



Tourism analysis in Spain during summer 2024, with Smart Steps

Summer 2024: June, July, August and September

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Context

01

01. CONTEXT

Tourist mobility analysis in Spain during summer 2024

We analyzed tourist **mobility in Spain** during the **summer of 2024 -June, July, August and September-** through the **Smart Steps** crowd mobility analysis platform, comparing the data with the same period in 2023.

The solution, developed by **Telefónica Tech**, integrates next-generation technologies such as **Artificial Intelligence** and **Big Data**, transforming anonymized, categorized, extrapolated, and aggregated mobile data into insights about the behavior of groups of people.

KEY INSIGHTS GATHERED FROM THE REPORT

+10%*

International tourists

**compared to summer 2023.*

62 M*

National tourists

**total sum of trips made during the four months*

August

Month with the highest influx of tourists in history

Domestic Tourism

02

02. DOMESTIC TOURISM

How has interprovincial tourism among residents evolved?

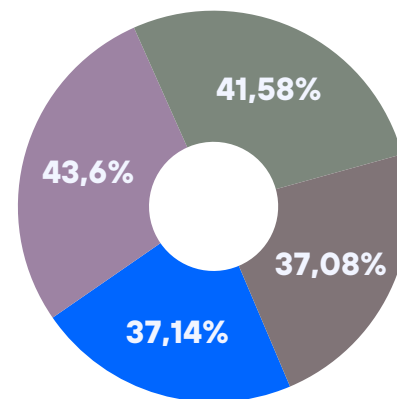
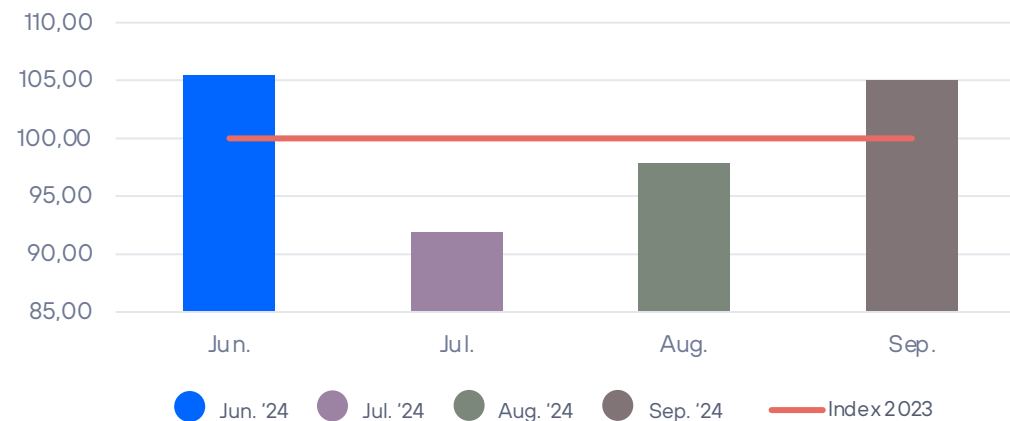
Nearly **62 million*** national tourists traveled during summer 2024, representing a slight decrease in tourism during **July and August** compared to the previous summer, although overall domestic mobility remained high.

However, **increases of 5% in June and 5.4% in September** were recorded, indicating an early start and an extension of the peak season.

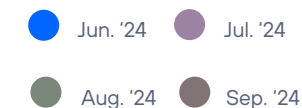
During summer 2024, **37.14%** of the Spanish population traveled domestically in June, **43.6%** in July, 41.58% in August, and **37.08%** in September.

