

Principality of Asturias 2020 Sustainable Tourism Programme

Agreement for the Economic Competitiveness and Social Sustainability of Asturias

PRINCIPALITY OF ASTURIAS STRATEGIC FRAMEWORK FOR SUSTAINABLE TOURISM



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1

Introduction

1. INTRODUCTION

The main objective of the **Principality of Asturias 2020 Sustainable Tourism Programme** is to generate wealth and greater economic activity, increasing sustainable competitiveness and improving the economic and social profitability of the sector and the region.

The document presented here, prepared with the collaboration of the private sector and all the agents involved, sets the common guidelines for the Administration. The design of this new tourism strategy in the Principality of Asturias must be based on the principles of **quality, professionalism, sustainability, innovation, talent and public-private partnership**.

The need to combine a stable strategic framework with the adaptation to the changing reality of the market and tourist demand make it convenient for the Principality of Asturias 2020 Sustainable Tourism Programme to be produced with two supplementary technical documents:

- *Strategic Framework for Sustainable Tourism.*
- *Positioning and Commercialisation Plan.*

This **Strategic Framework for Sustainable Tourism** defines and implements the basic principles of the tourism product and model for the Principality of Asturias, in accordance with the general principles of **sustainability, internationalisation, deseasonalisation and territorial balance, in order to guide the tourist policy of all the agents in the sector, public and private, and provide a framework for the generation of wealth and the preservation and exploitation of the cultural, natural and historical assets.**

Moreover, the **Positioning and Commercialisation Plan** is a document **aimed at the market and at promotion**. It is practical and operational, with a programme of proposed actions that will be promoted by the Asturian Tourist Department over the period in order to reach the desired objectives. This Plan is adapted to the current situation in terms of the market and tourist demand, both domestic and international, to the general outlook and strategies and to the real capacities for action.

1.1 Background

The Principality of Asturias 2013-2015 Strategic Tourism Programme (PRESTA 2013-2015, as per its acronym in Spanish) was already pointing to a more generic need for product creation and the focussing of supply on the international markets, and at the current time the evolution of the sector suggests the advisability of committing to products considered strategic, designed under new development and marketing parameters and integrated into the destinations, both domestic and international.

In this way, the Principality of Asturias 2020 Sustainable Tourism Programme is focused on demand, structures its promotional model around the issuing markets, both domestic and international, and has quality as the essential element in generating a competitive supply with a noteworthy added value.

1.2 General principles

The Principality of Asturias 2020 Sustainable Tourism Programme is based on four general principles:

- **Sustainability**
- **Internationalisation**
- **Capability to remove seasonality**
- **Balance between the different territories**, urban and rural, coastal and inland, in the Principality of Asturias.

1.3 Working methodology

1.3.1 Working stages

In order to create the Programme, a methodology sequenced into four essential working stages has been developed:

STAGE I: Analysis, diagnosis and conclusions on the current situation:

- Analysis of the current tourism situation in Asturias.
- Analysis of the resources, development models, tourism products and services, demand, distribution and promotion, as well as the positioning and image of Asturias both internally and externally.
- Study of the profiles of the tourists received by Asturias.

STAGE II: Definition of the current challenges facing the sector and critical success factors:

- Definition of priority strategic lines.
- Definition of the tourist profiles of interest with a 2020 horizon.

STAGE III: Product development strategy:

- Drawing up of product plans, taking into account the tourist profiles of interest and the existing tourism products.
- Generation of themed products according to the results of the demand study.

STAGE IV: Action proposals:

- Creation of a Positioning and Commercialisation Plan that defines the strategic lines for the Principality's tourist sector.

1.3.2 Tools for collecting the information

In order to carry out Stage I of the work, *Analysis, diagnosis and conclusions on the current situation*, various types of tool have been designed and implemented, focused on collecting information, specifically:

- **Tools for collecting secondary information:** different documents and official sources and statistics have been used, from which quantitative and qualitative information of interest for this study has been extracted. A list of the sources used can be found in the **Appendix on sources consulted**.
- **Tools for collecting primary information:** As has been mentioned, the document presented here has been prepared with the collaboration of the private sector and all of the agents involved in the region's tourist development. As a result, social research techniques and tools for the participation and consultation of the sector have been used, including **sector meetings, on-line communications, on-line surveys, face-to-face in-depth interviews, virtual interviews, presentations and forums**.

1.3.3 Tools for the participation and consultation of the tourist sector

In the field of planning, the active participation of private agents in developing sector plans has become a practical tool leading to the production of a text adapted to the real needs of the sector. The Principality of Asturias 2020 Sustainable Tourism Programme has been designed in this way.

The Programme has been of a clearly participatory nature in all its different stages, working hand in hand with the private sector and all of the agents involved. This is important given that it sets the common guidelines not only for the Tourism Department of the Principality of Asturias but also for all of the public and private players that form the Asturian tourist sector.

Thus, as has already been mentioned, workshops, forums, interviews, round tables, presentations, on-line communications, questionnaires and all types of channels for communicating with the sector, both nationally and internationally, were used when drawing up the programme, all of which are effective for managing the knowledge needed to prepare a programme of this type. **The collaboration of more than 500 regional agents, 200 national agents and around 150 international agents with accredited representativeness and of interest for the Asturian tourist supply has been promoted.**

The different working tools used for the diagnosis stage were as follows:

- **ON-LINE COMMUNICATION**: Throughout the project different messages were sent to the agents involved via e-mail, informing them of the different steps taken while carrying out the work and requesting their collaboration.
- **SECTOR MEETINGS**: During the first half of April, **6 Round tables or Sector meetings involving the sector** were organised and held **in different areas of the region** in order to facilitate the participation of the representatives of public and private entities linked to the regional tourist sector. The meeting points, councils involved and entities from the territory taking part in these were as follows:

MEETING POINT	MEETING POINT	COUNCILS	NO. OF COUNCILS PER MEETING
South-west	Cangas del Narcea	Allande, Ibias, Degaña, Cangas del Narcea, Tineo, Salas, Cudillero, Valdés	8
North-west	Taramundi	Tapia de Casariego, Castropol, Vegadeo, San Tirso de Abres, Taramundi, Villanueva de Oscos, Santa Eulalia de Oscos, San Martín de Oscos, Grandas de Salime, Illano, Boal, El Franco, Coaña, Villayón, Navia, Pesoz	16
East	Cangas de Onís	Ribadedeva, Peñamellera Baja, Peñamellera Alta, Llanes, Cabrales, Onís, Cangas de Onís, Amieva, Parres, Ponga, Piloña, Ribadesella, Caravia	13
Central	Oviedo	Oviedo, Las Regueras, Candamo, Siero, Grado, Santo Adriano, Noreña, Somiedo, Teverga, Yernes y Tameza, Belmonte de Miranda, Proaza, Quirós	13
Central Mountain	Langreo	Aller, Lena, Mieres, Morcín, Ribera de Arriba, Riosa, Caso, Langreo, Laviana, San Martín del Rey Aurelio, Sobrescobio	11
Central	Gijón	Gijón, Villaviciosa, Cabranes, Colunga, Sariego, Nava, Bimenes, Avilés, Muros del Nalón, Pravia, Soto del Barco, Castrillón, Corvera de Asturias, Illas, Gozón, Carreño, Llanera	17
TOTAL COUNCILS			78

In total, **178** entities representing the Asturian tourist sector were invited to take part in these meetings, and in the end around **100** agents agreed to take part.

These meetings analysed and discussed in detail the possible definition of the values conveyed by Asturias, the unique resources and experiences offered by the region, the resources not yet well known that could have tourist value, the experiences to discover, the strengths and weaknesses of the Asturias destination and proposals for improvement in terms of the quality of the services, promotion and marketing channels, training and creation of tourism products.

Details of the entities and agents invited and taking part, as well as the conclusions drawn from each of the round tables, can be seen in the **Appendix on Sector meetings on tourism. Executive report from the Round tables.**

- **In-depth FACE-TO-FACE INTERVIEWS and virtual interviews at a national and international level:** Moreover, in the framework of this project, **in-depth face-to-face interviews were conducted with a total of 84 tourist entities and strategic organisations representing the sector at a regional level**, including among these those linked to a minimum of 50 companies or partners, or at least 75% of the entities in the sector or sub-sector.

For this, an interview script was designed which reflected all the issues to be considered and this was forwarded to the agents when so requested. An agenda was set for holding the face-to-face meetings, taking into account their availability.

The list of agents interviewed and the agenda for holding these meetings can be seen in detail in the **Appendix on the agenda for in-depth interviews**.

- **ON-LINE SURVEYS:** In addition, to **extract quantitative and qualitative information of interest from both the public and private agents related to the tourist activity in the Principality of Asturias**, two types of on-line survey, one for regional agents and another for national and international agents, were also designed and run.

In the first case, a questionnaire was designed focused on **regional entities** in the Principality of Asturias with **18 specific questions** relating to different aspects, grouped into the following themes:

1. Entity type, size and representativeness
2. Demand orientation
3. Competitiveness of the Asturian tourist sector. Prioritisation of needs.
4. Internationalisation and attracting foreign tourism.
5. Relations in the tourist sector.
6. Promotion and marketing
7. Public-private collaboration in projects to revitalise tourism
8. Internal management

In order to facilitate the tabulation and aggregated processing of the data obtained, these questions were mostly designed as **closed-ended and/or evaluative questions**, only including open questions in some supplementary questions where some sort of clarification was required.

To guarantee greater participation by the people involved in completing this survey, the questionnaire was placed on the digital platform **Google Forms** where it remained available from **4 - 14 April**. An informative email was also sent to the business associations to ensure their participation and its dissemination among their associates.

As a result, **this informative e-mail was sent to around 500 associations and entities, both public and private, of importance for the Asturian tourist sector**. In the end a total of **192 responses** were obtained from the survey issued, representing a maximum margin of error of 6.9% for a 95% confidence interval and a heterogeneity of 50%.

In terms of the **survey for national and international entities**, a questionnaire was designed with **17 questions** relating to different aspects and grouped into the following themes:

1. Entity type.
2. Knowledge and image of the destination.
3. Demand orientation.
4. Promotion and marketing.



These questions were also mostly designed as closed-ended and/or evaluative questions, only including open questions in some supplementary questions.

The questionnaire was placed on the digital platform **Google Forms**, in both **Spanish and English**, where it remained available from **5 - 20 May**, and an informative email was sent to a total of **393 entities** of interest, specifically: regional (10), national (118) and international (189) agencies and tour operators, Asturian Centres (*Casas de Asturias*) throughout the world (43) and Tourism Offices abroad run by Turespaña (33). In the end, 17 responses were obtained in both surveys.

- **PRESENTATIONS:** In all the forums and meetings carried out with tourist agents in the framework of this Programme, a presentation was given on its objectives and purpose in order to provide the best information on the process to be followed by all the participants.



2

Background information,
influence factors and
current situation of
tourism in Asturias

2. BACKGROUND INFORMATION, INFLUENCE FACTORS AND CURRENT SITUATION OF TOURISM IN ASTURIAS

2.1. Background information and brief summary of the tourism model in Asturias.

For 30 years the Principality of Asturias has wanted to exemplify what tourism could mean as an economic sector, being a promoter and participant in creating the **first four star hotel located in a rural setting in western Asturias, in Taramundi**.

Following the Rectoral in Taramundi, many other visionary entrepreneurs adopted trends seen in other countries, such as the canoes on the Deva and Sella rivers, brought directly from France.

The transformation of agriculture, livestock and mining activity into tourism has also led to great examples of **agro-tourism** and the **exploitation of the industrial heritage as an attraction** for the districts.

In parallel, the main cities (Oviedo, Gijón and Avilés) have also developed in part thanks to tourism, forming a triangle of essential visits due to their heritage, leisure options, shops and business opportunities for many companies.

In this way, the sector has gradually grown with its own personality, becoming an **example and leader in rural tourism in España Verde (Green Spain)**. However, it is a leadership that has become blurred in many respects given the increasingly competitive market, with a more seasonal demand and in a context of global crisis, where keeping up-to-date with the new trends is fundamental.

The **Asturian tourist sector is characterised by mainly involving small family businesses which could be more professional and are widely scattered across the territory**. These factors hinder the union, coordination and dialogue between the private and public sectors, and therefore make progress more difficult in many respects.

The Asturian people as a whole do not have a clear idea of the importance of tourism as an industrial activity, but they are great hosts. It is difficult to find an Asturian who does not identify with the values recognised and appreciated by tourists: the landscape, nature, sea and mountains, gastronomy, cultural heritage, deeply-rooted traditions and, especially, the people.

Asturias has a **great richness of resources of all kinds**, with the following broad categories and their unique features standing out:

- **NATURE:** Asturias stands out for its natural richness and variety, having recognitions and landmarks as significant as being home to the first **National Park in Spain**, having an extensive territory covered by **Red Natura 2000**, and having multiple **Special Conservation Areas (ZEC)** and **6 Biosphere Reserves**, all of which demonstrates its sustainability and extraordinary conservationist and responsible approach. This scenario is also ideal for practising a multitude of **land, water and air sports**.

- **CULTURE AND HERITAGE:** In addition to the heritage assets declared **World Heritage by UNESCO** (some of the pre-Romanesque Art, Foncalada Fountain, the Holy Chamber of Oviedo Cathedral, five Prehistoric Caves with Rock Art and the stretches of the Original Way of St. James, the Coastal Way of St. James and the connections between both), Asturias has an important collection of art on the walls of the Museum of Fine Arts in Oviedo, with works by the greatest painters of all time. The **Niemeyer Centre** is his only work in Spain and the last he undertook in Europe; not forgetting to mention the deeply-rooted **ancestral traditions** that always surprise the visitor.
- **GASTRONOMY:** Asturias has a well-stocked native larder thanks to its natural sources of raw materials: the land and water. The mountains offer hunting and the picking of all types of fruit; the valleys and plains form the garden and livestock area; fish and seafood come from the sea; not forgetting the fish from the rivers. The highlights are its high quality restaurants under the **Principality's "Mesas de Asturias, Excelencia Gastronómica" brand** (Tables of Asturias - Gastronomic excellence), its **6 gastronomic products with Protected Designation of Origin and 3 with Protected Geographical Indication**, and the countless **gastronomic fairs and days** throughout the region, among others. Obviously, we cannot forget about the Asturian products that are most representative and best positioned nationally and internationally: its most traditional dish, Asturian "fabada" (bean stew), and its cider.

The rugged Asturian landscape has created a natural division between different spaces that are easy to visit and discover, allowing for one day excursions in almost all of the provinces. Over time, areas have developed with a wide diversity in their traditions, landscapes and gastronomy. We can identify **three broad areas** with similar characteristics:

- **EASTERN ASTURIAS:** Unique beach and mountain landscape, only 15 minutes away from each other by car, it covers the Picos de Europa and is a very popular area for sports and festivals.
- **CENTRAL ASTURIAS:** Comprises the main population centres, it is the region with the greatest tradition in cider, industry and has a more extensive cultural and leisure agenda with its theatres, cinemas, museums, etc.
- **WESTERN ASTURIAS:** This is the least crowded area and the one with the least well-structured tourist supply, but it is of great interest for travellers who want to discover the most deeply-rooted traditions since many of its towns have kept their traditional customs alive.

2.1.1. Key agents in the tourist sector in the Principality of Asturias.

The tourism model of Asturias **is based on a public and public-private organisational structure** that has powers and responsibilities for the **management, regulation, planning and promotion** of the destination. We can emphasise the important role of the Asturian **tourist associations**, as well as the many regional agents linked to the sector.

Listed below are the **key agents in the tourist sector** in Asturias, highlighting the **existing public-private relationship** as this is considered essential for the tourist planning of any destination.



ADMINISTRATION OF THE PRINCIPALITY OF ASTURIAS WITH RESPONSIBILITY IN TOURISM:

- Ministry of Employment, Industry and Tourism¹:

This Ministry **develops and executes the proposals in the Government's policy on tourism.**

Decree 64/2015, of 13 August, establishes the basic organic structure of the Ministry of Employment, Industry and Tourism, with one of its responsibilities being tourism.

In order to perform its duties, the Ministry of Employment, Industry and Tourism has central bodies and some advisory and support bodies which, in matters of tourism, are the **General Directorate of Trade and Tourism** and the **Tourism Advisory Council**.

- Central bodies: General Directorate of Trade and Tourism:

In accordance with the aforementioned Decree, the General Directorate of Trade and Tourism is responsible for a series of trade-related functions, which are not covered by this document, and the **following tourism-related functions:**

- Management, coordination and execution of the responsibilities of the autonomous community in matters of tourism.
- Development of regulations.
- The comprehensive and sustainable management of the Asturias tourist destination.
- The planning and execution of strategies for positioning the tourist destination of Asturias and for improving the competitiveness of the Asturian tourist supply.

- Tourism Service:

The **Tourism Service** executes the functions of the General Directorate of Trade and Tourism relating to:

- The planning and assessment of strategies for the positioning, promotion and marketing of Asturias as a tourist destination.
- The development of regulations and promotion of the most competitive tourist sector.
- The design and coordination of the tourist awareness network through studies, analyses, tourist data and, generally, all the measures aimed at promoting the tourist sector.
- The authorisation, inspection and sanctioning of tourist companies and establishments in the area of the autonomous community.
- Promotion of the quality and sustainability of the Asturian tourist image.
- Management of the tourist infrastructures owned by the Principality of Asturias.

¹Source: Official Gazette of the Principality of Asturias (BOPA). Decree 64/2015, of 13 August, establishing the basic organic structure of the Ministry of Employment, Industry and Tourism.

The Tourism Service is also responsible for **collaborating in the regulation of non-university teaching, in relation to tourist-related professions** and, generally, as many measures as are necessary to manage the Asturias tourist destination.

- **Sociedad Pública de Gestión y Promoción Turística y Cultural del Principado de Asturias, S.A.U.**

On 3 October 2013, the **companies RECREA and SRT** (Sociedad Regional de Turismo) merged to become "**Sociedad Pública de Gestión y Promoción Turística y Cultural del Principado de Asturias, S.A.U.**", which is attached to the Ministry of Education, Culture and Sport and in turn reports to the Ministry of Employment, Industry and Tourism with regard to its tourist-related responsibilities, **constituting a promotion and support tool for the marketing of the General Directorate of Trade and Tourism.**

The Society's **corporate purpose** is:

- To manage and operate cultural, tourist and sports facilities.
- To provide infrastructures that improve tourist exploitation.
- To provide advisory services for the promotion of the sector and tourist activities of the Principality of Asturias.

The company is funded in two ways: firstly through the income from its activity, generated by the sales and services provided by the facilities it manages; and secondly through the current transfers received from the Principality of Asturias.

The company has as its **medium-term strategic objectives**:

- To consolidate and secure the tourist promotion of the Principality of Asturias.
- To manage the facilities put in place and, therefore, its actions will be aimed at the effective management of:
 - Jurassic Museum of Asturias.
 - 'Fuentes de Invierno' Winter Resort.
 - Teverga Prehistoric Park.
 - Laboral City of Culture.
 - Tito Bustillo Rock Art Centre.
 - Asturian Pre-Romanesque Art Reception and Interpretation Centre.
 - Trasona Technical Sports Centre.

- **Advisory and support bodies: Tourism Advisory Council²:**

Law 7/2001 of the Principality of Asturias, of 22 June, on Tourism, reflects the creation of the **Tourism Advisory Council of the Principality of Asturias**, the body of the General Directorate competent in tourism-related matters, as an **advisory, support and proposal body for matters relating to the promotion, encouragement and development of tourism**.

The **Advisory Council** consists of:

- Chairperson: who is also the head of the General Directorate with responsibility for tourism-related matters.
- Vice-chairperson: chosen by the members of the Council.
- Members:
 - One for each **Parliamentary Group in the Parliament** of the Principality of Asturias.
 - Three appointed by the **Asturian Federation of Councils**.
 - One appointed by the **University of Oviedo**.
 - Two appointed by the most representative **trade union organisations**.
 - Three appointed by the most representative **business organisations**.
 - One appointed by and from among **citizen associations and entities** whose purpose includes the preservation of the natural environment and the sustainable development of the tourist sector.

The main **objectives of the Tourism Advisory Board** are:

1. To offer adequate technical support in decision making, with a team of specialists qualified in the different disciplines involved in tourism.
2. To operate in Plenary Sessions and Committees, which ensures efficiency in the processing of any matters so required.

2.1.2. Social Cooperation

The Government of the Principality of Asturias and the social agents consider it necessary to improve the effectiveness of the economic promotion policy and this involves, among other things, coordinating the various instruments existing in sector plans that allow a specific treatment of the potential and needs of the different branches of activity.

To this end, the sectors have been identified and classified according to factors such as their growth potential, their ability to boost the economy as a whole, their capacity to create employment, and their adaptation needs.

² Source: Law 7/2001, of the Principality of Asturias, of 22 June, on Tourism.



Following this approach, a first group of branches of activity has been established which must be promoted due to being considered catalysts of regional economic development (ICTs, biotechnology, creative industries and advanced services such as engineering) or due to their ability to boost GVA or employment (food, forestry, metalworking, **tourism** and construction industries). Other sectors that require a different treatment aimed at facilitating their modernisation or adaptation to new market trends (retail, facility and socio-health services, transport and logistics) have also been identified.

The promotion of sector policies must have clusters as one of its main pillars, understanding these as connecting links for our business sector and tools for multiplying the Government's economic promotion action. Its objectives must include, among other things, a greater alignment with the priorities of the industrial strategy and RIS3, and an increase in collaboration between companies in the same sector or different sectors on the basis of European projects financed by the H2020 plan.

In accordance with the above, the different sector committees will develop and monitor specific plans for each of these branches of activity, in accordance with the principles agreed upon and set out below.

Sector forum

We consider the sector as an essential element of the Asturian productive model, for both its direct ability to create wealth and employment and for its ability to boost all other economic sectors.

In the framework of the Sector Forum, specific plans for the following sub-sectors will be approved: metallurgy and materials, metalworking, chemistry and energy, as well as the new opportunities based around the "green economy".

Sector committees

Sector committees will also be created, comprised of the signatory parties from the Forestry, Agro-food Industries, Information and Communication Technologies, Tourism, Construction, Commerce and Transport and Logistics sectors, as well as the Facility Services working group, in order to study the specific problems of the sector.

These committees will develop:

- Strategic sector plans: which will establish, in accordance with the smart specialisation strategy, the objectives and measures to develop the sector. These plans must include the adaptation of the cross-cutting policies to promote competitiveness, referred to above, to the sector's needs, as well as to the needs in other areas such as training and investment in human capital or infrastructures and communications. They will also determine the suitability or otherwise of establishing a cluster within the value chain, continuing in such a case with its launch and development.
- Action plan: which will contain and quantify, in priority order, the specific measures to be implemented to the benefit of the sector.
- Impact analysis: which will detail the specific benefits expected in terms of gross value added and the use of the proposed actions. This analysis will also pay special attention to the sector's capacity to drive other branches of activity in the Asturian economy.
- Potential opportunities: for both the sector itself and for other sectors, through the integration of companies belonging to other branches of activity within its value chain.

- Table of indicators: adapted to the sector's strategic objectives, with which to monitor and assess the results of the economic promotion policies.
- Economic quantification of the actions to implement.
- Governance of the plan and identification of the agents responsible for implementing the agreed measures. Within the capabilities and competences of each of the agents signing the Agreement, the responsibilities of each in implementing the initiatives will be identified.

The measures to be adopted, especially those relating to public subsidies, will be subject to the conditions laid down in state and community legislation for the productive sectors.

Given the strategic plans prepared by the sector committees, the Sector Promotion and Competitiveness Improvement Committee may prioritise the actions to be implemented after considering the available budget and their potential impact.

The social cooperation agreements are signed with some clear objectives: to relaunch the economic activity, favouring the creation of employment in Asturias and progressing towards greater social cohesion.

- **Agreement for Employment and Progress in Asturias 2013-2015**

Signed by the Government of the Principality of Asturias, the employers and the main unions in February 2013, it led to the creation of a Strategic Tourism Programme as an instrument to develop and promote the tourist sector, prepared with the sector's participation through the Tourist Board, integrating all of the Principality's tourist resources.

Principality of Asturias 2013-2015 Strategic Tourism Programme (PRESTA 2013-2015):

The objective of PRESTA was, firstly, to carry out a diagnosis of the starting position of the tourist sector in 2013 and a review of the main tourist perspectives and, secondly, to present a series of priority proposals and initiatives to carry out during the period between that same year and 2015.

The Programme was based on three pillars:

- Management of the tourist destination.
- Positioning of the destination.
- Competitiveness of the tourist supply.

Each of these pillars included, in turn, a set of strategic areas which established initiatives to be implemented. Its results are analysed in the following section of the Framework.

- **Agreement for Economic Competitiveness and Social Sustainability - Social Cooperation Asturias 2016-2019**

The new social cooperation agreement was signed in May 2016 by the Government of the Principality of Asturias, the main unions (UGT and CCOO) and the Asturian Employers Federation.

The measures are grouped around four essential objectives, which correspond to each of the committees in the agreement: sector promotion and improvement of competitiveness; joining the workforce and improved employability; sustainable regional planning; and innovation and social sustainability.

The implementation of these essential objectives has led to the drafting of this 2020 Sustainable Tourism Programme for the Principality of Asturias.

2.1.3. Other management tools

a. Principality of Asturias 2014 – 2020 Rural Development Programme:

The **Principality of Asturias 2014-2020 Rural Development Programme** was presented as a document providing continuity but one that is still innovative: continuity because it allocates most of the financing to the livestock sector, and innovative because it reflects R&D initiatives in which the cattle breeders, farmers and associations will participate.

The Plan includes **six priorities** and their corresponding areas of focus:

- 1) To promote the transfer of knowledge and innovations in the agricultural sector, the forestry sector and in rural areas.
- 2) To improve the viability and competitiveness of all types of agriculture in all regions, and promote innovative agricultural technologies and forestry management.
- 3) To promote the organisation of the food distribution chain, including processed food, and the taking to market of agricultural products, animal welfare and risk management in the agricultural sector.
- 4) To restore, preserve and improve the ecosystems related to agriculture and forestry, with particular emphasis on:
- 5) Promoting the efficiency of resources and encouraging the transition to a low-carbon economy that is capable of adapting to climate change in the farming, food and forestry industries.
- 6) Promoting social inclusion, poverty reduction and economic development in rural areas.

