



**Observatori
del Turisme
a Barcelona**
ciutat i regió

Barcelona



INSTO

International Network
of Sustainable Tourism
Observatories

2024 INSTO Annual Progress Report

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 Provincial 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

During **2024**, Destination Barcelona - including Barcelona city and Barcelona region- experienced a **full recovery of tourism activity**, as reflected in year-on-year growth across the main indicators related to accommodation, mobility infrastructures, economic activity and employment.

This document provides a summary of **tourism performance in Destination Barcelona 2024** together with an analysis of the **current state of the indicators included** in the Sustainable Tourism Indicators System (SITS–OTB), whose ultimate objective is to serve as a **decision-making tool**. The system also facilitates **benchmarking** and contributes to a better understanding of the **impacts of tourism activity**.

Readers of this report will find an analysis of the **evolution of the SITS–OTB sustainability indicators** over the past year, offering an overview of recent data across the **environmental, economic and sociocultural dimensions**. The analysis highlights **areas of stability and change** linked to the consolidation of tourism activity in 2024 and outlines key insights to design **future policy and sustainability actions** at the destination, particularly in relation to working conditions and public perceptions of tourism. Finally, the report identifies the **main challenges** facing the Barcelona Tourism Observatory in order to **further strengthen the tourism indicators system** itself.

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 counties** located in **Barcelona province**, in Catalonia, Spain. The province has an area of **7,724 square kilometres** and a total population of **5.9 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)

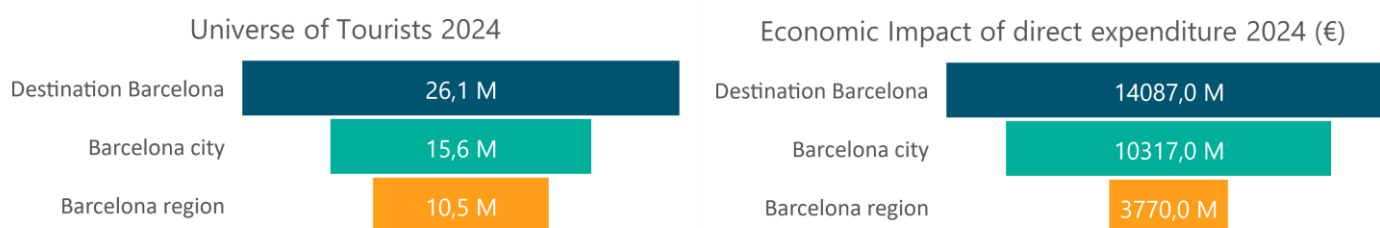
Figure 1: OTB Geographical areas of analysis



1.2. Tourism performance of Destination Barcelona 2024

According to Observatory calculations (Figure 2: Universe of tourists and economic impact of direct expenditure in Destination Barcelona 2024), in 2024 the **city of Barcelona** received **15.6 M tourists** which, added to the **10.5 M** in **Barcelona region**, resulted in more than **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 **14,087 M euros in the Destination** as a whole. This impact is distributed in **10,317 M euros in Barcelona city** and **3,770 M 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 2024



Source: Barcelona Tourism Observatory

1.2.1. Tourist accommodation demand

Demand for tourist accommodation ¹ (Figure 3: Tourist accommodation demand in Destination Barcelona 2024) **increased again year-on-year** in all types of accommodation analysed, reaching even higher levels than in 2019 in some type of accommodation, in terms of overnight stays.

In **hotels**, the number of **tourists** in the destination as a whole exceeded **12 million** (+2% year-on-year) and **32 million overnight stays** (+1.9% year-on-year). Two-thirds of the demand for hotels were recorded in Barcelona city.

Guesthouses and inns, with a **year-on-year growth in tourists** of +10.7%, recorded a **higher average stay**, resulting in a **higher growth in overnight stays** (+14.7% year-on-year).

¹ Excluding demand in other types of accommodation such as private homes or homes of friends or relatives

Campsites demand, with more than 3.4 million overnight stays, **increased** by +6.6% in overnights (year-on-year), well above **rural tourism establishments**, which despite registering **more nights than the previous year**, experienced more limited growth (+1%).

Finally, with data available only for Barcelona city, **homes for tourist use** generated **more than 12 million overnight stays** (+11.7% year-on-year), which meant 1 out of every 3 nights in the municipality, while **youth hostels**, **more than 2.5 million** (+3.4% year-on-year).

