✓ In this regard, the approach adopted under the various policies, actions and measures that have been implemented has provided a good response to the transformations identified during the analyses carried out.

ANNEX: AREAS MONITORED



GOVERNANCE

In 2023, the governance of tourism in Navarre was impacted by the Regional Tourism Sustainability in Destinations Plan 2023-2025 and the management of funds allocated to Navarre under the Recovery, Transformation and Resilience Plan of the Spanish Ministry of Industry, Trade and Tourism. The total funds allocated to Navarre amount to 80 million euros, of which 62 million euros are for the Regional Tourism Sustainability Plans.

The actions included under the REGIONAL PLAN OF THE PROVINCIAL REGION OF NAVARRE for 2023 imply development of the following Management Plans:

- Circular, inclusive and resilient Navarre Inter-destination Cohesion Action
- Rural Pamplona District Tourism Sustainability in Destinations Plan
- Navarre Ribera Alta Tourism Sustainability in Destinations Plan
- Plazaola-Sakana-Ultzamaldea Tourism Sustainability in Destinations Plan
- URDINA Tourism Sustainability in Destinations Plan. Way along the river Aragón.

Next Generation Funds Management

In 2023, management of the Next Generation Funds has led to the release of the following amounts:

€ **17.201.000**
TOTAL BUDGET

Developed by the Directorate-General of Tourism

**CIRCULAR, INCLUSIVE AND RESILIENT NAVARRRE INTER-
DESTINATION COHESION ACTION 6,871,000€**

Developed by the Destinations

- | | |
|------------------------------------|-------------|
| • PSTD PLAZAOLA-SAKANA-ULTZAMALDEA | 5 000 000 € |
| • PSTD RIBERA ALTA DE NAVARRA | 2 000 000 € |
| • PSTD COMARCA PAMPLONA | 2 000 000 € |
| • PSTD URDINA.CAMINO RÍO ARAGÓN | 1 330 000 € |

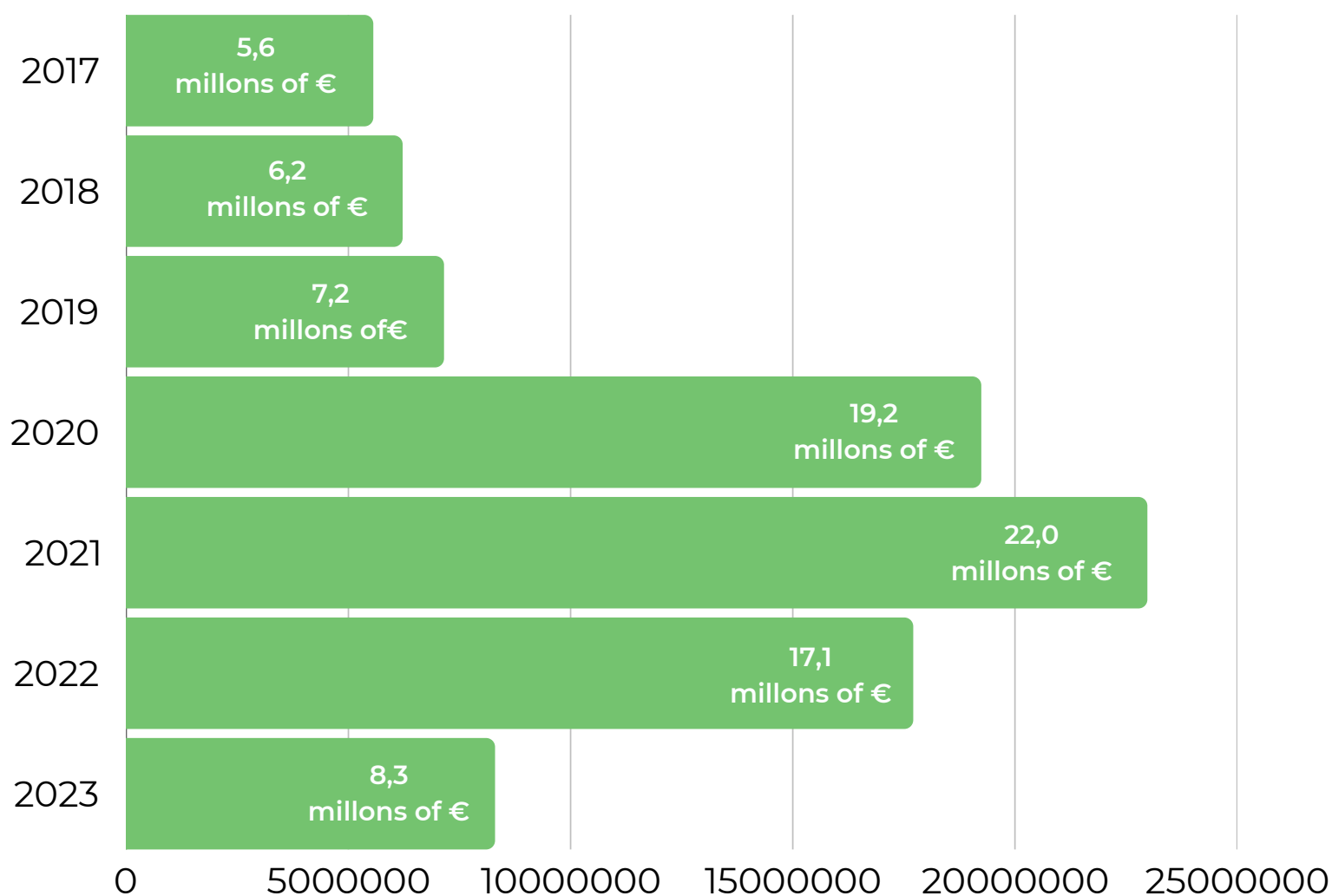
Other Funds

Project “Spain Living Lab” RETECH FUNDS 1,301,898

Spending on tourism coordination and promotion

The tourism budget in 2023, a year in which tourism spending would be returning to pre-pandemic levels, is 51% lower than it was in 2022.

In turn, it should also be noted that the total budget being managed is far higher than the budget allocated by the Regional Budget of Navarre due to the receipt of Next Generation Funds.



Source: Own work using data from the Regional Government of Navarre Budget



TOURISM SEASONALITY

A major aim of the aforementioned Strategic Tourism Plan for Navarre 2018-2025 is to position Navarre-Pamplona in the European tourism market in such a way as to capture deseasonalised demand flows, with a high average spend per day in the destination.

Section 74 of the programmatic agreement for the 2019-2023 legislature places special emphasis on the challenge of “increased deseasonalisation and specialisation in the tourism offer”. This section was further supported in the subsequent programmatic agreement for the 2023-2027 legislature, in which Section 7 on tourism proposes “Boosting the deseasonalisation of tourism”.

The aim of deseasonalising tourist influx is not only to make an economic impact on the destination but also to avoid overcrowding issues and environmental and social decline.

Navarre has been working to reduce its seasonality in a number of ways but mainly through the development of its strategic tourism niches and segments, such as MICE, sports tourism, the premium segment, cycle tourism and gastronomy and wine tourism; all of which have been developed significantly beyond the summer months.

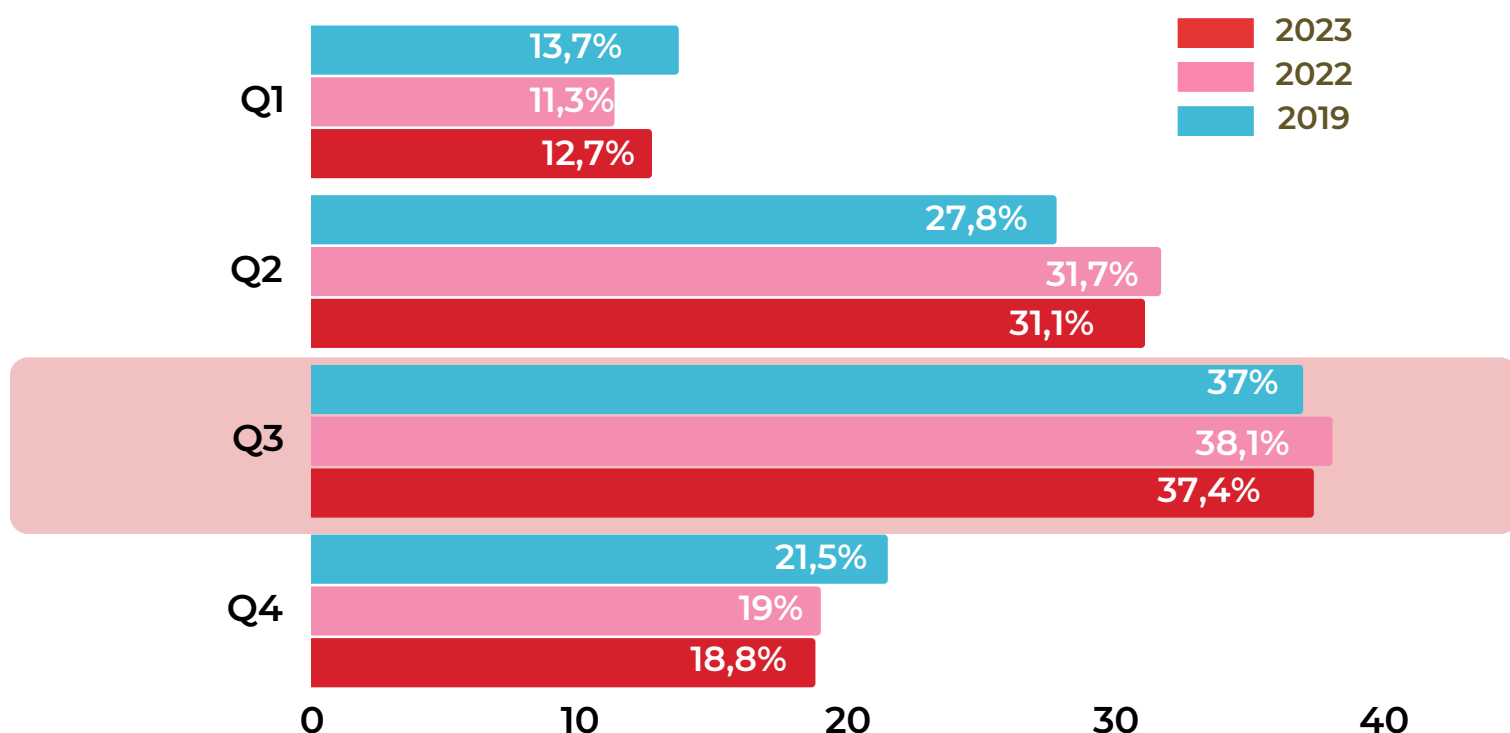
The results are becoming apparent, albeit subtly, in the following indicators corresponding to 2023.

37.4% of tourists travelled to Navarre in the main summer months

Beginning with the distribution of tourists in regulated accommodation in Navarre, and even though the first and third semesters present vastly different figures: 12.7% in the first and 37.4% in the third.

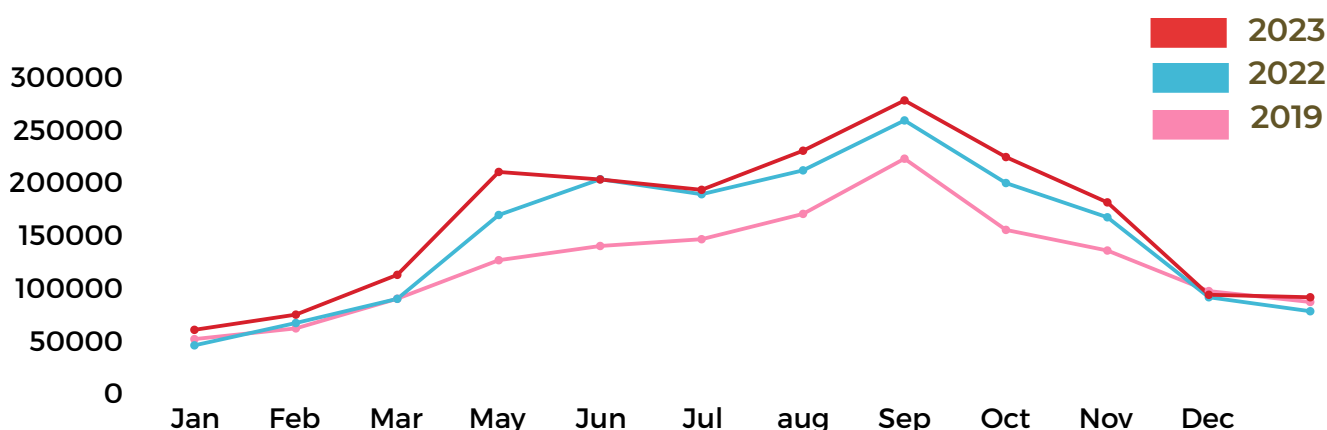
A lesser degree of seasonality can be observed in 2023 when compared with 2022 and there has been a shift back towards pre-COVID (2019) levels.