Tourism does not play a significant role in the document, but it is included in this Programme as an **outstanding complementary activity to agriculture**, especially in terms of **agro-tourism**, which is also of interest as a **diversification of supply**.

Actions relating to the revitalisation of tourism to preserve the rural environment and its values are also recommended, such as:

- Interpretation of the heritage.
- Environmental education programmes.
- Research and monitoring of flora and fauna.
- Investments relating to the planning of public use in protected areas.

As well as the development of **active tourism** as a complementary activity to accommodation.

a. Strategic local and district plans:

Different areas of Asturias with shared characteristics or with particular features have developed or are developing different strategic plans in order to diagnose the situation in the tourist sector and propose strategic lines for its development.

Some current examples are the **Special Plan for South-western Asturias**, the **Strategic Tourism Plan of Gijón** and the **Strategic Tourism and Commerce Plan of Piloña**, among others.

2.2. Assessment of the Principality of Asturias 2013 - 2015 Strategic Tourism Programme (PRESTA 2013 - 2015)

Included below is a summary table with the main actions carried out over the last three years in the area of tourism, and their comparison with the actions planned in the framework of PRESTA (Principality of Asturias 2013-2015 Strategic Tourism Programme).

Strategic Pillar I: Tourist Destination Management							
	ACTIONS	INTERVENTIONS	INDICATORS	AGENTS INVOLVED	TOOLS USED	PLANNED	EXECUTED
Line 1.1 Adaptation and modernisation of the legal system in order to optimise the quality and competitiveness of the tourist sector	1.1.1. Adequacy of the tourist regulations	1. Decree 111/2014, of 26 November, on Active Tourism 2. Decree 86/2014, of 8 October, providing the acquisition of right to ownership of the guarantee mark known as "Aldeas, Asturias Calidad rural". Regulation of the Use of the Guarantee Mark and Benchmark "Aldeas, Asturias Calidad rural" with the technical requirements approved by the Resolution of 2 December 2014 3. Proposed Decree on Tourist Campsites 4. Proposed Decree on Festivals and Activities of Tourist Interest 5. Review and updating of the Requirements Reference. Technical requirements of the "Casas Asturianas" Quality Mark published in the BOPA on 3 March 2014. 6. Review and Updating of the Technical Requirements of the "Mesas de Asturias" Quality Mark published in the BOIA on 3 March 2014. 7. Proposal for the Development and Processing of the Regulation for the Use of the "Siderías de Asturias, Calidad Natural" Guarantee Mark 8. Reports and regional coordination: rural accommodation (adaptation to the new green stars classification) and properties for tourist use 9. Market Unity Law and Regulation Rationalisation Plan YEAR 2015	- Tourist Regulations published by the BOPA - Actions carried out on the alignment of the tourist regulations - Actions carried out to simplify administrative procedures	- Government of the Principality of Asturias - Tourism Advisory Council - Technical requirements of the Quality Mark - Casonas Asturianas - Other Autonomous Communities - Travel agents	- Tourist legislation matters - Meetings - Reports - Regulatory working groups	- Tourist Regulations published by the BOPA: 2 - Actions carried out on the alignment of the tourist regulations: 18 - Actions carried out to simplify administrative procedures: 1	- Tourist Regulations published by the BOPA: 2 - Actions carried out on the alignment of the tourist regulations: 23 - Actions carried out to simplify administrative procedures: 1
	1.1.2. Simplification of administrative processes in the exercising of tourist activities by companies	1. Proposed regulations on rural tourism, camping and tourist camps 2. Participation in regulatory working groups with other Autonomous Communities 3. Tourist Apartments amendment to the Urban Leasing Law 4. Active Tourism and tour guides: Market Unity Law					
	1.1.3. Drafting and approval of the Tourist Sector Guidelines						
Line 2.1 Organisation and adaptation of the Tourist Public Administration of the Principality of Asturias	2.1.1. Reordering and adaptation of the material and personnel resources of the Public Administration	1. Through the "Adolfo Posada" Asturian Institute of Public Administration, development of the Training Plan for staff in the Tourist Service 2. Participation in an on-line platform with other Autonomous Communities to analyse the Tourist Inspection Procedures 3. Updating of the Asturias website in matters related to tourism 4. Monitoring of the 2014 Principality of Asturias Tourist Inspection Programme, approved by Resolution of the Ministry of Economy and Employment on 16 December 2013 YEAR 2015	- Actions carried out in the Tourist Companies Register (inclusions, removals and amendments) - Number of disciplinary cases resolved - Inspection actions carried out - Number of people attending training courses	- "Adolfo Posada" Asturian Institute of Public Administration - Other Autonomous Communities - Ministry of Economy and Employment - Government of the Principality of Asturias	- Courses - Participation in an on-line platform	- Actions carried out in the Tourist Companies Register (inclusions, removals and amendments) 3,848 - Number of disciplinary cases resolved 1,176 - Inspection actions carried out 8,173 - Number of people attending training courses 68	- Actions carried out in the Tourist Companies Register (inclusions, removals and amendments) 3,864 - Number of disciplinary cases resolved 1,123 - Inspection actions carried out 9,508 - Number of people attending training courses 71
	2.1.2. Training initiatives for public staff from the tourist sector						
	2.1.3. Coordination and control in tourist activity	1. Monitoring of the 2015 Principality of Asturias Tourist Inspection Programme, approved by Resolution of the Ministry of Economy and Employment on 10 December 2014 (BOPA, 2 January 2015)					
	2.1.4. Development and coordination of activities to promote and communicate tourism in Asturias						
Line 3.1 Boosting public and private cooperation in the tourist sector	3.1.1. Promoting coordination and cooperation among the public agents involved in tourist activity	1. Gastronomic Tourism Competitiveness Plan: implementation of the initiatives corresponding to the fifth and sixth years 2. Working Group on Atlantic Tourism and Culture of the Atlantic Corridor Committee. It met in Gijón at the <i>Laboral Ciudad de la Cultura</i> on 7 and 8 April 3. Attendance in Nantes of the multidisciplinary group for creating inter-territorial grouping 4. Working Group on the RESOE Macro-region 5. Participation in the LEADER 2014-2020 working groups 6. Collaboration Agreements 7. Subsidies to tourist SMEs YEAR 2015	- Sustainable and accessibility projects supported by the Tourist Administration - Collaboration agreements on tourism established between public bodies - Companies receiving subsidies for modernising tourist establishments - Initiatives implemented and support from the Government for carrying out R&D	- Councils - Associations of Municipalities - Foundations - Restaurants - German written press - 26 local entities - Atlantic Corridor Committee - Inter-territorial grouping - Sociedad Estatal para la Gestión de la Innovación y las Tecnologías Turísticas (SIGITTUR) - Ministry of Economy and Employment of the Principality of Asturias. - University of Oviedo - Sociedad Pública de Gestión y Promoción Turística y Cultural del Principado de Asturias. - Spanish Tourism Institute - Government of the Principality of Asturias - SMEs from the tourist sector - Tourism Faculty at Oviedo	- Competitiveness plans - On-line promotion - Monitoring Committees - Gastronomic tourism brochures and information - Social media - Advertising articles and inserts - Working groups - Collaboration agreements - Subsidies to tourist SMEs: €40,000 - Total amount awarded: €11,889	- Sustainable and accessibility projects supported by the Tourist Administration 0 - Collaboration agreements on tourism established between public bodies 14 - Companies receiving subsidies for modernising tourist establishments - Initiatives implemented and support from the Government in R&D development: 0	- Sustainable and accessibility projects supported by the Tourist Administration 0 - Collaboration agreements on tourism established between public bodies 14 - Companies receiving subsidies for modernising tourist establishments 55 - Initiatives implemented and support from the Government in R&D development: 18
	3.1.2. Support for the development of sustainable and accessible projects						
	3.1.3. Support for entrepreneurship and innovation	1. Gastronomic Tourism Competitiveness Plan: implementation of the initiatives corresponding to the sixth year of the Plan, focused on promoting and consolidating gastronomic tourism products from the Principality of Asturias, as well as consolidating and verifying the gastronomic tourist routes 2. Subsidies to tourist SMEs 3. Collaboration Agreements: Agreements corresponding to 2015 which configure the España Verde/Green Spain and Via de la Plata/Silver Way Brands for the development of the marketing for the tourist destinations and products associated with both brands; Collaboration agreement between the University of Oviedo and Sociedad Pública de Gestión y Promoción Turística y Cultural del Principado de Asturias for the development of statistical work to identify the characteristics of tourism in Asturias and its economic impact; Education Cooperation Agreement between the Tourism Faculty at Oviedo, part of the University of Oviedo, and the Principality of Asturias through the Ministry of Economy and Employment, through which students from the Tourism Faculty at Oviedo, enrolled on the Tourism Degree, can complement theoretical training with practical training that requires carrying out professional activities in the facilities of the Ministry of Economy and Employment, General Directorate of Trade and Tourism 4. Support for the Rural Tourism Cluster					
	3.1.4. Participation in technological platforms						
	3.1.5. Promoting inclusion in European tourism programmes						
Line 4.1 Encourage institutional collaboration between administrations and companies to improve the organisation and information available on land, air and sea connections	4.1.1. Collaborate in the development of multi-modal	1. Tourist signposting (SISTHO). New resources and/or destinations to be signposted by the Principality of Asturias: Pindal Cave, Redes Nature Park, Port of Vega, Santa Cristina de Lena 2. Subsidies to Local Corporations: Tourism Development Grants: signposting, Tourist Information Offices: 38 grants awarded 3. Subsidies to Councils in the Principality of Asturias in matters of the scope of powers of the Public Employment Service of the Principality of Asturias YEAR 2015	- Actions promoted by the Administration to improve tourist signposting and information - Local entities receiving grants for tourist signposting - Local entities receiving grants for tourist information - Actions carried out regarding information on public transport - People served in Tourist offices	- Government of the Principality of Asturias. - Local Corporations - Councils - Ministry of Development - Ministry of Employment, Industry and Tourism	- SISTHO Signposting - Activities of tourist interest (tourist signposting): €30,000. Total amount awarded: €29,989 - Tourist Information Offices: €150,000. Total amount awarded: €149,980 - Legislation on tourism (authorisations, decision on the approval of subsidies, etc.)	- Actions promoted by the Government to improve tourist signposting and information 4 - Local entities receiving grants for tourist signposting 45 - Local entities receiving grants for tourist information 114 - Actions carried out regarding information on public transport 3 - People served in Tourist offices: 2,402,184	- Actions promoted by the Government to improve tourist signposting and information 7 - Local entities receiving grants for tourist signposting 65 - Local entities receiving grants for tourist information 114 - Actions carried out regarding information on public transport 3 - People served in Tourist offices: 2,291,577
	4.1.2. Facilitating access to information on tourism-based public transport						
	4.1.3. Tourist reception and welcome in terminals	1. Tourist signposting (SISTHO). Subject to authorisation from the Ministry of Development, by resolution of 3 September 2015 of the Ministry of Employment, Industry and Tourism, a contract is awarded for the Manufacture, Supply and installation of signposts on State-owned roads in the Principality of Asturias, in accordance with the SISTHO System, for three tourist resources and destinations: Pindal Cave, Redes Nature Park, Port of Vega. 2. Subsidies to Local Corporations 3. Subsidies to Councils in the Principality of Asturias in matters of the scope of powers of the Public Employment Service of the Principality of Asturias (call for applications 2014-2015)					
	4.1.4. Tourist signposting						
	4.1.5. Tourist information network at the destination						
Line 5.1 Management and installation of tourist facilities	5.1.1. Thematic structuring of differentiating tourist resources	The creation of experiences and sensations around resources with tourist potential that are reflected in the marketing website: www.escapateurias.es and that includes a section on themed experiences that consists of the following proposals: nature, culture, gastronomy, adventure and active tourism	- Joint actions and programmes of activities carried out between the tourist administration and public and private facilities - Number of differentiated experience packages on the "Escapadas" website - Number of visits to tourist facilities linked to or dependent on the administration	- Government of the Principality of Asturias	- Creation of a marketing website	- Joint actions and programmes of activities carried out between the tourist administration and public and private facilities 0 - Number of experience packages on the "Escapadas" website: 95 - No. of visits to tourist facilities linked to or dependent on the administration: 0	- Joint actions and programmes of activities carried out between the tourist administration and public and private facilities 0 - Number of experience packages on the "Escapadas" website: 59 - No. of visits to tourist facilities linked to or dependent on the administration: 0
	5.1.2. Cooperation between cultural and leisure facilities and installations						

Strategic Pillar II: Positioning of the Tourist Destination								
ACTIONS		INTERVENTIONS	INDICATORS	AGENTS INVOLVED	TOOLS USED	PLANNED	EXECUTED	
Line 6.1 Enhancing the brand identity of the Asturias destination	6.1.1. Strengthen the tourist image of Asturias	1. Tourism Communication and Promotion Actions 2. Launching of the new tourist information portal www.turismoasturias.es and the sub-portal aimed at professionals. Development of a portal positioning campaign (SEM and SEO) through search engines and its versions in English, French and German 3. Execution of the national campaign media plan, expanding its scope of action in the summer to the more distant communities such as Catalonia, Andalusia and the Valencian Community 4. Execution of a regional campaign media plan 5. Execution of the international campaign media plan aimed at our main European markets: France, United Kingdom and Germany 6. A significant presence on social media, in which, according to a study carried out by Catalonia, we occupied fifth position in the ranking of Autonomous Communities in terms of followers, but have now risen to third position 7. 88 articles have been published, including 6 reports about snow in the Galician press, 2 reports on cycling tourism and the inclusion of 3 reports in the "El camping y su mundo" magazine 8. National promotion campaign through means of transport: on-line actions, reports in airline magazines, creation of tourism products and the development of a monographic brochure with Viajes El Corte Inglés						
	6.2.2. Regional approach: Destination Asturias	YEAR 2015 1. Festivals and activities of tourist interest in the Principality of Asturias 2. Tourist Communication and Promotion Actions 3. The Tourist Information Portal www.turismoasturias.es has added new sections such as Offers and Breaks, an advanced accommodation search engine and is working on adding more sections such as a newsletter, competition manager and scrap-books from Paradise 4. Execution of the national campaign media plan in three waves: Easter Week, summer and autumn, mainly aimed at nearby markets and Madrid 5. Execution of the regional campaign media plan 6. Execution of the international campaign media plan aimed at our main European markets: France, Germany and United Kingdom. This year we have also added other priority markets such as Portugal and Italy 7. Asturias is in the top 5 of autonomous communities with the most followers on social media. The presence in the social media has seen an increase in the number of followers by 100,000 compared to figures from the end of 2014 8. 100 articles have been published, including 2 articles on cycling tourism and the inclusion of 5 articles in the "Camping y su mundo" magazine 9. National promotion campaign through means of transport: 10. In 2015 we celebrated 30 years of the "Asturias, Natural Paradise" tourist brand, implementing a programme of commemorative events 11. On-line marketing campaign (SEO/SEM and Social Media)	- Strengthening of the image of the Asturias destination in Green Spain (market share)	- Government of the Principality of Asturias. - Autonomous Communities - European tourist markets - Media organisations	- Tourism promotion and marketing campaigns and actions - Campaign to position the tourist information portal National promotion campaign through means of transport: - On-line marketing campaign (SEO/SEM and Social Media)	- Strengthening of the image of the Asturias destination in Green Spain (market share) 18.1%	- Strengthening of the image of the Asturias destination in Green Spain (market share) 18.30%	
Line 7.1 Development of comprehensive communication for the Asturias destination	7.1.1. Control of image positivity							
	7.1.2. Awareness of the true image of Asturias							
	7.1.3. Relations with influencers for the Asturias destination							
	7.1.4. Marketing and advertising promotion strategy							
	7.1.5. Strategy in tourism fairs	1. Constant dissemination of good news 2. Holding of 29 press trips with 57 media organisations and more than 100 journalists, 18 of them international (USA, Italy, United Kingdom, Germany, Switzerland and Finland) 3. Holding of 5 travel agent trips, with 21 operators who have held 30 interviews 4. 3 marketing days, two with the British market and a commercial mono-graphic meeting with Viajes El Corte Inglés 5. Running of 3 campaigns: at a regional, national and international level 6. Participation in 13 tourism fairs 7. The Turismoasturias website received a total of 763,740 visits	- No. of press releases and conferences to promote a positive image of the Asturias destination - No. of press trips - No. of travel agent trips - No. of tourism fairs attended Design of communication campaigns - No. of presentations - No. of commercial meetings - No. of on-line marketing actions - No. of direct marketing actions - No. of posts on Facebook and Twitter. - No. of news stories generated - No. of news stories and reports generated by press trips.					
		YEAR 2015 1. Constant dissemination of good news about Asturias through different media organisations 2. Holding of 46 press trips with 86 media organisations, 28 of them international from 17 countries 3. Holding of 10 influencer trips, with almost 100 influencers of interest 4. Holding of 14 presentations on the Asturias destination, with 700 attendees 5. Holding of 2 commercial meetings with 28 interviews 6. Running of 3 tourist campaigns: at a regional, national and international level 7. Participation in 16 tourism fairs, 10 of them international 8. The Turismoasturias website received 1,677,891 visits in 2015, more than double those received in 2014 9. Social Media Management	- No. of direct marketing actions - No. of posts on Facebook and Twitter. - No. of news stories generated - No. of news stories and reports generated by press trips. - No. of interviews on commercial actions - Queries at fairs - Visits to the corporate website Percentage of clicks, on-line marketing Percentage of openings, direct marketing - No. of followers on Social Media (Facebook and Instagram) - No. of interactions on Social Media (Facebook and Instagram)	- Media organisations - International press - Travel agents - British market - Viajes El Corte Inglés - Government of the Principality of Asturias	- News and publications Marketing days Tourism promotion and marketing campaigns - Participation	- No. of press releases and conferences: 234 - No. of press trips: 107 - No. of agent trips: 22 - No. of tourism fairs: 34 - Communication campaigns: 17 - No. of presentations: 8 - No. of commercial meetings: 16 - No. of on-line marketing actions: 9 - No. of direct marketing actions: 13 - No. of posts on Facebook and Twitter: 14,143 - No. of news stories generated: 459 - No. of news stories and reports from press trips: 289 - No. of interviews on commercial actions: 2,200 - Queries at fairs: 144,962 - Visits to the corporate website: 1,581,172 - Percentage of clicks, on-line marketing: 0.14 % - Percentage of openings, direct marketing: 11%	- No. of press releases and conferences: 269 - No. of press trips: 123 - No. of agent trips: 23 - No. of tourism fairs: 29 - Communication campaigns: 18 - No. of presentations: 23 - No. of commercial meetings: 33 - No. of on-line marketing actions: 14 - No. of direct marketing actions: 8 - No. of publications on Facebook and Twitter: 13,777 - No. of news stories generated: 497 - No. of news stories and reports generated from press trips: 225 - No. of interviews on commercial actions: 1,528 - Queries at fairs: 212,191 - Visits to the corporate website: 2,859,063 - Percentage of clicks, on-line marketing: 0.14 % - Percentage of openings, direct marketing: 11%	
	7.1.6. On-line marketing strategies	7.1.6.1. Development of viral marketing actions that enable the brand to be better recognised 7.1.6.2. Creation of an institutional portal suited to the new needs of positioning and information for the visitor 7.1.6.3. Social media management 7.1.6.4. Development of applications for mobile devices 7.1.6.5. Emerging technologies 7.1.6.6. Generation, updating and immediacy in disseminating the information 7.1.7.7. Analysis and feedback of the information. Monitoring and managing the on-line reputation of Asturias as a tourist destination						
	7.1.7. Development of loyalty programmes							



Strategic Pillar II: Positioning of the Tourist Destination

	ACTIONS		INTERVENTIONS	INDICATORS	AGENTS INVOLVED	TOOLS USED	PLANNED	EXECUTED	
8.1 Strategies of positioning in the market	8.1.1. Promotions campaigns to increase internal tourism		1. Regional campaign "Hoy salgo en casa, hoy salgo en Asturias" (Today I am going out at home, I am going out in Asturias)	- Campaigns launched by the government to promote internal tourism and hiking - Advertising actions: Number of advertising panels, number of micro-spaces on the radio, number of micro-spaces and spots on TV	- Government of the Principality of Asturias	- Television spots in the Principality of Asturias - On-line marketing actions - Radio slots - Press inserts	- Campaigns to increase internal tourism and hiking: 5 - Advertising actions: Number of advertising panels: 229. Number of micro-spaces on the radio: 116. Number of micro-spaces and spots on TV: 154	- Campaigns launched by the administration to promote internal tourism and hiking 7 - Advertising actions: Number of advertising panels: 229. Number of micro-spaces on the radio: 594. Number of micro-spaces and spots on TV: 220	
	8.1.2. Promotion of hiking								
9.1. Strategies of positioning in national market	9.1.1. Promotion campaigns in the main issuing markets		1. National campaign "Guardianes del Paraíso" (Guardians of Paradise) 2. National promotion campaign through means of transport: 3. Development of promotional actions in accordance with the different seasons	- Campaigns launched by the administration to promote national tourism - Advertising actions: Number of advertising panels, number of radio slots, number of television spots, number of inserts and reports in press and magazines, on-line marketing (impressions) Direct marketing (copies)	- Government of the Principality of Asturias - Mass media: radio and press	- Campaign on national radio stations - On-line campaign - Outdoor campaigns through digital screens or in buildings - Campaigns in national cinemas - Press inserts - On-line marketing actions - Use of banners on the Turismoasturias website and on the ALSA website - Actions on Social Media	- Campaigns launched by the administration to promote national tourism 9 - Advertising actions: Number of advertising panels: 465. Number of radio slots: 3,690. Number of television spots: 600. Number of inserts and reports in press and magazines: 64. On-line marketing (impressions): 39,135,000. Direct marketing (copies): 39,000. Spots on digital or cinema screens: 237,414	- Campaigns launched by the administration to promote national tourism 9 - Advertising actions: Number of advertising panels: 3,186. Number of radio slots: 4,690. Number of television spots: 644. Number of inserts and reports in press and magazines: 288. On-line marketing (impressions): 66,383,404. Direct marketing (copies): 39,000. Spots on digital or cinema screens: 237,414.	
	9.1.2. Promotion campaigns in secondary issuing markets								
	9.1.3. Development of promotional actions in accordance with the different seasons								
10.1 Strategies of positioning in international market	10.1.1. Marketing under international tourist brands		1. Action plans for promotion with Green Spain/España Verde 2. Action plan for promotion with the Silver Way/Vía de la Plata 3. International campaign	- Agreements on supra-national tourist brands - International campaigning actions	- Other countries (Finland, Sweden, Norway, Germany, Ireland, Austria, Budapest, France) - Other national cities (Badalona and Tarragona)	- Promotional action plan - International campaign: channels such as Youtube and Zoomin, promotional support on public transport and inserts in international magazines	- Agreements on supra-national tourist brands 6 International campaigning actions: 41	- Agreements on supra-national tourist brands 6 - International campaigning actions: 68	
	10.1.2. Positioning of the Asturias destination in Europe								
	10.1.3. Adapting of the marketing and communication strategies for specific markets and segments in international tourism								
	10.1.4. Establishment of cooperation networks with entities and institutions which allow access to more distant markets								
11.1. Positioning based on tourist types	11.1.1. Development of nature tourism in the rural environment	11.1.1.1. Promote rural tourism as a differential offer	1. Promotion of nature tourism 2. Promotion of cultural tourism 3. Promotion of gastronomic tourism 4. Promotion of urban and meetings tourism 5. Promotion of tourism on the coast and in seaside towns 6. Sporting activities and events	- Actions to promote nature tourism - Actions to promote cultural tourism - Actions to promote gastronomic tourism - Actions to promote tourism on the coast and in seaside towns - Actions to promote urban and meetings tourism, sporting activities and events	- Government of the Principality of Asturias - Other European countries - Media organisations - Other Autonomous Communities - Cycling Tour "La Vuelta"	- Themed fairs - Press trips, reports and articles in the media - Presentations - Business meetings - Collaboration agreements	- Actions to promote nature tourism: 19 - Actions to promote cultural tourism: 11 - Actions to promote gastronomic tourism: 15 - Actions to promote tourism on the coast and in seaside towns: 5 - Actions to promote urban and meetings tourism: 5 - Actions to promote urban and meetings tourism, sporting activities and events: 5	- Actions to promote nature tourism: 35 - Actions to promote cultural tourism: 28 - Actions to promote gastronomic tourism: 25 - Actions to promote tourism on the coast and in seaside towns: 8 - Actions to promote urban and meetings tourism: 11 - Actions to promote urban and meetings tourism, sporting activities and events: 7	
		11.1.1.2. Promotion of camping tourism							
		11.1.1.3. Promotion of active tourism							
	11.1.2. Promotion of cultural tourism	11.1.2.1. Cultural destination through prehistory, rock art and archaeological sites							
		11.1.2.2. Asturian pre-Romanesque art - World Heritage							
		11.1.2.3. Religious tourism							
		11.1.2.3. Cultural offer linked to the industrial heritage							
	11.1.3. Promotion of seaside tourism, seaside towns, coasts and beaches	11.1.2.4. Cultural events and programmes							
	11.1.4. Promotion of gastronomic tourism								
	11.1.5. Promotion of cities and events tourism	11.1.5.1. Business tourism: fairs, conferences, conventions and business days							
		11.1.5.2. Tourist focus on sporting activities and knowledge							