● Barcelona city ● Barcelona region ● Destination Barcelona

Figure 3: Tourist accommodation demand in Destination Barcelona 2024

	Tourists	Overnights	Length of stay (nights)
 Hotels	7,880,740	20,054,797	2.5
	4,614,138	12,399,197	2.7
	12,494,878	32,453,994	2.6
 Guesthouses and inns	523,624	1,663,119	3.2
	157,763	512,837	3.3
	681,387	2,175,956	3.2
 Tourist apartments	161,888	553,740	3.4
	171,246	1,326,774	7.7
	333,134	1,880,514	5.6
 Homes for tourist use	3,234,777	12,405,734	3.8
	nd	nd	nd
	nd	nd	nd
 Campsites	0	0	na
	785,361	3,428,420	4.4
	785,361	3,428,420	4.4
 Rural accommodation	0	0	na
	168,223	415,898	2.5
	168,223	415,898	2.5
 Youth hostels	925,331	2,583,816	2.8
	nd	nd	nd
	nd	nd	nd

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

Source: Barcelona Tourism Observatory

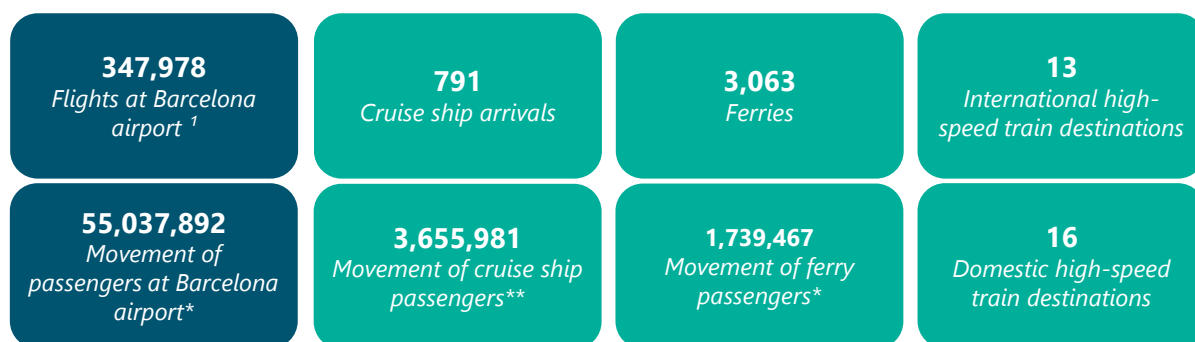
1.2.2. Mobility infrastructures

The global recovery of air capacity resulted in an **increase** in both **operations** (+9.1 year-on-year) and **passenger movements** (+10.3% year-on-year) at **Barcelona Airport**, which exceeded pre-pandemic figures (+4.5% YoY. 24/19), closed the year with more than **55 million passengers** (Figure 4: Key figures of infrastructures at Destination Barcelona 2024). Particularly noteworthy was the **increase in passengers on intercontinental flights** (+19.2% year-on-year), due to the recovery of normality in the air market worldwide.

At **Barcelona Port**, 791 cruise arrivals and 3,063 ferry arrivals were recorded, carrying **more passengers than last year**: 3.6 million in the first case (+2.4% year-on-year) and 1.7 million, in the second (+0.2% year-on-year). As for the rail sector, the city of **Barcelona** was **directly connected by the high-speed train to 13 international and 16 domestic destinations**².

Figure 4: Key figures of infrastructures at Destination Barcelona 2024

● Barcelona city ● Destination Barcelona



* Including arrivals and departures / ** Including embarking, disembarking, and in-transit passengers

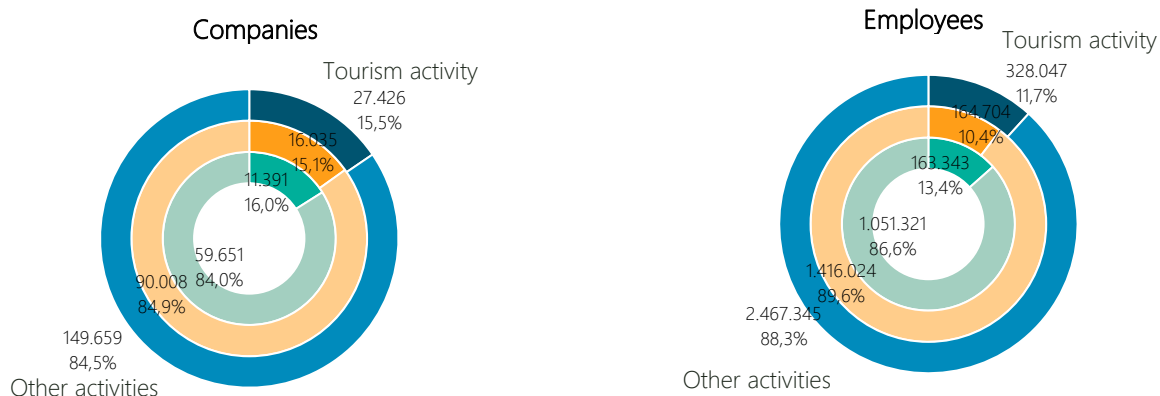
Sources: AENA, Port de Barcelona, RENFE, and SNCF

1.2.3. Economic activity and job market

The **weight of tourism** on the economic activity continued to be **higher in Barcelona city** (16% in number of companies and 13.4% in employment) than in Barcelona region (15.1% in number of companies and 10.4% in employment) (See Figure 5).