**total sum of trips made during the four months.*

INTERPROVINCIAL TOURISM COMPARISON SUMMERS 2023 AND 2024



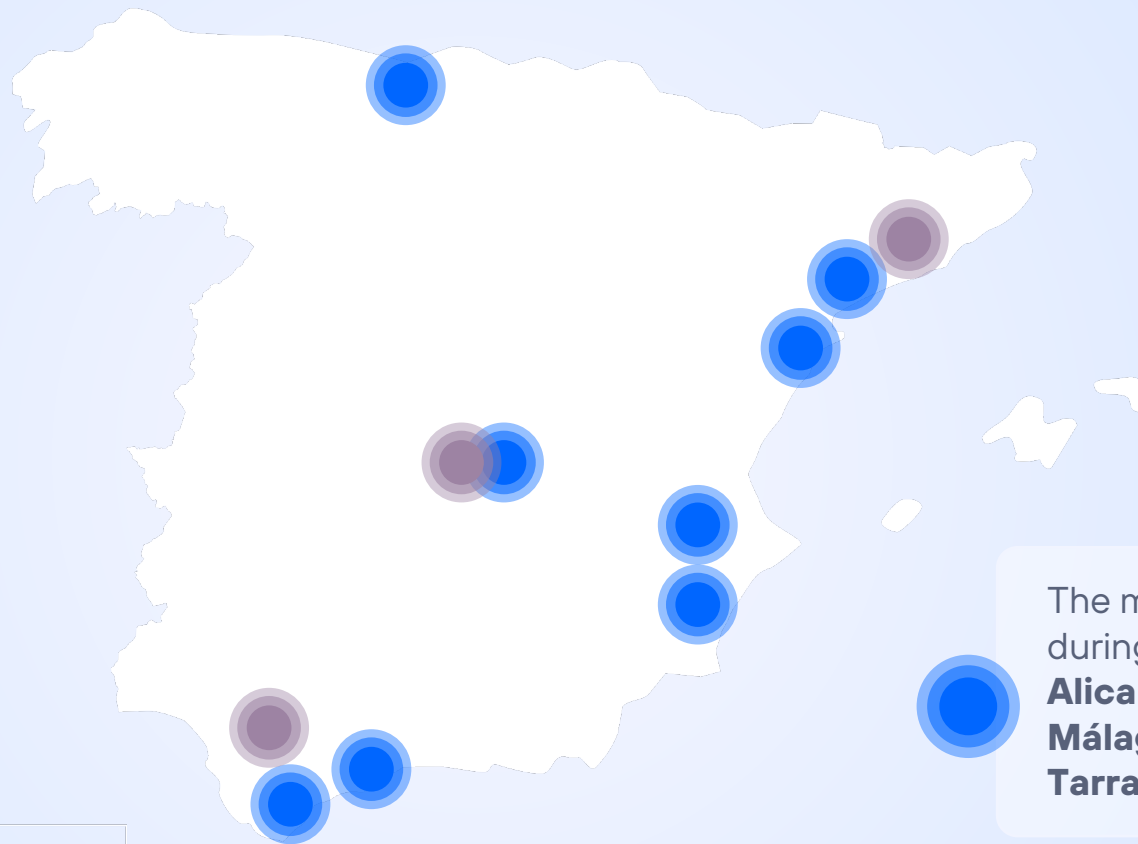
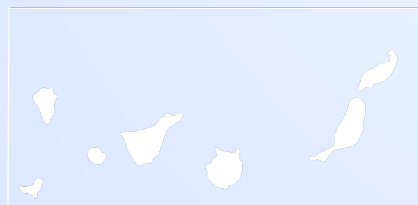
INTERPROVINCIAL TOURISM BY MONTH SUMMER 2024



02. DOMESTIC TOURISM

What were the favorite destinations?

In general, the figures remained very similar to the previous year, with **little variation in behavior**. Much of the domestic tourism was concentrated in **coastal areas** and **second homes**, although it was spread **quite evenly** across various Spanish provinces.



The most visited provinces during summer 2024 were: **Alicante, Cádiz, Madrid, Málaga, Cantabria, Valencia, Tarragona, and Barcelona.**

The provinces with the highest number of outbound tourists were **Madrid, Barcelona, and Seville.**

Inbound Tourism

03

03. INBOUND TOURISM

Spain, one of the top international tourist destinations

Spain welcomed nearly **47 million international tourists** during summer 2024, reaching **historical levels** with figures around **14 million arrivals per month**.