Strategic Pillar III: Competitiveness of the Tourism Supply

	ACTIONS	INTERVENTIONS	INDICATORS	AGENTS INVOLVED	TOOLS USED	PLANNED	EXECUTED
12.1. Management of the tourist company	12.1.1. Link to tourist companies in the generation of the experience	1. Digital platform management 2. Programme for the Management of the Tourist Quality Marks of the Principality of Asturias		- Government of the Principality of Asturias - Secretary of State for Tourism			
	12.1.2. Competitiveness through expanding the size and forms of business cooperation	- Design and development of a comprehensive plan - Development of the Programme for the Management of the Tourist Quality Marks 2014-2015	- Number of establishments certified or distinguished with quality marks from the Principality of Asturias "Casas Asturias", "Mesas de Asturias", "Aldeas-Asturias Calidad Rural"	- Tourist Quality Institute - Asturian regions in which these tourism quality models are implemented (Gijón, Llanes, Ribadesella, etc.)	- Themed offers advertised - SICTED committees - Training actions on SICTED - Meetings and working groups	- No. of establishments certified with quality marks from the Principality of Asturias: 471. By mark: "Casas Asturias": 153. "Mesas de Asturias": 124. "Aldeas-Asturias Calidad Rural": 128 - Companies certified under the Q quality standards 214 - Companies distinguished with the Comprehensive Tourist Destination Quality System (SICTED) 1,173	- Number of establishments certified or distinguished with quality marks from the Principality of Asturias 450. By mark: "Casas Asturias": 151. "Mesas de Asturias": 115. "Aldeas-Asturias Calidad Rural": 184 - Companies certified under the Q quality standards 175 - Companies distinguished with the Comprehensive Tourist Destination Quality System (SICTED) 1,141
	12.1.3. Development of relational marketing programmes and platforms	- Administrative processes - Creation of a new brand for the Cider Bars in the Principality of Asturias - "Casas Asturias" and "Mesas de Asturias" Quality Mark - "Aldeas, Asturias Calidad Rural" Guarantee Mark	- Companies certified under the Q quality standards - Companies distinguished with the Comprehensive Tourist Destination Quality System (SICTED)				
	12.1.4. The quality of companies as a competitive strategy	- Creation of a database for processing the results of the questionnaires.					
	12.1.5. Promotion of the incorporation of environmental management into companies	- Improvement Plan for the Tourist Quality Marks - Development of the Collaboration Agreement between the Ministry of Industry, Energy and Tourism and the Ministry of Economy and Employment of the Principality of Asturias in matters of Tourist Quality, 2013-2017					
13.1. Strengthening and development of tourist knowledge	13.1.1. Training actions		- Number of scheduled marketing training courses - Number of scheduled ICT training courses - Actions to support tourist knowledge and research	- Government of the Principality of Asturias - Public Employment Service	- Training actions and courses - Credit awarded: €8,508,864.61 - Tools for analysing the results of statistical data - 2014 demand questionnaire - Monthly reports on the survey regarding occupancy of hotel and non-hotel accommodation - Quarterly Situation bulletins - Two studies on demand profiles. - Other reports	- Number of scheduled marketing training courses: 29 - Number of scheduled ICT training courses: 41 - Actions to support tourist knowledge and research 3 - Number of training courses scheduled by the Public Employment Service in the field of Hospitality and Tourism 75 - Number of companies participating in marketing training courses 1,134 - Number of companies participating in ICT training courses 829	- Number of scheduled marketing training courses: 15 - Number of scheduled ICT training courses: 26 - Actions to support tourist knowledge and research 4 - Number of training courses scheduled by the Public Employment Service in the field of Hospitality and Tourism: 100 - Number of companies participating in marketing training courses: 1,527 - Number of companies participating in ICT training courses: 429
	13.1.2. Support for tourism knowledge and research	1. Training actions for improving the employability of young people under 30 and groups with greater difficulties in finding a job	- Number of training courses scheduled by the Public Employment Service in the field of Hospitality and Tourism - Number of companies participating in marketing training courses - Number of companies participating in ICT training courses	- Unemployed workers corresponding to business and trade union organisations - University of Oviedo - SITA			
14.1. Support to the product development from the private initiative	14.1.1. Product portfolio	1. The marketing website launched by the Principality of Asturias continues to add experiences, offers and breaks structured into themes	- Management of the digital platform "www.escapateasturias.com". Number of member tourist companies and travel agents - Number of breaks, by themes advertised: Nature, Culture, Golf, Gastronomy, Active Tourism, Health	- Government of the Principality of Asturias	- Product offer on the website	- Digital platform management "www.escapateasturias.com": 1,294 - Number of breaks: 329. By themes advertised: Nature: 184. Culture: 130. Golf: 116. Gastronomy: 198. Active tourism: 120. Health: 107	- Management of the digital platform "www.escapateasturias.com": 1,444. - Number of breaks: 356. By themes advertised: Nature: 261. Culture: 112. Golf: 20. Gastronomy: 152. Active tourism: 117. Health: 70.

2.3 Contribution and importance of tourism in the region

According to the **Economic and Social Council of the Principality of Asturias**³, the Asturian economy experienced slight growth of 0.8% in 2014 after several consecutive years of decline (-2.5% in 2013).

The **GDP per capita** (€20,334) increased by 1.5% compared to the previous year, at 89.3% of the national value. Despite this, during the last economic period (2008-2014) there was a cumulative fall of 9% which moved it away from the Spanish average.

The **service sector**, compared to the primary, industrial and construction sectors, **experienced the most growth**, contributing greatly to the regional economy.

Tourism has become the key driver of progress and the strategic axis for diversification and socio-economic expansion at a national level. It is one of the main players in national trade and also represents one of the greatest sources of income for most Spanish communities.

In **2015** Asturias received a total of **2,086,754 visitors**, 9.5% more than in 2014, which is also a record since the figure of 1,995,898 visitors reached in 2007. It should be noted that there has also been growth in the number of overnight stays in the autonomous community compared to 2014, this growth being 10.8% and a total of 4,909,400.

With regard to **employment in Asturias**, tourism contributed **40,724 jobs in 2015**, representing 11.06% of total employment in the Principality. This is also **a growth of 7,262 jobs compared to 2014**.

TOURIST EMPLOYMENT	Direct effects	Indirect effects	Included effects	Total effects	Asturias EMPLOYMENT
2015 Employment	27,163	8,362	5,199	40,724	368,149 *
Contribution to employment	7.38%	2.27%	1.41%	11.06%	
2014 Employment	22,290	6,888	4,284	33,462	357,514**
Contribution to employment	6.23%	1.93%	1.20%	9.36%	
2013 Employment	20,243	6,262	3,886	30,391	354,543**
Contribution to employment	5.71%	1.77%	1.10%	8.57%	

Source: SITA

* Asturias employment data in 2015 is an estimate made from an econometric model, using those paying Social Security as an explanatory variable.

** Tourism employment data in Asturias in 2014 and 2013, published by SADEI in its last update on 24-08-2015 Employment: Estimated number of work positions in Asturias within each branch of economic activity and distributed across the 78 districts of the autonomous community.

- The impact model uses the Input-Output Tables on the Asturian economy for 2010, published in December 2013 - SADEI.

³ Economic and Social Situation of Asturias (Economic and Social Council of the Principality of Asturias-CSPA, 2014)

The **total expenditure** of tourists staying in collective accommodation, per person and trip in 2015, is €447.88 on average, with an average expenditure per person per day of €81.80. In terms of the tourists staying in private establishments, the average expenditure per person and trip is €407.71, which represents an increase of €34.10 compared to 2014. As for hikers, there was a slight reduction compared to the figures from 2014, with a daily average expenditure per person of €33.66 in 2015, compared to €35.64 in 2014.

Based on the quantification of the number of visitors and their average expenditure, it is estimated that the Total Tourist Expenditure has grown by 19.8% (taking into account the expenditure of visitors staying in collective, private and hiking establishments) compared to 2014.

In 2015, **tourism GVA⁴ was €1,928,319 thousand**, with tourism's contribution to the GVA of the Asturian economy being **9.83%**, taking into account the direct, indirect and induced effects. This compares to 8.39% in 2014.

Tourist GVA	Direct effects	Indirect effects	Induced effects	Total effects	Asturias GVA
2015 GVA	1,177,487	474,308	276,524	1,928,319	19,609,871
Contribution to the GVA	6.00%	2.42%	1.41%	9.83%	
2014 GVA	969,449	391,262	228,082	1,588,793	18,938,802
Contribution to the GVA	5.12%	2.07%	1.20%	8.39%	
2013 GVA	881,206	354,983	206,934	1,443,123	18,911,437
Contribution to the GVA	4.66%	1.88%	1.09%	7.63%	

Source: SITA

Gross Value Added (GVA)⁵:

Calculated as the difference between the value of the production and operating expenses other than those for resale (purchases of raw materials, other supplies and expenses in outsourcing services), deducting the taxes linked to production and adding the operating subsidies.

2.4 International context, changes to the tourism models and adaptation by the destination and sector to these changes

2.4.1. International and European context

The **World Tourism Organisation, UNWTO**, in its annual report "*Panorama of International Tourism*" from 2015, sets out the current tourism trends and makes a forecast up to 2030.

⁴ Scorecard of general indicators of tourist activity (Government of the Principality of Asturias, 2015).

⁵ Definition of GVA, (National Statistics Institute, 2016). www.ine.es

The future forecasts and trends for the tourism sector shown by the UNWTO in this report and which are included in **Tourism Towards 2030** are:

- International tourism arrivals will grow annually by 3.3% from 2010 until 2030, standing at 1,400 and 1.8 billion in each of these years respectively.
- The growth of arrivals to emerging destinations will be twice that of arrivals to other established destinations, +4.4% and +2.2% per year respectively.
- Market shares will grow in **emerging destinations such as Asia, the Pacific, the Middle East and Africa** and 57% of international tourist arrivals will be to emerging economy destinations.
- The more established destinations, such as **Europe and the Americas**, will experience a decline in their market share, in contrast to the growth of emerging destinations. It is expected that 43% of arrivals will be to these more veteran destinations.

What stands out is that the trend for tourism, the world's most powerful economic sector, is that it will **continue growing in terms of the number of tourist destinations, sector revenue, the creation of companies and generation of employment.**

This growth will be more palpable in **emerging tourist destinations such as Asia, the Pacific, and the Middle East**, which will have the largest market share and will therefore receive more international tourists. The more established destinations such as **North America and Northern Europe** will see a **decline in their growth.**

One remarkable fact is that in 1925 the UNWTO recorded a total of 25 million international tourists, but by 2012 this figure had risen to 1 billion. Taking into account these figures, the UNWTO has made a forecast for 2030 and **has calculated that the number of tourists in 2030 will reach 1.8 billion worldwide.**



Taking a look at the sector from the European Union's perspective, a mention must be given to its **Horizon 2020 Framework Programme** (H2020) which is being executed over the 2014-2020 period.

This programme aims to launch strategies linked to research and innovation, and in this way increase the competitiveness of Europe. It has a budget of €76.88 billion.

The three essential pillars on which H2020 is based are:

- Generation of excellent science
- Creation of industrial leadership
- Addressing societal challenges

Through H2020, the EU wants to promote the scientific, technological and business leadership of science, technology and innovation, seeking the involvement of institutions and companies in the initiatives and programmes developed by the European Union.

Within the **framework of H2020** we find the **tourist sector trends** and these can be summarised as follows:

- According to the Economist Intelligence Unit, **Spain will grow by 2.4% on average to 2020**, which is a higher growth rate than seen by the United Kingdom, Germany and France, the main tourist issuing markets.
- **New tourist destinations will appear in emerging economies**, intensifying the globalisation of tourism.
- The growth of **destinations in emerging economies** will make it more difficult to differentiate the supply.
- With **investment through European funds**, the free movement of citizens in Europe and **political stability**, there will be a strengthening of the issuance of tourists to established European destinations.
- The **demographic trend for the population to live in urban environments** will create new and greater challenges for the managers of destinations, as they will have to consider the needs of both the inhabitants and the tourists.
- The **ageing of the population and consolidation of the middle class** in the emerging economies will mean that the tourism product and destination will have to adapt to this type of customer.
- The **influence of environmental trends** will mean that the companies in the sector, as those mainly responsible for properly preserving the environment and efficiently using resources, will be involved in reducing their energy consumption and being more efficient. The demand will also require this environmental, economic and social sustainability.
- **Technological development and the appearance of a new consumer profile** will require changes to how the sector is marketed and a constant reinvention of the tourism product.

Tourism is the **third largest economic sector in the European Union** so, due to its importance, it has a high impact on economic growth, employment and the development of society.

In this regard, the EU offers an extensive range of aid programmes that meet the needs of the tourist sector. Highlighted among these programmes are the following:

A. European Regional Development Fund (ERDF), in which the "themed objectives and investment priorities" that are in line with the priorities of the 2020 European policy and that most interest the sector are as follows:

- Research and innovation
- Information and communication technologies
- Competitiveness of small and medium sized companies
- Move to becoming a low carbon economy

- Environmental protection and resource efficiency
- Employment and support for labour mobility
- Education, skills and lifelong learning

B. European Social Fund (ESF), whose objective is to improve employment mobility as well as the professional qualification level of the EU. The tourism-related actions that may obtain funding are:

- Training of workers with a view to helping companies that are undergoing a restructuring or lack skilled employees.
- Training of workers who are going through a difficult situation, or more disadvantaged groups, so that they improve their skills and have access to better jobs.
- Support for mutual learning through networks which expand and promote best practices and methodologies in the field of social innovation.

C. European Agricultural Fund for Rural Development (EAFRD), whose objective is to promote the economic development of rural areas. The tourism related actions that may obtain funding are:

- Vocational training and acquisition of skills actions, demonstration activities and informative actions.
- Advisory services to help farmers, forest owners and other forest managers, as well as SMEs in rural areas, improve their economic performance.
- Help to create companies, investments in non-agricultural activities in rural areas, such as accommodation, shops, restaurants and guided tours.
- Drafting and updating of plans for the development of municipalities and towns in rural areas.
- Investments for the public use of recreational infrastructures, tourist information and small-scale tourist infrastructures.
- Studies and investments related to the maintenance, restoration and updating of the cultural and natural heritage of towns, rural landscapes and sites of great natural value, as well as environmental awareness actions.
- Cooperation projects between at least two entities such as the creation of clusters and networks, cooperation between small operators to organise common processes and share facilities and resources, as well as the organisation and/or marketing of tourist services relating to rural tourism.

D. European Maritime and Fisheries Fund (EMFF). The priorities of these funds are to increase employment and territorial cohesion in coastal and inland communities that rely on fishing and aquaculture. Highlights among the actions in the tourist sector that may be financed from these funds are the following:



- Studies
- Pilot and cooperation projects
- Conferences, seminars and workshops
- Public information that enables the sharing of best practices, awareness campaigns and communication and dissemination activities such as advertising campaigns, various acts, website development and maintenance, etc.
- Vocational training, lifelong learning and acquisition of new professional skills that enable professionals from the fishing sector or their partners to perform tourist activities or carry out complementary activities in the tourist field.

E. LIFE, as a financial instrument to support environmental and nature conservation instruments in the EU. Within LIFE, the tourist actions that may obtain financing are those included in the so-called "Traditional Projects" and may be:

- Pilot projects which assess the effectiveness of a new method or approach used in a different context, and compare the results with those obtained with best practices.
- Demonstration projects which test and assess a new method/approach used in a different context and inform the interested parties of the results
- Best practice projects which apply adapted, profitable and cutting-edge techniques, methods and approaches.
- Information, awareness and dissemination projects which focus on one of the priority areas

F. Horizon 2020, forming part of the already discussed EU Framework Programme for Research and Innovation (2014-2020), formed by two pillars: The most interesting sections for the sector are "*Excellent Science*", "*Industrial Leadership*", "*Societal Challenges*", "*SME Instrument*":

- "*Excellent science*": for the professional development and training of researchers, through geographical mobility and between sectors.
- "*Industrial Leadership*": to achieve greater competitiveness in the European cultural and creative sectors through stimulation of the ICTs used in SMEs.
- "*Societal Challenges*": which deals with identity, tolerance and the cultural heritage.
- "*SME Instrument*": supports the technical and commercial assessment of an innovative concept, as well as the development of a business plan. The SME instrument may support development and demonstration stages if the viability study concludes that it has potential but requires financing. This instrument may also facilitate access to risk financing.

The type of tourist actions that may be financed are:

- **MSCA: "Marie Skłodowska-Curie Actions" funds**, both individual fellowships and innovative training networks and exchanges of research and innovation staff.
- **LEIT**: programme that finances "Innovative actions" and "Coordination and support actions" of interest for the tourist sector. The "innovative actions" should develop ICT-based products, tools, applications and services for the cultural and creative sector; the "coordination and support actions" are focused on activities to disseminate results and promote innovation driven by ICT.
- **Reflective Societies**: programme that finances "research and innovation actions" and "coordination and support actions" for the transmission of European cultural heritage.

G. COSME, EU programme for the competitiveness of companies and SMEs, whose objective is to support companies in the areas of access to finance, improved access to markets, improved competitiveness and sustainability framework conditions for companies and promotion of business initiative and culture. The **type of tourist actions** that may be financed are:

- **Financing**: transaction or investment useful for the development of the legitimate activities of SMEs
- **Tourist Action Plan**: to achieve the development and/or promotion of sustainable, transnational themed tourism products; development and/or promotion of specialised products that take advantage of the synergies between tourism and the creative industries at the European level; transnational public-private collaboration for the development of tourism products aimed at specific age groups; programmes capable of generating capacity through which destination managers, entrepreneurs, etc. can learn from successful operators and create synergies with other operators in the supply chain, exploring new market opportunities and ways of doing business.
- **Erasmus for young entrepreneurs (EYE)**

2.4.2. National context

In the sector diagnosis set out in the **2012-2015 Comprehensive National Tourism Plan**, it is concluded that the tourist sector must innovate and focus that innovation on the customer, suggesting that the tourist destinations that fail to do so will see a fall in their ranking in the market.

This innovation includes the **creation of new business management models**, the creation of new forms of communication and a search for customer welfare in its broad sense, focusing especially on health and the customer-environment relationship.

In this line and with that approach, the **Horizon 2020 Spanish Tourism Plan** contains the trends and challenges for the tourism sector in Spain.

The aim with this Spanish Tourism Plan is to achieve a more competitive and sustainable Spanish tourist system that also contributes the greatest social welfare to the population. It contains the measures that drive the sector and the competitiveness of companies during the 2012-2015 period.

The **Challenges for the Spanish Tourist System**, focused on strengthening competitiveness and overcoming the current challenges are:

- 1- To improve the methodologies and tools supporting tourist planning and their transfer to land and urban planning.
- 2- To adapt the design, development and marketing of the tourism products of the new emerging destinations to new trends.
- 3- To adapt the management and marketing systems of tourist companies to the needs of the new environment.
- 4- To improve the presence in distant markets and valuable segments in the European markets.
- 5- To establish a retention and loyalty strategy for the current demand, especially among the Spanish.
- 6- To break the strong seasonality of tourist flows
- 7- To adapt the human resources management model to improve the ability to attract and retain talent.
- 8- To improve the competitive environment.

Other **challenges** identified in the plan are related to the **tourism product** and are focused on achieving a better managed tourism product in terms of its marketing through marketing channels, adapted to the new customer segments, differentiated and with more variety and quantity.

In short, the **Horizon 2020 Spanish Tourism Plan** wants Spain to continue being a global leader in the sector and to contribute to generating wealth, employment and citizen welfare.

Global phenomena have emerged in recent times **that have created new ways of doing tourism and new customer segments**, highlights among which are:

- **HEALTH OR WELFARE TOURISM:** through this experience the user seeks to receive services related to health and welfare in its broadest sense in a country other than the one in which they reside.
- **SHOPPING TOURISM:** the user, as part of their travelling experience, seeks a further component which is to shop, this being either their main motivation or an essential activity to perform at the destination.
- **GASTRONOMIC TOURISM:** in this case the user wants, as part of their experience, to try the cuisine of the destination, or perform any activity related to gastronomy. In this case, the essential feature of the trip is the gastronomic offer of the destination.

These tourist experiences have contributed to revitalising and diversifying the supply, and therefore to stimulating economic development and creating new tourist destinations.

2.5 Forecast evolution at a global, national and regional level that could significantly affect the tourism model.

According to the **European Commission**, some of the challenges faced by tourism over the coming years are⁶:

- An increase in demand from an increasingly demanding society.
- The appearance of new emerging destinations, leading to increased competition.
- The increasing use of Information and Communication Technologies (ICT).
- The search for constant differentiation and innovation.
- The cohesion of public and private authorities in advancing in the sector.
- Improved internal business quality with sustainability projects (Corporate Social Responsibility and Business Social Responsibility).

Consequently, there is great potential for further expansion over the coming decades. According to the Horizon 2020⁷ European project, **three clear priorities** are necessary:



⁶ Europe, the world's Nr. 1 tourist destination - a new political framework for tourism (European Commission, 2010)

⁷ Horizon 2020 (European Union, 2014)



According to Turespaña, reference is made in its Horizon 2020 report to the **trends that must be addressed by the tourist sector for socio-economic development with a forecast duration of 10 years**, which refers to the following issues⁸:

- Increased international competition.
- Increase in new types of customers in traditional markets and opportunities to capture new markets.
- Creation of environmental trends based on the objective of mitigating climate change.
- Technological development that will shape the marketing method and configuration of tourism products.
- A constantly changing environment in which the creation of new tourism products as well as the capture of new issuing and receiving tourism markets will be priority.

⁸ Spanish Tourism Plan. Horizon 2020 (TURESPAÑA, 2007)



3

Analysis of the supply

3. ANALYSIS OF THE SUPPLY

3.1 Analysis of the primary tourist resources in the Principality of Asturias

Asturias is an established destination that combines diverse attractions, included among which are: a landscape full of contrasts, an ancient culture and a gastronomy forming part of its identity. As part of Green Spain, it shares values with other regions in the north-west of the country, although it has its own unique tourist resources that create their own competitive advantages.

Below is a description of the primary tourist resources in the Principality of Asturias, strongly influenced by its landscape, geographical location and diversity.

3.1.1 Primary natural tourist resources

Due to its landscape and environmental values, the supply of primary tourist resources offered to us by the region is highly varied.

Asturias has been a **pioneer in protecting natural areas since 1918**, when the **first Spanish National Park** was declared in this region, the **Covadonga Mountain in the Picos de Europa**⁹. It also stands out for being a region with flora and fauna species not found anywhere else in the world.

The environmental policy¹⁰ of the community is regulated by Decree 28/1994, of 19 May, approving the **Natural Resources of the Principality of Asturias Management Plan (PORN)**, Law 42/2007, of 13 December, on Natural Heritage and Biodiversity in Asturias and Autonomous Law 5/91 on the Protection of Natural Areas.

The figures available in the latest report published by SITA, corresponding to 2015, indicate that **the wealth of the natural environment is the second ranked reason for visiting and what visitors like most is still the landscape, environment and atmosphere in the community**. Due to all of the above, the responsible and sustainable use of this type of resource must be preserved and enhanced, as it is one of the most important elements of Asturian tourism.