Figure 5: Weight of tourism activity in Destination Barcelona 2024

● Barcelona city ● Barcelona region ● Destination Barcelona



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

² Barcelona Tourism Observatory: city and region. (2025, 20). The economic impact of the direct spending from tourist activity grew by +10.5% year-on-year in 2024 in Barcelona Destination. Retrieved from <https://observatoriturisme.barcelona/en/noticia/limpacte-economic-de-la-despesa-economica-de-lactivitat-turistica-vacreixer-un-105-interanual-el-2024-a-la-destinacio-barcelona/>

Both, the number of **companies in tourism** and the **employees' increased year-on-year** in Destination Barcelona (+2.8% and +3.4%, respectively). In the latter case, in Barcelona city recorded a higher increase in employment (+5.3%) than in Barcelona region (+1.6%).

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 2024 **hiring experienced a downward trend**. In this sense, **temporary contracts decreased the most** year-on-year (-9.3%), while permanent contracts increased by a smaller proportion (+2.3%).

On the other hand, **registered unemployment** remained broadly stable, decreasing by 0.1% year-on-year³.

³ Barcelona Tourism Observatory: city and region. (2025, 5 22). Tourism activity grows in employment and businesses throughout Destination Barcelona. Retrieved from <https://observatoriturisme.barcelona/en/noticia/the-number-of-meeting-attendees-surpassed-pre-pandemic-figures-in-2024-in-destination-barcelona/>



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 a summary table of the **final list of issues and indicators** monitored by the Barcelona Tourism Observatory, according to their **availability** as for December 2025.

Figure 7: Checklist on issues and indicators

Issue	Name of the indicator	Status	Notes
Climate change	I01: Average distance travelled by tourists from origin to destination	Available	Working on a new indicator to measure carbon footprint of tourism companies at the destination.
Noise pollution	I02: Tourist opinion about noise	Available	
Air pollution	I03: Number of annual air pollution episode days	Available	Not specifically tourism-related.
Wastewater and solid waste management	I04: Percentage of treated wastewater to, at least, a secondary level	Available	Not specifically tourism-related.
	I05: Solid waste generated per capita	Available	Not specifically tourism-related.
Energy and water management	I06: Water consumption per capita	Available	Not specifically tourism-related. Working on a new indicator to measure water consumption of tourism companies.
	I07: Energy consumption per capita	Available	Not specifically tourism-related. Working on a new indicator to measure energy consumption of tourism companies.
	I08: Percentage of energy produced from renewable sources	Available	Not specifically tourism-related.
Mobility	I09: Percentage of tourists arriving by sustainable collective vehicles	Available	
	I10: Percentage of tourists moving actively at the destination	Available	

Issue	Name of the indicator	Status	Notes
	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	Latest data available: 2023
Accessibility	I20: Tourist opinion about motor accessibility	Available	Based on subjective opinions. It may be changed for a more objective indicator if data on tourism companies are 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	Latest data available: 2023
Marketing for sustainable tourism	I24: Percentage of tourism marketing actions that apply sustainability criteria	Not available	Working on a redefinition of this indicator.
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	

Issue	Name of the indicator	Status	Notes
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	Data is only available at a Spain level.

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 2025 the OTB has been able to **update the results of 27 of the 30 indicators** of the Sustainable Tourism Indicators System (SITS –OTB) with **2024 data**, and **2 other indicators** have been updated with **2023 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 website⁴.

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 2024: in Destination Barcelona this distance has increased from 3,318 km to 3,495. Besides, due to the higher prevalence of international tourists in Barcelona city, the results of this indicator in Barcelona city (4,064 km) are higher than those of Barcelona region (2,477 km).

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

Although this is not a direct indicator of **carbon footprint**, this indicator has been used to get an **approach** to it, with the aim to measure the impact of tourism on the increase in greenhouse gases, as some DMMOs have carried out marketing **actions to attract domestic tourism and other near source markets to reduce carbon footprint**.

However, as reported in the latest Annual Progress Report, our Observatory, in collaboration with the sustainability departments of its member entities, has been working to develop a **more robust approach to tourism sustainability** through the collection of data from **businesses adhered to the Commitment to Sustainable Tourism in Barcelona**. These companies have been requested to **provide data on several environmental aspects**, including climate change, measured through their **carbon footprint**.

In the previous report, it was noted that this initiative had not achieved the expected results, as some companies experienced difficulties in sharing the required information or lacked sufficient awareness of the importance sharing their information. On this occasion, the OTB is pleased to report that in 2025 **a sufficient volume of data has been collected** from these companies to enable the **consideration of a new indicator** to measure this issue at the destination level. Accordingly, it is expected that the **first results on the carbon footprint of tourism companies** in Destination Barcelona could be available within the next year.

Issue 2: Noise pollution

Although the stagnation of the **tourist opinion about noise** (I02) in recent years, in 2024 this indicator has shown a **significant year-on-year increase**, scoring 7.26 (on a scale of 0 to 10) in Destination Barcelona as a whole (+0.13 points). Barcelona city (6.81), which usually is the geographical area with the lowest score in noise pollution, has improved its score by +0.12 points, while Barcelona region, with a highest score, 7.93, by +0.14 points.

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.

Issue 3: Air pollution

The number of **annual air pollution episode days in Destination Barcelona** (I03) in 2024 was **zero** for the third year-in-a-row.