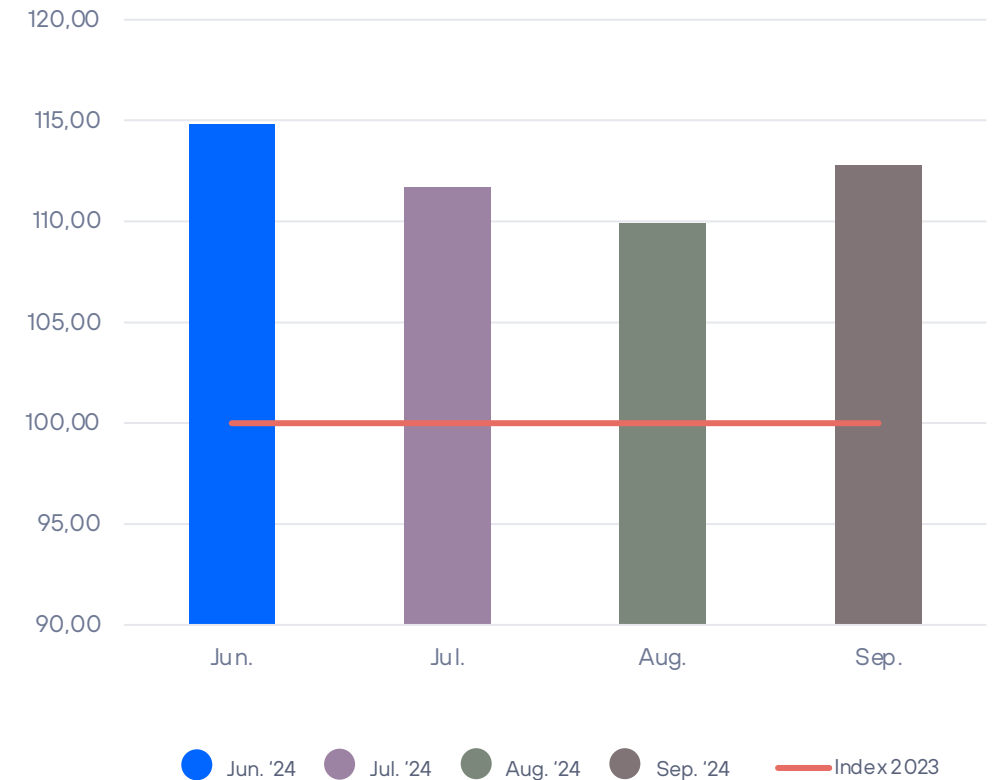
~47M

International tourists

~14M

Monthly arrivals

INTERNATIONAL TOURISM COMPARISON
(SUMMERS 2023-2024)