Shown in the following tables are the **main natural resources** of the community, to which the many areas belonging to the **Natura 2000 Network**, both Places of Community Interest and Special Areas of Conservation, need to be added. Below are the areas forming part of the **Regional Network of Protected Natural Areas in Asturias, the Biosphere Reserves and the Areas from the Natura 2000 Network (Special Areas of Conservation (SAC), Special Protection Areas for Birds (SPA) and Wetlands of International Importance (Ramsar Agreement)**, as well as the Asturian beaches that have been awarded the **Blue Flag in 2016**:

⁹ The physical variety of the Asturian geographical area (I.E.S Rey Pelayo)

¹⁰ Regional Network of Protected Natural Areas in Asturias (RRENPA) (Government of the Principality of Asturias, 2016)

PROTECTED AREA	MUNICIPALITIES
Picos de Europa National Park	Amieva, Cangas de Onís, Cabrales, Onís Peñamallera Alta and Peñamallera Baja
Fuentes del Narcea, Degaña e Ibias Nature Park	Cangas de Narcea, Degaña and Ibias
Somiedo Nature Park	Somiedo
Las Ubiñas-La Mesa Nature Park	Lena, Quirós and Teverga
Redes Nature Park	Caso and Sobrescobio
Ponga Nature Park	Ponga
Muniellos Nature Reserve	Cangas del Narcea and Ibias
Barayo Partial Nature Reserve	Navia and Valdés
Cueva Rosa Partial Nature Reserve	Ribadesella
Las Caldas Cave Partial Nature Reserve	Oviedo
Llovíu Cave Partial Nature Reserve	Villaviciosa
Sidrón Cave Partial Nature Reserve	Piloña
Villaviciosa Estuary Partial Nature Reserve	Villaviciosa
Peloño Partial Nature Reserve (undeclared)	Ponga
Eo Estuary Partial Nature Reserve (undeclared)	Castropol and Vegadeo
Cueto de Arbás Partial Nature Reserve (undeclared)	Cangas del Narcea
Peñas Cape Protected Landscape	Gozón
Cuencas Mineras Protected Landscape	Langreo, Laviana, Mieres and San Martín del Rey Aurelio
Protected Landscape of the West Coast (undeclared)	Valdés and Cudillero
Protected Landscape of the East Coast (undeclared)	Llanes and Ribadedeva
Esva Basin Protected Landscape (undeclared)	Valdés, Tineo and Salas
Sierra del Aramo Protected Landscape (undeclared)	Quirós, Riosa and Morcín
Sierra del Suevo Protected Landscape (undeclared)	Colunga, Caravia, Ribadesella, Parres and Piloña
Sierras de Carondio y Valledor Protected Landscape (undeclared)	Allande, Grandas de Salime and Villayón
Sierra del Cuera Protected Landscape (undeclared)	Cabrales, Llanes, Peñamallera Alta, Peñamallera Alta, Ribadedeva
Pico Caldoveiro Protected Landscape (undeclared)	Proaza, Yernes y Tameza, Grado and Teverga
Alcornocal de Boxo Natural Monument	Allande
Bufón de Santiuste Natural Monument	Llanes
Bufones de Arenillas Natural Monument	Llanes
Carbayera de El Tragamón Natural Monument	Gijón
Carbayón de Lavandera Natural Monument	Gijón
Carbayón de Valentín Natural Monument	Tineo
Cascadas de Oneta Natural Monument	Villayón
Charca de Zeluán and Ensenada de Llodero Natural Monument	Avilés and Gozón
Complejo de Cobijeru Natural Monument	Llanes
Lacustre de Somiedo Natural Monument Site	Somiedo
Deboyu Cave Natural Monument	Caso
Huerta Cave Natural Monument	Teverga
Andina Caves Natural Monument	El Franco
Desfiladero de las Xanas Natural Monument	Santo Adriano, Quirós and Proaza
Entrepeños and Vega Beach Natural Monument	Ribadesella
Foces de El Pino Natural Monument	Aller
Hoces del Esva Natural Monument	Valdés
Isla La Deva y Playón de Bayas Natural Monument	Soto del Barco and Castrillón

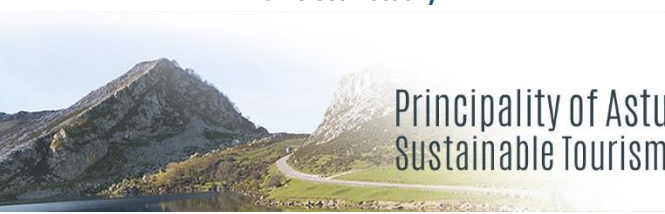


Los Meandros del Nora Natural Monument	<i>Oviedo and Las Regueras</i>
Frexulfe Beach Natural Monument	<i>Navia</i>
Gulpiyuri Beach Natural Monument	<i>Llanes</i>
Penarronda Beach Natural Monument	<i>Castropol and Tapia de Casariego</i>
El Espartal Beach Natural Monument	<i>Castrillón</i>
Puertos de Marabio Natural Monument	<i>Yernes and Tameza, Teverga and Proaza</i>
Red de Toneyu Natural Monument	<i>Amievo</i>
Ruta del Alba Natural Monument	<i>Sobrescobio</i>
Saucedas de Buelles Natural Monument	<i>Peñamallera Baja</i>
Sistema del Jitu Natural Monument	<i>Onís</i>
Sistema del Trave Natural Monument	<i>Cabrales</i>
Tabayón de Mongayo Natural Monument	<i>Caso</i>
Tejo de Bermiego Natural Monument	<i>Quirós</i>
Tejo de Pastur Natural Monument	<i>Illano</i>
Tejo de Salas Natural Monument	<i>Salas</i>
Tejo de Santa Coloma Natural Monument	<i>Allande</i>
Tejo de Santibañez de la Fuente Natural Monument	<i>Aller</i>
Tejo de Lago Natural Monument	<i>Allande</i>
Torca de Urriellu Natural Monument	<i>Cabrales</i>
Turbera de las Dueñas Natural Monument	<i>Cudillero</i>
Ichnites of Asturias Natural Monument	<i>Gijón, Villaviciosa, Colunga and Ribadesella.</i>

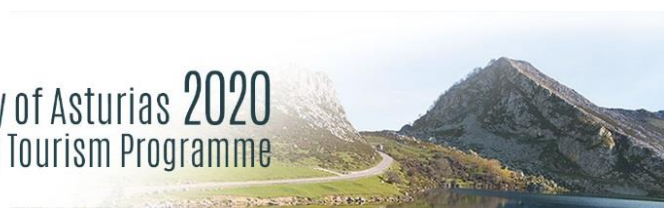
Source: Own development based on technical sheets from the Regional Network of Protected Natural Areas in Asturias (RRENPA)

BIOSPHERE RESERVES	MUNICIPALITIES
Río Eo, Oscos y Terras de Burón	<i>Castropol, Taramundi, San Tirso de Abres, Vegadeo, San Martín de Oscos, Santa Eulalia de Oscos and Villanueva de Oscos</i>
Picos de Europa	<i>Amieva, Cangas de Onís, Onís, Cabrales, Peñamallera alta and Peñamallera baja</i>
Las Ubiñas – La Mesa	<i>Lena, Quirós and Teverga</i>
Redes	<i>Caso and Sobrescobio</i>
Muniellos	<i>Cangas de Narcea, Degaña and Ibias</i>
Somiedo	<i>Somiedo</i>

NATURA 2000 NETWORK AREAS: SPECIAL AREAS OF CONSERVATION (SAC)	MUNICIPALITIES
Somiedo	<i>Somiedo</i>
Fuentes del Narcea, Degaña and Ibias	<i>Cangas del Narcea, Degaña and Ibias</i>
Penarronda - Barayo	<i>Castropol, Coaña, El Franco, Navia, Tapia de Casariego and Valdés</i>
Busto – Luanco Cape	<i>Avilés, Castrillón, Gozón, Muros del Nalón, Pravia, Soto del Barco and Valdés</i>
Ribadesella Estuary - Tinamayor Estuary	<i>Llanes, Ribadesella and Ribadedeva</i>
Picos de Europa (Asturias)	<i>Amieva, Cabrales, Cangas de Onís, Onís, Peñamallera Alta and Peñamallera Baja</i>
Muniellos	<i>Cangas del Narcea and Ibias</i>
Villaviciosa Estuary	<i>Villaviciosa</i>



Cueva Rosa	<i>Ribadesella</i>
Redes	<i>Caso and Sobrescobio</i>
Ponga - Amieva	<i>Amieva and Ponga</i>
Montovo - La Mesa	<i>Belmonte de Miranda, Grado, Quirós, Teverga and Tineo</i>
Peña Ubiña	<i>Lena, Quirós and Teverga</i>
Caldoveiro	<i>Grado, Proaza, Teverga y Yernes and Tameza</i>
Sierra de los Lagos	<i>Allande and Cangas del Narcea</i>
Eo Estuary	<i>Castropol and Vegadeo</i>
Vega Beach	<i>Ribadesella</i>
Eo River (Asturias)	<i>San Tirso de Abres and Vegadeo</i>
Porcía River	<i>El Franco and Tapia de Casariego</i>
Navia River	<i>Coaña, Navia and Villayón</i>
Negro River	<i>Valdés</i>
Esva River	<i>Tineo and Valdés</i>
Esqueiro River	<i>Cudillero</i>
Nalón River	<i>Candamo, Grado, Las Regueras, Oviedo, Pravia and Ribera de Arriba</i>
Narcea River	<i>Belmonte de Miranda, Pravia and Salas</i>
Pigüña River	<i>Belmonte de Miranda</i>
Sella River	<i>Amieva, Cangas de Onís, Onís, Parres, Piloña and Ribadesella</i>
Las Cabras - Bedón River	<i>Llanes</i>
Purón River	<i>Llanes</i>
Cares - Deva River	<i>Cabrales, Peñamellera Alta, Peñamellera Baja and Ribadedeva</i>
Alcornocales del Navia	<i>Allande, Illano and Pesoz</i>
Aller-Lena	<i>Aller and Lena</i>
Carbayera de El Tragamón	<i>Gijón</i>
Cuencas Mineras	<i>Langreo, Laviana, Mieres and San Martín del Rey Aurelio</i>
Meandros del Nora	<i>Las Regueras and Oviedo</i>
Peña Manteca-Genestaza	<i>Belmonte de Miranda, Cangas del Narcea and Tineo</i>
Sierra Plana de la Borbolla	<i>Llanes</i>
Sierra del Sueve	<i>Caravia, Colunga, Parres and Piloña</i>
Turbera de la Molina	<i>Salas and Tineo</i>
Turbera de Las Dueñas	<i>Cudillero</i>
Valgrande	<i>Lena</i>
Ichnite Sites	<i>Colunga, Gijón, Ribadesella and Villaviciosa</i>
Alto Navia	<i>Ibias</i>
Basin of the Agüeira	<i>Grandas de Salime, Pesoz, San Martín de Oscos, Santa Eulalia de Oscos and Villanueva de Oscos</i>
Basin of the Alto Narcea	<i>Cangas del Narcea and Tineo</i>
Ibias River	<i>Degaña and Ibias</i>
Trubia River	<i>Oviedo, Proaza and Santo Adriano</i>
Oro River	<i>Allande</i>
Negro and Aller Rivers	<i>Aller</i>



NATURA 2000 NETWORK AREAS: SPECIAL PROTECTION AREAS FOR BIRDS (SPA)	MUNICIPALITIES
Muniellos	<i>Cangas del Narcea and Ibias</i>
Picos de Europa (Asturias)	<i>Amieva, Cabrales, Cangas de Onís, Onís, Peñamellera Alta and Peñamellera Baja</i>
Somiedo	<i>Somiedo</i>
Fuentes del Narcea y del Ibias	<i>Cangas del Narcea, Degaña and Ibias</i>
Eo Estuary	<i>Castropol and Vegadeo</i>
Redes	<i>Caso and Sobrescobio</i>
Penarronda - Barayo	<i>Castropol, Coaña, El Franco, Navia, Tapia de Casariego and Valdés</i>
Ribadesella Estuary-Tinamayor Estuary	<i>Llanes, Ribadesella and Ribadedeva</i>
Ubiña-La Mesa	<i>Belmonte de Miranda, Grado, Lena, Proaza, Quirós, Teverga y Yernes and Tameza</i>
Ponga-Amieva	<i>Amieva and Ponga</i>
Busto-Luanco Cape	<i>Avilés, Castrillón, Gozón, Muros del Nalón, Pravia, Soto del Barco and Valdés</i>
Villaviciosa Estuary	<i>Villaviciosa</i>
Central reservoirs (San Andrés, la Granda, Trasona and la Furta)	<i>Corvera, Gijón and Gozón</i>

WETLANDS OF INTERNATIONAL IMPORTANCE (RAMSAR AGREEMENT)	COUNCILS
Eo Estuary	<i>Castropol and Vegadeo</i>
Villaviciosa Estuary	<i>Villaviciosa</i>

BLUE FLAG BEACHES 2016	COUNCILS
Arnao Beach	<i>Castropol</i>
Penarronda Beach	<i>Castropol-Tapia de Casariego</i>
Anguileiro Beach	<i>Tapia de Casariego</i>
Cadavedo Beach	<i>Valdés</i>
Salinas Beach	<i>Valdés</i>
Otur Beach	<i>Valdés</i>
Concha de Artedo Beach	<i>Cudillero</i>
Aguilar Beach	<i>Muros de Nalón</i>
Los Quebrantos Beach	<i>Soto del Barco</i>
San Juan de Nieva Beach	<i>Castrillon</i>
Salinas Beach	<i>Castrillón</i>
Luanco Beach	<i>Gozón</i>
La Ñora Beach	<i>Villaviciosa</i>
Rodiles Beach	<i>Villaviciosa</i>
Barro Beach	<i>Llanes</i>
Palombina Beach	<i>Llanes</i>
El Sablón Beach	<i>Llanes</i>
Toró Beach	<i>Llanes</i>

During the consultation of the Asturian tourist sector for the drawing up of the Sustainable Tourism Programme, its opinion was sought on the resources and experiences related to the community's most noteworthy or distinctive natural assets. Below are the unique resources and experiences identified by the sector itself:

- The **observation of native flora and fauna**, with the highlights being bears, wolves and multiple birds (ornithological tourism).
- **Howling**.
- **Hunting and fishing**, especially that linked to salmon in the Eo River.
- **Hiking and other nature-related sports**, either on land, sea or in the air (highlights are canoeing, kayaking, surfing, mountaineering, skiing, caving, etc.)
- **Astronomy**.
- **Eco-tourism** and **agro-tourism** activities.
- **Geological tourism** activities.

Finally, it is worth mentioning the **strong link existing** in the perception of the sector in terms of the **natural values** found in the **brand image** of Asturias, Natural Paradise.

Some of the **values associated with the brand image**, that are related to nature, are: **tranquillity, oxygen, pure air, landscape, landscape diversity, ecology, paradise, beach, mountain, civil population, rain, water, clouds, green**.

3.1.2 Primary cultural tourist resources

The **cultural and historic wealth** of the community is very extensive and visitors are increasingly travelling to Asturias as a result of its cultural offering.

Discovering places of interest, monuments or historical sites is linked to immersion in the natural and cultural history, with knowledge of the arts, philosophy, the habits and customs of the different peoples in Asturias, with intangible heritage, ethnography, folklore, literature, festivals, art, cultural events, etc.

The following tables set out the community's cultural supply and include primary tourist resources of great importance, such as the historical sites of the pre-Romanesque culture, the monuments declared World Heritage by UNESCO, rock art, and museums and other cultural areas of tourist interest that are currently promoted by Sociedad Pública de Gestión y Promoción Turística y Cultural del Principado de Asturias S.A.U. The Principality of Asturias also especially stands out for its history linked to industry, so they also contain the community's main tourist resources linked to industrial tourism:

RESOURCES DECLARED WORLD HERITAGE BY UNESCO	MUNICIPALITY
Rock art: Covaciella Cave	<i>Cabrales</i>
Rock art: Llonín Cave	<i>Peñamellera Alta</i>
Rock art: El Pindal Cave	<i>Ribadedeva</i>
Rock art: Tito Bustillo Cave	<i>Ribadesella</i>
Rock art: La Peña (Candamo) Cave	<i>Candamo</i>
Asturian pre-Romanesque: San Julián de los Prados Church	<i>Oviedo</i>
Asturian pre-Romanesque: San Miguel de Lillo Church	<i>Oviedo</i>
Asturian pre-Romanesque: Santa Cristina de Lena	<i>Lena</i>



Asturian pre-Romanesque: Santa María del Naranco	Oviedo
Asturian pre-Romanesque: La Foncalada	Oviedo
Asturian pre-Romanesque: Holy Chamber of Oviedo Cathedral	Oviedo
Original Way of St. James	Oviedo, Las Regueras, Grado, Salas, Tineo, Allande and Grandas de Salime.
Coastal Way of St. James and connections between both.	Ribadedeva, Llanes, Ribadesella, Colunga, Villaviciosa, Gijón, Carreño, Corvera de Asturias, Avilés, Castrillón, Soto del Barco, Muros de Nalón, Cudillero, Valdés, Navia, Coaña, El Franco, Castropol.

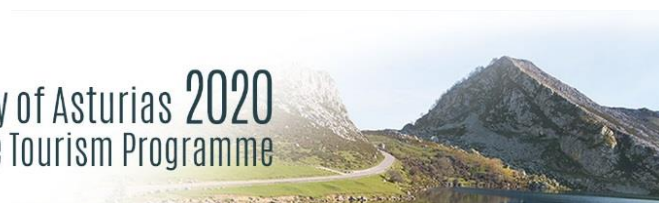
CULTURAL RESOURCES LINKED TO THE PRE-ROMANESQUE	MUNICIPALITY
San Andrés de Bedriñana	Villaviciosa
San Salvador de Priesca Church	Villaviciosa
San Salvador de Valdediós Church	Villaviciosa
Santa María de Arzabal	Villaviciosa
Holy Chamber	Oviedo
San Julián de los Prados Church	Oviedo
San Miguel de Lillo Church	Oviedo
San Tirso el Real Church	Oviedo
Santa María de Bendones Church	Oviedo
La Foncalada	Oviedo
Santa María del Naranco	Oviedo
Old Tower of San Salvador in Oviedo	Oviedo
San Pedro de Nora Church	Las Regueras
Santiago de Gobiendes Church	Colunga
Santo Adriano de Tuñón Church	Santo Adriano
Santa Cristina de Lena	Lena
Santianes de Pravia	Pravia

Source: Own development from www.prerromanicoasturiano.es

ROCK ART	MUNICIPALITY
La Peña (Candamo) Cave	Candamo
Fresnedo Rock Shelters	Teverga
Conde (Fornu) Cave	Santo Adriano
Demo Cave	Boal
Entrefoces Shelter	Morcín
Covaciella Cave	Cabrales
La Lluera Cave	Oviedo
Los Azules Cave	Cangas de Onís

El Pindal Cave	<i>Ribadedeva</i>
Tito Bustillo Cave	<i>Ribadesella</i>
Llonín Cave	<i>Peñamellera Alta</i>
Santo Adriano Rock Shelter	<i>Santo Adriano</i>
La Loja Cave	<i>Peñamellera Baja</i>
El Buxu Cave	<i>Cangas de Onís</i>

MUSEUMS AND CULTURAL AREAS OF TOURIST INTEREST	MUNICIPALITY
San Chuís Fortified Settlement	<i>Allande</i>
Megaliths of "El Padrún"	<i>Aller</i>
El Nido del Urogallo (The Grouse's Nest)	<i>Aller</i>
Carriona Cementary Interpretation Centre	<i>Avilés</i>
Niemeyer Centre	<i>Avilés</i>
Artistic historical site of Avilés	<i>Avilés</i>
Avilés Urban History Museum	<i>Avilés</i>
Educational Exhibition on Gold	<i>Belmonte de Miranda</i>
"La Casa del Lobo" Interpretation Centre	<i>Belmonte de Miranda</i>
Casa de les Radios	<i>Bimenes</i>
Ironwork Interpretation Centre	<i>Boal</i>
Bee-keeping House	<i>Boal</i>
Rozadas Ethnographic Collection	<i>Boal</i>
Pendia Fortified Settlement	<i>Boal</i>
Emigration and Public Instruction Interpretation Centre	<i>Boal</i>
Quesu Cave	<i>Cabrales</i>
House-Museum of Popular Asturian Ceramics	<i>Cabranes</i>
Rural School Museum of Asturias	<i>Cabranes</i>
La Peña Cave Interpretation Centre	<i>Candamo</i>
Dolmen of Santa Cruz	<i>Cangas de Onís</i>
Covadonga Museum	<i>Cangas de Onís</i>
Bridge over the Sella River (Roman bridge)	<i>Cangas de Onís</i>
Collegiate of Our Lady of Covadonga	<i>Cangas de Onís</i>
Pedro Pidal Visitors Centre	<i>Cangas de Onís</i>
Cangas Wine Museum	<i>Cangas del Narcea</i>
House of the Fuentes del Narcea, Degaña and Ibias Nature Park	<i>Cangas del Narcea</i>
Alejandro Casona Visitors Reception Centre	<i>Cangas del Narcea</i>
Muniellos Biological Reserve Interpretation Centre	<i>Cangas del Narcea</i>
Candás Sculpture Centre. Antón Museum	<i>Carreño</i>
Monte Areo Barrow Cemetery	<i>Carreño</i>
Permanent Exhibition of the Candás Canning Industry	<i>Carreño</i>
Nature Interpretation Centre of Redes	<i>Caso</i>
Bee-keeping Exhibition	<i>Caso</i>
Anchor Museum	<i>Castrillón</i>
Eo Estuary Interpretation Centre	<i>Castropol</i>



Mohías Fortified Settlement	Coaña
Coaña Fortified Settlement Educational Exhibition	Coaña
Coaña Fortified Settlement	Coaña
Asturias Jurassic Museum (MUJA)	Colunga
Sierra del Suevo Interpretation Centre	Colunga
Selgas Fagalde Foundation	Cudillero
Foundry Museum	El Franco
Veranes Roman Town	Gijón
Laboral City of Culture	Gijón
Campo Valdés Roman Baths	Gijón
Collegiate and Palace of Revillagigedo	Gijón
Museum of the Asturian People	Gijón
Nicanor Piñole Museum	Gijón
Laboral Centre of Art and Industrial Creation	Gijón
Gijón Aquarium	Gijón
Atlantic Botanical Garden	Gijón
Birthplace of Jovellanos	Gijón
Interpretation Centre for Cinema in Asturias (CICA)	Gijón
Juan Barjola Museum	Gijón
Archaeological-Nature Park of la Campa Torres	Gijón
Evaristo Valle Museum	Gijón
Real Sporting de Gijón Museum	Gijón
Medio Marino de Peñas Visitors Reception and Interpretation Centre	Gozón
Grado Ethnographic Museum	Grado
Petroglyphs of la Xorenga	Grandas de Salime
Grandas de Salime Ethnographic Museum	Grandas de Salime
Chao de Samartín Museum	Grandas de Salime
Chao Samartín	Grandas de Salime
La Palloza de Ibias Interpretation Centre	Ibias
Dolmen of Pradías	Ibias
Nature Exhibition for the Fuentes del Narcea, Degaña and Ibias Nature Park	Ibias
Dolmen of the Filadoira Stone	Illano
Castelón Ancient Mining Settlement	Illano
Langreo - Eduardo Úrculo Municipal Art Gallery	Langreo
"El Molín de la Chalana" Educational Exhibition	Laviana
Armando Palacio Valdés Interpretation Centre	Laviana
La Cobertoria Asturian pre-Romanesque Educational Exhibition	Lena
Fernando Alonso Museum and Circuit	Llanera
Llanes Marine Exhibition	Llanes
Eastern Asturias Ethnographic Museum	Llanes
Idol of Peña Tú Interpretation Exhibition	Llanes
Idol of Peña Tu	Llanes
Pozo Fortuna Interpretation Centre	Mieres
Gallegos Ethnographic Museum	Mieres
Benjamín Pumarada Museum of Local Customs ("La Panerona de Cenera")	Mieres
Pozo Espinos Interpretation Exhibition	Mieres
Loreda Railway Exhibition	Mieres
"Historias del Mar" (Stories from the Sea) Reception Centre	Navia

Juan Pérez Villamil Ethnographic Museum	Navia
Gamonéu Cheese Interpretation Centre	Onís
Glacial Fauna Interpretation Exhibition	Onís
Asturian pre-Romanesque Reception and Interpretation Centre	Oviedo
Monumental Area of Oviedo	
Asturias Archaeological Museum	Oviedo
Historical Archive of Asturias	Oviedo
Asturias Museum of Fine Arts	Oviedo
Old Hospice (Hotel de la Reconquista)	Oviedo
Church Museum	Oviedo
Oviedo Wall	Oviedo
La Loja Cave Educational Exhibition	Peñamellera Baja
Asturias Bowls Museum	Peñamellera Baja
Pesoz Ethnological Museum	Pesoz
The House of Time	Piloña
Santianes Pre-Romanesque Museum	Pravia
Quirós Ethnographic Museum	Quirós
San Emeterio and El Pindal Cave Interpretation Centre	Ribadedeva
Tito Bustillo Rock Art Centre	Ribadesella
Territory of Ribadesella Museum	Ribadesella
Raised Granary Interpretation Centre	Ribera de Arriba
San Martín de Salas Pre-Romanesque Museum	Salas
San Isidro Fortified Settlement	San Martín de Oscos
Casa del Marco. Museum of the Country House	San Martín de Oscos
Interpretation Centre of Fishing in the Eo River	San Tirso de Abres
Ethnographic Site of Mazonovo	Santa Eulalia de Oscos
Birthplace of Marqués de Sargadelos	Santa Eulalia de Oscos
Fortified Enclosure of Cortín dos Mouros	Santa Eulalia de Oscos
La Ponte Eco-Museum	Santo Adriano
Puppet Workshop Museum	Siero
Sobrescobio Water House	Sobrescobio
Somiedo Nature Park Reception and Interpretation Centre	Somiedo
Somiedo Eco-Museum	Somiedo
"Puerta del Mar" Nalón River Interpretation Centre	Soto del Barco
Los Señores de las Casas-Palacio (Lords of the Manor)	
Reception Centre	Tapia de Casariego
Bres Handicraft Centre	Taramundi
Cutlery Museum	Taramundi
Esquíos Ethnographic Museum	Taramundi
Teverga Prehistoric Park	Teverga
Forest Museum	Tineo
Sacred Art Museum	Tineo
Asturias Cowboy Museum	Tineo
Dolmen of Merillés	Tineo
Parque de la Vida	Valdés
Severo Ochoa Permanent Exhibition	Valdés
Bread Eco-museum	Villanueva de Oscos
"Refugio de la Arquitectura Desnuda" Architectural Interpretation Centre	Villanueva de Oscos
Villaviciosa Estuary Interpretation Centre	Villaviciosa



INDUSTRIAL HERITAGE	MUNICIPALITY
Wood Museum	<i>Caso</i>
Arnao Mining Museum	<i>Castrillón</i>
Asturias Railway Museum	<i>Gijón</i>
Asturias Maritime Museum	<i>Gozón</i>
Grandas de Salime Hydroelectric Power Station and Chute	<i>Grandas de Salime</i>
Asturias Iron and Steel Museum (MUSI)	<i>Langreo</i>
"Valle de Samuño" Mining Eco-Museum	<i>Langreo</i>
Mining Landscape of the Turón Valley	<i>Mieres</i>
Bustiello Mining Village Interpretation Centre	<i>Mieres</i>
Ethnographic Dairy Museum	<i>Morcín</i>
Cider Museum	<i>Nava</i>
Indian Archive Foundation - Emigration Museum	<i>Ribadedeva</i>
Mining and Industry Museum (MUMI)	<i>San Martín del Rey Aurelio</i>
Mining Memorial and Experiences Centre	<i>San Martín del Rey Aurelio</i>
Pozo Sotón (Mine)	<i>San Martín del Rey Aurelio</i>
Mazonovo Milling Museum	<i>Taramundi</i>
Os Teixois Ethnographic Site	<i>Taramundi</i>
Bres Water House	<i>Taramundi</i>
Asturias Gold Museum (MOA)	<i>Tineo</i>
El Gaitero Cider Factory	<i>Villaviciosa</i>

During the consultation of the Asturian tourist sector for the drawing up of the Sustainable Tourism Programme, its opinion was sought on the community's most noteworthy or distinctive cultural resources and experiences.

Below are the unique resources and experiences identified by the sector itself:

- Pre-Romanesque art.
- Traditional towns and architecture.
- Cosmopolitan cities (*especially Gijón and Oviedo*).
- Seaside towns (*Bustio, Candás, Castropol, Cudillero, Lastres, Llanes, Figueras, Gijón, Ortiguera, Navia, Luanco, Luarca, San Juan de la Arena, San Esteban de Pravia, Puerto de Vega, Ribadesella, Tazones, Viavélez, Tapia de Casariego*).
- The language.
- Folklore, traditional dance and music.
- Festivals of tourist interest.
- Museums and interpretation centres.
- Traditional professions and ethnographic heritage (*iron craftsmen, farmers and ranchers, bee-keepers, etc.*).
- Industrial heritage.
- Crafts.
- Caves and Roman mining.
- Rock art.
- Dinosaur footprints.
- The "Princess of Asturias" Awards.
- The Way of St. James.
- Spiritual and religious tourism: Covadonga.