It should be noted that this indicator is **not exclusive to tourism activity** and that no significant differences are observed among the results of the various geographical areas analysed, as pollution episodes tend to occur simultaneously across locations. Furthermore, the results recorded in recent years have remained unchanged. Therefore, **this indicator may be revised** if a more suitable alternative is identified.

Issue 4: Wastewater and solid waste management

Wastewater is monitored through the **proportion of wastewater treated to at least a secondary level at the destination** (I04). In Catalonia, treatment at this level is **mandatory** by law through wastewater treatment plants. Therefore, all areas within Destination Barcelona achieve a 100% result for this indicator, which is expected to remain stable over time.

With regard to solid waste, the OTB monitors waste generation through the indicator of solid waste generated per capita (I05). The most recent results show a **downward trend in waste generation** in Destination Barcelona, with levels lower than those recorded in 2018–2019.

As in previous cases, **neither** of these indicators is **exclusive to tourism activity**; consequently, they may **be revised in the future** if more tourism-specific data become available.

Issue 5: Energy and water management

A **downward trend in water consumption per capita** (I06) was also observed in Destination Barcelona in 2024, with levels remaining below those recorded prior to the COVID-19 pandemic. This reduction in water consumption should be interpreted within the broader context of the **drought affecting Catalonia since 2022**⁵. Although hydrological conditions began to improve in 2024, the downward trend in consumption remained unchanged. From a territorial perspective, Barcelona city continues to register, on average, lower values than Barcelona region. This difference is largely due to higher water consumption by economic activities, which have a greater weight outside the city of Barcelona.

With regard to energy issue, **energy consumption per capita** (I07) **declined on a year-on-year**, particularly in the city of Barcelona. Historically, energy consumption levels in the city have been lower than in Barcelona region, mainly due to higher consumption by economic activities and own sources, which once again have a greater weight outside of Barcelona city.

Finally, the percentage of **energy produced from renewable sources** (I08) showed a **significant year-on-year increase** reaching 19.09% in 2024 (+3.3pp).

It should be borne in mind that the indicators used to measure this issue are **not exclusive to tourism activity**, as they include consumption of domestic and other economic activities within the tourist destination. In addition, the data

⁵ Diari Ara. (2025, 8 19). The historic drought in Catalonia: how the critical situation of the reservoirs was reversed. Retrieved from https://en.ara.cat/environment/the-thermometer-of-drought-in-catalonia-the-reservoirs-of-the-internal-basins-shoot-up-thanks-to-the-rains_1_5309492.html

on the **energy produced from renewable sources** is only available at a national level, which limits the possibility of comparisons between regions.

Nevertheless, as outlined under Issue 1: Climate change, the Barcelona Tourism Observatory, in collaboration with the sustainability departments of its member entities, has been working on the **collection of water and energy consumption data from businesses** adhered to the Commitment to Sustainable Tourism in Barcelona. As previously indicated, the **first results** derived from this dataset are **could be available during 2026**.

Issue 6: Mobility

Despite the increase in international tourism recorded in 2024—particularly in intercontinental travel—the **share of tourists arriving by sustainable collective modes of transport** (I09), such as ferries, boats, trams, metro, trains, buses and coaches, **increased significantly in the city of Barcelona**, reaching 14.56% (+1.71pp compared to 2023). As a result, energy efficiency in terms of access mobility to the destination improved. In **Barcelona region**, where domestic tourism has a greater relative weight, the use of sustainable transport to reach the destination **also increased**, although without such pronounced year-on-year variations.

Regarding internal mobility within the destination municipality, the proportion of **tourists using active modes of transport** (I10)—including walking, cycling, non-electric scooters, etc.—**rose significantly in the city of Barcelona**, reaching 45.66% (+5.91pp compared to 2023). As usual, and due to longer travel distances in the city, this proportion remained lower than in the **municipalities of Barcelona region**, where it stayed relatively **stable** year-on-year at 66.99%. By contrast, the use of **public transport as internal transportation** (I11), remained **more prevalent in Barcelona city** (34.66%) than in Barcelona region (8.79%). However, this use declined in the city (-5.67pp compared to 2023) and remained stable in the region.

These indicators, which the OTB was able to update for 2024 thanks to the Survey on the Profile and Habits of Tourists in Destination Barcelona, are widely used by destination management and marketing organisations (DMMOs) and local councils across the destination to **assess the impact of measures aimed at reducing visitors' environmental footprint and promoting sustainable mobility**, such as initiatives to encourage public transport use through fare reductions.

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

The **percentage of tourism companies with sustainability certifications** (I12) **increased** in 2024 to 29.52% in Barcelona city (+3.3pp year-on-year) and to 41.65% in Barcelona region (+1.13pp year-on-year).

It should be recalled that, due to the difficulty of comprehensively monitoring the full universe of tourism companies, the analysis is **based on a representative sample**. Where companies that are members of Turisme de Barcelona and the Barcelona Regional Council Circle have been taken into account. In addition, in the absence of publicly available registries covering all sustainability certifications, only companies holding **the Biosphere Responsible Tourism Certification** are currently included as certified entities.