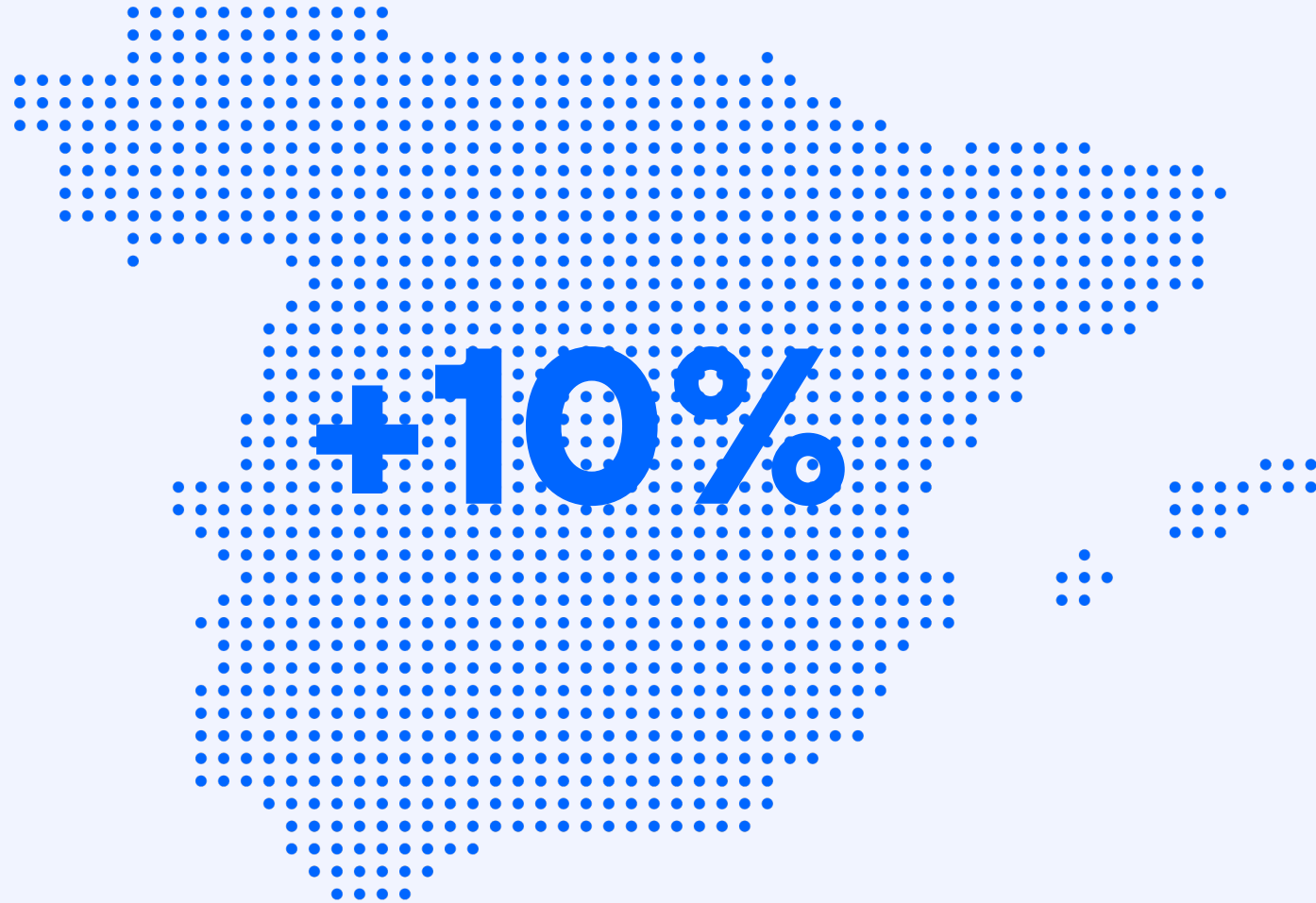


03. INBOUND TOURISM

Spain, one of the top international tourist destinations

Inbound tourism in Spain saw notable growth during summer 2024, consolidating Spain as one of the **top international destinations**. A **10% increase** in foreign tourist arrivals was recorded.

August saw the highest influx of international arrivals.