Percentage distribution of the number of tourists by quarter



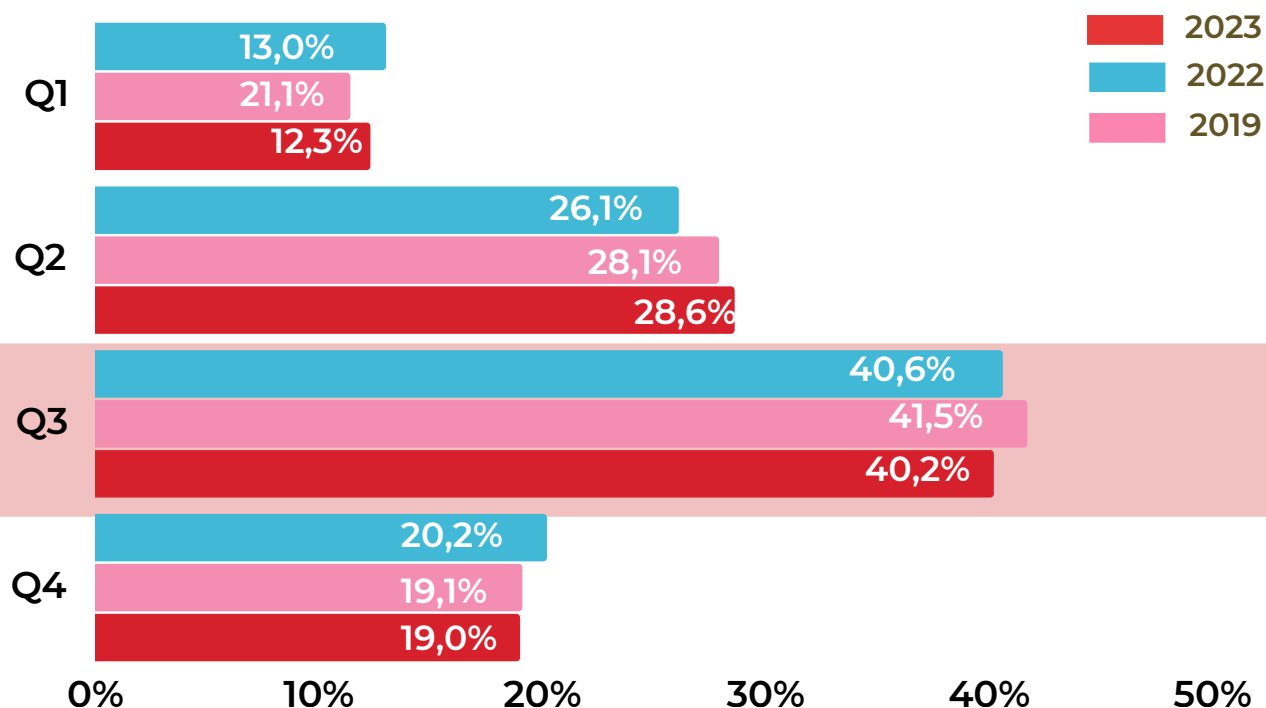
Source: Own work using data from Hotel, Rural Tourism, Campsite, Apartment and Hostel Occupancy Surveys conducted by the Spanish National Statistics Institute (INE).

Distribution of travellers by month as a proportion of the total



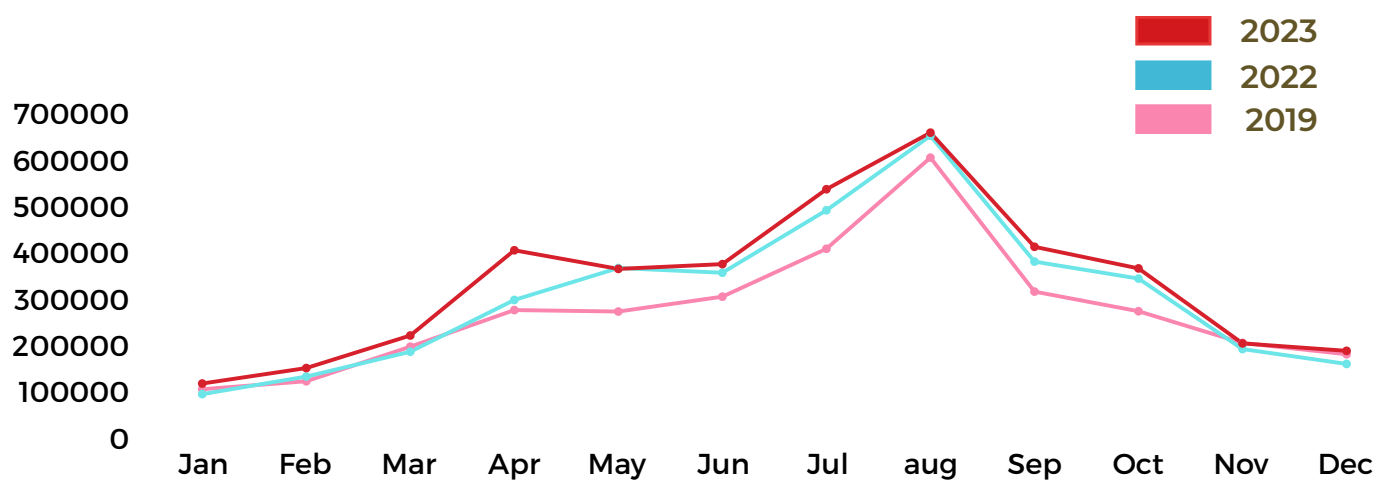
40% of overnight stays were concentrated in the third quarter

Percentage distribution of the number of overnight stays by quarter



Source: Own work using data from Hotel, Rural Tourism, Campsite, Apartment and Hostel Occupancy Surveys conducted by the Spanish National Statistics Institute (INE).

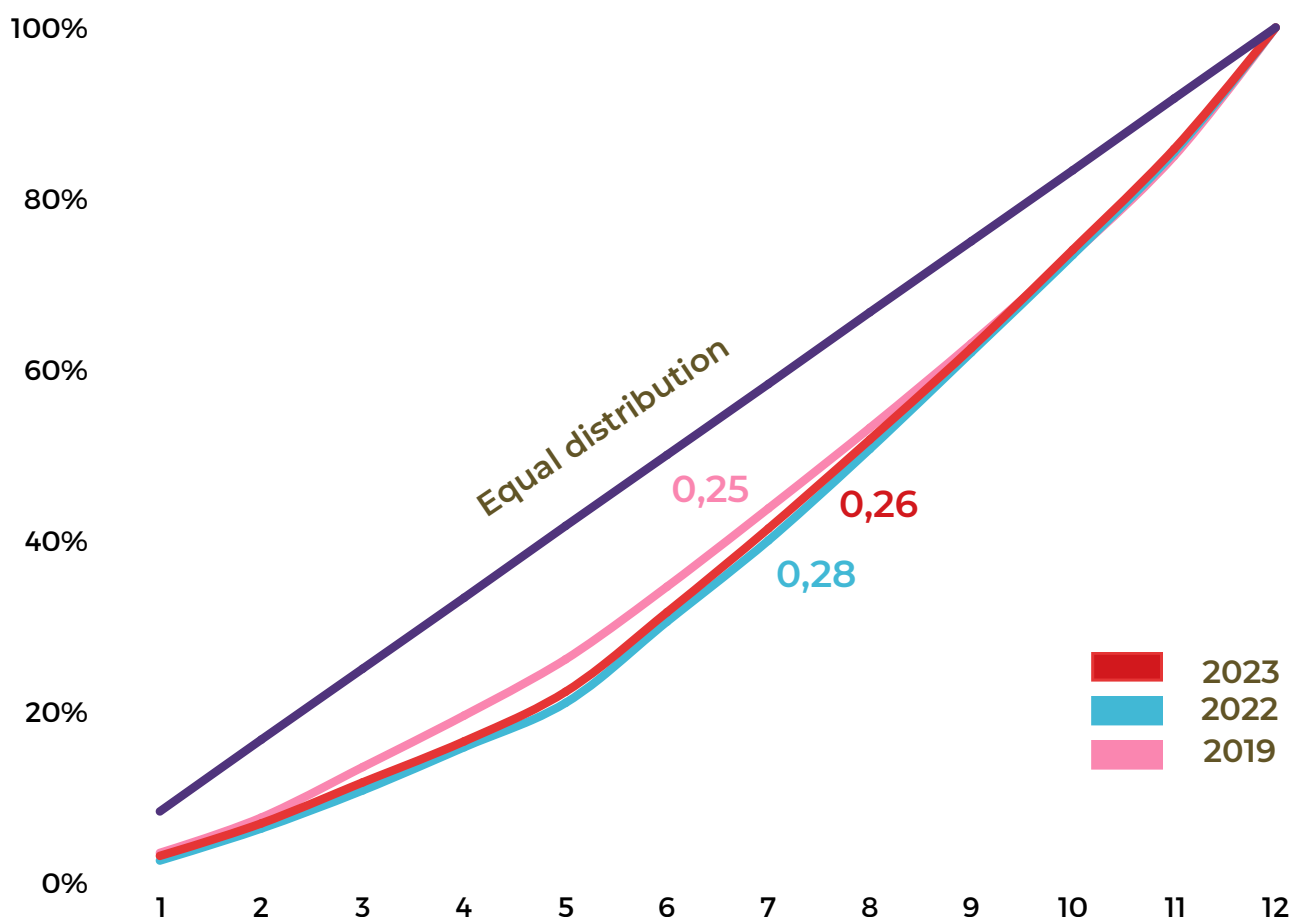
Distribution of overnight stays by month as a proportion of the total



The Gini Index can be used as a reference to analyse changes in the degree of seasonal concentration of tourism flows. This indicator quantifies the degree of equal/unequal distribution of tourists and overnight stays, so that 0 indicates that all the travellers/overnight stays are distributed equally over the year (deseasonalised flow) and 1 means that all the tourists are concentrated in one month (high seasonality).

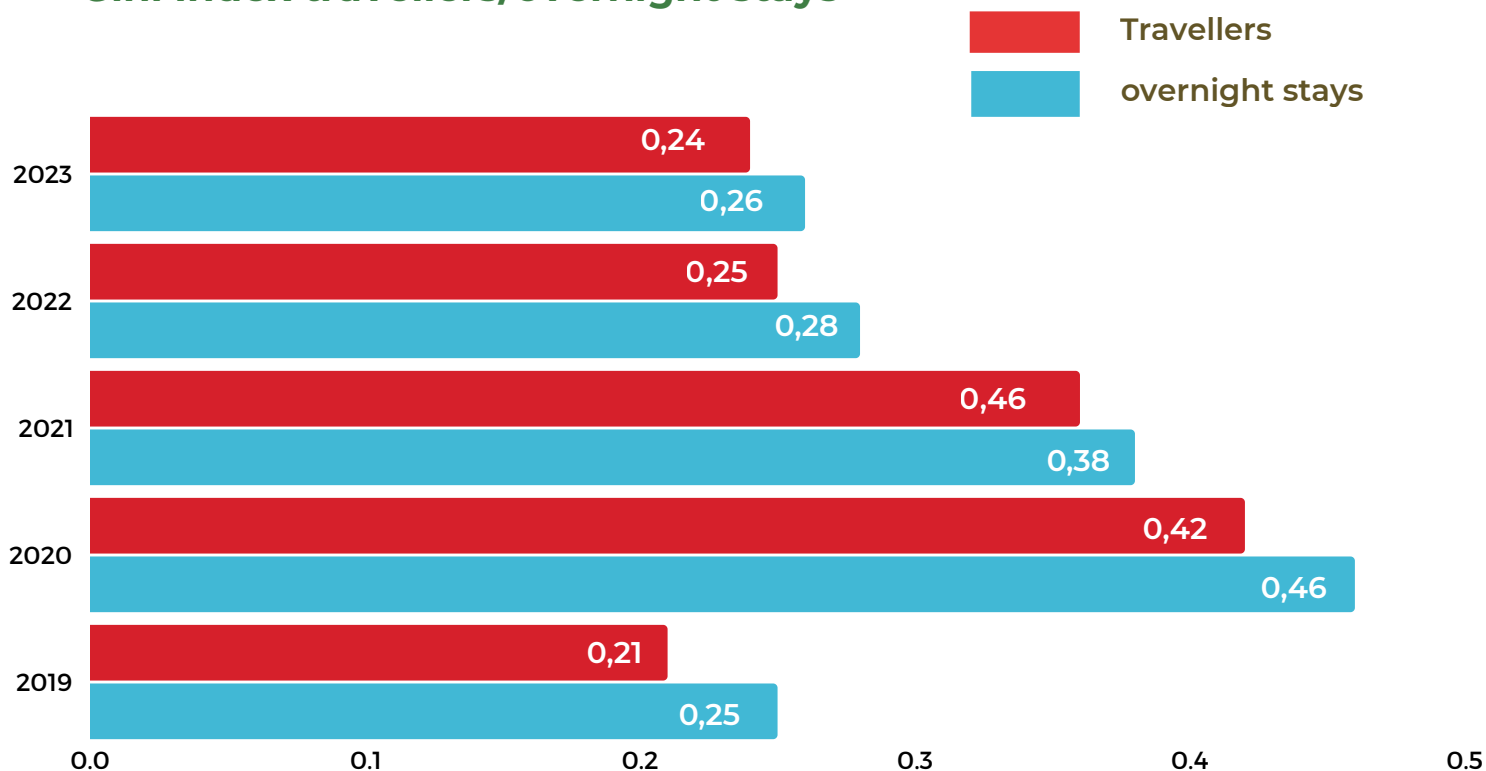
The Gini Coefficient corresponding to 2023 shows that the distribution of travellers and overnight stays was more balanced than it was in 2022. However, it remains above the level recorded in 2019.

Distribution of tourists by month from lowest to highest occupancy

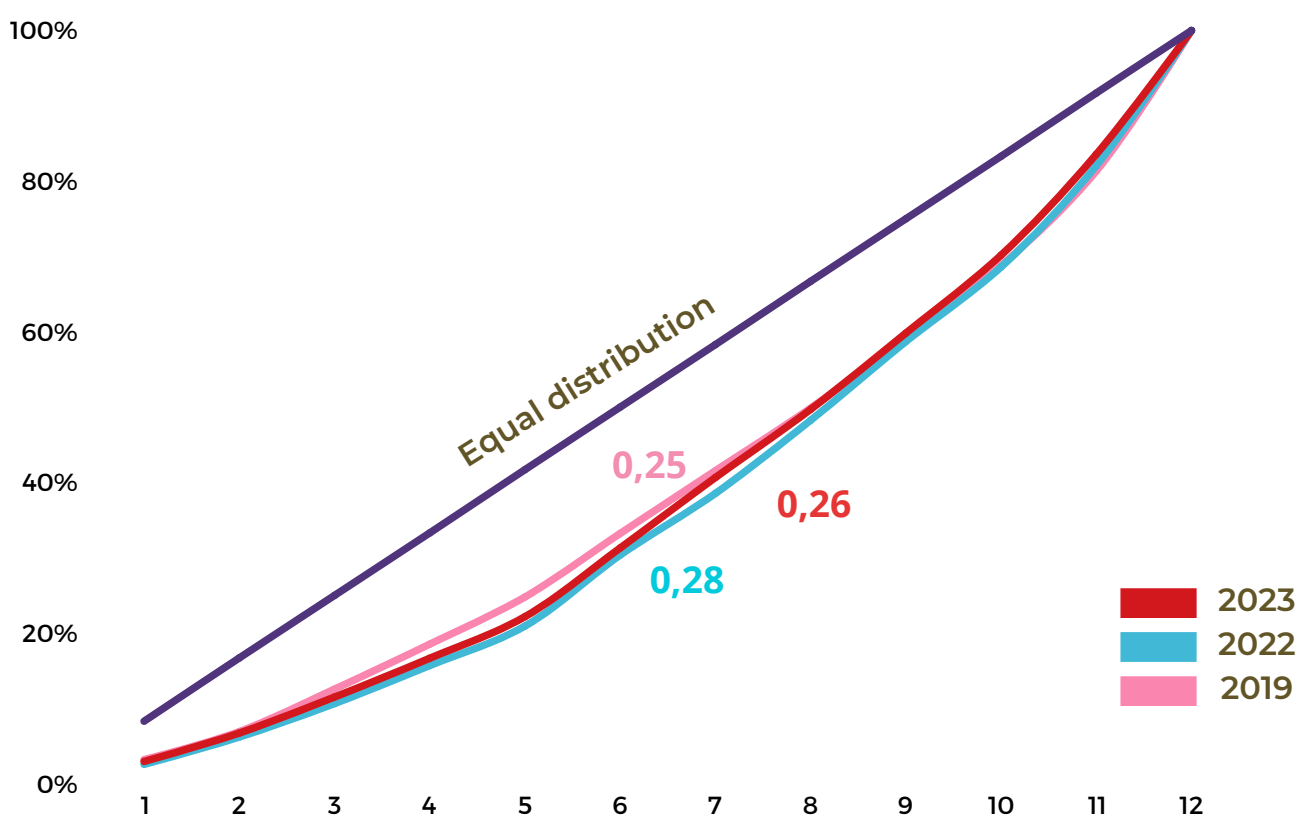


Source: Own work using data from Hotel, Rural Tourism, Campsite, Apartment and Hostel Occupancy Surveys conducted by the Spanish National Statistics Institute (INE).