Nevertheless, this indicator is widely used by destination management organisations and local councils to assess the **level of commitment to sustainable tourism across both the public and private sectors**, as the adoption of such certifications reflects tourism stakeholders' willingness to improve management practices by applying responsible criteria.

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 tourism in a responsible manner.

In this context, the OTB considers the **Strategic Tourism Plan 2020 of Barcelona city**⁶, presented in 2017, to remain valid, as it is firmly grounded in the principles of tourism sustainability and its measures continued to be actively implemented up until the third quarter of 2024. From that moment on, the new Government for Tourism Management 2024-2027⁷ came into force.

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, the Barcelona City Council and the Barcelona Regional Council, with the support of the Barcelona Chamber of Commerce, the Consortium Turisme de Barcelona, and the regional tourism boards, have launched the **Commitment to Sustainable Tourism Destination**

⁶ Barcelona City Council. (1, 3 2017). *Turisme 2020 Barcelona. Pla Estratègic*. Retrieved from https://ajuntament.barcelona.cat/turisme/sites/default/files/2025-01/turisme_2020_barcelona_0_0.pdf

⁷ Barcelona City Council. (2024, 9 1). Government Measure for Tourism Management 2024-2027. Retrieved from https://ajuntament.barcelona.cat/turisme/sites/default/files/2025-12/Government%20Measure%20for%20Tourism%20Management%202024-2027_compressed.pdf

Barcelona⁸⁹. 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 6 certified destinations and another 59 distinguished in 2024, more than a thousand companies certified, the commitment on this issue is not only proved, but also **getting stronger year-on-year**.

Issue 9: Tourism seasonality

Although the evolution of the indicator on seasonality has maintained a downward trend since the beginning of the records, in 2024 the **ratio between the maximum and minimum monthly overnight stays in accommodation** (I14) increased to 6.22 in Barcelona region (+0.26 year-on-year). This change indicates a **growth in tourism seasonality** compared to the previous year in this geographical area.

On the contrary, this ratio decreased slightly year-on-year in Barcelona city – from 2.53 to 2.48, meaning a slight reduction in tourism seasonality

This indicator, the improvement of which can have positive impacts in both the quality of jobs and the social costs associated with tourism activity, is used to **assess the effectiveness of measures implemented by destination management and marketing organisations** (DMMOs) to mitigate tourism seasonality. Such measures include initiatives aimed at attracting off-season events, including cultural, sporting and business activities.

Issue 10: Destination economic impact

The **average expense during the stay per tourist per day** (I15) **increased**, especially in Barcelona city, where it almost reached €100 per person per day (+8.73% year-on-year). In Barcelona region, it also grew reaching nearly €50 (+12.5% year-on-year). It is important to contextualize these increases within a situation of intense CPI growth, which in the province of Barcelona was +2.9% year-on-year in 2024.

By contrast, tourist **tax income per resident** (I16) recorded a **more moderate increase**, especially in the city of Barcelona, where it reached €29.66 per capita in 2024 (+2.3% year-on-year). In Barcelona region, although the

⁸ Barcelona City Council. (2026, 1 13). Commitment to Sustainable Tourism in Barcelona. Retrieved from <https://ajuntament.barcelona.cat/turisme/en/tourism-barcelona/projects/commitment-sustainable-tourism-barcelona>

⁹ Barcelona Regional Council. (2026, 1 28). Programa Compromís per a la Sostenibilitat Turística Comarques de Barcelona. Retrieved from <https://www.diba.cat/ca/web/turisme/programa-comprom%C3%ADs-per-a-la-sostenibilitat-tur%C3%ADstica-comarques-de-barcelona>

absolute level remained comparatively modest (€2.99 per capita), a notable year-on-year increase was observed (+9.52%).

Issue 11: Employment

In the area of employment, 11.74% of the workforce in Destination Barcelona was employed in tourism-related activities, a proportion that **remained stable** compared to the previous year (I17: **Percentage of tourism employment**).

Within this same issue, the **ratio between the average salary of tourism activity**¹⁰ over other economic activities (I18), also **remained stable** year-on-year. According to the latest available data for 2023, for every euro of gross salary earned in non-tourism activities in Destination Barcelona, a worker in the tourism activity earned **€0.73**. This figure highlights not only a **significant wage gap** between tourism and other sectors, but also the **persistence of this disparity** over time.

This latter indicator is being used by DMMOs and councils to **assess the effectiveness of measures to promote better working conditions** in tourism.

Issue 12: Tourist activity performance

The **average length of stay** (I19) **remained stable** at 3.82 nights. It is worth noting, however that, while the length of stay increased in Barcelona region (+0.21 nights year-on-year), it decreased slightly in the city (-0.14 nights year-on-year).

This indicator is used to measure the **efforts of the destinations to diversify their tourist offer**, with a view to increasing the length of stay. A **longer average stay** is associated with **greater possibilities** for the destinations to decentralize and diversify their tourism products, as well as to increase average expenditure, thereby allowing tourism activity to benefit a larger number of stakeholders. It should be noted, however, that factors such as destination pricing policies can influence the results.