Finally, it is worth mentioning the **strong link existing** in the perception of the sector in terms of the **values of its culture** found in the **brand image** of Asturias, Natural Paradise.

Some of the **values associated with the brand image** that are related to culture, are: **tradition, culture, authenticity, identity, heritage, peoples and civil population, myths and legends, hospitality, diversity.**

3.1.3 Primary gastronomic tourist resources

Asturias stands out for its gastronomic tradition and the fact that visitors rate this highly.

a. GASTRONOMIC PRODUCTS:

The quality of its products has led to recognitions such as **Protected Geographic Indication (PGI)** and **Designation of Origin (DO)**, which guarantee the consumer an optimum level of quality, a specific provenance and a preparation method that meets all the guarantees.

Products with **Protected Designation of Origin** and **Protected Geographic Indication**:

- **"Asturias Cider"¹¹ (PDO):** prepared from different varieties of cider apple, traditionally cultivated in the protected production area which comprises the **78 municipalities of the Principality of Asturias**. Three forms of cider can be found on the market: natural cider, natural pouring cider and sparkling cider.
- **"Faba Asturiana" (Bean Stew)¹² (PGI):** dry beans of the traditional "Granja Asturiana" variety, whose preparation, production and packaging area covers the lands and companies located in the territory of the autonomous community of the Principality of Asturias.
- **"Cabrales Cheese"¹³ (PDO):** this is the best known of the cheeses produced in Asturias, as well as being the most produced, most consumed and most used in cooking. The production area includes the Municipality of Cabrales and some towns in the Municipality of Peñamellera Alta. The Cabrales cheese festival, which is a **Festival of Tourist Interest**, takes place each year on the last Sunday in August.
- **"Afuega'l Pitu Cheese"¹⁴ (PDO):** This is one of the oldest and most commonly found cheeses in all of Asturias. The municipalities included in this area are: Morcín, Riosa, Santo Adriano, Grado, Salas, Pravia, Tineo, Belmonte, Cudillero, Candamo, Las Regueras, Muros del Nalón and Soto del Barco. A festival dedicated to this cheese is held annually in **La Foz de Morcín**.
- **"Gamonéu Cheese" (PDO)¹⁵:** There are two varieties: El Gamonedo del Puerto and El Gamonedo del Valle. Its festival is held in **Benia de Onís** during October.
- **"Casín Cheese"¹⁶ (PDO):** One of the oldest in Spain, it is produced in the municipalities of Caso, Sobrescobio and Piloña.

It is worth mentioning that as well as the 4 cheeses with PDO, in Asturias there are more than 40 types of cheese produced (Los Beyos, La Peña, Porrúa, Peñamellera, Taramundi, Buelles, Valle del Narcea, Panes, Caso, Ovín, Afuega'l Pitu, Pría, Valdesano, Varé, Los Oscos, Vidiago, Gamonéu, Cabrales and La Peral, etc.), so there is a very important culture linked to this product.

¹¹ Regulatory Cider Council of Asturias.

¹² Regulatory Council for the Protected Geographic Indication of "Faba Asturiana" or "Fabes de Asturias"

¹³ <http://www.fundacioncabrales.com/>

¹⁴ <http://www.doafuegalpitu.com/>

¹⁵ <http://www.quesogamonedo.com/>

¹⁶ www.dopquesocasin.es

- **“Chosco de Tineo”¹⁷(PGI):** this is a typical product from the area of south-west Asturias, a cured and smoked sausage in pig's intestine. This is the main dish at local festivals, especially during the winter.
- **“Ternera Asturiana” (Asturian Beef)¹⁸ (PGI):** this comes from animals of the two native breeds in the Principality: Asturiana de los Valles (“roxa”) and Asturiana de las Montaña (“casina”). The farmers breed their animals through a traditional handling system (natural calf suckling, grazing and fodder of natural foods).
- **“Cangas Protected Designation of Origin”¹⁹ (PDO):** Wine prepared in the south-west region of Asturias, there are two types: red and white.

As far as gastronomic products are concerned, beyond the official distinctions that guarantee their quality and link to their origin, there are other **highly representative and differentiating products from the Asturian culture**²⁰, such as, for example: **meats** (pig, hen, chicken, sheep, wild boar, roe deer, ibex, stag, etc.), **fish** (hake, tuna, squid, scorpion fish, red mullet, salmon, sea trout, trout, eel, etc.), **poultry** (woodcock, etc.), **seafood** (spider crab, small crab, crayfish, lobster, limpet, barnacle, clam, sea urchin, etc.), **sweets**, **cold meats** (“chosco”, “butiello”, “androya” chorizo, black pudding, “moscancia”, “sabadiago”, “fariñón de Carreño”, etc.), **soups**, **casseroles**, **pulses** (bean stew, “pote”, etc.), **honey** (from chestnut or heather, in Asturias there is a very deep-rooted honey culture), **mushrooms** (Asturias has almost 2,000 mushroom varieties), **cereals** (spelt flour or spelt wheat, etc.), etc.

b. **QUALITY MARKS AND GUARANTEE OF THE PRINCIPALITY: “Mesas de Asturias” and “Sidrerías de Asturias, Calidad Natural”:**

The Principality is also committed to creating and promoting a quality tourist mark, **“Mesas de Asturias”**, which has a total of **33 restaurants**²¹ distributed throughout all of Asturias. These restaurants offer high levels of excellence in terms of service, facilities and use of regional produce.

It is also worth mentioning the new guarantee mark promoted by the Principality, **“Sidrerías de Asturias, Calidad Natural”**, in order to identify the cider bars with the best service, those that offer cider with Designation of Origin and regional gastronomic produce, among other requirements for quality, sustainability and atmosphere.

c. **“EXPERIENCES”:**

There are currently 12 themed experiences available on the “Savouring Asturias” portal, which have different activity plans that allow the visitor to find out more about the culture, professions, products and people linked to Asturian gastronomy:

1. **Asturias with a taste of the sea:** offers 7 plans to learn about shellfish farms, markets (rulas), oyster farms, canners, chefs, etc.
2. **Asturias from flower to flower:** offers 2 plans to discover the Asturian culture linked to honey production.
3. **Sharing the cider of paradise:** offers 12 plans to learn about the cider preparation process and 5 linked to apple orchards.

¹⁷ <http://www.tineo.es/embutidos-de-tineo>

¹⁸ <http://www.terneraasturiana.org/>

¹⁹ <http://www.vinosdeasturias.es/consejoregulador>.

²⁰ <https://www.turismoasturias.es>

²¹ www.saboreandoasturias.org

4. **Harvesting flavours:** offers 2 experiences to learn about Asturian bean stew and 3 linked to bread, blueberries and life in a farmhouse.
5. **Discover the wine of Asturias:** offers 3 plans to learn about the Asturian vineyards, cellars and wines.
6. **The paradise of cheeses:** offers a total of 19 experiences linked to the culture of Asturian cheese, the different types of DO cheeses, guided visits to cheese factories, tastings, etc.
7. **Milk in Asturias:** offers 3 experiences to learn about the culture of Asturian milk, the preparation of dairy products, caring for cows, etc.
8. **EcoAsturias:** offers 3 plans to learn about ecological farmers and ranchers.
9. **Routes with great taste:** offers a total of 8 routes through the Asturian region, combining culture and gastronomy.
10. **A tradition with a Saint's name:** offers 2 plans related to the "Chosco de Tineo" and 3 with other Asturian cold meats.
11. **Other tastes, other sensations:** offers 2 plans linked to astronomy, gastronomy and the cultivation of coffee.
12. **Experience a moment to savour:** "Aller-Adicto" loyalty card, with discounts and offers to enjoy the gastronomy of Aller and its region.

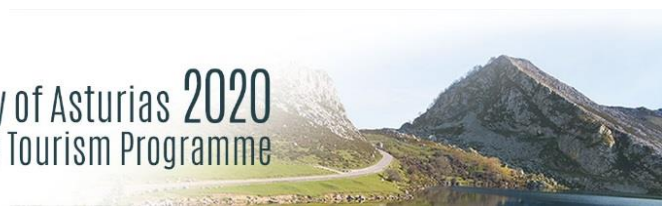
Routes:

As a complement to the experiences, "Savouring Asturias" proposes **5 gastronomic themed routes** through the Asturian region:

1. Cider route.
2. Flavours of the sea route.
3. Cheese and cheese-making route.
4. Flavours of the countryside route.
5. Cangas Wine route.

During the consultation of the Asturian tourist sector for the drawing up of the Sustainable Tourism Programme, its opinion was sought on the resources and experiences related to the community's most noteworthy or differential gastronomic assets. Below are the unique resources and experiences identified by the sector itself:

- Cangas Wine.
- Cider.
- Asturian "fabas".
- Asturian cheeses.
- The culture of honey.
- Salmon fishing.
- Visits to cellars and vineyards.
- Local produce.
- The culture of corn.
- Spelt and other cereals, the culture of bread.
- Apple orchards.
- The ways of life and traditional professions linked to gastronomy (bee-keeping, beer, medicinal plants, mushrooms, etc.).
- Oyster cultivation.
- Hunting and fishing.
- Visits to markets, farms and livestock facilities, etc.
- Food and drink tastings.
- Agro-tourism.
- Ecological products.
- Quality of the restaurants.
- Festivals celebrating gastronomy.



Finally, it is worth mentioning the **strong link existing** in the perception of the sector in terms of the **values of its culture** found in the **brand image** of Asturias, Natural Paradise.

Some of the **values associated with the brand image** that are related to culture, are: **tradition, culture, authenticity, identity, gastronomy, quality, good quality-price relationship, feelings, ecology, sustainability, hospitality.**

3.2 Analysis of the basic and complementary offer

The year 2015 closed with the tourist supply of **collective accommodation** (hotels, rural accommodation, hostels, tourist campsites, holiday homes and tourist apartments) amounting to **84,390 beds distributed across 3,419 establishments**, figures that represent a growth of 0.10% and 0.60% respectively compared to 2014.

3.2.1. Basic Supply

The following tables show the basic supply of the Principality of Asturias in 2015 for collective accommodation, which includes **hotel accommodation** (hotels, guest houses and B&Bs), **rural accommodation** (rural hotels, country houses and rural apartments), **tourist campsites, tourist apartments, hostels and holiday homes**, looking at the number of establishments and beds per category and geographical area. Below are the main conclusions drawn from the analysis of the community's tourist supply.

Figure 1. COLLECTIVE ACCOMMODATION BEDS AND ESTABLISHMENTS IN 2015

COLLECTIVE ACCOMMODATION	BEDS	% of total	ESTABLISHMENTS	% of total
5 star hotels	954	1.1%	7	0.2%
4 star hotels	7,347	8.7%	62	1.8%
3 star hotels	8,443	10%	158	4.6%
2 star hotels	6,436	7.6%	226	6.6%
1 star hotels	2,486	2.9%	102	3%
Total hotels	25,666	30.4%	555	16.2%
B&Bs	548	0.6%	21	0.6%
Guest houses	2,755	3.3%	213	6.2%
Total hotel sector	28,969	34.3%	789	23.1%
Rural hotels	3,043	3.6%	165	4.8%
Country houses	7,554	9%	1,172	34.3%
Rural apartments	7,743	9.2%	522	15.3%
Total rural accommodation	18,340	21.7%	1,859	54.4%
Tourist campsites	26,237	31.1%	53	1.6%
Tourist apartments	5,502	6.5%	287	8.4%
Hostels	3,343	4%	80	2.3%
Holiday homes	1,999	2.4%	306	14.7%
TOTAL	84,390	100%	3,419	100%

Source: SITA, from the Official Registry of the Principality of Asturias - General Directorate of Trade and Tourism



Figure 2. EVOLUTION OF THE NUMBER OF COLLECTIVE ACCOMMODATION BEDS 2013-2014-2015

COLLECTIVE ACCOMMODATION	2013	2014	2015	% Δ 2015	% of total 2015
5 star hotels	944	954	954	0.0%	1.1%
4 star hotels	7,586	7,323	7,347	0.3%	8.7%
3 star hotels	8,583	8,539	8,443	-1.1%	10%
2 star hotels	6,751	6,776	6,436	-5%	7.6%
1 star hotels	2,658	2,637	2,486	-5.7%	2.9%
Total hotels	26,522	26,229	25,666	-2.1%	30.4%
B&Bs	634	623	548	-12%	0.6%
Guest houses	2,995	2,961	2,755	-7%	3.3%
Total hotel sector	30,151	29,813	28,969	-2.8%	34.3%
Rural hotels	2,976	3,011	3,043	1.1%	3.6%
Country houses	7,472	7,558	7,554	-0.1%	9%
Rural apartments	7,460	7,608	7,743	1.8%	9.2%
Total rural accommodation	17,908	18,177	18,340	0.9%	21.7%
Tourist campsites	25,563	26,065	26,237	0.7%	31.1%
Tourist apartments	5,141	5,420	5,502	1.5%	6.5%
Hostels	2,851	3,074	3,343	8.8%	4%
Holiday homes	1,693	1,784	1,999	12.1%	2.4%
TOTAL BEDS	83,307	84,333	84,390	0.1%	100%

Included within Hotels are beds in Apartment Hotels: 1,425 beds:

Beds for "Casonas Asturianas" amount to a total of 1,048, distributed between Rural Hotels and Hotels.

Centre of rural tourism: the beds for the holiday centres specialising in rural tourism, due to being complexes with accommodation in one or more modes of rural tourism, are accounted for under their corresponding heading, with a total of 127 beds at 31/12/2015 and 72 at 31/12/2014.

Source: SITA, from the Official Registry of the Principality of Asturias - General Directorate of Trade and Tourism

Fig 3. EVOLUTION OF THE NUMBER OF COLLECTIVE ACCOMMODATION ESTABLISHMENTS 2013-2014-2015

COLLECTIVE ACCOMMODATION	2013	2014	2015	% Δ 2015	% of total 2015
5 star hotels	7	7	7	0%	0.2%
4 star hotels	66	63	62	-1.6%	1.8%
3 star hotels	158	158	158	0%	4.6%
2 star hotels	233	233	226	-3%	6.6%
1 star hotels	112	110	102	-7.3%	3%
Total hotels	576	571	555	-2.8%	16.2%
B&Bs	25	24	21	-12.5%	0.6%
Guest houses	235	235	213	-9.4%	6.2%
Total hotel sector	836	830	789	-4.9%	23.1%
Rural hotels	158	163	165	1.2%	4.8%
Country houses	1,161	1,177	1,172	-0.4%	34.3%
Rural apartments	502	512	522	2%	15.3%
Total rural accommodation	1,821	1,852	1,859	0.4%	54.4%
Tourist campsites	53	53	53	0%	1.6%
Tourist apartments	270	286	287	0.3%	8.4%
Hostels	66	72	80	11.10%	2.3%
Holiday homes	299	306	306	35.10%	14.7%
TOTAL ESTABLISHMENTS	3,345	3,399	3,419	0.60%	100%

Included within Hotels are Apartment Hotels: 30 establishments.

Establishments under "Casonas Asturianas" amount to a total of 48, distributed between Rural Hotels and Hotels.

Centre of rural tourism: the establishments for the holiday centres specialising in rural tourism, due to being complexes with accommodation of one or more modes of rural tourism, are accounted for under their corresponding heading, with a total of 7 establishments at 31/12/2015 and 72 at 31/12/2014.

Source: SITA, from the Official Registry of the Principality of Asturias - General Directorate of Trade and Tourism

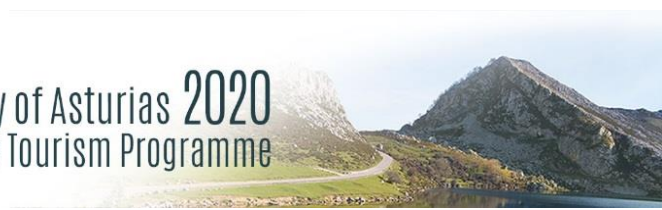


Figure 4. EVOLUTION OF BEDS IN COLLECTIVE ACCOMMODATION BY TYPE AND STRATEGIC AREA IN 2012 - 2013 - 2014 - 2015

COLLECTIVE ACCOMMODATION	2012			2013			2014			2015		
	West	Central	East	West	Central	East	West	Central	East	West	Central	East
5 star hotels	592	769	175	568	769	175	562	779	175	577	779	175
4 star hotels	288	6,104	1,363	372	5,858	1,356	438	5,612	1,273	438	5,568	1,341
3 star hotels	592	4,706	3,090	568	4,964	3,051	562	4,860	3,117	577	4,793	3,073
2 star hotels	1,068	2,796	3,183	1,048	2,532	3,171	1,048	2,606	3,122	1,008	2,328	3,100
1 star hotels	753	836	1,140	711	818	1,129	660	861	1,116	632	840	1,014
Total hotels	2,701	15,211	8,951	2,699	14,941	8,882	2,708	14,718	8,803	2,655	14,308	8,703
B&Bs	38	386	318	14	367	253	14	356	253	14	303	231
Guest houses	653	1,335	1,064	651	1,264	1,080	640	1,305	1,016	523	1,230	1,002
Total hotel sector	3,392	16,932	10,333	3,364	16,572	10,215	3,362	16,379	10,072	3,192	15,841	9,936
Rural hotels	873	744	1,295	868	814	1,294	876	846	1,289	892	808	1,343
Country houses	1,221	1,519	4,596	1,248	1,543	4,681	1,266	1,537	4,755	1,298	1,524	4,732
Rural apartments	2,177	1,930	3,147	2,218	1,956	3,286	2,223	1,963	3,422	2,339	1,909	3,495
Total rural accommodation	4,271	4,193	9,038	4,334	4,313	9,261	4,365	4,346	9,466	4,529	4,241	9,570
Tourist campsites	5,594	5,482	14,417	5,714	5,482	14,367	5,639	5,527	14,899	5,607	5,527	15,103
Tourist apartments	1,081	1,055	2,967	1,167	1,076	2,898	1,198	1,223	2,999	1,234	1,231	3,037
Hostels	227	1,078	1,409	227	1,154	1,470	257	1,347	1,470	288	1,575	1,480
Holiday homes	108	194	1,316	109	215	1,369	122	267	1,395	146	297	1,556
TOTAL BEDS	14,673	28,934	39,480	14,915	28,812	39,580	14,943	29,089	40,301	14,996	28,712	40,682

Source: SITA, from the Official Registry of the Principality of Asturias - General Directorate of Trade and Tourism
Included within Hotels are Apartment Hotels: The "Casonas Asturianas" are split between Rural Hotels and Hotels.

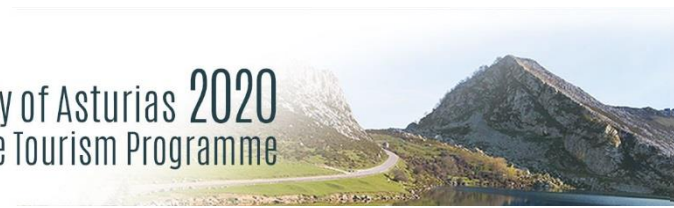


Figure 5. EVOLUTION OF COLLECTIVE ACCOMMODATION ESTABLISHMENTS BY TYPE AND GEOGRAPHICAL AREA IN 2012 - 2013 - 2014 - 2015

COLLECTIVE ACCOMMODATION	2012			2013			2014			2015		
	West	Central	East	West	Central	East	West	Central	East	West	Central	East
5 star hotels	-	5	2	-	5	2	-	5	2	-	5	2
4 star hotels	5	42	21	6	39	21	6	37	20	6	35	21
3 star hotels	18	69	71	17	71	70	17	70	71	18	70	70
2 star hotels	45	77	112	46	76	111	46	76	111	44	72	110
1 star hotels	35	28	53	32	27	53	31	28	51	27	27	48
Total hotels	103	221	259	101	218	257	100	216	255	95	209	251
B&B	2	16	11	1	15	9	1	14	9	1	12	8
Guest houses	50	107	82	49	104	82	49	106	80	41	94	78
Total hotel sector	155	344	352	151	337	348	150	336	344	137	315	337
Rural hotels	45	44	66	46	46	66	47	49	67	48	47	70
Country houses	187	264	698	190	264	707	194	264	719	200	256	716
Rural apartments	156	137	197	159	137	206	158	139	215	166	136	220
Total rural accommodation	388	445	961	395	447	979	399	452	1,001	414	439	1,006
Tourist campsites	17	11	25	17	11	25	17	11	25	17	11	25
Tourist apartments	71	66	129	75	65	130	77	72	137	78	71	138
Hostels	9	22	27	9	25	32	11	29	32	13	34	33
Holiday homes	21	31	234	22	33	244	24	39	243	28	43	280
TOTAL ESTABLISHMENTS	661	919	1,728	669	918	1,758	678	939	1,782	687	913	1,819

Source: SITA, from the Official Registry of the Principality of Asturias - General Directorate of Trade and Tourism

Included within hotels are Apartment Hotels. The "Casas Asturianas" are split between Rural Hotels and Hotels.



THE QUALITY AND GUARANTEE MARKS OF THE PRINCIPALITY: "Casonas Asturianas" and "Aldeas, Asturias Calidad Rural":

The Principality is also committed to creating and promoting a quality tourist mark, "**Casonas Asturianas**", which has a total of 50 establishments distributed throughout all of Asturias. This accommodation has levels of excellence in terms of visitor service, facilities and equipment.

It has also created the guarantee mark promoted by the Principality "**Aldeas, Asturias Calidad Rural**", which distinguishes the Country Houses and Rural Apartments that stand out from their competitors thanks to their uniqueness and levels of quality, equipment and excellent service.

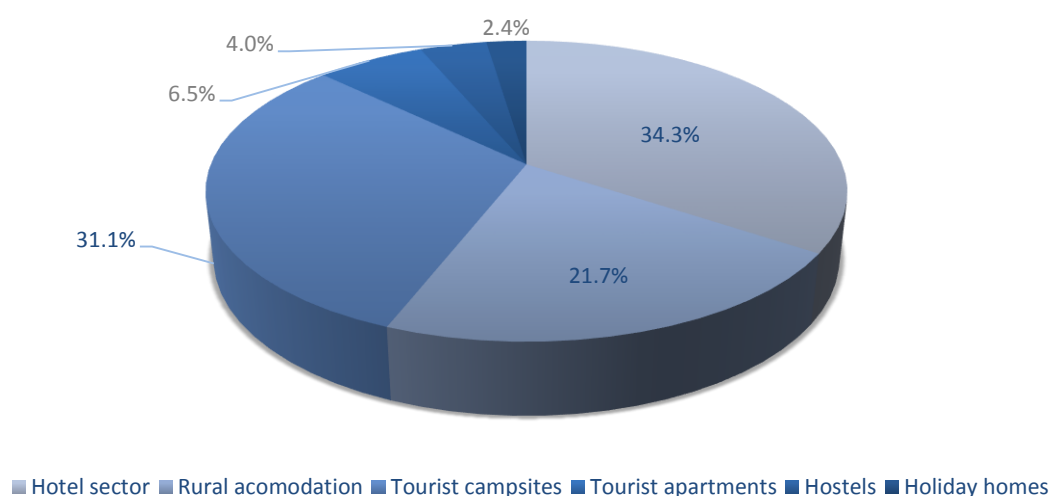
CONCLUSIONS ON THE BASIC TOURIST SUPPLY

At the end of 2015, the Principality of Asturias had a tourist supply made up of 84,390 beds in collective accommodation (hotels, rural accommodation, tourist campsites, hostels, holiday homes and tourist apartments) distributed among 3,419 establishments.

PERCENTAGE DISTRIBUTION OF THE SUPPLY

- These figures represent an increase of 0.10% in terms of beds and 0.6% in the number of establishments compared to 2014.
- Accommodation in the hotel sector (hotels, guest houses and B&Bs) represent 34.30% of the total beds in collective accommodation and 23.10% of the total establishments in the entire community.
- With regard to rural accommodation (rural hotels, country houses and rural apartments), these represent 21.7% of the total beds in collective accommodation and 54.4% of the total establishments in the entire community.
- In terms of tourist campsites, beds here represent 31.10% of the total beds and 1.16% of all establishments in collective accommodation.
- Hostels represent 4% of the total beds and 2.3% of the total establishments in all collective accommodation in the community.
- Tourist apartments represent 6.5% of the total beds and 8.4% of the total establishments in collective accommodation in Asturias, whereas holiday homes represent 2.4% of the total beds and 14.7% of all establishments.

Figure 6. DISTRIBUTION OF COLLECTIVE ACCOMMODATION ESTABLISHMENTS IN 2015



Source: Own development based on data from SITA, from the Official Registry of the Principality of Asturias - General Directorate of Trade and Tourism

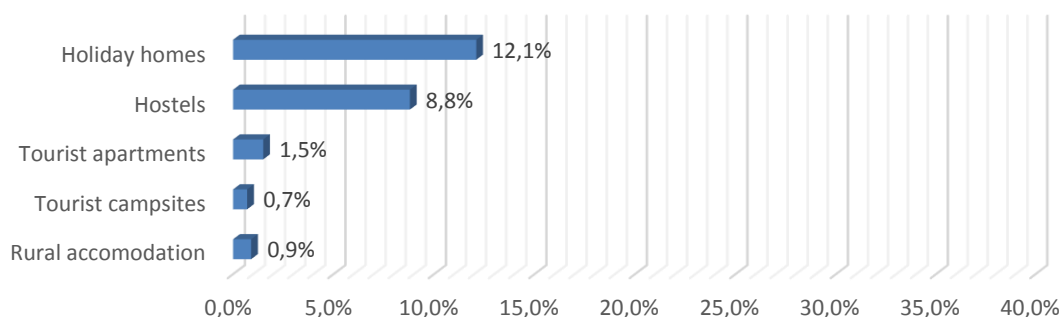
GROWTH AND DECLINE OF THE SUPPLY

2015 saw a growth in the number of beds in rural accommodation, hostels, tourist campsites, tourist apartments and holiday homes. However, beds in the hotel sector declined by 2.8%.

In terms of the number of establishments, rural accommodation, hostels, tourist campsites, tourist apartments and holiday homes again increased. There was only an **anomaly** in the number of **establishments in the hotel sector** due to a decline of **4.9%** compared to 2014.