Gini Index travellers/overnight stays

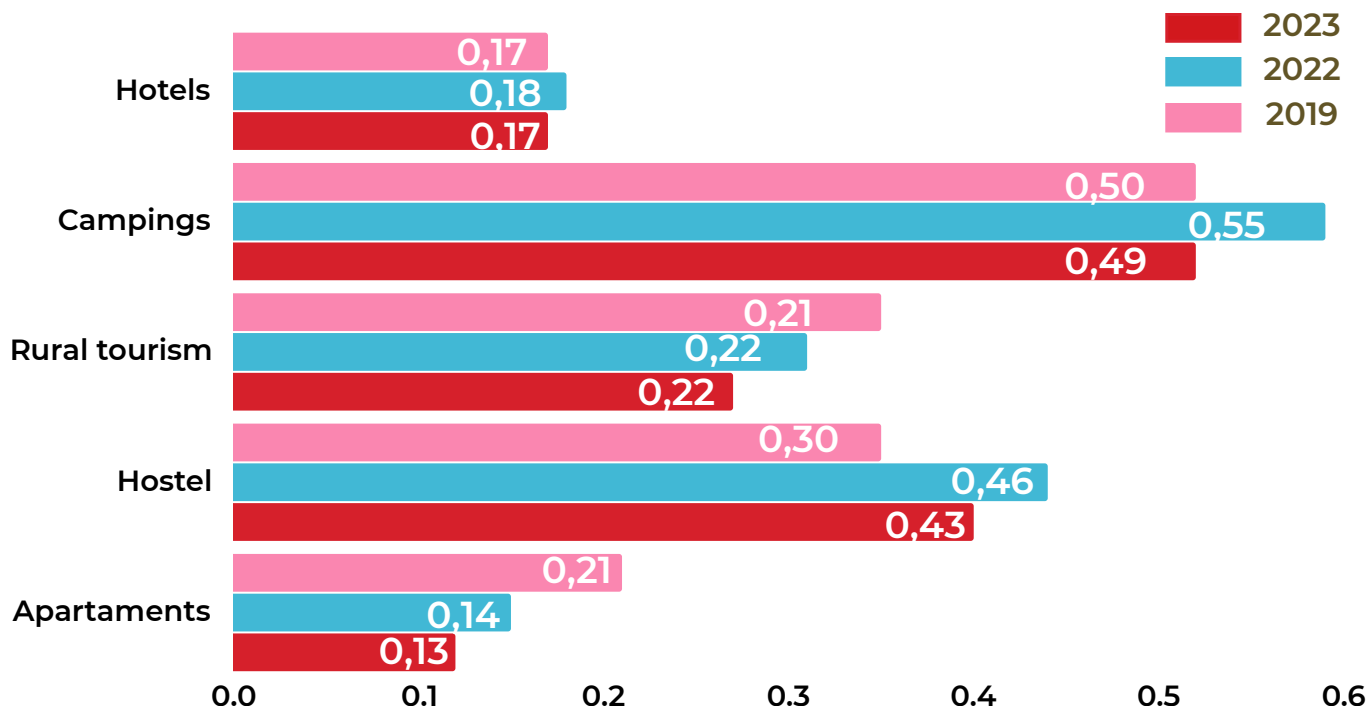


Gini Index international travellers



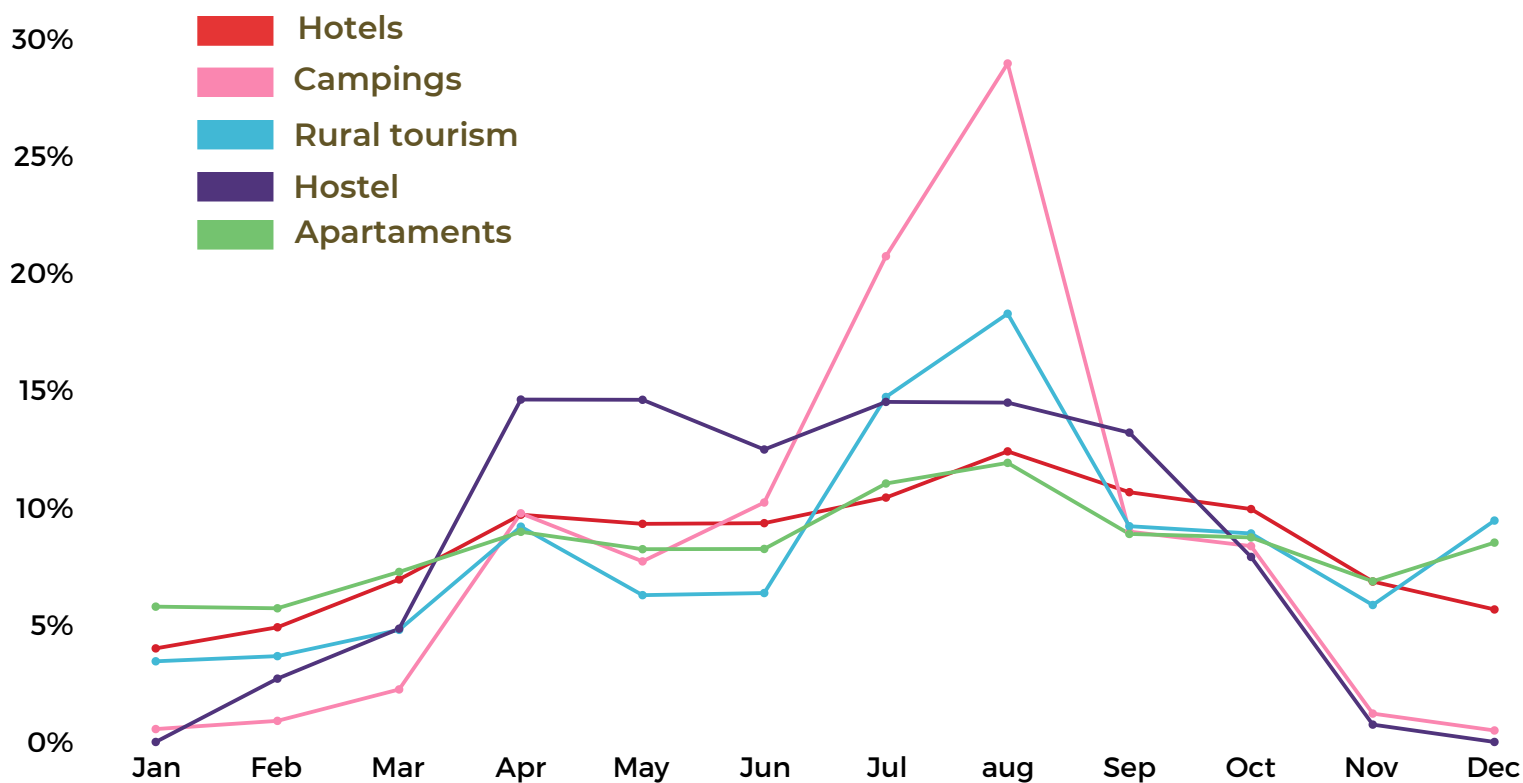
Source: Own work using data from Hotel, Rural Tourism, Campsite, Apartment and Hostel Occupancy Surveys conducted by the Spanish National Statistics Institute (INE).

GINI types of accommodation / overnight stays

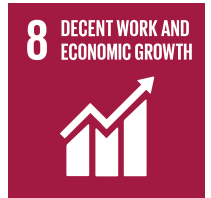


Source: Own work using data from Hotel, Rural Tourism, Campsite, Apartment and Hostel Occupancy Surveys conducted by the Spanish National Statistics Institute (INE).

Distribution of Overnight Stays in 2023



Source: Own work using data from Hotel, Rural Tourism, Campsite, Apartment and Hostel Occupancy Surveys conducted by the Spanish National Statistics Institute (INE).



Monitoring of the Sustainable Development Goals (SDGs) in Navarre

Code 8.9.1.4.a

“Proportion of overnight stays by tourists in the two months of maximum occupancy compared to the total overnight stays by tourists”.

Sources:

- Resident Tourism Survey (Spanish National Statistics Institute)
- Tourist Spending Survey (Spanish National Statistics Institute)
- Ongoing population statistics (Spanish National Statistics Institute)

Unit: Percentage

	2017	2018	2019	2020	2021	2022	2023
Spain	32,45	31,27	31,14	41,57	39,93	31,97	31,23
Navarre	30,31	29,30	30,07	40,28	36,13	28,37	23,73

Code 8.9.1.4.b

“Proportion of overnight stays by non-resident tourists in the two months of maximum occupancy compared to the total overnight stays by non-resident tourists”.

Sources:

- Resident Tourism Survey (Spanish National Statistics Institute)
- Tourist Spending Survey (Spanish National Statistics Institute)
- Ongoing population statistics (Spanish National Statistics Institute)

Unit: Percentage

	2017	2018	2019	2020	2021	2022	2023
Spain	27,99	27,64	25,98	43,57	33,04	25,98	24,62
Navarre	30,9	37,76	35,98	45,98	39,19	27,30	24,40

<https://nastat.navarra.es/es/indicadores/indicadores-ods>



EMPLOYMENT

Growth in employment and activities tied to tourism in Navarre

At 31 December 2023, the number of people in Navarre registered with the Spanish Social Security system had risen by 4.2% on the previous year.

A total of 18,897 people were registered under activities tied to tourism in Navarre. The only branch where this figure does not increase is “Accommodation services”, which remains stable and shows neither an increase nor a decrease

18,897 people in the Social Security system under the tourism branches (4.2% more than in 2022)



Accommodation services

2.702

+0%



Food and drink services

15.817

+4,7%



Tour operators, etc.

378

+12,5%

Snapshot of Tourism-related Employment in Navarre in 2023



63% of all those employed in the sector are women. Meanwhile, 74% of the unemployed are women.



The services of travel agencies and tour operators posted the highest increase, rising to 378 in 2023



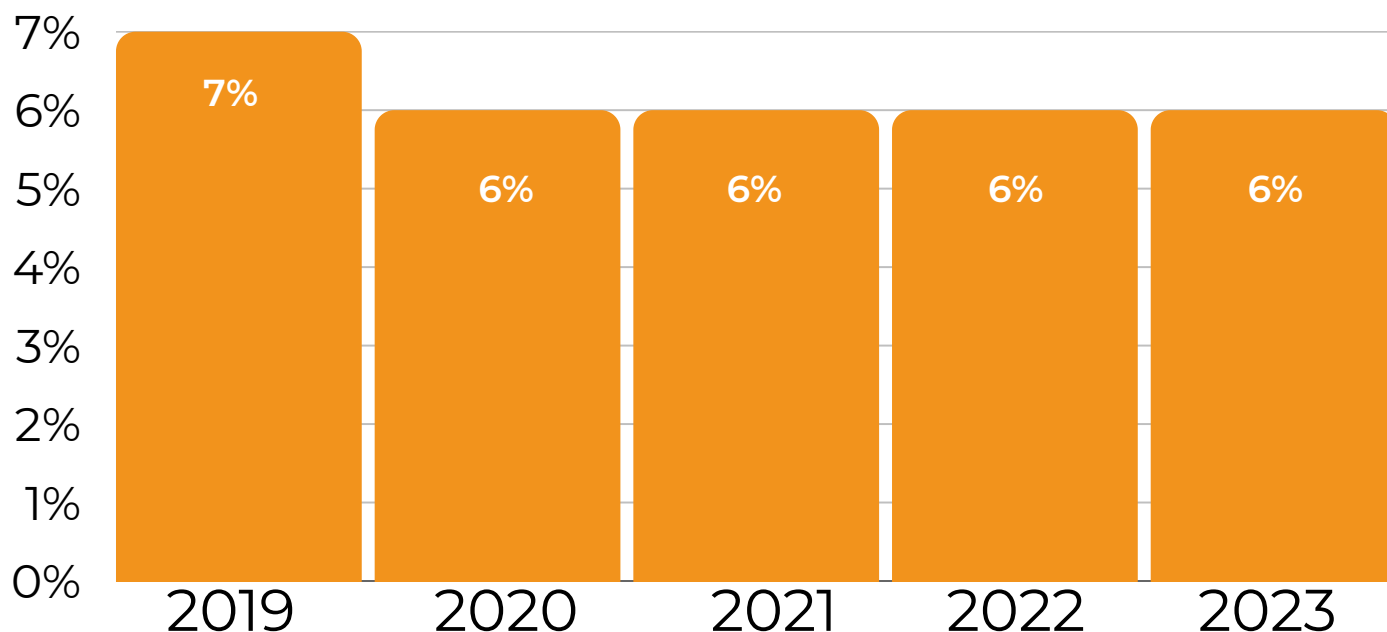
The number of people registered with the Spanish Social Security system and employed under a contract rose by 5.5% on the previous year



**56% of those registered with the Spanish Social Security system have full-time contracts.
7 out of every 10 men have full-time contracts, compared to 5 in 10 women.**

Source: Data provided by the Navarre Institute of Statistics - Nastat, from the General Social Security Treasury.