¹⁰ Barcelona Tourism Observatory: city and region. (2025, 6 19). *The average gross salary per capita in tourism activities in 2023 in Destination Barcelona rose by +5,0% year-on-year, up to €25,156*. Retrieved from <https://observatoriturisme.barcelona/en/noticia/the-average-gross-salary-per-capita-in-tourism-activities-in-2023-in-destination-barcelona-rose-by-50-year-on-year-up-to-e25156/>

2.3.3. Sociocultural area

Issue 13: Accessibility

The SITS-OTB approaches destination accessibility by monitoring tourists' perceptions in this area, specifically through I20: **Tourist opinion on motor accessibility**. In 2024, results remained **stable** compared to previous years, with an average score of 7.86 out of 10.

This is a provisional indicator **which may be revised or complemented** in the future by another indicator that measures tourist accessibility **more objectively**. As said in Issue 1: Climate change and in Issue 4: Wastewater and solid waste management, the OTB aims to collect data from private companies and other tourism services in order to improve the methodological approach to sustainable tourism indicators. In this context, the accessibility indicator could be strengthened through this data collection process, although its scope and definition are still under analysis.

Issue 14: Effects of tourism in the community

From 2023 to 2024, the **percentage of tourists to residents** (Tourist pressure) (I21) **decreased in Barcelona city**, from 10 to 9.51 tourists per 100 residents. In contrast, **in Barcelona region**, tourist pressure **rose slightly**, reaching 2.65 tourists per 100 residents.

The result of this indicator is frequently being used in order to identify the most **overcrowded areas** at the destination and to apply corrective measures, as **tourist pressure** can have a significant **impact on public opinion and satisfaction** (see Issue 18: Local satisfaction with tourism) and even tourism opinion (see Issue 19: Tourist satisfaction). For this reason, it is useful to analyse the results of these indicators simultaneously, in order to determine whether there is correspondence among them.

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 tools 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 these instruments 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) have its own governance instruments.

Issue 16: Gender equality

Based on 2023 data, the **ratio of women's to men's wages in tourism activities** (gender wage gap indicator (I23) remained **below 1** for Destination Barcelona, indicating that, on average, **women continued to earn less than men**. Specifically, for every euro earned by men in tourism, women earned €0.79—an increase of 4 cents compared to the previous year. This reflects a slight reduction in the gender wage gap¹¹, yet the results of this indicator remain **far from the desired ideal value (=1)**.

Issue 17: Marketing for sustainable tourism

Unfortunately, the indicator that measures this issue (I24: **Percentage of tourism marketing actions that apply sustainability criteria**) **has not been yet calculated**. The Observatory, together with the relevant stakeholders providing the information on this indicator—the Consortium of Turisme de Barcelona and the Barcelona Regional Council Tourism Department—are currently **discussing the methodology** for its computation. It is expected that this matter will be resolved in the coming months.

Issue 18: Local satisfaction with tourism

One more year, attention must be drawn to the **negative evolution of public opinion indicators**, which are crucial for understanding the level of tolerance or rejection of tourism by local residents. In this regard, the two indicators included in the SITS-OTB that assess this issue declined compared to the previous year. In Barcelona city, the **percentage of residents who considered tourism to be rather beneficial for their municipality** (I25) **dropped to 59.60%**¹² (-11.2 year-on-year). Likewise, the proportion of those who believed that **the city is reaching its capacity to host more tourists** (I26) **rose significantly**, reaching 74.40% (+12.9pp year-on-year). A **similar trend** was observed in Barcelona

¹¹ Barcelona Tourism Observatory: city and region. (2025, 6 19). The average gross salary per capita in tourism activities in 2023 in Destination Barcelona rose by +5,0% year-on-year, up to €25,156. Retrieved from <https://observatoriturisme.barcelona/en/noticia/the-average-gross-salary-per-capita-in-tourism-activities-in-2023-in-destination-barcelona-rose-by-50-year-on-year-up-to-e25156/>

¹² Oficina Municipal de Dades. Barcelona City Council. (2025, 4 24). Percepció del turisme a Barcelona. Presentació de resultats. Retrieved from <https://w10.bcn.cat/APPS/riswestudis/documentacio.do?reqCode=mostrarImatge&idDoc=18629>

region, where this indicator reached a result of 38.80%¹³ (+10.50pp year-on-year). All of this occurred in a year marked by several anti-tourism protests around the world¹⁴—particularly in Europe—where tourism is increasingly perceived as a key contributor to problems such as rising housing prices and gentrification.

Issue 19: Tourist satisfaction

Tourist satisfaction, monitored thanks to the Survey of Profile and Habits of Tourists in Destination Barcelona is 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 8.60** out of 10.

Issue 20: Public safety

The same survey is also used to monitor public safety by asking tourists about their **perceptions of safety in the different municipalities of the destination** (I28) and whether they have been **victims of a crime or attempted crime** (I29).

Regarding **perceptions of safety**, the score of this question **remained stable** year-on-year, with an average rating of 8.16 out of 10.

In terms of **victimization**, the proportion of tourists who reported being victims of a crime or attempted crime in **Barcelona city remained at 2.58%** in 2024 (-0.05pp year-on-year). It should be noted that, prior to the pandemic, this proportion was higher, at 3.90% in 2019. In **Barcelona region**, for which data are available from 2020 onwards, the results are lower than in the city, with **less than 1% of tourists affected**.