03. INBOUND TOURISM

Which countries are driving the growth of inbound tourism?



The UK continued to be the leading source of tourists to Spain, accounting for **21%** of the total.



Germany and **France** also remained key markets.



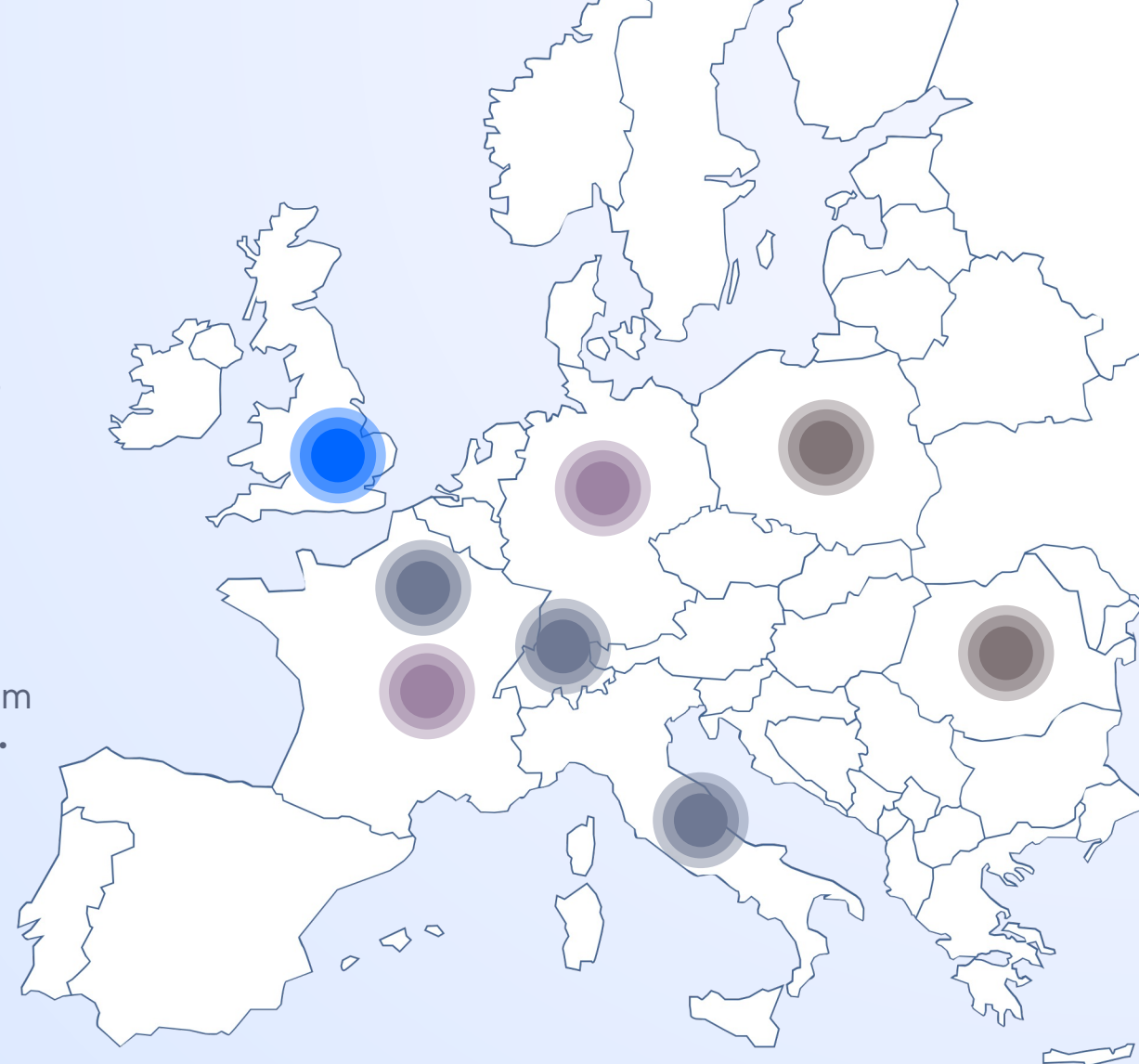
A decrease in tourists from **Switzerland**, **Italy**, and **France** was noted.