Contribution from tourism to employment



Source: Own work based on data from the Spanish Social Security system

Recorded unemployment (CNAE 55, 56, 79)

Recovery of employment is also reflected in the unemployment figures registered by the Navarrese Employment Service. At 31 December 2023, unemployment in this sector stands at 2,704 people (74% women). This is 3.8% lower than at the same date in 2022.

Unemployment in tourism industries represents 9% of total unemployment in Navarre.



ECONOMIC BENEFITS IN THE DESTINATION

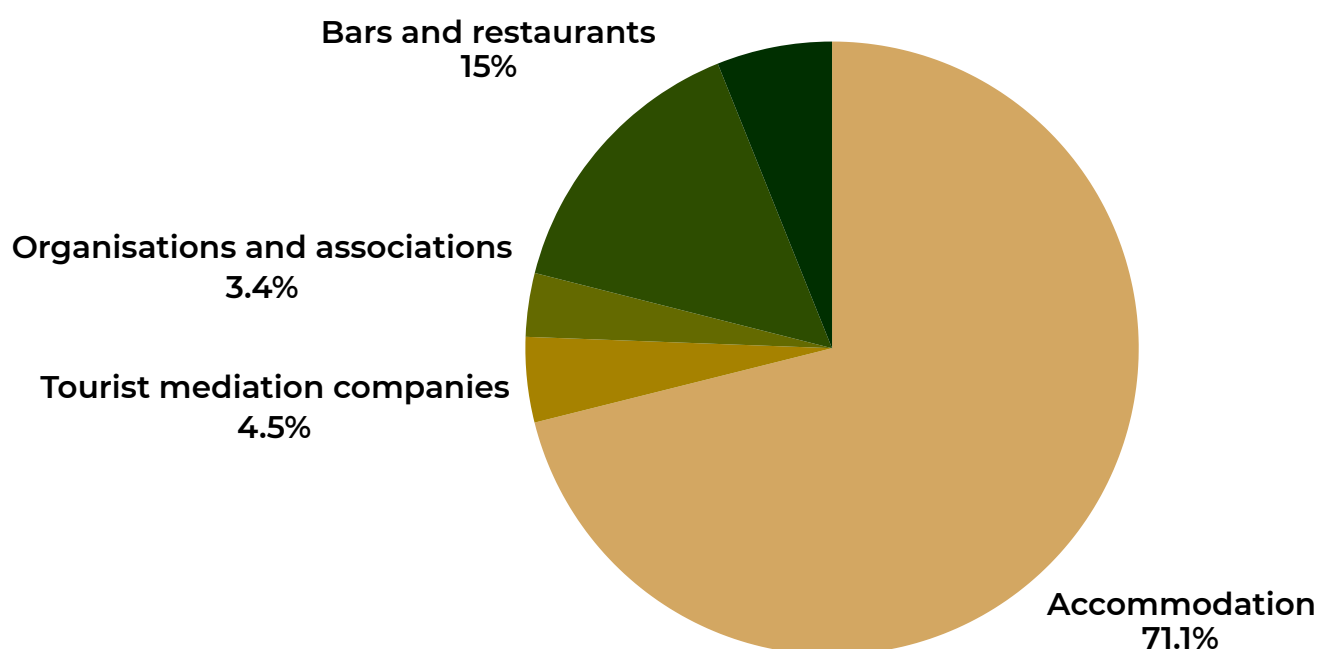
Improving the economic benefits from tourism is a strategic objective for Navarre. Tourism in the destination has traditionally been an activity that mostly involves domestic tourism and is heavily characterised by a lack of internationalisation.

This generates a short and seasonalised average length of stay and a weak ability to generate spending. For those reason, the Navarre Strategic Tourism Plan includes the following objectives:

“Position Navarre-Pamplona in the European tourism market in such a way as to capture deseasonalised demand flows, with a high average spend per day in the destination.”

Business fabric

An analysis of the economic benefits must also analyse the business fabric. The main source of data for studying this issue is the companies register itself. Navarre keeps a tourism companies register that is called InfoReyno, which includes accommodation establishments, tourism activity companies, restaurants and bars, although restaurants and bars join the register voluntarily.



Source: Own work using data from the InfoReyno register kept by the Regional Government of Navarre. 2023

3,339 tourism companies have been registered in total, of which 71.1% are accommodation establishments, followed by 15% restaurants and bars.

Of all the accommodation establishments, almost half are rural establishments (rural houses, apartments and, to a lesser degree, rural hotels and dwellings). The other half mainly consists of tourist apartments and, to a lesser degree, lodgings, hostels and hotels.

SPENDING FROM INTERNATIONAL TOURISM



TOTAL SPEND

299,76
millions of €

⬆️ +70,3% (2022)

⬆️ +14,7% (2019)



AVERAGE SPEND PER PERSON

824€

⬆️ +28,0% (2022)

⬆️ +30,8% (2019)



DAILY SPEND PER PERSON

134€

⬆️ +22,4% (2022)

⬆️ +30,2% (2019)

source: EGATUR (2023) Spanish National Statistics Institute (INE).
Spending by international tourists based on their main destination
autonomous region

Two main sources of information exist on total tourist spending in Navarre: the EGATUR surveys and experimental statistics which combine EGATUR data with PST data.

SPENDING FROM INTERNATIONAL EXCURSIONS



TOTAL SPEND

333,49 millions of €

⬆️ +11,0% (2022)

⬆️ +51,4% (2019)



AVERAGE SPEND PER PERSON

133€

⬆️ -2,2% (2022)

⬆️ +47,8% (2019)

source: EGATUR (2023) Spanish National Statistics Institute (INE).
Spending by international tourists based on their main destination
autonomous region



SPENDING FROM DOMESTIC TOURISM



TOTAL SPEND

423,9
millones of €

⬆️ +3,1% (2022)

⬆️ +4,6% (2019)



AVERAGE SPEND PER PERSON

190,36€

⬆️ -5,2% (2022)

⬆️ +36,9% (2019)



DAILY SPEND PER PERSON

62,38€

⬆️ -3,1% (2022)

⬆️ +32,4% (2019)

SPENDING FROM INTERNATIONAL EXCURSIONS



TOTAL SPEND

93,2
millones of €

⬆️ -8,6% (2022)

⬆️ -10,3% (2019)



AVERAGE SPEND PER PERSON

41,05 €

⬆️ +10,2% (2022)

⬆️ +24,8% (2019)

Source: Domestic Tourism Survey (ETR /FAMILITUR) (2023) Spending by international tourists on excursions based on their main destination autonomous region



LOCAL SATISFACTION

Tracking of Sustainable Development Goals in Navarre



Code 8.9.1.3.b

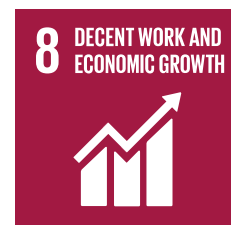
“Overnight stays by non-resident tourists per inhabitant”

Sources

- Domestic Tourism Survey, Spanish National Statistics Institute (INE)
- Tourist Spending Survey, Spanish National Statistics Institute (INE)
- Ongoing population statistics, Spanish National Statistics Institute (INE)

Unit: Overnight stays

	2016	2017	2018	2019	2020	2021	2022	2023
Spain	12,78	13,62	13,2	12,62	3,13	5,36	11,25	12,71
Navarre	10,59	11,93	12,15	12,78	6,98	6,93	8,54	9,5



As can be seen in the table, the number of overnight stays per inhabitant is slightly below the average for Spain as a whole. Furthermore, the figures for Spain have returned to pre-pandemic levels whereas this is not the case yet in Navarre.

This is something that impacts tourism pressure in the region and therefore local satisfaction.

Source: <https://nastat.navarra.es/es/indicadores/indicadores-ods>

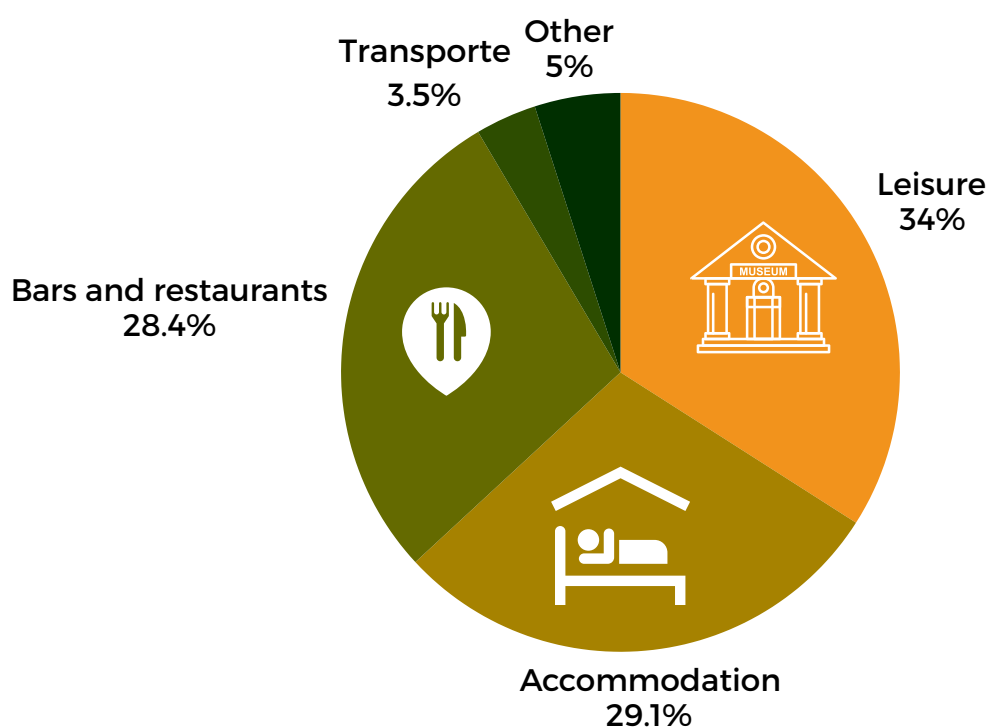


ACCESSIBILITY

Tourism resources validated by Equalitas Vitae

Equalitas Vitae is a consultancy company specialising in accessible tourism that performs diagnoses on tourism resource accessibility. Its directory of tourism resources has 141 tourism resources registered in Navarre, 11 more than in 2022. At this time, they are distributed as follows:

Navarrese tourism companies in the Equalitas Vitae Tourism Companies Directory:



Source: Own work using data from the Equalitas Vitae Accessible Tourism Directory.

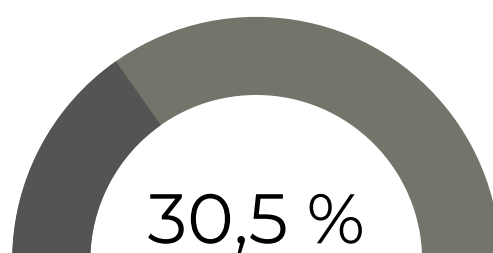


Accessible tourism resources according to booking platforms

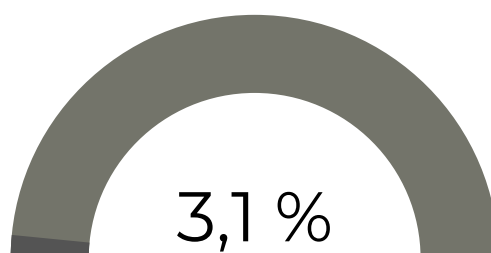
The accessibility conditions of various tourist accommodation establishments in Navarre began to be examined in 2023 using information published by booking platforms, especially Booking.

The following results were obtained:

Percentage of establishments fully accessible for wheelchair users



Percentage of establishments with information provided in Braille



Percentage of accommodation establishments with an audio guide



Source: Tot Lab. Web Scraping Private booking platforms



ENERGY MANAGEMENT

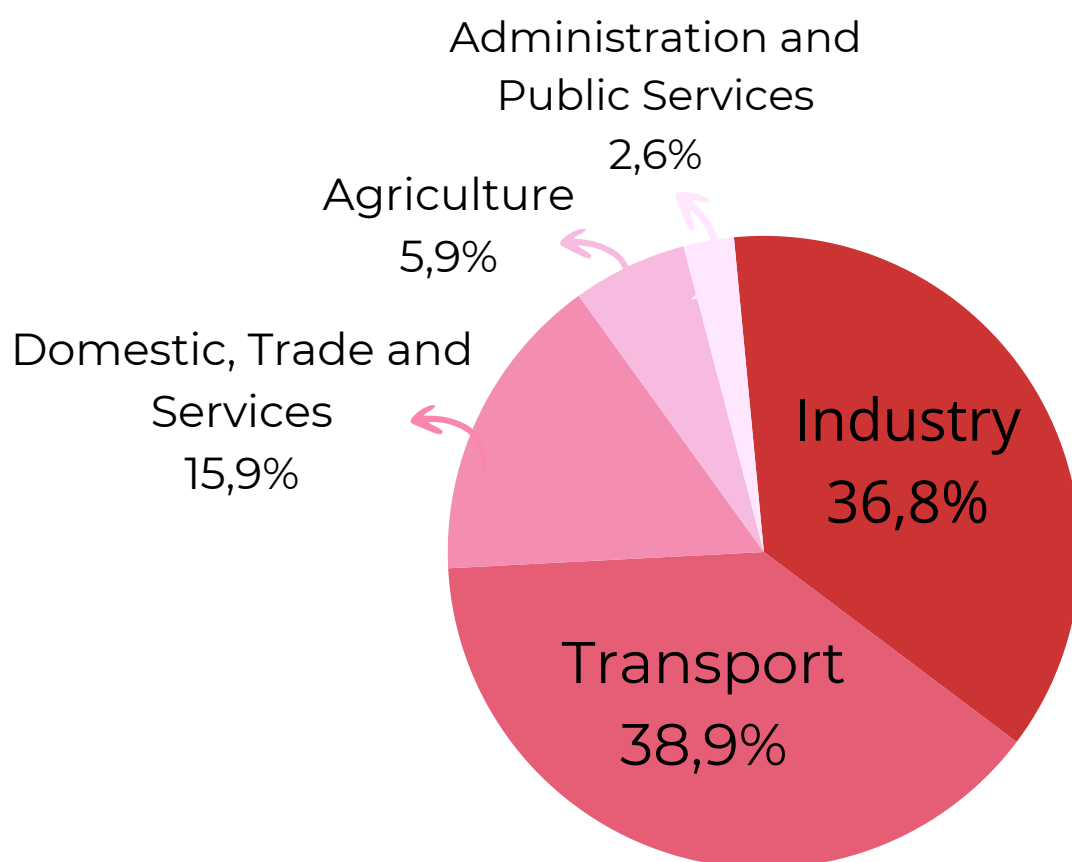
ENERGY CONSUMPTION IN NAVARRRE

This chapter presents data from the 2023 Navarre Energy Report, estimating the proportion that can be attributed to tourism. The Navarre Energy Report shows the direct consumption of energy by the tourism sector under “Domestic, Trade and Services” consumption.