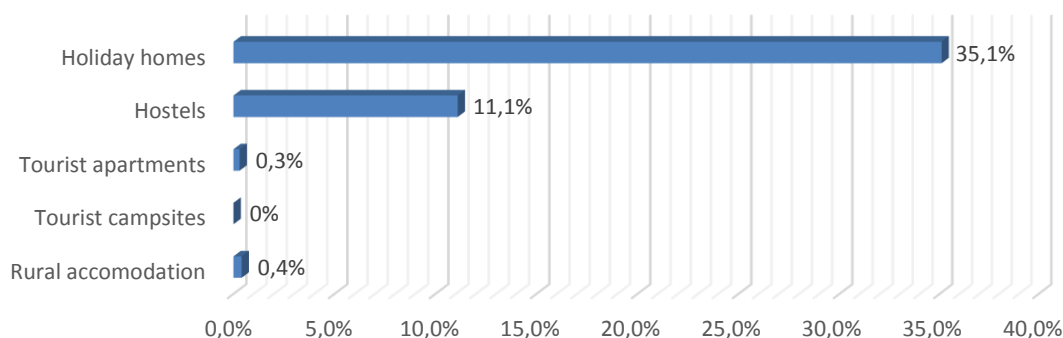
The following graphs show the growth of the supply from 2014 to 2015.

Figure 7. GROWTH OF THE NUMBER OF BEDS IN 2015



Source: Own development based on data from SITA, from the Official Registry of the Principality of Asturias - General Directorate of Trade and Tourism

Figure 8. GROWTH OF THE NUMBER OF ESTABLISHMENTS IN 2015



Source: Own development based on data from SITA, from the Official Registry of the Principality of Asturias - General Directorate of Trade and Tourism

In 2015, the growth of rural tourism accommodation continued to moderate, with growth of 0.9% in the number of beds and 0.4% in the number of establishments.

Significant growth is observed in holiday homes, which have increased by 12.10% in terms of the number of beds.

A strong performance can also be seen for hostels, with an increase of 8.8% in terms of the number of beds and 11.10% in the number of establishments.

DISTRIBUTION OF ESTABLISHMENTS BY GEOGRAPHIC AREA

Studied below is the distribution of collective accommodation by geographic area in 2015.

Figure 9. DISTRIBUTION OF ESTABLISHMENTS BY GEOGRAPHIC AREA IN 2015

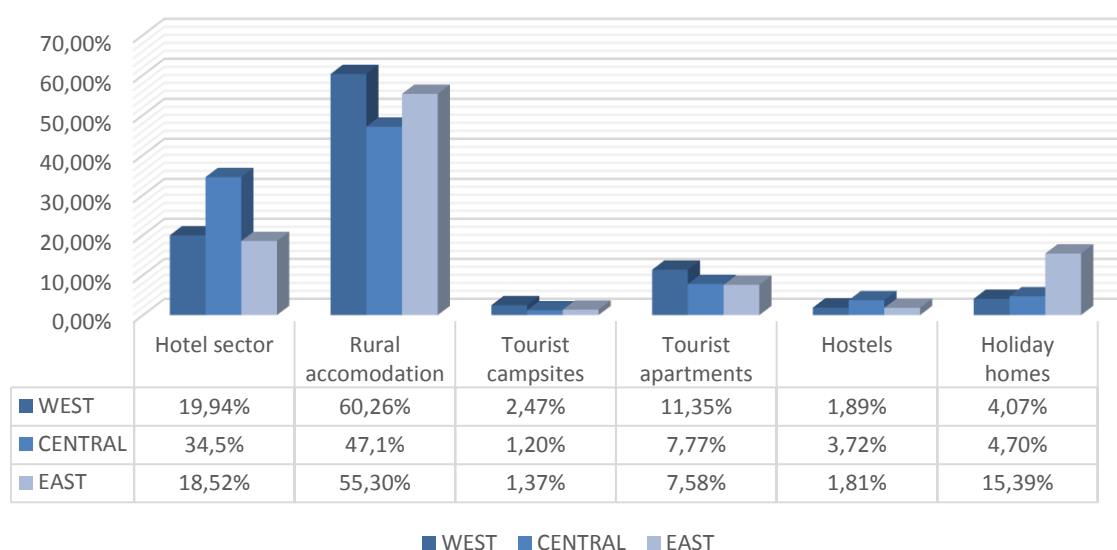
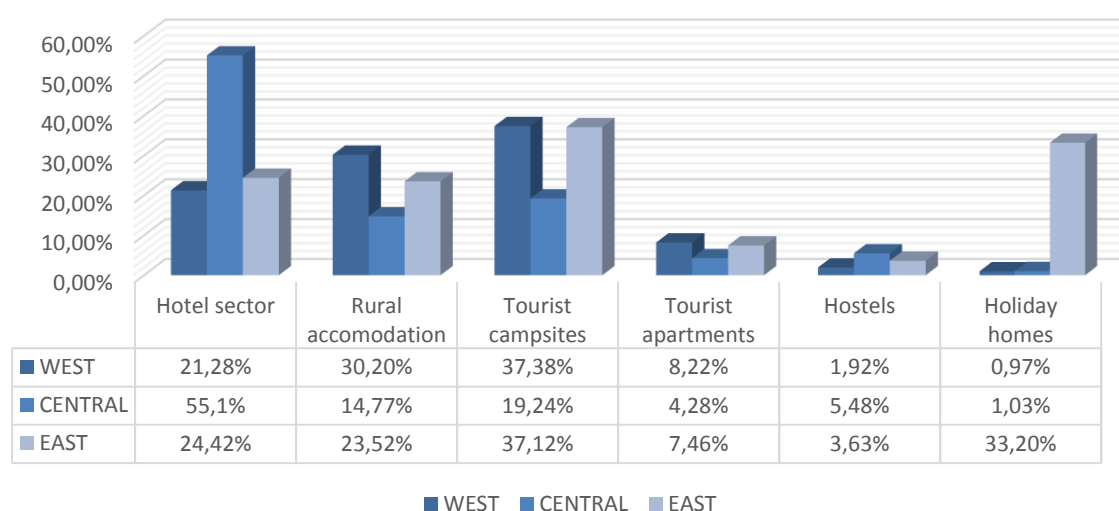
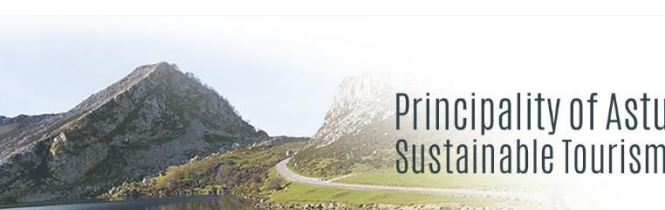


Figure 10. DISTRIBUTION OF BEDS BY GEOGRAPHIC AREA IN 2015



Source: Own development based on data from SITA, from the Official Registry of the Principality of Asturias - General Directorate of Trade and Tourism



The west stands out for being the area with the greatest supply of rural accommodation beds and establishments. It is also observed to be the area with the greatest supply in terms of campsites, in terms of both establishments and beds, during 2015.

The centre has 55.1% of the beds in the hotel sector and 34.5% of establishments, which represents a greater supply than seen in the other two areas.

It is worth mentioning that the Principality's three most important cities, and the most popular with visitors in 2014, are found in the central area, these being Gijón with 55.5%, Oviedo with 46.6% and Avilés with 23.2%, as is shown in the supply data²²

In terms of the eastern area of the region, we see a greater supply of beds in holiday homes and campsites. With regard to establishments, the greatest supply is seen in rural accommodation and the hotel sector.

TRANSPORT METHODS

The **Asturias Transport Consortium**, a public body established for the coordination and management of transport, has the following main objectives²³:

- To structure a more efficient transport system.
- To support regional land planning.
- To minimise overall transport costs, including external costs.
- To reduce the use of private transport and replace this with public transport.
- To contribute to improving the environment and a more rational and efficient use of the already saturated road infrastructures in central Asturias.

Over recent years various initiatives relating to public transport have been carried out. Within the **sustainable mobility campaign**, a plan for **public transport access to the lakes of Covadonga** has been launched, stopping at the main points of tourist interest, including hotel establishments and tourist activities.

Moreover, the **Single Ticket** has been created which consists of a smartcard with a format similar to that of a credit card, which is used for journeys on any public transport line, by road or rail, provided that the origin and destination are in any locality in Asturias²⁴.

Asturias also has the **Sustainable Mobility Office**, through which it offers support and information to the user whilst also promoting and supporting improvements in matters of sustainable mobility.

From this office, in addition to offering all types of information about public transport and sustainable transport systems, it also promotes the use of public transport and disseminates the advantages of its use.

MASTER PLAN OF INFRASTRUCTURES FOR THE MOBILITY OF ASTURIAS 2015-2030

Mobility has increased in recent years, and one of the reasons for this is the journeys made for leisure or tourism purposes. This increase, in addition to its economic impact, causes traffic congestion and pollution.

²² 2014 Report. (SITA - Official Registry of the Principality of Asturias - General Directorate of Trade and Tourism 2014)

²³ Functions and regulations (Asturias Transport Consortium, 2016). www.consorticioasturias.com

²⁴ What is the Single Ticket (Asturias Transport Consortium, 2016). www.consorticioasturias.com

This is why a tourist destination must have a mobility plan which implements innovative solutions that minimise the negative impact of tourist mobility and offer both residents and visitors environmentally-friendly resources.

Asturias has a **Master Plan of Infrastructure for the Mobility of Asturias²⁵ (PIMA)**, which is based on different sources that reflect the new policies on a sustainable economy.

The Government of the Principality of Asturias, through this plan, aims to forecast the future of the transport and communications system, and does so in a coordinated manner in terms of both forms of transport and geographic issues.

Therefore the plan is unified in three ways.

One. To achieve more sustainable mobility, economically and socially, in all modes of transport (sea, land and air) and for both the resident population and visitors.

Two. To integrate the Infrastructures Plan into the planning of the Asturian region.

Three. To combine all proposals into a single document.

Given that analysed, the **PIMA** is founded on three basic principles:

1. **Economic, social and environmental sustainability:** highlighting in this sense that transport for the movement of both residents, visitors and tourists, as well as goods, must be as efficient as possible, thus guaranteeing the reduction of CO₂ emissions and less pollution.
2. **Planning vision**, which takes into account that the population is concentrated in the central area of Asturias, which causes the less populated areas to have travel problems due to a lack of infrastructure and mobility.
3. **Desire to integrate and have powers:** which takes into account the different modes transport, both **modal** and inter-modal, and the infrastructure needs of the region.

ROAD NETWORK

Having a good road network and connectivity is essential for the economic development of the region, and therefore from the viewpoint of tourist development. Roads being in perfect condition and offering quick access to any point in the region is essential for its tourist development and appeal.

Asturias has a **Road Plan**, which is defined within the Infrastructures Plan for the Mobility of Asturias.

The main road network in the Principality of Asturias has two essential axes:

- 1- The transversal axis, east - west, running parallel to the Cantabrian motorway (A-8), which connects Asturias with Galicia, Cantabria and the Basque Country.
- 2- The radial axis, north - south, which through a high-capacity road crosses the centre of Asturias and connects Gijón, Avilés and Mieres with Madrid through León. This axis is complemented with another transversal route that runs from northern to southern Asturias, and coincides with the radial axis between Asturias and León.

²⁵ Master Plan of Infrastructures for the Mobility of Asturias 2015-2030 (Government of the Principality of Asturias)

REGULAR TRANSPORT SERVICES IN ASTURIAS²⁶

- **RAIL**

An Iberian gauge network, operated by RENFE, which is structured into a local network within the region and a network for connecting Asturias with inland Spain and Europe.

The railway connects the Principality of Asturias with the following cities: Santander, San Sebastián/Donostia, Victoria-Gasteiz, Ponferrada, León, Palencia, Burgos, Logroño, Pamplona, Zaragoza, Zamora, Valladolid, Salamanca, Ávila and Madrid. Shown on the map below are the Medium Distance RENFE lines originating in the community of Asturias.

A metric gauge network, traditionally operated by FEVE (currently run by RENFE), which is established as an essentially local network and a network for connecting with the neighbouring Cantabrian communities (Galicia, Cantabria, Basque Country). The following are the FEVE lines:

- ***Galicia/Asturias Line:*** Ferrol-Oviedo-Gijón.
- ***Asturias Line:*** Gijón-Llaviana.
- ***Asturias-Cantabria Line:*** Oviedo-Santander.
- ***Basque Country Line:*** Bilbao-Balmaseda.

In order to make travel simpler, the FEVERail card has been created. It is a personal use card that will enable you to travel the 1,300 kilometres of the FEVE network on board all of its local and regional train lines.

- **BUSES**

Asturias has an important road infrastructure network that facilitates the arrival of people who visit the community using this mode of transport.

The main bus stations are in Oviedo, Gijón and Avilés, where we can find public and private companies offering transport services to the entire community.

Within the bus network of the Principality of Asturias we can make a distinction between the main public and private companies operating in the community dedicated to collective passenger transport:

A. PRIVATE SECTOR

- The company **ALSA** offers the main connections by road, both within the Principality as well as national and international.

There are also other regional road transport companies.

B. PUBLIC SECTOR

- The company Transportes Unidos de Asturias S.L. (TUA) is solely responsible for providing the collective urban public passenger transport service in Oviedo.

²⁶ List of regular transport companies in Asturias (Asturias Consortium, 2016). www.consorticioasturias.com

- The urban transport service in the city of Gijón is provided by company EMTUSA, Empresa Municipal de Transportes Urbanos de Gijón S.A.
- Moreover, the company Tranvía Eléctrico de Avilés S.A. links the municipalities of Avilés, Castrillón and Corvera.

• AIR TRANSPORT

Asturias airport is located in the municipality of Castrillón, 14km from Avilés, 40km from Gijón and 47km from Oviedo.

La Morgal airfield²⁷, used for private flights, has a 1,000m runway and a heliport area with 5 spaces.

According to data from AENA, the Asturian airport ended 2015 with a total²⁸ of **1.1 million tourists, an increase of 5.1% compared to 2014**. A total of 10,758 operations were also carried out, which represents a decline of 8.2% compared to the previous year.

With regard to registered passenger traffic, **88% were domestic and 12% international**. Among the international issuers, the United Kingdom was the main issuer market for the passengers arriving by air transport with 8%, followed by France with 3%.

The airlines currently operating from the airport are: Air Europa, Air Nostrum, EasyJet, Evelop, Iberia Express, Iberia, TAP Portugal, Volotea and Vueling Airlines.

NO. OF PASSENGERS BY MAJOR AIRLINE COMPANY IN 2015	
Air company	Passengers (Millions)
Vueling	400.20
Iberia	372.78
Air Europa	95.98
EasyJet	90.57
Volotea	77.90

Source: Own development based on data from AENA

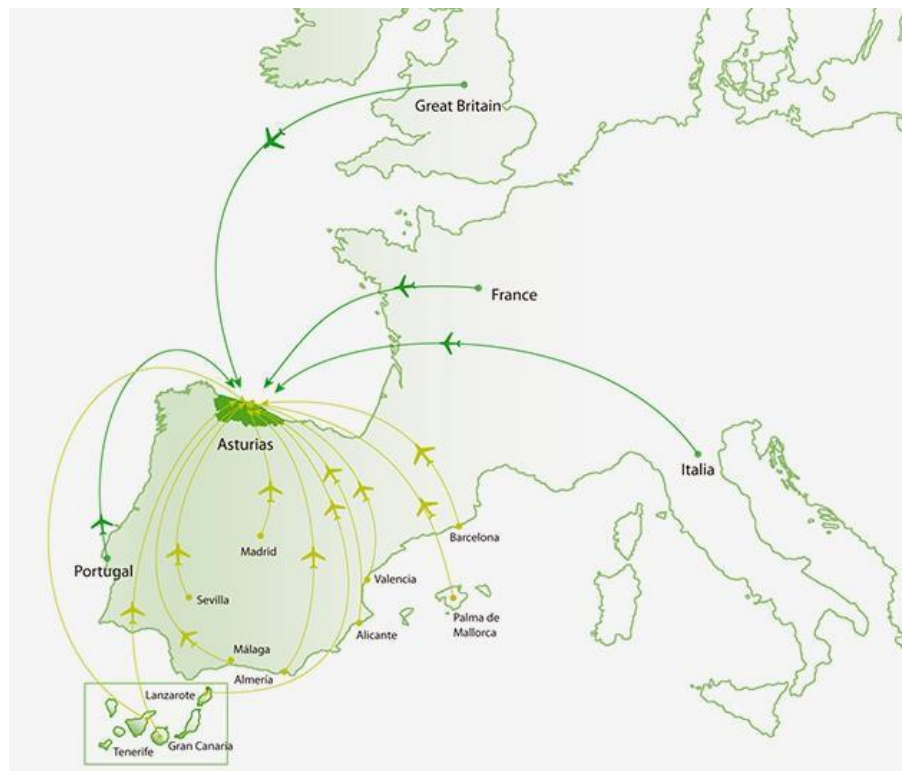
²⁷ How to get here (Sociedad Pública de Gestión y Promoción Turística y Cultural del Principado de Asturias, S.A.U, 2014). www.turismoasturias.es

²⁸ 2015 Asturias data (AENA, 2015)



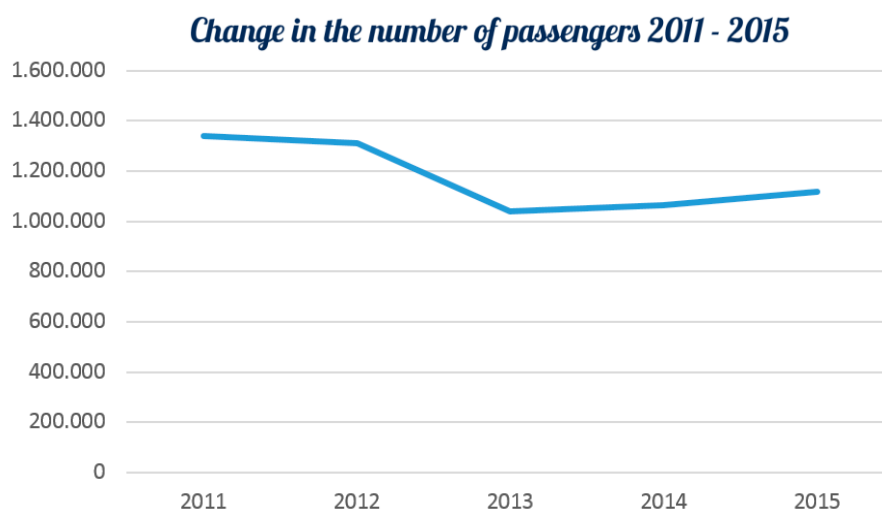
The domestic and international destinations to which passengers can travel from Asturias airport during the winter season are: **Alicante, Barcelona** (El Prat), **Lanzarote, Gran Canaria, Madrid** (Barajas Adolfo Suárez), **Malaga, Seville, Palma de Mallorca, Seville, North Tenerife, Valencia, Lisbon, Paris, London** (Heathrow, Gatwick, Stansted) and **Venice**.

And during the summer season they are: **Alicante, Barcelona** (El Prat), **Lanzarote, Gran Canaria, Madrid** (Barajas Adolfo Suárez), **Malaga, Seville, Palma de Mallorca, Seville, North Tenerife, Ibiza, Menorca, South Tenerife, Fuerteventura, Valencia, Lisbon, Paris, London** (Heathrow, Gatwick, Stansted), **Venice and Geneva**.



Source: Sociedad Pública de Gestión y Promoción Turística y Cultural del Principado de Asturias, S.A.U.

The following table analyses the evolution of passenger traffic from 2011 to 2015.



Source: Own development based on data from AENA

A decrease in passenger traffic is observed from 2011 to 2015, reaching the lowest point in 2013 with 1,039,406 passengers. However, with reference to the year-on-year change, an increase of 4.9% occurred from 2014 to 2015, the number of passengers recovering slightly.

SEA TRANSPORT AND CRUISES

EL MUSEL PORT - GIJÓN

El Musel Port, located in the city of **Gijón**, is the main port for the entire community. Due to its strategic location and deep waters, El Musel has become one of the main entry points, via the Cantabrian Sea, for all types of large tonnage vessels and a stopover point for tourist cruise ships and recreational boats that dock in Osa Dock²⁹.

It is worth highlighting the importance of this port, as it contributes to promoting nautical tourism in the city of Gijón.

The port has connections with over 300 domestic and international ports through an important network of regular lines, and has become the leading Spanish port for goods transported by rail.

Gijón Port has three docking areas for the mooring of tourist cruise ships, these three terminals being: Muelle Moliner, 7ª Alineación and Espigón II, the latter being the largest with a 360m mooring area.

²⁹ Gijón seeks to promote nautical tourism with new regattas (La Nueva España, 2015) www.lne.es.



Some of the most prestigious cruise companies that stopover each year in El Musel are **Royal Caribbean, Celebrity Cruises, Silversea, Seabourn Swan Hellenic and Hapag Lloyd**.

Given the great importance of cruise tourism for the community, as well as for the city of Gijón itself, and the objective of working together for the future development of this activity, the **Cruises Working Group was created in 2012**, formed by the Port Authority, Gijón Tourism, shipping agents, the Regional Tourism Company (Sociedad Regional de Turismo), the National Police, the Civil Guard and the Associations of Hoteliers and Merchants in Gijón.

Gijón Port has evolved considerably in recent years, which has led to the growth in cruise traffic reflected in the following figures:

- A new record was achieved in 2015 due to a significant increase, reaching 13 stopovers and 16,534 passengers arriving in the community, which represents three additional arrivals and a 19% increase in visitors compared to 2014.
- In 2016, according to Gijón Port Authority, a new record figure is expected with 33 stopovers and more than 33,000 passengers, which would show the port's clear positioning within the Atlantic Corridor.
- With the idea of promoting this Atlantic Corridor, the Costa Verde Cruise association has been created, made up of the ports of A Coruña, Gijón, Santander and Bilbao, in order to promote cruise tourism within Green Spain.

AVILÉS PORT

Meanwhile, **Avilés Port** also has a **commercial port** with a large area of docks, distributed into the following areas and uses:

- A) **Docks on the left side**: The docks of San Juan de Nieva, Raíces and Raíces Extension, which add up to a total surface area of 369,478m², dedicated to solid bulk, liquid bulk, general goods and containers.
- B) **Docks on the right side**, divided into the following areas and uses:
 - South Dock: dedicated to the mooring of cruise ships and **disembarking of passengers**, which has a total surface area of 10,400m², a length of 260m and a depth of 7m.
 - Arcelor-Mittal East Dock, with a surface area of 48,993m², dedicated to commercial uses and managed via administrative concession.
 - Alcoa-Inespal Dock: 2,700m² in total, for commercial uses, and also managed via administrative concession.
 - Valliniello Dock: 65,850m², dedicated to commercial docking uses.

Avilés Port also has a **fishing port** with a total surface area of 18,550m² of fishing dock, with a market, ice factory, premises for wholesalers and retailers, an automated auction room with 180 seats for buyers and air-conditioned rooms; and a **marina** with a total of 200 berths distributed across 18 jetties for small sporting boats. This is the location of two clubs, the Avilés Nautical Club and the "Puerto Ría de Avilés" sailing club.

With regard to the arrival of **cruise ships** at Avilés Port, in 2015 it received two stopovers from the 'Braemar' cruiser, from the Fred Olsen Cruise Line, with capacity for 1,075 passengers and 400 crew.

For 2016 this stopover figure is expected to double, as to these two new arrivals of the "Braemar" in June and July we can add the arrival of two new cruise ships in September and October: one with the luxury cruise ship 'MS Europa' from Hapag-Lloyd Cruises, with capacity for 408 passengers with notable purchasing power and 285 crew, and one with 'Black Watch', also from Fred Olsen Cruise Lines, with capacity for 868 passengers, as well as 330 sailors and service staff.

NAUTICAL SPORTS FACILITIES

Along the entire Asturian coast there are a total of 20 nautical sports facilities. Below is a brief description of each of these:

- **Castropol Marina**

Due to its proximity, Castropol Marina, located in the municipality of the same name, is shared with Figueras marina. Although it does not have its own mooring services, it does have its own Sailing Club where sailing classes are given on the weekends. Close to the port is the impressive Mirandilla Viewpoint.

- **Figueras Marina**

Figueras Marina, which is located in the Municipality of Castropol, is the fifth largest port in Asturias.

It has the Figueras Nautical Club which offers various sporting activities such as sailing courses, kayaking, dinghies, etc.

- **Tapia de Casariego Marina**

Tapia de Casariego Marina, located in the municipality of the same name, is the place most visited by those who come to town.

This marina is used for fishing, as fishing is a leisure activity popular with the people who live in this town.

- **Viavélez Marina**

Marina located in the municipality of El Franco, in the mouth of the Vío River, where fishing, tourist and sporting activities take place.

- **Navia Marina**

Navia Marina, also known as the Navia Nautical Sports Club, is located in the estuary of the municipality of the same name.

Both recreational boats and fishing boats are found here.

- **Puerto de Vega Marina**

Puerto de Vega Marina, belonging to the municipality of Navia, always linked to fishing, stands out for being a picturesque spot in Asturias thanks to its mixture of beautiful architectural styles, with older country-style houses and small palaces (known locally as "casas de indianos") standing side-by-side with more modern architecture.

The places of interest worth a visit are the Baluarte viewpoint, with canons from the 18th century, La Riba viewpoint, the chapels of the Watchtower and the old mansions, among others.



- **Luarca Marina**
Luarca marina is located in the tourist town of the same name, within the municipality of Valdés, and the port is its main tourist attraction due to being one of the main fishing ports in Asturias.

From the port, walking along its promenade, visitors can reach the Watchtower which offers views of the cemetery, a chapel and Luarca lighthouse.
- **Cudillero Nautical Club**
Cudillero Marina is located in the town, in an area of great tourist appeal due to the arrangement of the buildings in the town, as well as its cultural and gastronomic tradition.

This port has a Nautical Club, formed by people with a passion for fishing, navigation and sailing.
- **San Esteban de Pravia Nautical Club**
This Marina is located in the parish of the same name, in the municipality of Muros de Nalón. It has a seafront promenade and the San Esteban de Pravia Nautical Club.