The results of these indicators have recently been used to **assess the state of security and tourism in Barcelona city**. This study that has also established an **action plan** in order to **increase the perception of safety** in the city among visitors, to **improve stakeholders' knowledge of safety protocols**, and to **foster better coordination** among all involved parties.

¹³ Labturisme. Barcelona Regional Council. (2024, 11 1). Informe de resultats: L'opinió ciutadana sobre el turisme a la regió de Barcelona. Resultats 2024. Retrieved from https://www.diba.cat/documents/d/turisme/20241203-informe-percepcio-ciutadana-vers-el-turisme_2024-pdf

¹⁴ BBC. (2024, 5 22). The world's revolt against bad tourists. Retrieved from <https://www.bbc.com/travel/article/20240522-the-worlds-revolt-against-bad-tourists>

Issue 21: Tourist security

The counter-terrorism alert level in Spain (I30) has remained at a **4 out of 5 level** since 2018, with no changes recorded during this period. This information is **only available at a national level**, so the results cannot be compared between regions. However, the counter-terrorism alert level in Spain directly **influences police operations** at the destination: a high alert level leads to increased deployment of staff and resources, enhanced visible presence in public and tourist areas, contingency plans updates, among other actions.

3. Conclusions

The evolution of the SITS–OTB indicators over the last year shows a context of **overall stability with some relevant changes**, largely linked to the consolidation of tourism activity in 2024. **Environmental indicators** show mixed trends: while the growth in international tourism **increased average travel distances**, **positive developments** were observed in **sustainable mobility, energy and water consumption** and the **uptake of sustainability certifications** among tourism businesses.

From an **economic perspective**, **tourist expenditure continued growing**, although partly influenced by inflation. **Employment-related indicators remained stable**, but structural challenges such as **wage gaps and gender inequality persist**.

On the **sociocultural side**, although the **destination maintained its strategic commitment** to development control with active sustainable tourism plans and strategies, and the **tourist pressure indicator decreased in Barcelona city**, the **deterioration of residents' perceptions of tourism** emerged as the main concern, highlighting the need to strengthen governance, redistribution and sustainability measures. However, **tourist satisfaction and perceived safety remained high**, confirming the destination's attractiveness by visitors.

Overall, the results underline the importance of continuing to **design policies to balance tourism performance with environmental, economic and sociocultural sustainability**. Meanwhile the Observatory will continue its work on redefining current indicators and sources for a better measurement of sustainability at the destination.

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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**.

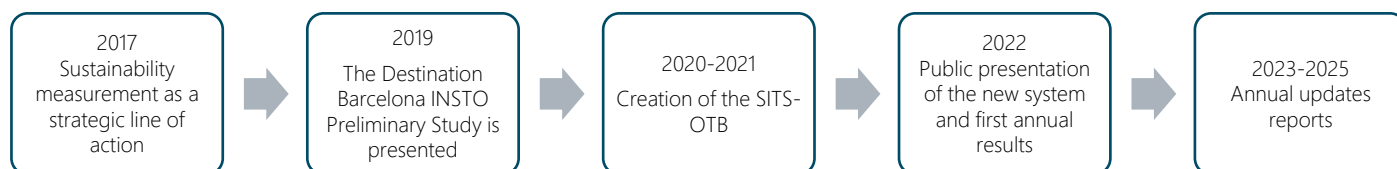
With this premise, and taking into account **SDG12b** "to develop and to apply instruments to monitor the effects of sustainable development, with the aim of **achieving sustainable tourism** that generates jobs and promotes culture and local products", the **Barcelona Tourism Observatory (OTB)** established 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**¹⁵. Since then, **four annual updates** (2021, 2022, 2023, and 2024) have been released and presented on the Sustainability section of Barcelona Tourism Observatory¹⁶.