According to the 2023 Energy Report, this figure stood at 281,623 TOE (tonnes of oil equivalent), which accounts for 15.9% of the 1,775,979 TOE consumed in Navarre during 2023.

The domestic, trade and services sector shows a decrease of 16.2% on 2022

Total consumption of final energy per sector

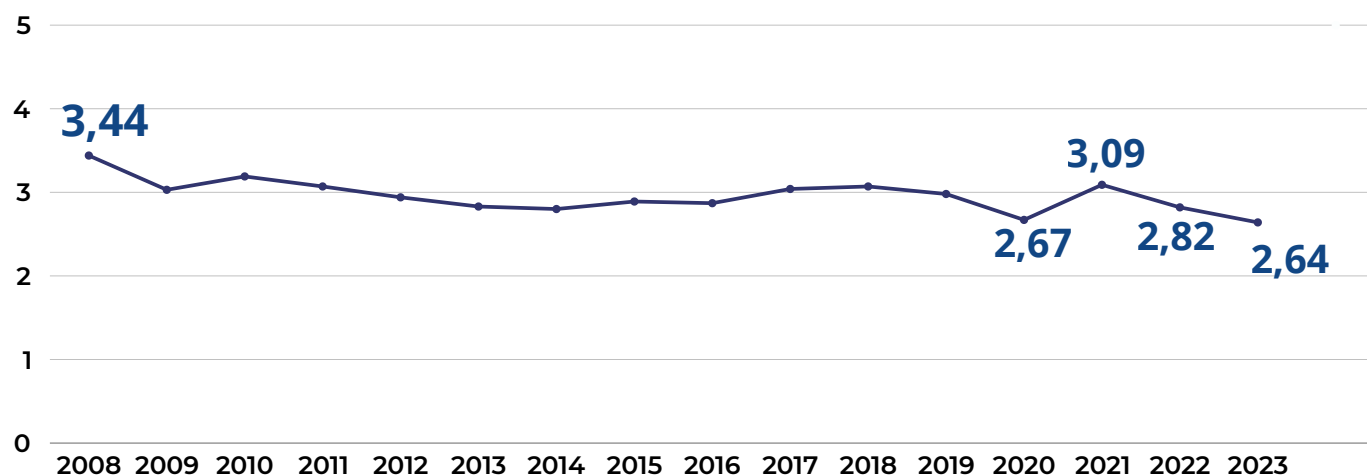


Source: Own work using data from the navarre Energy Report 2023

Energy consumption per capita in TOE:

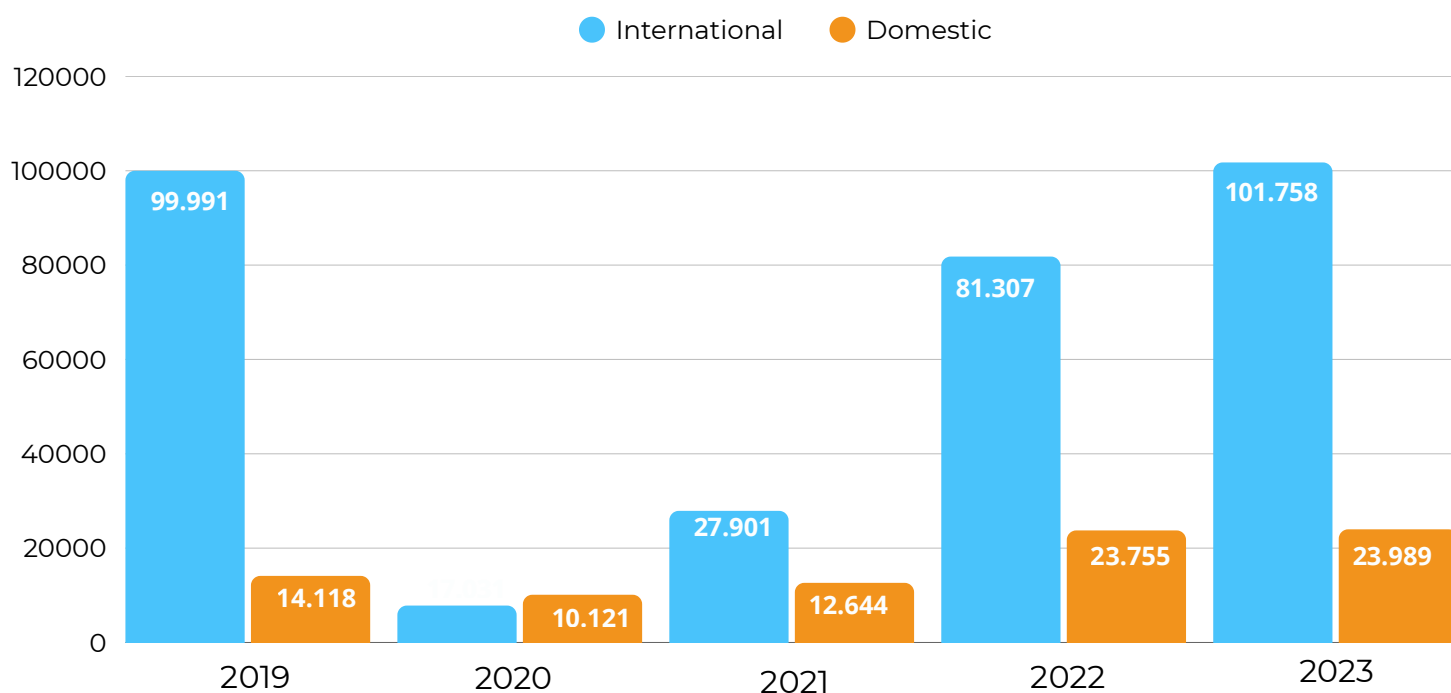
Energy consumption per capita is a basic indicator used to determine energy consumption trends over time. In Navarre, the consumption per inhabitant is calculated in the TOE unit (tonne of oil equivalent), which equates to 11,630 kWh.

The figure for 2023 is 2.64 TOE per inhabitant. This is 6.4% lower than the previous year and corresponds to the lowest figure recorded to date.



Source: Own work using data from the Navarre Energy Reports 2011-23

Tourists arriving by air



Source: Frontur

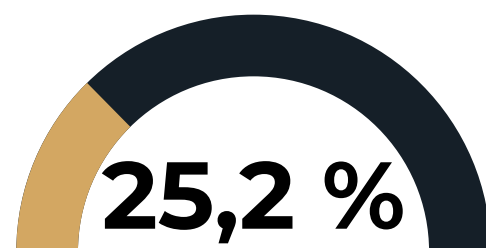
INDICATORS ON THE STATE OF RENEWABLE ENERGY IN NAVARRRE:

On the path towards sustainability and energy sovereignty, renewable energy (RE) is essential.

Navarre thereby monitors a series of indicators on the proportion of renewable energy generated and consumed in Navarre.

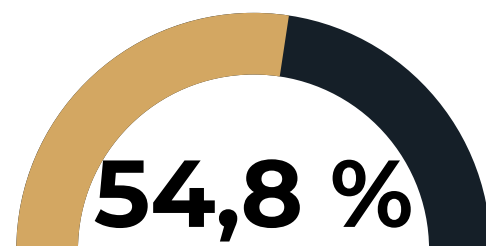
RE share in the gross final energy consumption:

According to the 2023 Navarre Energy Report, 25.24% of final consumption came from renewable sources. This is a decrease of 6.35% when compared with 2022 and an increase of 18% over the last 10 years.



RE percentage of electricity production:

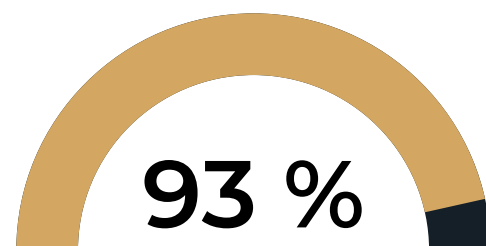
Electrical energy from renewable sources in 2023 amounted to 54.77, which is an increase of 19% on the previous year.



Electricity production using RE / Electricity consumption:

The ratio between electricity production using RE and total electricity consumption is an objective indicator for the European Union. For 2030, this indicator should reach 70%.

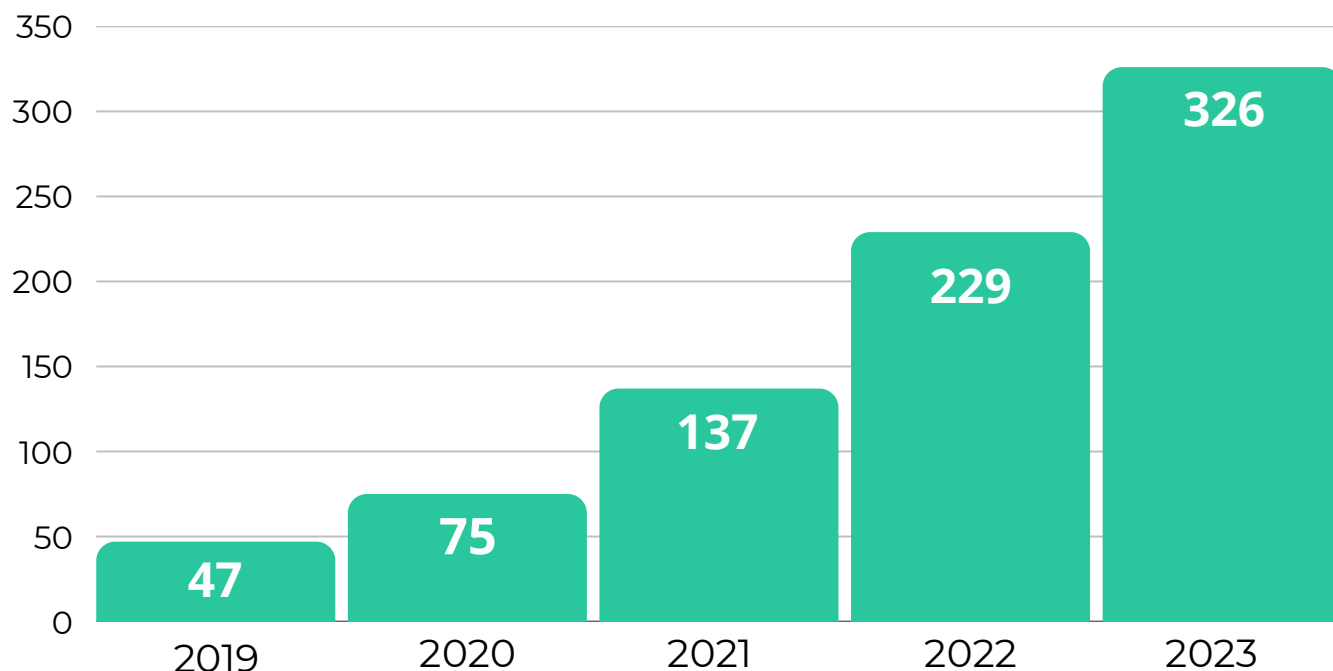
As shown in the table, Navarre meets this figure easily. However, it has fallen slightly (-2.4%) on the previous year.



Source: Own work using data from the Navarre Energy Report 2023

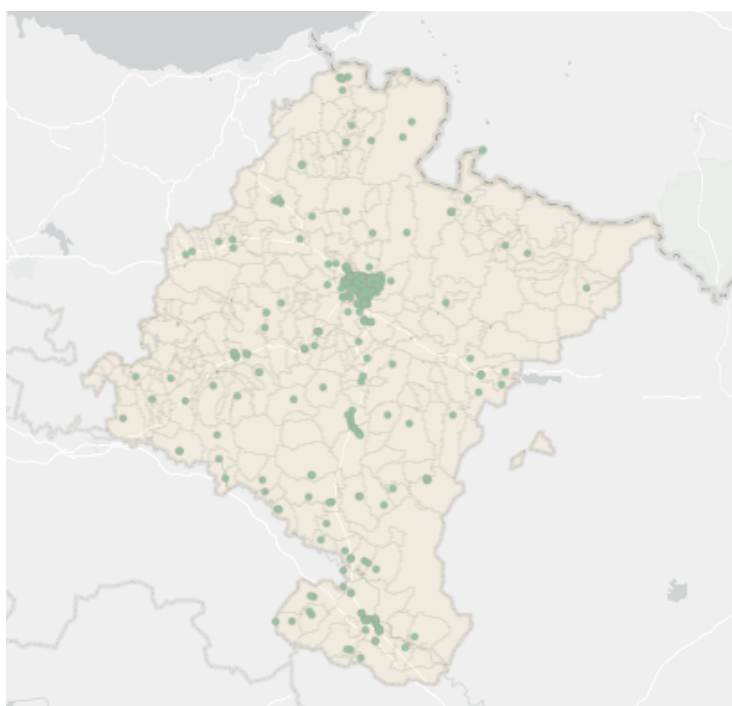
CHARGING STATIONS

Spanish Royal Decree Law 29/2021 was published in 2021 and requires one charging station to be installed per 40 parking spaces and in all private nonresidential car parks with more than 20 spaces.



In 2023, there were 326 charging stations in Navarre, a large proportion of which were located in the capital.

These charging stations are distributed across the various municipalities of the Autonomous Community, as shown in the attached image.



Source: <https://transicion-energetica.navarra.es/pages/puntos-recarga>



WATER MANAGEMENT

This section compiles data from other Navarrese public institutions.

The Rural Development and Environmental Affairs Department of the Regional Government of Navarre runs periodic tests on natural bathing areas and rivers. To measure water consumption, we rely on the system of strategic climate change indicators for Navarre within the KLiNA Navarre climate change roadmap, as well as data from the local authorities that manage supply.

This topic is increasingly more important due to climate change, among other things, as it is leading to periods of drought as well as the potential for more extreme rainfall. This issue exacerbates the need for sustainable water resource management in our region.