There was also an increase in tourists from **Romania** and **Poland**.

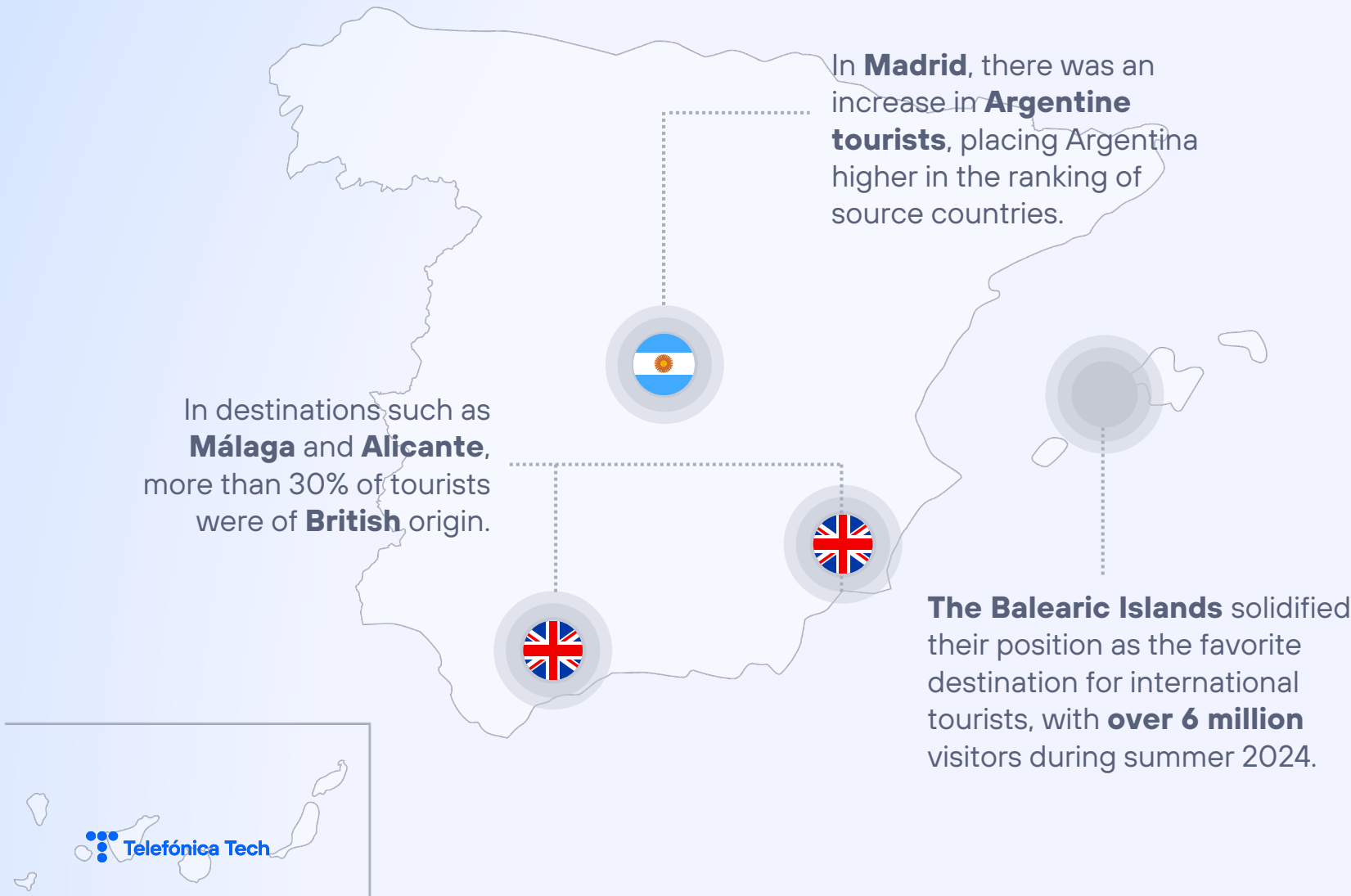


Tourism from **South America**, particularly from **Argentina**, showed a significant increase compared to 2023.

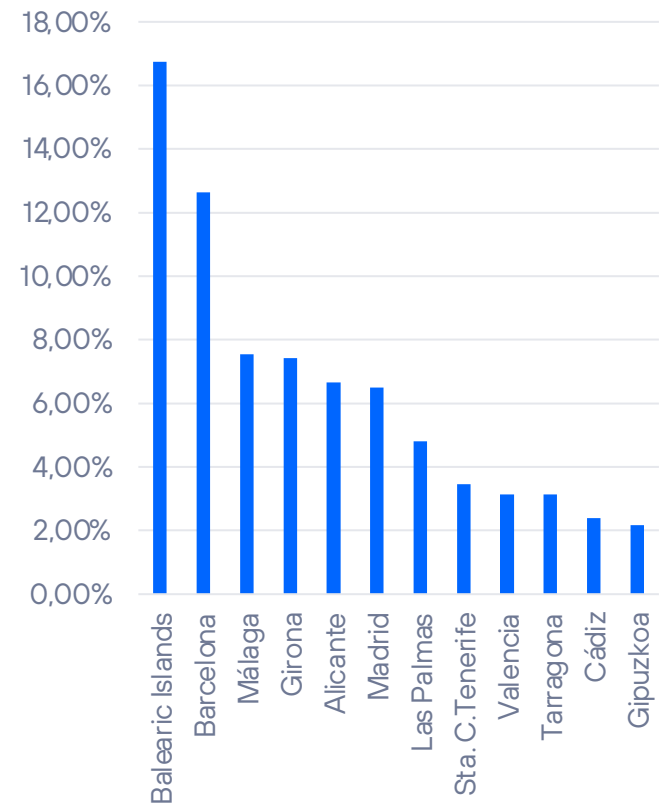


03. INBOUND TOURISM

What are their preferred destinations?



MAIN DESTINATION PROVINCES



Outbound Tourism

04

04. OUTBOUND TOURISM

What were the preferred international destinations for Spaniards?



Portugal and **France** led as the most visited destinations by Spaniards, receiving **more than 55%** of the total outbound tourism.