In the immediate vicinity of the marina are old mineral loading bays that have been restored and built into an accessible promenade that now allows visitors to walk to Garruncho beach and natural seawater pools.
- **Puerto Norte Nautical Club**
San Juan de la Arena is the main urban centre within the municipality of Soto del Barco. Its San Juan de la Arena Marina is also known as Club Puerto Norte.

San Juan de la Arena is a place known for its gastronomy, where elver is the star dish, as it is in other areas in Asturias.
- **Avilés Marina**
The marina is found inside Avilés Port, with enough infrastructures for boats to be moored there for long periods, boats to pass through and for those sailors who wish to moor up their vessel for the winter.

There are two clubs within the marina, the Avilés Marina Nautical Club and the "Puerto Ría de Avilés" Sailing Club.
- **Luanco Marina**
Luanco Marina, located in the municipality of Gozón, is surrounded by the locality's old town, and therefore is one of its most visited sites.

Its maritime tradition can be seen from the small fishing boats moored here.
- **Candás Marina**
Candás Marina, in the municipality of Carreño, has a strong fishing tradition and spirit, since many of the inhabitants of this town were involved in whale fishing.

A catamaran goes from Candás Marina to Cabo Peñas three times a week. A nautical club and the marina can be found within the larger port.
- **Gijón Marina**
Gijón has one of the main maritime ports in the Atlantic Corridor and an excellent supply in terms of infrastructures.

Aside from being a leading port nationally in terms of the entry of merchandise, it is a port with strong growth in terms of cruise ship traffic, providing space for the docking of cruise ships in 3 areas of the port.

It has been awarded a blue flag and holds the Quality and the Environment certification standards UNE-EN ISO 9001: 2008 and ISO 14001:2004. There are further guarantees about the quality of its services through it belonging to the Integral System for Quality in Tourism in Spain as a Destination (SICTED) for marinas.

Gijón Port, together with the ports of A Coruña, Santander and Bilbao, forms part of the Costa Verde Cruise association with the objective of promoting themselves as a cruise ship destination. It has two marinas, Muelle and Marina Yates, which is in El Musel.

- **Tazones Marina**

Tazones port is a small fishing port located in the municipality of Villaviciosa.

Within Tazones Port is the seaport, located very close to the Asturias Ichnite Sites.

- **El Puntal Marina**

El Puntal marina or the "El Puntal" Nautical Club is located in the port of the estuary of the municipality of Villaviciosa, at El Puntal beach. This estuary is considered to be the most biologically rich in Asturias.

The beach where the marina is located, El Puntal Beach, has been declared a natural area due to its golden sand and wooded area.

- **Bahía de Lastres Marina**

Lastres port is located in the municipality of Colunga and has a marina known as the Bahia de Lastres Nautical Club, close to Punta Misiera.

This port has a market where fish and seafood are sold daily, and a bay where both fishing from boats and diving are practised.

- **Ribadesella Marina**

Ribadesella marina, located inside the estuary and next to the town, is known as the "Portulano de Ribadesella". Highlights in this port include the great facilities on offer for fishing and leisure boats, the second largest in Asturias, after Gijón.

- **Llanes Marina**

Llanes marina is located in the heart of the municipality which has a long fishing tradition that is still evident today.

Although Llanes port is small in size, both fishing and other water sports are practised here.

- **Bustio Marina**

Bustio marina, located in the municipality of Ribadedeva, is a small marina close to the mouth of the Tina Mayor Estuary. Close to this modest port we can find the San Emeterio Chapel.

FOOD AND DRINK SUPPLY

Food and drink companies, regardless of their name, are those that regularly and professionally, for a price, serve the public food or drink to be consumed, preferably, in their establishments³⁰.

1. Food and drink establishments can be classified into the following groups on the basis of their characteristics:

a) **Restaurants:** These have a kitchen and dining area, preferably separate from each other, where the food and drink listed on their menus are offered to the public.

b) **Cafés:** These have a bar and table service, where drinks and simple or main dishes listed on their menus are offered to the public during their opening hours.

c) **Bars, coffee shops or similar:** These, equipped with a bar but lacking a dining area, may also provide a table service in the same space, servicing drinks to the public which may or may not be accompanied by tapas, snacks or sandwiches.

2. Cider bars are those establishments that reflect the traditional Asturian culture, are appropriately decorated and themed, and have the ideal facilities and equipment for storing, offering and pouring cider. They can be classified into groups a) or c) above depending on their characteristics.

3. The establishments included in group c) will not require authorisation from the Tourist Administration of the Principality of Asturias, although they must be registered in the Register of Tourist Companies and Activities after obtaining the municipal opening licence and will be subject to the regulations determined.

4. New groups of food and drink establishments may be statutorily organised.

FOOD AND DRINK ESTABLISHMENTS IN 2016	
TYPE	ESTABLISHMENTS
Restaurants	3,979
Bar, coffee shop or similar	8,482
Cider bars	515
Cafés	79
Total	12,461

Cider bars and cafés are included within the "Bar, coffee shop or similar" section.

Source: Own development based on data from the Register of Activities and Companies. Government of the Principality of Asturias

³⁰ Food and drink establishments, BOPA. (Government of the Principality of Asturias, 2001)

TOURIST BROKERAGE COMPANIES

In accordance with the Principality of Asturias Tourism Law 7/2001, of 22 June, tourist brokerage companies are considered to be those that, meeting the requirements determined by the regulations, are professionally and regularly involved in the brokerage and organisation of tourist services, being able to use their own resources to do this.

- **Types of tourist brokerage companies:**
Tourist brokerage companies may be of any of the following types: travel agents, reservation centres and any others determined by the regulations.

ESTIMATED TOURIST BROKERAGE COMPANIES IN 2016	
TYPE	ESTABLISHMENTS
Travel agents	680
Reservation centres	45
Total	725

Source: Own development based on data from the Register of Activities and Companies. Government of the Principality of Asturias

ACTIVE TOURISM SUPPLY:

Active tourism in the Principality of Asturias is currently regulated by Decree 111/2014, of 26 November, on Active Tourism, which defines the *Active tourism companies and activities*.

Active tourism companies are considered to be those that are dedicated to regularly and professionally providing, for a price, recreational, sporting and adventure tourist activities that are practised basically using the resources offered by nature itself in the environment in which they take place.

In particular, considered as recreational tourist activities will be those, among others, that are based on cultural knowledge, regardless of whether this is related to the landscape, heritage or something similar, carried out in the natural environment or similar locations.

The activities offered by these companies, which are listed for guidance purposes in appendix I, involve active participation by the user, having inherent to them a certain difficulty or requiring at least a certain degree of skill to carry them out.

ACTIVE TOURISM COMPANIES IN 2016	
TYPE	ESTABLISHMENTS
Organising and participating in activities	445
Rental of material	33
Total	478

Source: Own development based on data from the Register of Activities and Companies. Government of the Principality of Asturias

In 2015, Trivago included Asturias as one of the ten best Spanish destinations³¹ for active and adventure sports, due to the exceptional and unique natural and landscape features of the region.

The land, air and sea sports that can be practised in the community are as follows:

- **LAND SPORTS:**

- *Skiing and snowboarding*
- *Golf*
- *Mountain biking*
- *Climbing*
- *Caving*
- *Hiking*
- *Archery*
- *Paintball*
- *Quads*
- *Horse riding*
- *Rock climbing*
- *Mountaineering*
- *Buggies*
- *Tibetan bridge*
- *Bungee jumping*
- *Zip lining*
- *Trekking*
- *Vía Ferrata (climbing using steel cables)*
- *Off road 4x4*
- *Tibetan bridge*
- *Archery*

- **AIR SPORTS:**

- *Paragliding*

- **WATERSPORTS:**

- *Sea kayaking*
- *Rafting*
- *Tourist boat tour*
- *Tourist fishing boat tour*
- *Canoeing*
- *Paddle surf*
- *Jetskis*
- *Sailing*
- *Diving*
- *Surfing*
- *Windsurfing*
- *Light sailing*
- *Water skiing*
- *Wakeboarding*
- *Descent down canyons or ravines*

³¹ Asturias, among the ten best destinations for active tourism (Trivago, 2015)

BUSINESS TOURISM SUPPLY:

According to the UNWTO, in its document entitled **Panorama of International Tourism, business tourism**, this established and positioned as one of the key drivers for tourism due to 14%³² of tourists in the world having travelled for business purposes in 2015.

The available data published by SITA in the last quarter of 2015 indicates to us that **15.8% of visitors made their journey for work or business purposes**, and **11% of visitors for conference or trade fair purposes**. These figures show us the importance and growth of this tourism for the community.

The following table shows the main venues in the Autonomous Community designed to offer services for holding congresses, events, trade fairs, business meetings, conferences, etc. As can be seen, three Asturian cities offer the facilities required for Business Tourism:

AREA	MUNICIPALITY
Centro Niemeyer (Niemeyer Centre)	Avilés
Laboral, ciudad de la cultura (Laboral, City of Culture)	Gijón
Convention and Exhibition Centre (PEC)	Oviedo
Palacio de Congresos y Exposiciones (La Magdalena Trade Fair and Conference Venue)	Avilés
Recinto Ferial Luis Adaro y Palacio de Congresos (Luis Adaro Trade Fair Venue and Conference Centre)	Gijón
Auditorio Palacio de Congresos Príncipe Felipe (Príncipe Felipe Auditorium and Palace of Congresses)	Oviedo

TOURIST ASSISTANCE NETWORK

Institutional tourist information is attributed both to the General Directorate responsible for Tourism by virtue of the powers of development and promotion of tourist resources and management of the tourist facilities run by the Government of the Principality of Asturias, and to the Councils in their respective territorial areas.

The **Principality of Asturias Tourist Information Centre (CITPA)**, located in the square called *Plaza de Constitución* in Oviedo, is a result of the collaboration between the Government of the Principality of Asturias and Oviedo City Council in order to provide a visitor information and assistance service.

³² *Panorama of International Tourism (UNWTO, 2015)*

In addition to the aforementioned Principality of Asturias Tourist Information Centre, the Tourist Assistance Network is comprised of Tourist Information Centres, Tourism Offices and Tourist Information Points, managed by each municipality, strategically distributed throughout the Principality of Asturias:

- **ALLANDE:** TOURISM OFFICE
- **ALLER:**
 - VISITOR RECEPTION CENTRE
 - T.I.P. (TOURIST INFORMATION POINT)
- **AMIEVA:** TOURISM OFFICE
- **AVILÉS:** TOURISM RECEPTION CENTRE
- **BELMONTE DE MIRANDA:** TOURISM OFFICE
- **BOAL**
 - TOURISM OFFICE
 - T.I.P. (TOURIST INFORMATION POINT)
- **CABRALES:** TOURISM OFFICE
- **CANGAS DE ONIS**
 - TOURISM OFFICE: Casa Riera - Cangas de Onis
 - TOURISM OFFICE: El Repelao, Covadonga
- **CANGAS DEL NARCEA:** TOURISM OFFICE
- **CARAVIA:** TOURISM OFFICE
- **CARREÑO:** MUNICIPAL TOURISM OFFICE
- **CASO:** REDES NATURE PARK RECEPTION AND INTERPRETATION CENTRE
- **CASTRILLÓN**
 - MUNICIPAL TOURISM OFFICE: Piedras Blancas
 - MUNICIPAL TOURISM OFFICE: Salinas
- **CASTROPOL**
 - TOURISM OFFICE
 - T.I.P. (TOURIST INFORMATION POINT): Eo Estuary Interpretation Centre
- **COAÑA:** TOURISM OFFICE
- **COLUNGA**
 - VISITOR RECEPTION CENTRE: Colunga
 - T.I.P. (TOURIST INFORMATION POINT): Lastres
- **CUDILLERO:** TOURISM OFFICE
- **DEGAÑA:** TOURISM OFFICE
- **EL FRANCO**
 - TOURISM OFFICE: A Caridá
 - T.I.P. (TOURIST INFORMATION POINT): Andía (El Franco)
- **GIJÓN**
 - INFOGIJÓN: Espigón Development Centre (Marina)
 - INFORMATION POINT: INFOGIJÓN – Escalerona: San Lorenzo Beach
- **GOZÓN**
 - MUNICIPAL TOURISM OFFICE
 - CABO PEÑAS MARINE ENVIRONMENT INTERPRETATION CENTRE
- **GRADO:** TOURISM OFFICE
- **GRANDAS DE SALIME:** TOURISM OFFICE
- **IBIAS:** TOURISM OFFICE
- **ILLANO:** TOURISM OFFICE
- **LANGREO:** MUNICIPAL TOURISM OFFICE
- **LAVIANA**



- MUNICIPAL TOURISM OFFICE: Entralgo
 - T.I.P. (TOURIST INFORMATION POINT): Pola de Laviana
- **LENA:** MUNICIPAL TOURISM OFFICE
- **LLANERA:** T.I.P. (TOURIST INFORMATION POINT)
- **LLANES:** TOURISM OFFICE
- **MIERES:** MUNICIPAL TOURISM OFFICE
- **MORCIN:** MUNICIPAL TOURISM OFFICE
- **MUROS DE NALÓN**
 - MUNICIPAL TOURISM OFFICE: Muros de Nalón
 - T.I.P. (TOURIST INFORMATION POINT): San Esteban de Pravia
- **NAVA:** VISITOR RECEPTION CENTRE
- **NAVIA:** TOURISM OFFICE
- **NOREÑA:** MUNICIPAL TOURISM OFFICE
- **ONIS:** TOURISM OFFICE
- **OVIEDO**
 - MUNICIPAL TOURISM OFFICE: El Escorialín
 - T.I.P. (TOURIST INFORMATION POINT IN THE BUS STATION)
- **PARRES:** MUNICIPAL TOURISM OFFICE
- **PEÑAMELLERA BAJA:** TOURISM OFFICE
- **PILOÑA:** TOURISM OFFICE
- **PONGA:** REDES NATURE PARK RECEPTION AND INTERPRETATION CENTRE
- **PRAVIA:** TOURISM OFFICE
- **PROAZA:** TOURISM OFFICE
- **QUIRÓS:** MUNICIPAL TOURISM OFFICE
- **RIBADEDEVA**
 - “CASA DE PIEDRA” MUNICIPAL CULTURAL CENTRE: Colombres
 - TOURISM OFFICE: Colombres
- **RIBADESELLA:** MUNICIPAL TOURISM OFFICE
- **RIOSA:** TOURISM OFFICE
- **SALAS:** TOURISM OFFICE
- **SAN MARTÍN DE OSCOS:** TOURISM OFFICE
- **SAN MARTIN DEL REY AURELIO:** TOURISM OFFICE
- **SAN TIRSO DE ABRES:** TOURISM OFFICE
- **SANTA EULALIA DE OSCOS:** TOURISM OFFICE
- **SIERO:** TOURISM OFFICE
- **SOBRESCOBIO:** TOURISM OFFICE
- **SOMIEDO:** SOMIEDO NATURE PARK RECEPTION AND INTERPRETATION CENTRE
- **SOTO DEL BARCO:** MUNICIPAL TOURISM OFFICE
- **TAPIA DE CASARIEGO:** TOURISM OFFICE
- **TARAMUNDI:** TOURISM OFFICE
- **TEVERGA:** TOURISM OFFICE
- **TINEO**
 - MUNICIPAL TOURISM OFFICE: Tineo
 - T.I.P. (TOURIST INFORMATION POINT): La Riera
- **VALDÉS:** TOURISM OFFICE
- **VEGADEO:** T.I.P. (TOURIST INFORMATION POINT)
- **VILLANUEVA DE OSCOS:** TOURISM OFFICE
- **VILLAVICIOSA:** TOURISM OFFICE
- **VILLAYÓN:** TOURISM OFFICE

OTHER CENTRES PROVIDING TOURIST INFORMATION:

- VALDÉS-BAZÁN PALACE (CANDAMO CAVERN INTERPRETATION CENTRE)
- COVADONGA SANCTUARY INFORMATION OFFICE
- "CASA DAGO" INFORMATION OFFICE
- "PEDRO PIDAL" VISITOR RECEPTION CENTRE
- ASTURIAS JURASSIC MUSEUM
- TEVERGA PREHISTORIC PARK
- LABORAL CITY OF CULTURE
- TITO BUSTILLO ROCK ART CENTRE
- ASTURIAN PRE-ROMANESQUE ART RECEPTION AND INTERPRETATION CENTRE
- "FUENTES DE INVIERNO" WINTER RESORT
- NIEMEYER CENTRE

A person with dark hair tied back, wearing a light blue long-sleeved shirt and dark shorts, sits on a dark, jagged rock formation. They are looking out over a calm sea towards a natural rock arch on the horizon. The sky is filled with vibrant orange, red, and purple clouds, reflecting on the water's surface. A semi-transparent dark blue rectangle is positioned in the lower right, containing the chapter number and title.

4

Analysis of the demand

4. ANALYSIS OF THE DEMAND

4.1 Analysis of the current demand and tourist profiles in Asturias

In order to understand the composition of the demand for the Principality of Asturias, it is necessary to analyse the figures available from the Asturias Tourist Information System (SITA as per its acronym in Spanish) in 2015.

The following tables show the figures on the tourists staying overnight in collective accommodation in the Principality: hotel accommodation (hotels, B&Bs and guest houses), rural tourism accommodation (rural hotels, country houses and rural apartments), tourist campsites and tourist apartments.

SITA, which extracts the figures from the National Institute of Statistics (INE), does not publish information on hostels or holiday homes.

Figure 11. TRAVELLERS AND OVERNIGHT STAYS IN ASTURIAS FROM 2010 TO 2015

TOTAL ASTURIAS	2010	2011	2012	2013	2014	2015
Total Travellers	1,822,296	1,850,922	1,732,118	1,767,203	1,905,404	2,086,754
% Annual Variation	-	1.6%	-6.4%	2%	7.8%	9.5%

TOTAL ASTURIAS	2010	2011	2012	2013	2014	2015
Overnight stays	4,552,217	4,618,123	4,265,884	4,185,963	4,430,095	4,909,400
% Annual Variation	-	1.4%	-7.6%	-1.9%	5.8%	10.8%

Source: Own development based on data from SITA.

Figure 12. TRAVELLERS BY ACCOMMODATION TYPE FROM 2010 TO 2015

TRAVELLERS	2010	% OF TOTAL	2011	% OF TOTAL	2012	% OF TOTAL	2013	% OF TOTAL	2014	% OF TOTAL	2015	% OF TOTAL
Hotel establishments	1,427,238	78.3%	1,451,995	78.4%	1,338,279	77.3%	1,408,035	79.7%	1,493,706	78.4%	1,658,175	79.5%
Tourist campsites	179,316	9.8%	178,156	9.6%	177,797	10.3%	170,262	9.6%	164,359	8.6%	169,739	8.1%
Tourist apartments	36,826	2%	40,281	2.2%	34,432	2%	42,704	2.4%	51,582	2.7%	51,238	2.5%
Rural tourism accommodation	178,916	9.8%	180,490	9.8%	181,610	10.5%	146,202	8.3%	195,757	10.3%	207,602	9.9%
Total Asturias	1,822,296	100%	1,850,922	100%	1,732,118	100%	1,767,203	100%	19.05	100%	2,086,754	100%

Source: Own development based on data from SITA.

Figure 13. OVERNIGHT STAYS BY ACCOMMODATION TYPE FROM 2010 TO

OVERNIGHT STAYS	2010	% OF TOTAL	2011	% OF TOTAL	2012	% OF TOTAL	2013	% OF TOTAL	2014	% OF TOTAL	2015	% OF TOTAL
Hotel establishments	2,973,637	65.3%	3,031,118	65.6%	2,805,187	65.8%	2,844,238	67.9%	2,953,495	66.7%	3,299,475	67.2%
Tourist campsites	729,603	16.0%	727,819	15.8%	723,638	17.0%	681,204	16.3%	651,698	14.7%	728,794	14.8%
Tourist apartments	175,736	3.9%	190,642	4.1%	148,003	3.5%	167,907	4%	201,361	4.5%	199,914	4.1%
Rural tourism accommodation	673,241	14.8%	668,544	14.5%	589,056	13.8%	492,614	11.8%	623,541	14.1%	681,217	13.9%
Total Asturias	4,552,217	100%	4,618,123	100%	4,265,884	100%	4,185,963	100%	4,430,095	100%	4,909,400	100%

Source: Own development based on data from SITA.

Figure 14. YEAR-ON-YEAR CHANGE IN OVERNIGHT STAYS BY ACCOMMODATION TYPE FROM 2011 TO 2015

OVERNIGHT STAYS	2011	2012	2013	2014	2015
Hotel establishments	1.9%	-7.5%	1.4%	3.8%	11.7%
Tourist campsites	-0.2%	-0.6%	-5.9%	-4.3%	11.8%
Tourist apartments	8.5%	-22.4%	13.4%	19.9%	-0.7%
Rural tourism accommodation	-0.7%	-11.9%	-16.4%	26.6%	9.2%

Source: Own development based on data from SITA.

Figure 15. YEAR-ON-YEAR CHANGE IN TRAVELLERS BY ACCOMMODATION TYPE FROM 2011 TO 2015

TRAVELLERS	2011	2012	2013	2014	2015
Hotel establishments	1.7%	-7.8%	5.2%	6.1%	11%
Tourist campsites	-0.6%	-0.2%	-4.2%	-3.5%	3.3%
Tourist apartments	9.4%	-14.5%	24.0%	20.8%	-0.7%
Rural tourism accommodation	0.9%	0.6%	-19.5%	33.9%	6.1%

Source: Own development based on data from SITA.

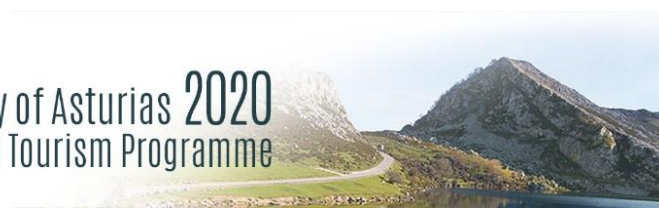
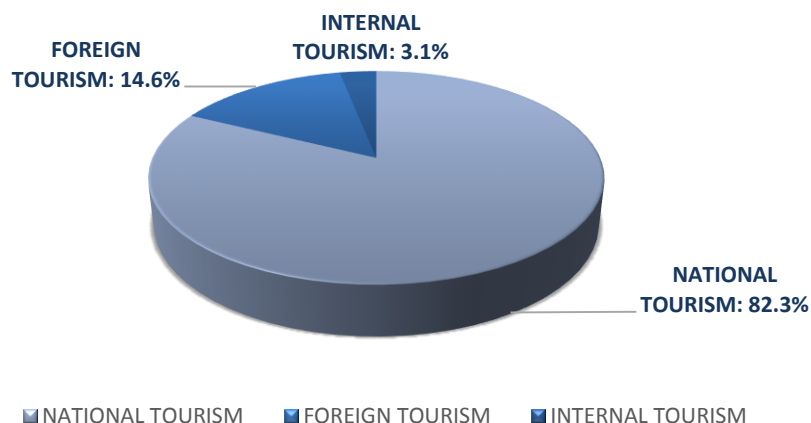


Figure 16. TRAVELLERS IN ASTURIAS: RESIDENT/NON-RESIDENT FROM 2010 TO 2015

TRAVELLERS	2010	2011	2012	2013	2014	2015
Resident Travellers	1,600,490	1,615,482	1,501,808	1,523,704	1,620,986	1,773,047
% Resident Travellers	87.8%	87.3%	86.7%	86.2%	85.1%	85%
% Annual variation	-	0.9%	-7.0%	1.5%	6.4%	9.4%
Non-Resident Travellers	221,804	235,441	230,306	243,501	284,417	313,708
% Non Resident Travellers	12.2%	12.7%	13.3%	13.8%	14.9%	15%
% Annual variation	-	6.1%	-2.2%	5.7%	16.8%	10.3%
OVERNIGHT STAYS	2010	2011	2012	2013	2014	2015
Overnight stays by Residents	4,057,693	4,110,080	3,780,660	3,685,912	3,856,478	4,282,106
% Overnight stays by Residents	89.1%	89%	88.6%	88.1%	87.1%	87.2%
% Annual variation	-	1.3%	-8%	-2.5%	4.6%	11%
Overnight stays by Non-Residents	494,524	508,046	485,228	500,052	573,620	627,293
% Overnight stays by Non-Residents	10.9%	11%	11.4%	11.9%	12.9%	12.8%
% Annual variation	-	2.7%	-4.5%	3.1%	14.7%	9.4%

Source: Own development based on data from SITA.

Figure 17. TRAVELLERS BY ORIGIN IN 2015



Source: Own development based on data from SITA.

Figure 18. TRAVELLERS BY AUTONOMOUS COMMUNITY OF ORIGIN IN 2015

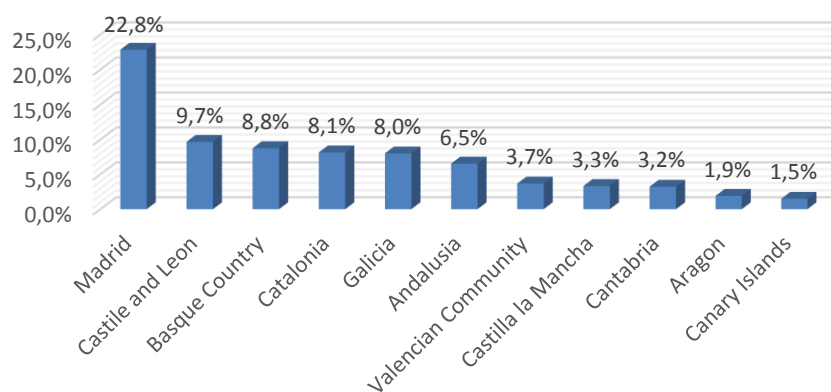
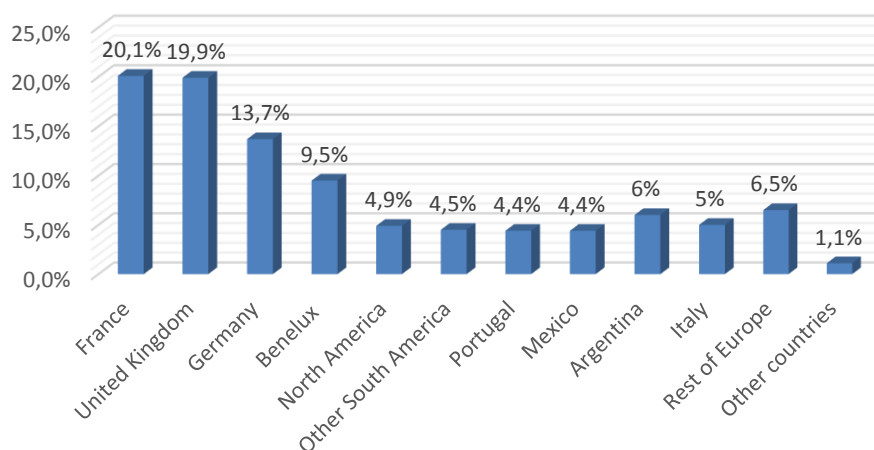


Figure 19. TRAVELLERS BY COUNTRY OF ORIGIN IN 2015



Source: Own development based on data from SITA.