According to the system of strategic indicators on climate change in Navarre, total consumption per inhabitant per day in Navarre stood at 301.7 litres/day in 2023. This represents consumption of approximately 73,978,777 m³ per year.

The consumption per inhabitant data varies considerably between local water authorities.



Indicador 31. Consumo total
de agua por habitante

Water consumption estimate:

In an attempt to provide the most complete image of water consumption possible, we have estimated the water consumed by tourists staying in Navarre.

We calculated equivalent consumption, which applies the local population's consumption to the tourist population.

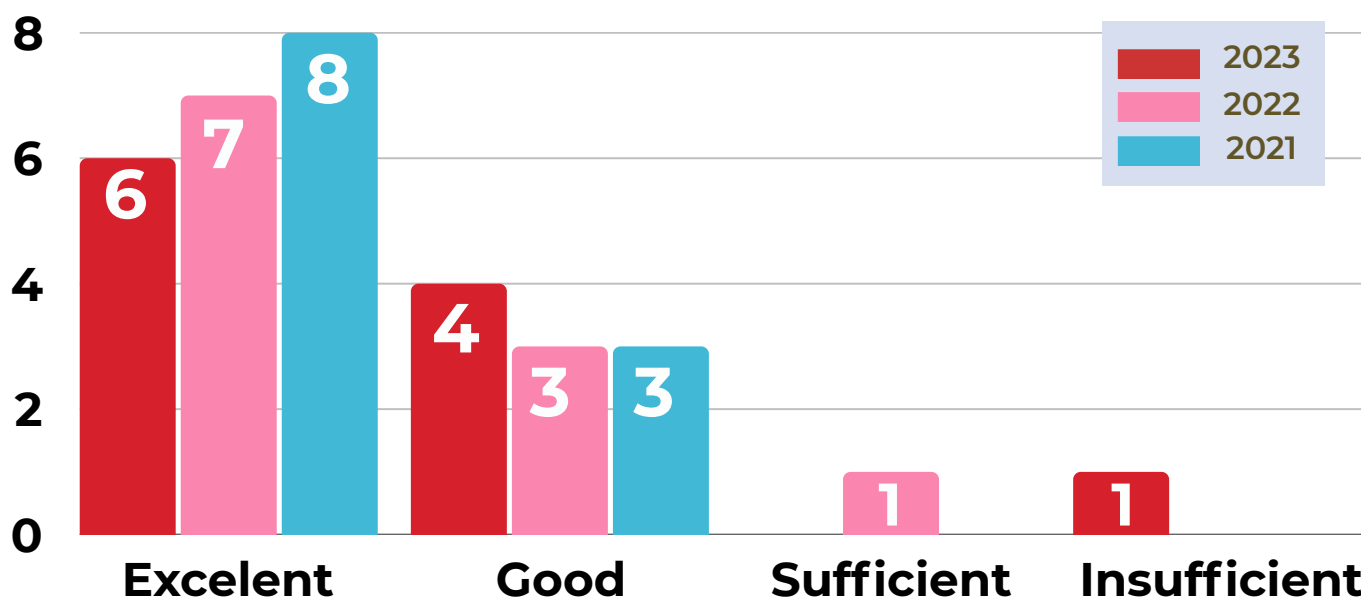
In 2023, there were 3,992,841 overnight stays. When multiplying this figure by the daily consumption of 113,8 litres, an annual consumption figure can be obtained for the tourist population of 454,385,305.8 m³ of water



Indicador 31. Consumo total
de agua por habitante

Bathing water

The Rural Development and Environmental Affairs Department of the Regional Government of Navarre and the Institute of Public and Occupational Health monitor water quality in bathing areas. The quality of this water is important for health, the environment and tourists' perception of Navarre.



Of the 11 bathing areas monitored in Navarre, the water in 63% is of excellent quality. Nonetheless, the trend has shifted over the last, as can be seen in the table below:

Year	2021	2022	2023
La Morea Pond	Exc	Exc	Exc
Esca River – Dam	Good	Good	Good
Aragón River – Dam	Exc	Exc	Exc
Saltwater Spring	Exc	Exc	Buena
Alloz Reservoir	Exc	Exc	Exc
Foz Ravine	Exc	Exc	Exc
El Pulguer Pond	Exc	Exc	Exc
Uztarroz River	Exc	Good	Good
Urederra River – The Power Station	Good	Good	Good
Urederra River – Natural Swimming Pool	Exc	Exc	Exc
Araxes River	Buena	Sufficient	Insufficient



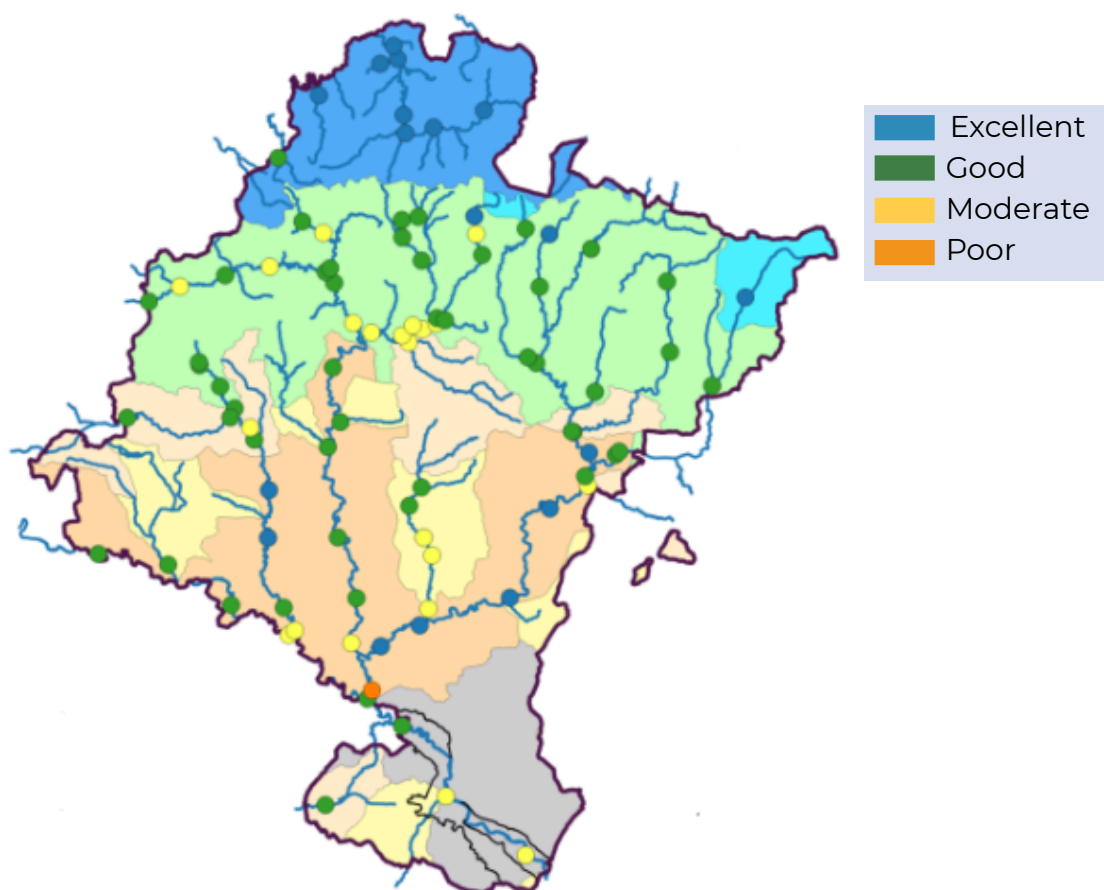
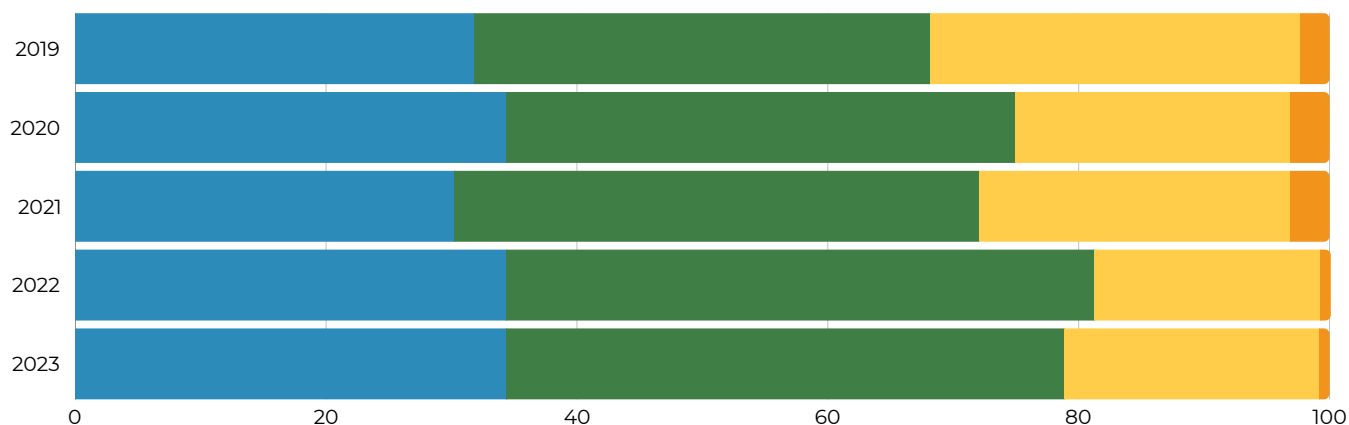
REPORT 2023 **Control network for natural bathing** **areas in Navarre**

Nafarroako Gobernua  Gobierno de Navarra

Nafarroako Ingurumen Kudeaketa, S.A.  Gestión Ambiental de Navarra, S.A.

Trend in the ecological condition of rivers in Navarre

Finally, it should be highlighted that the general condition of the rivers in Navarre has improved over the last decade. As shown in the graph below, the number of “Excellent” and “Good” quality scores has improved since 2000, although the figure has stabilised in the last year



Source: Environmental condition of surface water bodies 2023 from NILSA



Report 2023 Environmental condition of surface water bodies

Nafarroako
Gobernua



Gobierno
de Navarra

Nafarroako
Ingurumen
Kudeaketa, S.A.



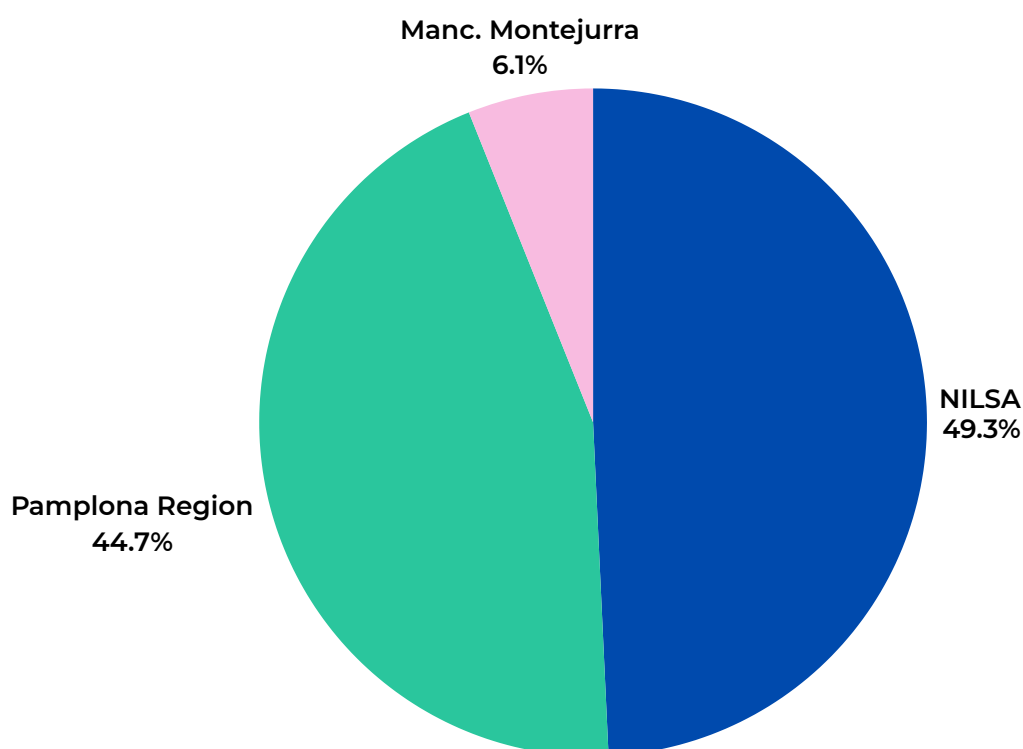
Gestión
Ambiental de
Navarra, S.A.



WASTE WATER MANAGEMENT

Navarre has an extensive network of water treatment facilities. A total of 79,411,955 litres of water were treated in 2023, enough to fill 23,530 Olympic swimming pools.

A public company, NILSA S.A. (Navarra de Infraestructuras Locales, S.A.), manages 49% of waste water treatment in Navarre. The remaining 51% is managed by the two largest local authorities in the Provincial Region of Navarre: the Pamplona District Authority, which treated 31,087,780 cubic metres of waste water; and the Montejurra District Authority, which treated 4,818,365 cubic metres.