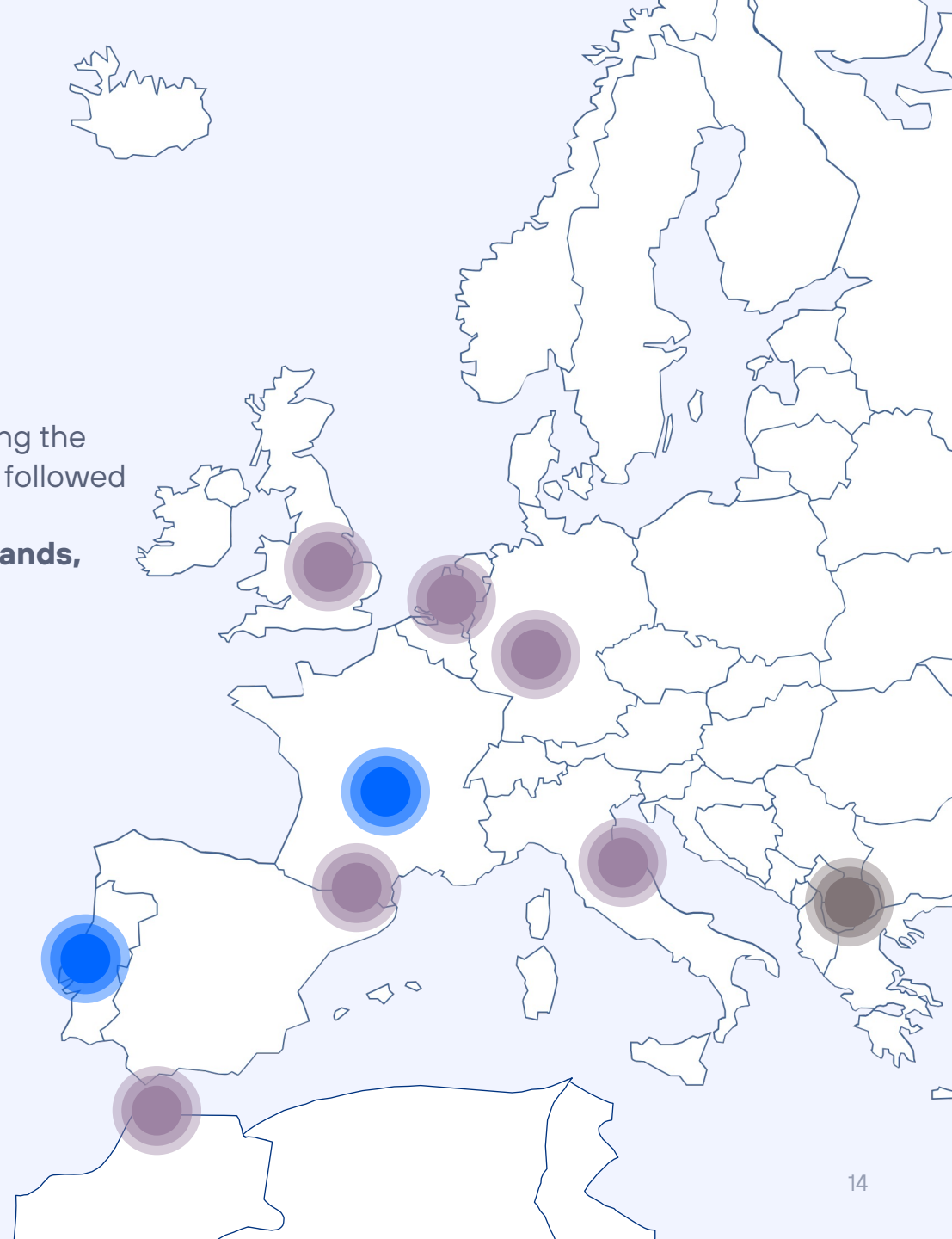
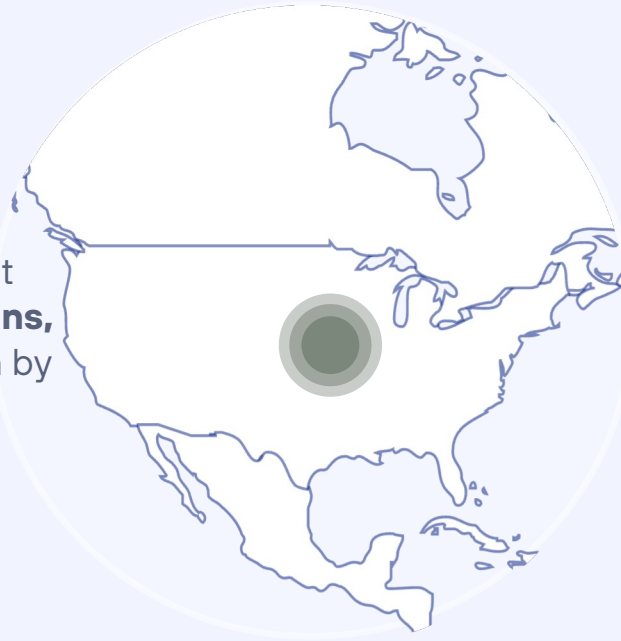
Italy ranked third among the most visited countries, followed by: **the UK, Germany, Andorra, the Netherlands, and Morocco.**



Greece also continued to gain popularity as a tourist destination among Spaniards.