¹⁵ 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>

¹⁶ 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	2024
ENVIRONMENTAL	Issue 1: Climate change							
	I01 Average distance travelled by tourists from origin to destination (km)	3,845.65	4,029.52	3,080.62	2,382.21	3,348.32	3,853.74	4,064.59
		2,470.49	2,612.62	1,635.21	1,339.91	2,044.99	2,365.50	2,477.64
		3,371.37	3,554.94	2,554.05	2,000.46	2,897.77	3,318.72	3,495.58
	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	6.81
		7.62	7.65	7.84	7.83	7.81	7.79	7.93
		7.07	7.14	7.34	7.20	7.22	7.13	7.26
	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	0.00
		3.00	5.00	5.00	7.00	0.00	0.00	0.00
		3.00	5.00	5.00	7.00	0.00	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	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	446.76
		477.78	476.42	481.26	482.31	463.65	440.40	446.19
		476.69	474.64	462.72	469.87	461.75	443.63	446.29
	Issue 5: Energy and water management							
	I06 Water consumption per capita (m³/person/year)	61.48	60.31	56.27	56.32	59.47	58.37	53.66
		66.78	67.01	66.10	66.40	66.09	62.00	58.16
		65.25	65.07	63.25	63.51	64.20	60.96	56.86
	I07 Energy consumption per capita (kWh/person/year)	4,261.69	4,150.42	3,620.21	3,739.78	3,917.58	3,817.19	3, < 688.07
		5,115.59	5,006.68	4,667.14	4,714.96	4,703.97	4,584.39	4,521.26
		4,868.93	4,759.27	4,363.78	4,435.66	4,479.32	4,365.00	4,280.79
	I08 Energy produced from renewable sources (%)	20.84	16.10	19.63	17.07	14.23	15.78	19.09
	Issue 6: Mobility							
	I09 Tourists arriving by sustainable collective vehicles (%)	13.27	12.74	27.03	25.11	14.88	12.85	14.56
		10.67	10.81	17.11	12.92	11.48	12.31	12.34
		12.41	12.11	21.91	19.62	13.51	12.63	13.66
	I10 Tourists moving actively at the destination (%)	nd	nd	60.62	48.51	40.28	39.75	45.66
		nd	nd	55.10	62.46	62.74	66.67	66.99
		nd	nd	57.77	54.76	49.88	50.42	54.22
	I11 Tourists moving by public transport at the destination (%)	nd	nd	23.79	32.93	40.80	40.33	34.66
		nd	nd	3.55	4.59	8.20	8.58	8.79
		nd	nd	13.35	20.19	27.74	27.75	24.28
	Issue 7: Sustainability and environmental management policies and practices at tourism businesses							
	I12 Tourism companies with sustainability certifications (%)	nd	nd	nd	16.83	23.89	26.23	29.52
		nd	nd	nd	29.67	38.17	40.52	41.65
		nd	nd	nd	22.09	30.24	32.19	34.41

Area	Issue and indicator name		2018	2019	2020	2021	2022	2023	2024
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	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	2.48
			nd	nd	nd	10.17	6.37	5.96	6.22
			nd	nd	nd	6.16	3.83	3.10	3.25
	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	99.72
			39.38	44.11	37.12	40.31	41.77	41.91	47.16
			66.21	69.93	52.74	57.50	67.34	71.94	78.08
	I16	Euros received from the tax on stays in tourist establishments per inhabitant (€)	18.59	21.15	6.90	4.88	23.31	28.97	29.66
			2.01	2.06	0.66	0.78	2.29	2.73	2.99
			6.80	7.58	2.47	1.96	8.29	10.23	10.68
	Issue 11: Employment								
	I17	Tourism employment (%)	13.42	13.58	12.28	11.65	12.48	13.15	13.45
			10.70	10.76	9.95	9.91	10.35	10.48	10.42
			11.88	11.98	10.95	10.66	11.28	11.63	11.74
	I18	Average salary of tourism activity and average salary of the rest of the activities ratio	nd	0.72	0.56	0.67	0.76	0.74	nd
			nd	0.71	0.57	0.62	0.75	0.75	nd
			nd	0.73	0.56	0.64	0.73	0.73	nd
	Issue 12: Tourist activity performance								
	I19	Length of stay (nights)	3.92	3.99	4.16	4.03	4.02	3.94	3.80
			nd	nd	nd	3.60	3.81	3.64	3.85
			nd	nd	nd	3.82	3.94	3.82	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	7.96
			nd	7.32	7.48	7.64	7.81	7.77	7.71
			nd	7.68	7.69	7.71	7.88	7.88	7.86
	Issue 14: Effects of tourism in the community								
	I21	Percentage of tourists to residents (Tourist pressure)	10.06	10.79	2.87	4.09	9.07	10.13	9.51
			nd	nd	nd	1.38	2.47	2.49	2.65
			nd	nd	nd	2.16	4.35	4.68	4.63
	Issue 15: Governance								
	I22	Percentage of good governance instruments	100.00	100.00	100.00	100.00	100.00	100.00	100.00
			88.89	88.89	100.00	100.00	100.00	100.00	100.00
			na	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	0.81	nd
			nd	0.71	0.65	0.70	0.73	0.75	nd
			nd	0.80	0.73	0.73	0.75	0.79	nd

Area	Issue and indicator name	2018	2019	2020	2021	2022	2023	2024
	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	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	59.60
		92.00	92.30	87.80	85.10	84.60	nd	nd
		89.60	86.69	nd	81.18	79.52	nd	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	74.40
		32.60	27.90	32.60	24.70	27.80	28.50	38.80
		40.11	37.55	nd	nd	35.83	37.94	49.07
	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	8.71
		8.27	8.27	8.32	8.45	8.44	8.42	8.43
		8.63	8.62	8.51	8.58	8.62	8.59	8.60
	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	7.87
		8.44	8.41	8.27	8.60	8.57	8.64	8.59
		8.24	8.16	8.09	8.16	8.25	8.23	8.16
	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	2.58
		nd	nd	1.04	0.92	0.90	0.74	0.88
		nd	nd	1.37	1.70	1.94	1.87	1.89
	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	4.00

na: not applicable / nd: not available

Source: Barcelona Tourism Observatory



Observatori del Turisme a Barcelona

ciutat i regió



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Barcelona Tourism Observatory

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