Source: Own work using the 2023 Annual Report from NILSA

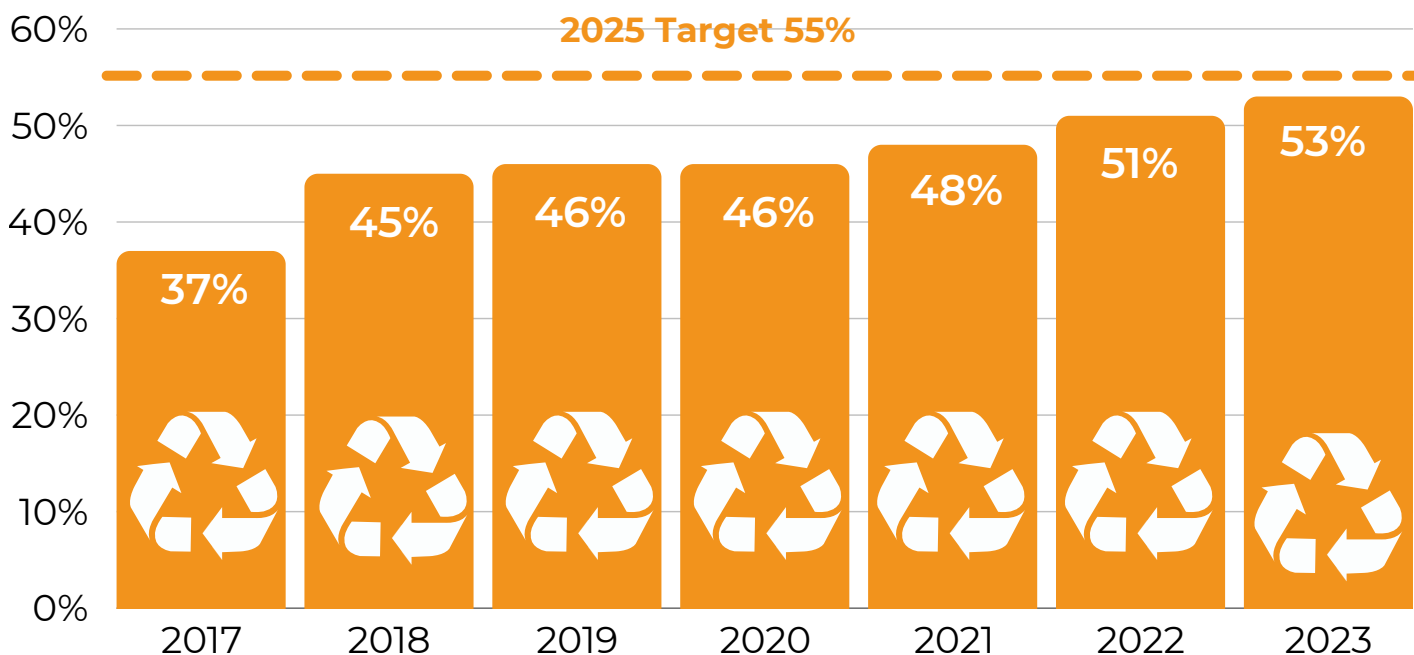


SOLID WASTE MANAGEMENT

A total of 275,226 tonnes of domestic and commercial waste was created in the Provincial Region of Navarre in 2023. The waste directly generated by the tourism sector is included within this category. The figure is 1% lower than the previous year (2022; 278,048 tonnes). In terms of waste generation per inhabitant, this figure stands at 410 kilograms per inhabitant per year. The Navarrese Waste Act sets a series of reduction targets: to 384 kg per inhabitant by 2025 and to 375 kg per inhabitant by 2030.

In 2023, Navarre recycled more than 50% of its domestic-commercial waste

Percentage variations in recycled waste:



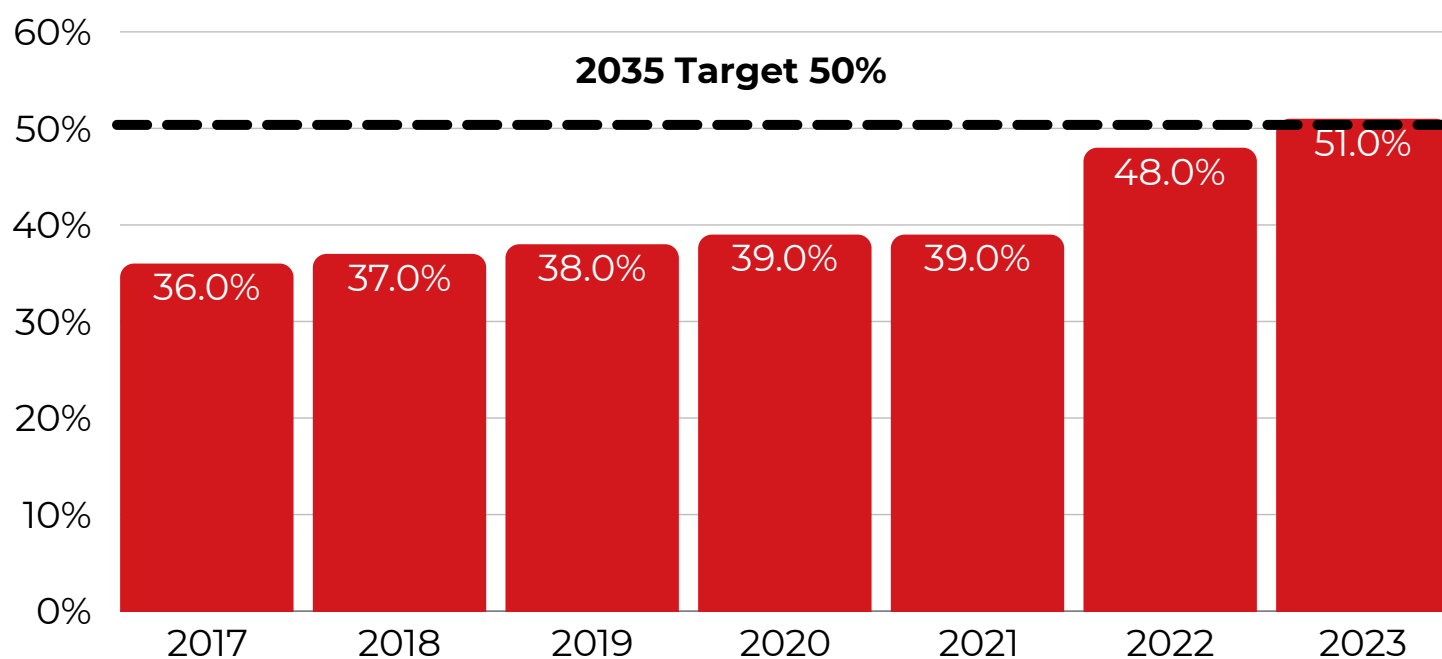
Source: Navarrese Waste Plan tracking

SEPARATED COLLECTION DATA

Spanish Law 7/2022, of 8 April, on Waste and Contaminated Land for a Circular Economy, sets the first ever quantitative target for global selective collection of at least 50% by 2035. The revised Navarrese Waste Plan brings forward that target to 2027. 140,646 tonnes were collected in 2023 and 51% of municipal waste was collected separately, thereby exceeding that minimum target.

This percentage is highly unbalanced among the various types of waste and not all of them reached 50%

Trend in separated collection:



Source: Monitoring of the Navarre Waste Management Plan



CLIMATE ACTION

MONITORING:

More extreme weather phenomena are one consequence of climate change, resulting in periods of both drought and intense precipitation.

The LIFE NADAPTA project by the Regional Government of Navarre was presented in December 2017. The aim of this project is to adapt Navarre to the effects of climate change, specifying 53 measures to develop in six strategic areas: water, forests, farming, health, infrastructures, and planning and monitoring. The project manages a series of adaptation actions and a system of indicators relating to climate change.

The system has four goals:

1. Characterising hazards (climatic variables).
2. Characterising exposure and vulnerability.
3. Monitoring associated impacts.
4. Applying adaptation measures.

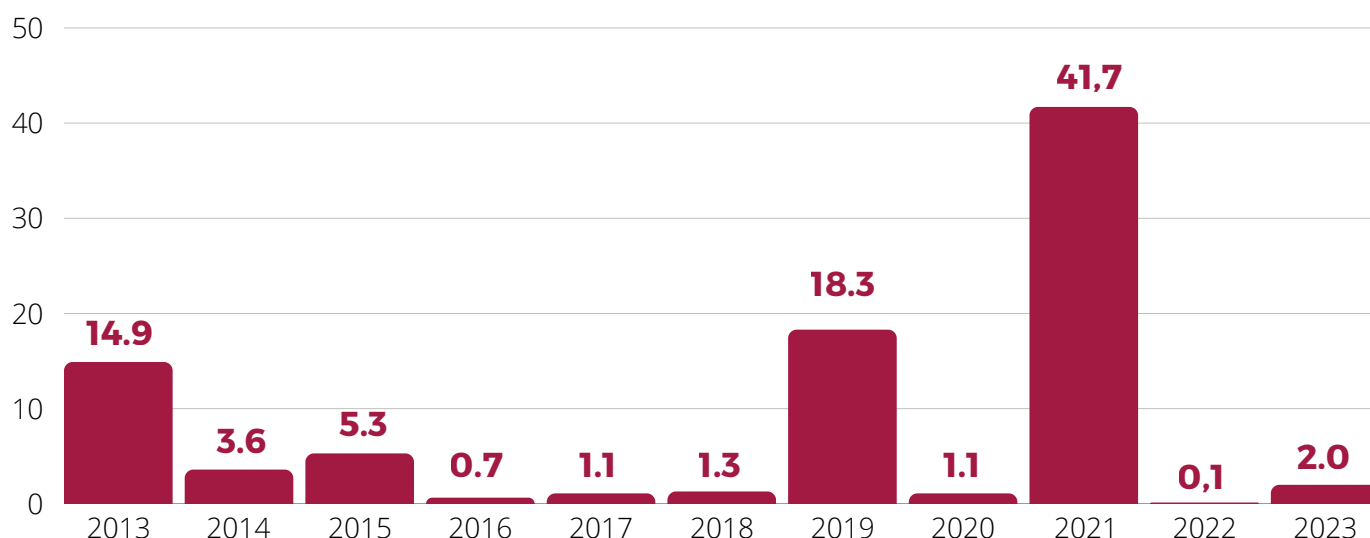
A few of the indicators most highly relevant to tourism are presented below.



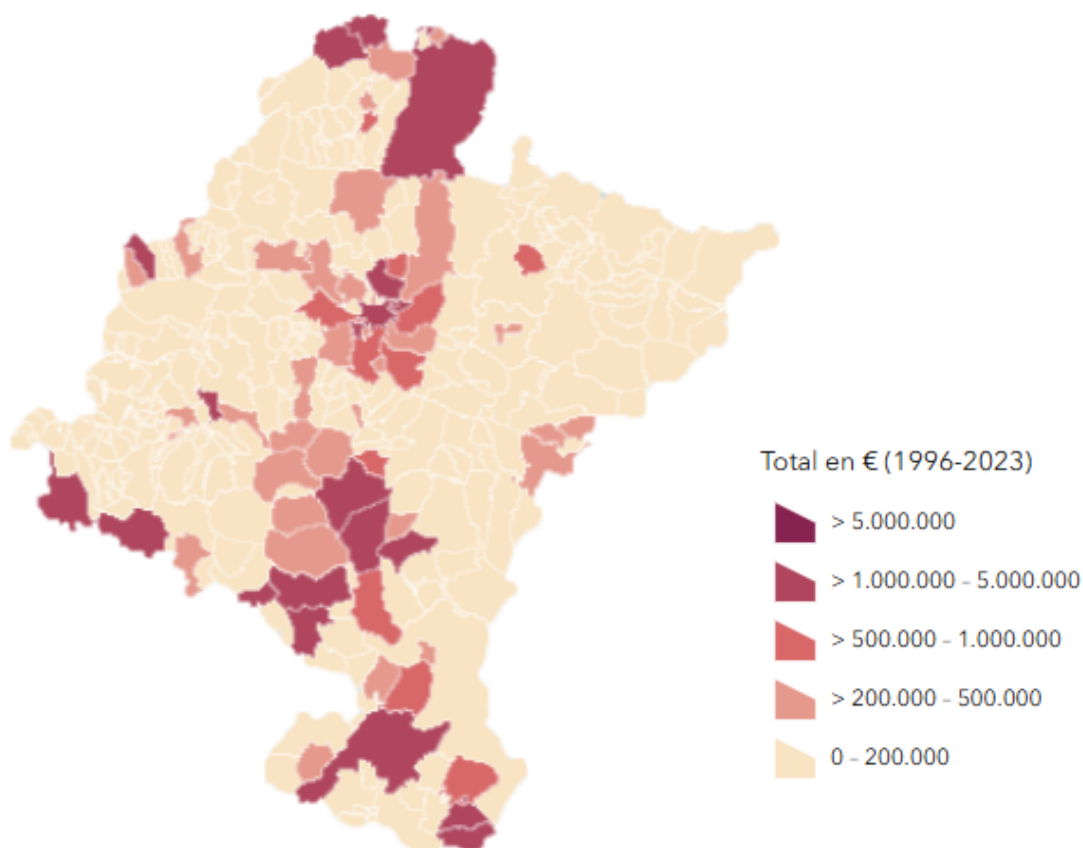
Precipitation, flooding and drought

Floods and the effects of drought are another of the negative effects caused by adverse weather conditions, which can cause harm to material assets. The damage caused by these phenomena can be quantified using data provided by insurance companies.

Property damages caused by flooding covered by the Spanish Insurance Compensation Consortium (CCS) Amount in Million euros.