The United States made it into **the top 10 destinations**, especially in August, driven by student tourism.



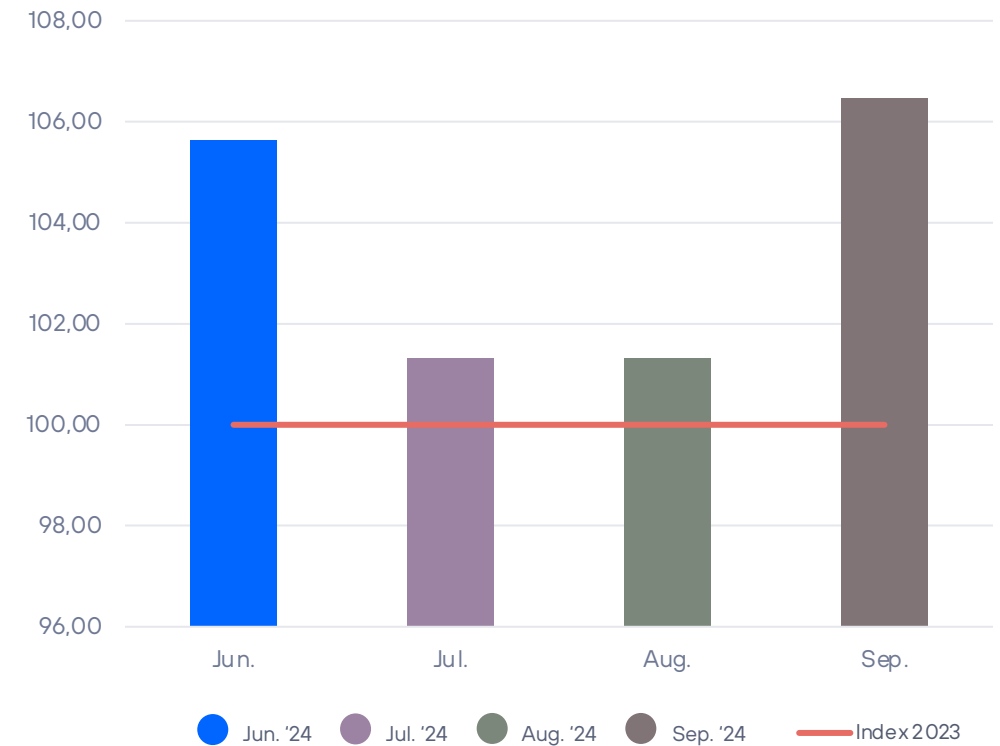
04. OUTBOUND TOURISM

How has the trend changed?

Outbound tourism from Spain **grew by 3%** compared to summer 2023, reflecting a positive trend in Spanish residents traveling abroad.

+3%
Outbound tourism

SPANISH OUTBOUND TOURISM COMPARISON
(SUMMERS 2023-2024)



Benefits
of Smart Steps

05

05. BENEFITS OF SMART STEPS

How can this solution help the tourism sector?

By better understanding how and when tourists move, it is possible to anticipate demand, ease pressure in overcrowded areas, and promote **sustainable tourism**.

Smart Steps not only provides a snapshot of the present but also helps **plan the future of the tourism sector and its associated challenges**, benefiting both **public administrations** and **businesses** in a more efficient and personalized way.



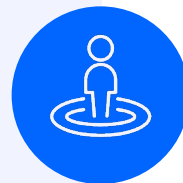
Optimizing infrastructure and resource planning

By planning airport demand or efficiently managing parking; optimizing infrastructure and public transport routes in high-tourism areas; limiting the strain on natural spaces at certain times of the year to improve tourism sustainability, etc.



Making data-driven strategic decisions

By designing routes that promote tourism in less-visited areas, easing pressure on more saturated destinations; diversifying tourist activities; planning the opening of new hotels, or preventing and planning crisis management, among other benefits.



Improving segmentation and campaign personalization

By personalizing marketing campaigns based on origin and behavior, or launching promotions triggered by an increase in a specific target group in the area, etc.



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