Property damages caused by flooding and atypical cyclonic storms covered by the Spanish Insurance Compensation Consortium (CCS)

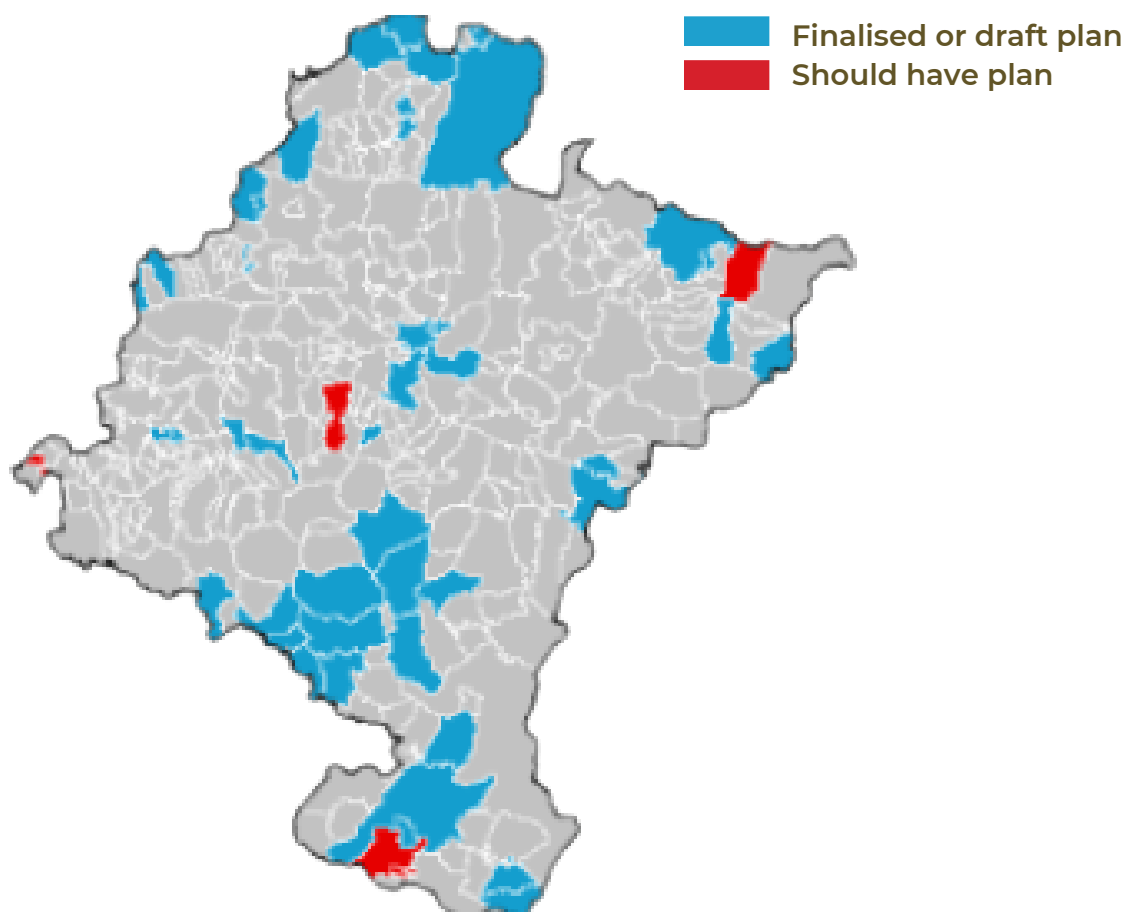
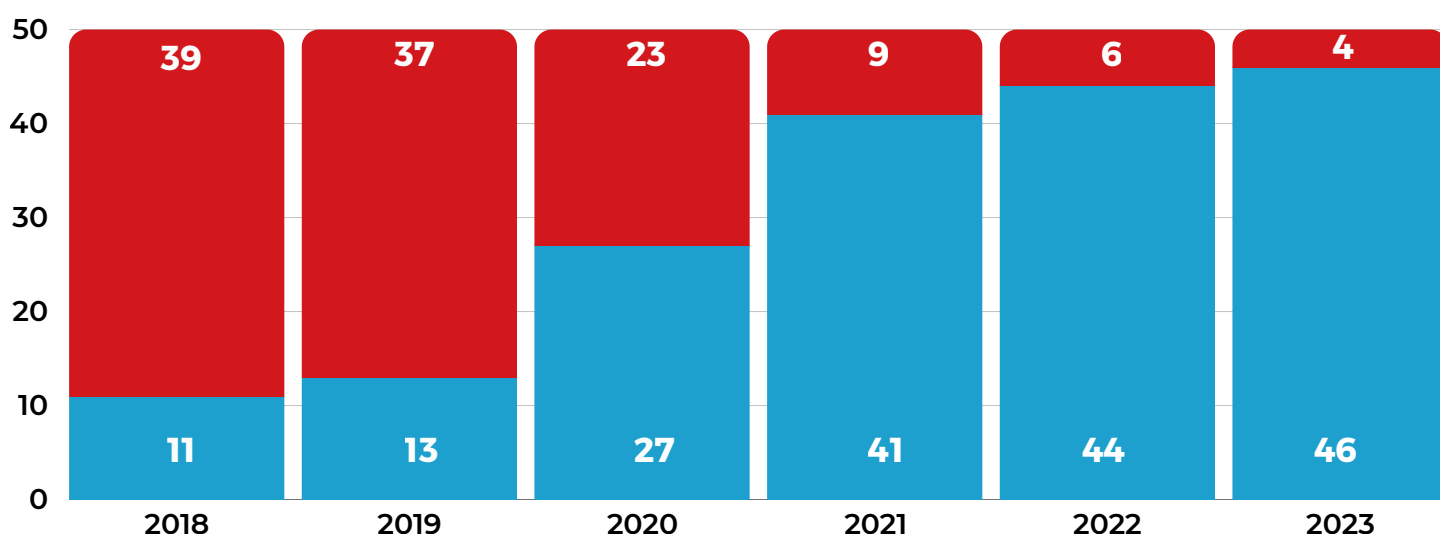


Source: [LIFE NAdapta](#)

Self-protection plans against floods

As part of the adaptation, an objective has been set for town councils in the risk zones to devise local self-protection plans against flooding. A total of 50 local council authorities that should have an anti-flood plan have been identified. In 2023, 46 of these municipalities have such a plan. This is two more than the previous year.

Municipalities with local self-protection plans

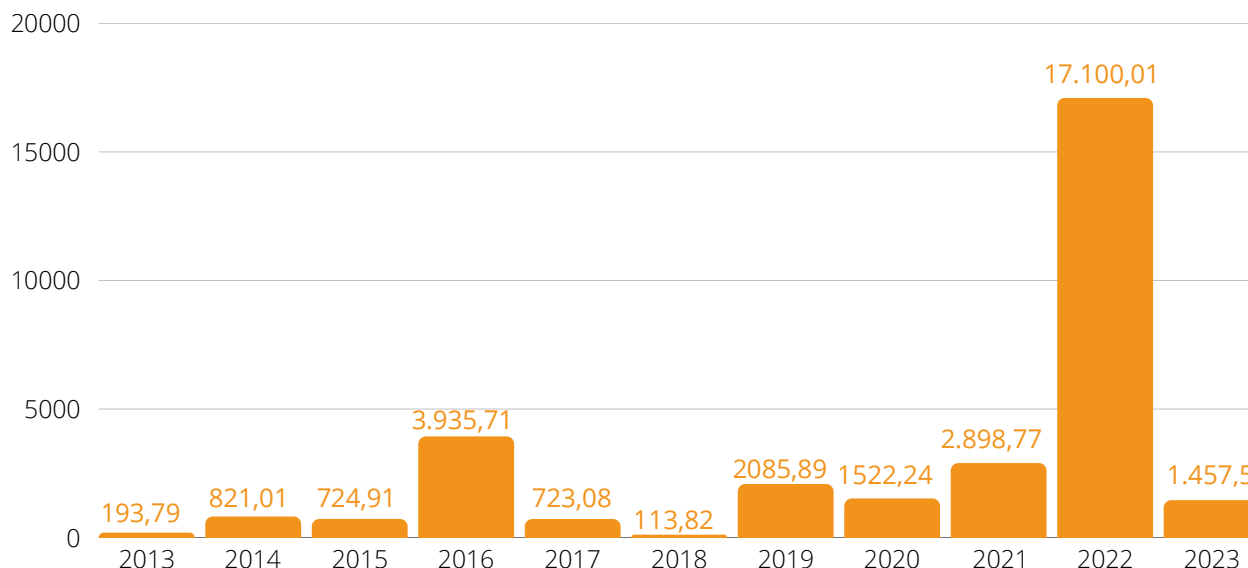


Source: LIFE NAdapta

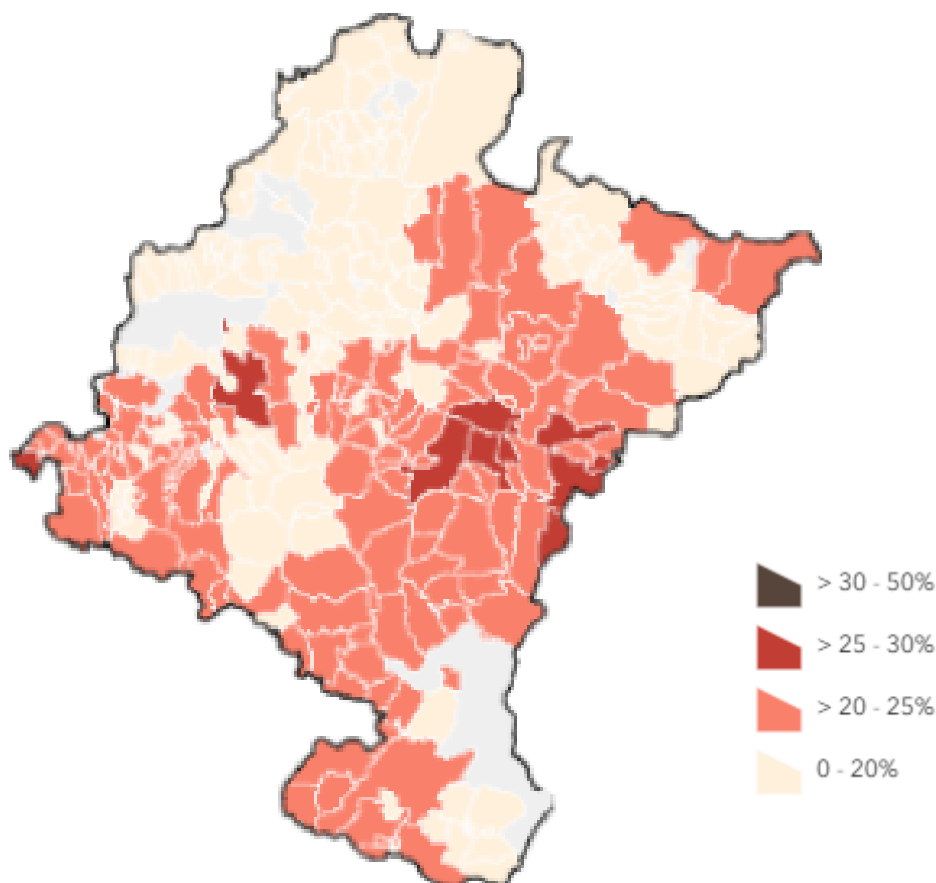
Forest fires

A total of 1,457.5 hectares were burned by forest fires in Navarre during 2023. This is a significant reduction on the previous year and understandably so given that 2022 was the year with the largest area burned by forest fires since records began.

Total annual surface area (ha) burned



Days with very high or extreme weather risk (%)



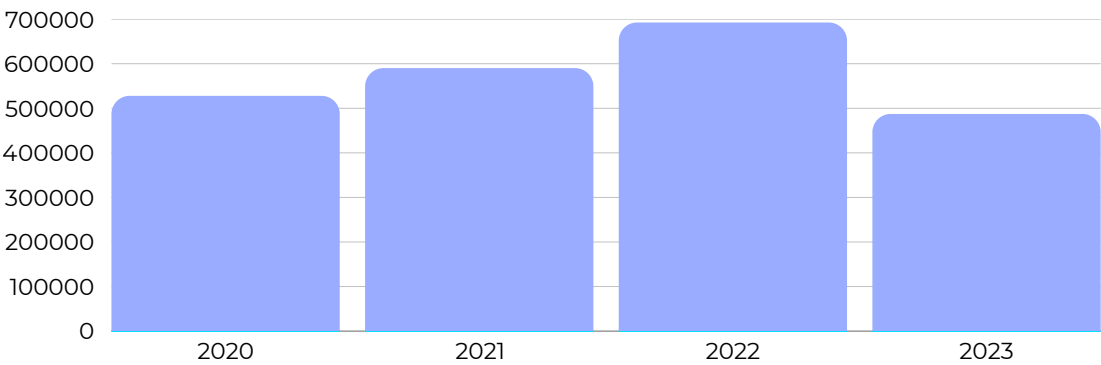
Source: LIFE NAdapta

Tonnes of CO₂ emissions avoided by generating electricity from renewable sources

Energy transition towards renewable energy sources means taking a path towards a more sovereign energy model such as a reduction in CO₂ emissions. In the 2021 energy report, it is estimated that electricity production from renewable sources has avoided the emission of 690,485 tonnes of CO₂ into the atmosphere.

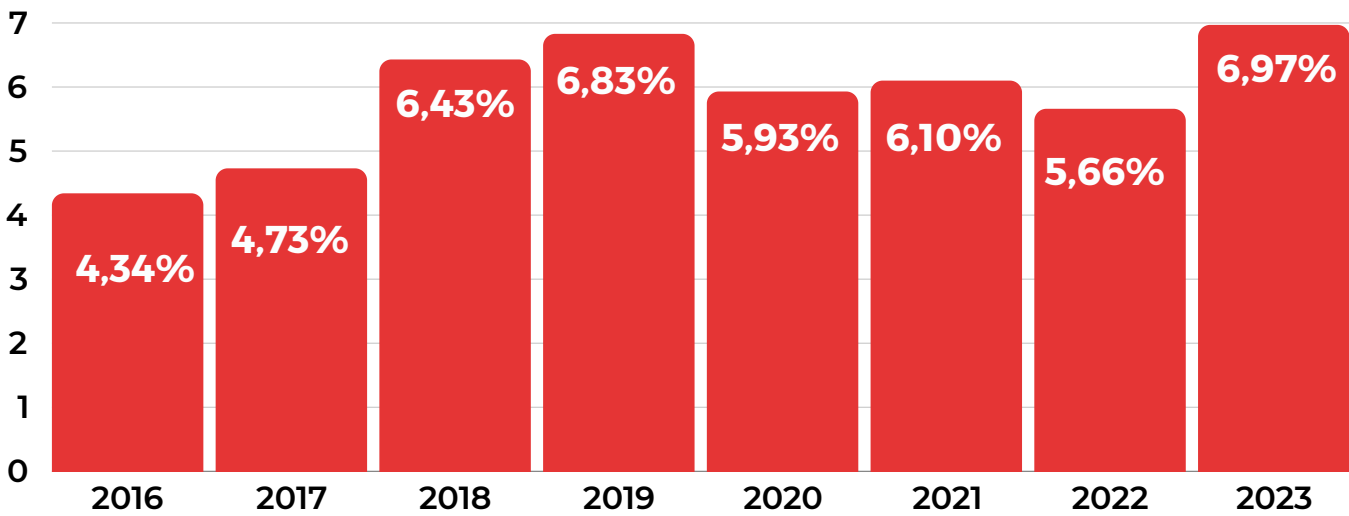


T of CO₂e avoided by generating electricity from RE



Source: 2016-2023 Navarre Energy Reports

One way of reducing transport emissions is to increase the use of renewable energy in the sector. The European Union has set the goal of covering 10% of transport needs using renewable energy. The target must be 12% for 2025 and the Navarre Energy Plan-Horizon 2030 has set a target of 15% by 2030. This figure stood at 6.97% in 2023, which is a 22.6% increase on 2022 but still far from the targets set for the coming years.



Source: 2016-2023 Navarre Energy Reports



Observatorio Turístico de Navarra
Nafarroako Turismoaren Behatokia

www.observatorioturistico.navarra.es
observatorioturistico@navarra.es