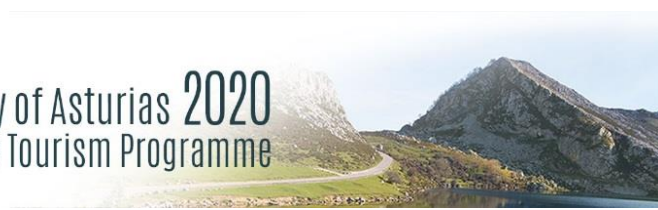
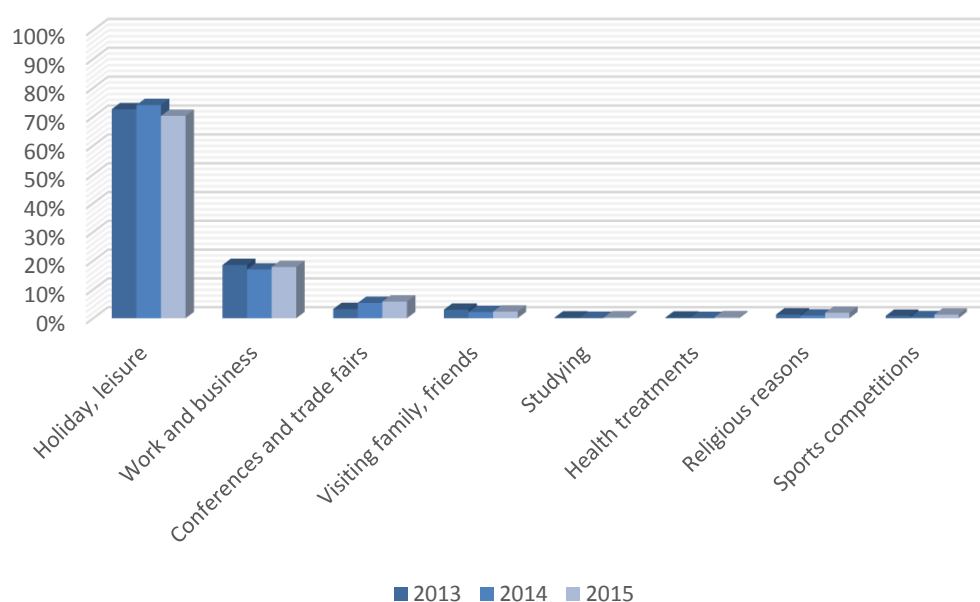


Figure 20. REASON FOR THE VISIT FROM 2013 TO 2015



Source: Own development based on data from SITA.

Figure 21. REASONS FOR CHOOSING ASTURIAS FROM 2013 TO 2015

REASONS	2013	2014	2015
Discover new places	21.7%	23.1%	27.2%
Recommendations	9.2%	8.3%	6.1%
Previous experience	13.9%	12.5%	15.3%
Natural environment	20.5%	20.5%	18.4%
Cultural heritage	5.2%	7.9%	4.7%
Tranquillity	4.6%	5.0%	4.5%
Gastronomy	9.7%	12.8%	10.1%
Geographical proximity	6.3%	5.9%	4.7%
Asturian roots	2.1%	1.2%	2.2%
Benign climate	4.2%	1.9%	5.2%
Hunting/fishing	0.1%	0.1%	0%

Source: Own development based on data from SITA.



Figure 22. COMPANY USED TO MAKE THE TRIP FROM 2013 TO 2015

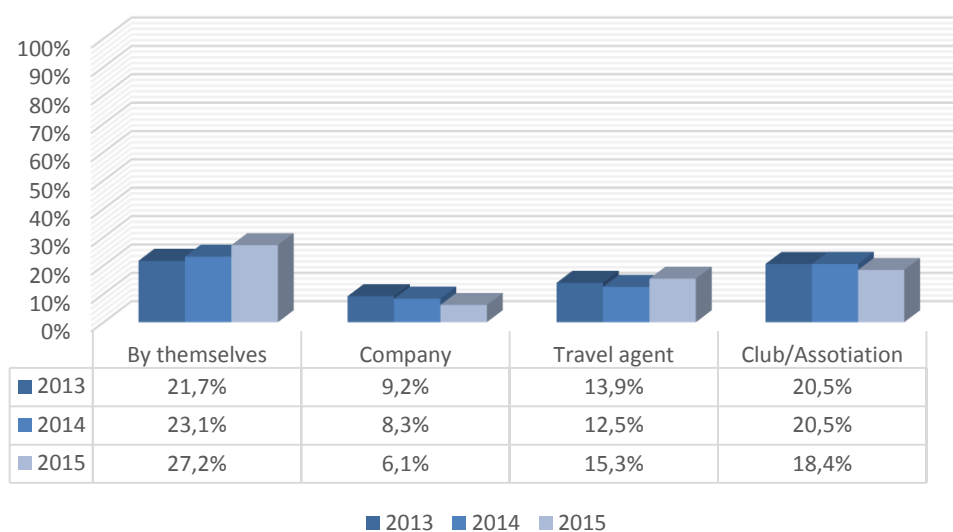
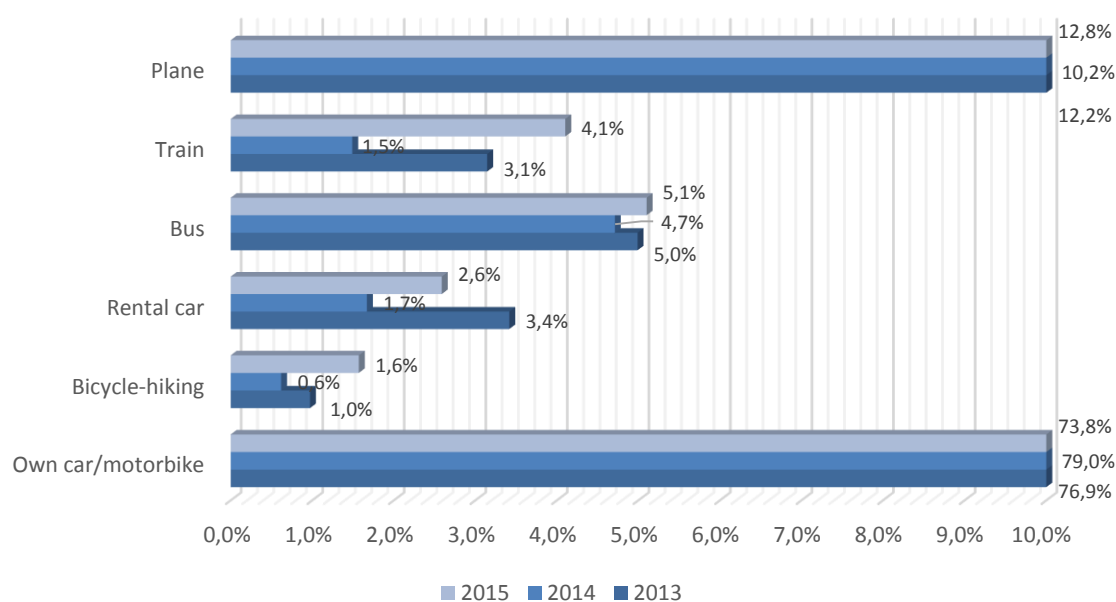
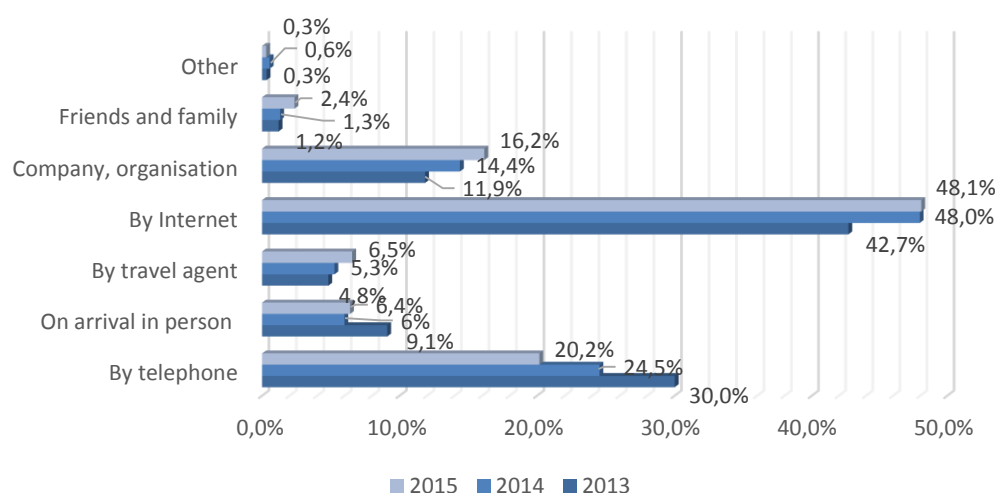


Figure 23. MEANS OF TRANSPORT USED TO MAKE THE TRIP FROM 2013 TO 2015



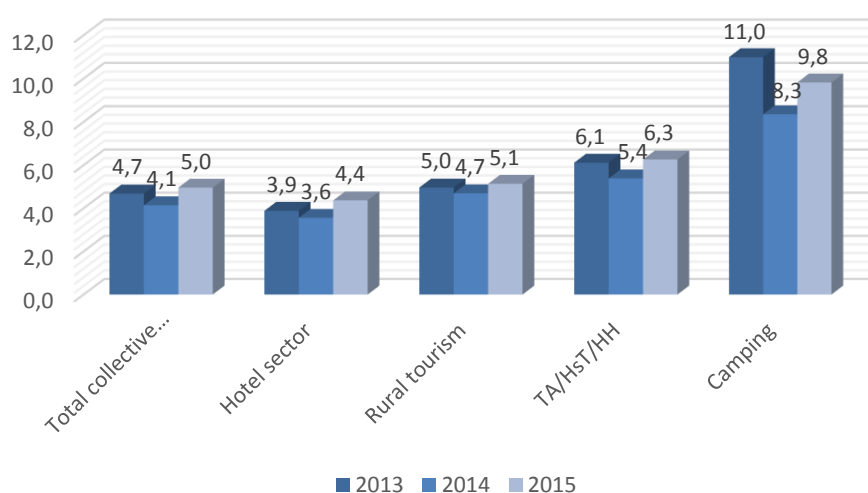
Source: Own development based on data from SITA.

Figure 24. METHOD OF BOOKING ACCOMMODATION FROM 2013 TO 2015



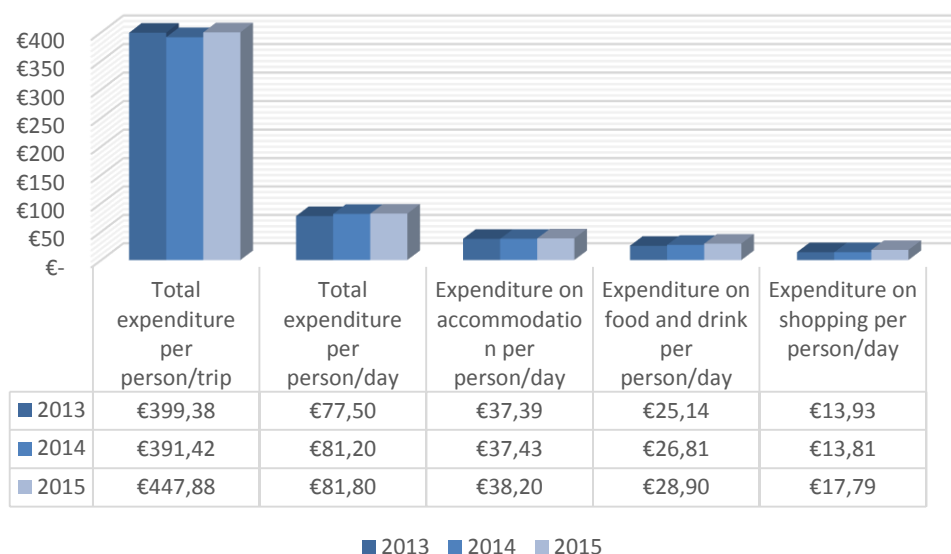
Source: Own development based on data from SITA.

Figure 25. AVERAGE STAY (VALUES FROM 0 TO 10) IN NIGHTS FROM 2013 TO 2015



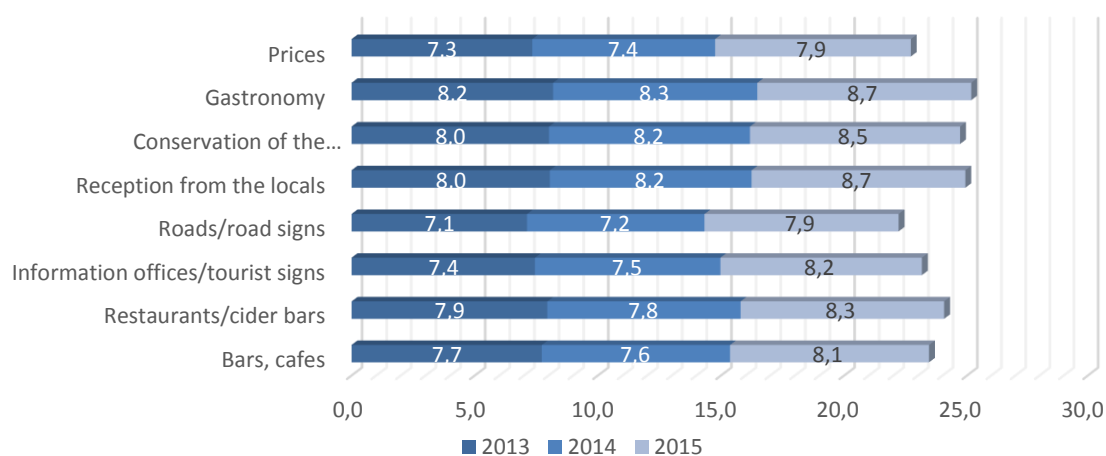
Source: Own development based on data from SITA.

Figure 26. AVERAGE TOURIST SPEND FROM 2013 TO 2015



Source: Own development based on data from SITA.

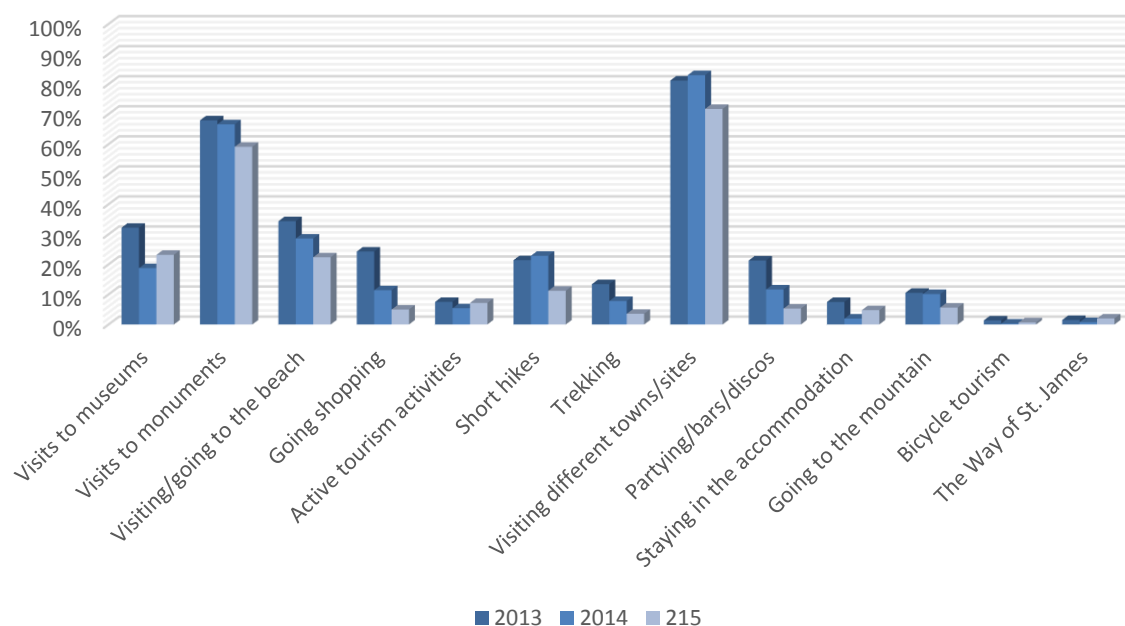
Figure 27. AVERAGE RATING OF ASTURIAS FROM 2013 TO 2015



Source: Own development based on data from SITA.

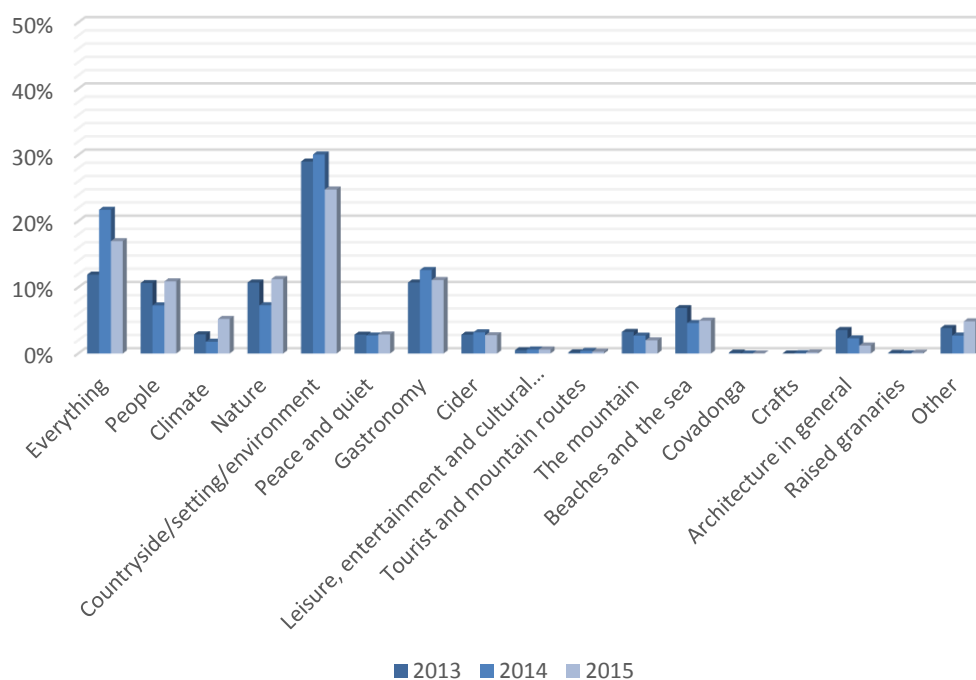
Units: Value from 0 to 10 points

Figure 28. MOST DEMANDED ACTIVITIES IN ASTURIAS FROM 2013 TO 2015



Source: Own development based on data from SITA.

Figure 29. WHAT IS MOST LIKED IN ASTURIAS FROM 2013 TO 2015



Source: Own development based on data from SITA.

Units: Tourists in collective accommodation.

CONCLUSIONS ON DEMAND

- A total of 2,086,754 travellers were recorded in 2015. This represented an increase of 9.5% compared to 2014. There were also 4,909,400 overnight stays, an increase of 10.8% compared to the previous year.
- In 2015, a growth in overnight stays and travellers was observed in most tourist types, except for the reduction seen in tourist apartments, with a 0.7% fall in the number of overnight stays and travellers.
- The number of resident travellers grew by 9.4% and non-resident travellers by 10.3% compared to 2014. In terms of the number of overnight stays, those by residents increased by 11% and those by non-residents grew by 9.4%.
- In 2015, domestic tourism accounted for 82.3%, foreign tourism 14.6% and internal community tourism 3.1%.
- In terms of the country of origin, the trend seen in previous years has continued, with France being the main issuer country with 20.1%, followed by the United Kingdom with 19.9% and Germany with 13.7%.
- In terms of domestic tourism, the main issuer community for travellers continues to be Madrid with 22.8%, followed by Castilla y León with 9.7%, and very closely followed by other communities such as the Basque Country, Catalonia and Galicia, with 8.8%, 8.1% and 8% respectively.
- The main reason for visiting Asturias continues to be for holidays and leisure, accounting for 70.3%, followed by work and leisure, with 17.8%, which has increased compared to 2014. Other reasons have grown slightly, including conferences and trade fairs (5.8%) and visits to family and friends (2.3%) in 2015.
- The main reason for choosing Asturias as a tourist destination continues to be discovering new places with 27.2%, followed by the natural environment with 18.4%.
- Gastronomy, cultural heritage and geographical proximity have decreased compared to 2014.
- In terms of the choice of the company to make the trip, 27.2% prefer to organise their own trip to the region, 18.4% organise it through a club or association and 15.3% through travel agents. Bookings through a club or association and through the company decreased compared to 2014.
- A personal vehicle or motorcycle was the method chosen by 73.8% to visit Asturias. 12.8% chose to travel by plane, followed by bus and train with 5.1% and 4.1% in 2015.
- With regard to the method used to book accommodation, 28.4% of tourists in collective accommodation made their reservation over the Internet, while 20.2% booked by telephone.
- The average stay increased compared to 2014; in all collective accommodation during 2015 the average was 5 nights, whereas in 2014 it was 4.1 nights.

By accommodation type, the average in hotel establishments was a total of 4.4 nights, in rural tourism accommodation it was 5.1 nights, in tourist apartments, hostels and holiday homes it was 6.3 nights, and in tourist campsites it was 9.8 nights.

- The total expenditure per person per trip for tourists in collective accommodation increased to an average of €447.88. The total average expenditure per person per day was €81.80, which is split between an average accommodation expenditure per person per day of €38.20, an average

food expenditure per person per day of €28.90 and an average shopping expenditure per person per trip of €17.79. A slight increase of 0.7% was observed in the average daily expenditure compared to 2014.

- In 2015, the best rated aspects of the community continued to be gastronomy, the friendliness of the people and the preservation of the natural environment and cultural heritage. However, the aspects rated worst by visitors were prices and accessibility, the state of the roads and the lack of road signs.
- The activities most demanded by tourists in collective accommodation in 2015 were visits to Asturian towns and other places, at 71.4%, followed by visits to monuments and museums, with 59.3% and 23.8% respectively.
- 16.97% of people who visited Asturias in 2015 said that they liked everything about the community, but a decline of 4.71% was seen compared to 2014.
- The landscape, environment and atmosphere, as well as the nature, gastronomy and people continued to be the most liked aspects of the community.

4.2 Analysis of potential demand

4.2.1 Target audience segments

The main reason for visiting Asturias is currently for holidays and leisure, with 74% of the total, followed by for work and business, with 16.9%.

Analysing the profile of those currently choosing the Asturias tourist destination, through figures extracted by SITA in 2015, it can be seen that the most highly rated aspects and those most liked about the community are the landscape, environment and atmosphere.

The reasons of the tourists that have increased in the last few years are to discover new places, repeating the visit given previous experience, the tranquillity and geographical proximity.

In contrast, cultural heritage, gastronomy, Asturian roots, benign climate and hunting and fishing have seen a decrease.

All of these aspects have an influence on the target audience segments with the greatest potential for Asturias, both nationally and internationally, and are analysed in more detail in Section 9.3 of this document.

4.2.2 Priority markets

France, Germany, the United Kingdom and Portugal are established as issuing markets given that in recent years they have been the countries providing the most visitors to the community. However, as we have seen, the current percentage of foreign visitors and tourists in the community is low.

In 2004, Germany led the foreign tourism issuing market with 17.60%, followed by France and Portugal with 16.20% and 15.02% respectively.

Madrid is the main domestic community in issuing travellers to Asturias, with 22.8% of the total in 2015, followed by Castilla y León with 9.7% and the Basque Country with 8.8%. This can be directly related to one of the reasons for choosing Asturias as a tourist destination, namely geographical proximity. Although very important in recent years, in 2015 it decreased and lost weight compared to other reasons such as discovering new places.



5

Analysis of the
supply-demand relationship

5. ANALYSIS OF THE SUPPLY-DEMAND RELATIONSHIP

As seen in the analysis in the previous sections, demand grew by 9.5% in terms of travellers and 10.08% in terms of overnight stays and there was an increase in supply of 0.1% in beds and 0.6% in establishments (hotels, B&Bs, guest houses, rural houses, tourist campsites, hostels, tourist apartments and tourist properties).

With regard to the average stay, there was an increase in 2015 to 5 nights, whereas in 2014 it was 4.1 nights.

Carrying out an analysis by category of tourist establishment, the following is observed:

The demand for hotel accommodation increased by 11% and the number of overnight stays by 11.7%, but the hotel supply fell by 4.9% in the number of establishments and 2.8% in the number of beds compared to 2014.

In rural accommodation (rural hotels, country houses and rural apartments), demand grew by 6.1% whilst there was an increase in the supply of establishments by 0.4% and in the number of beds by 0.9%.

In terms of tourist campsites, traveller demand increased by 3.3% and by 11.8% in the number of overnight stays, but the supply of campsites has remained stable over recent years at 53 establishments and the supply of beds only increased by 0.7% compared to 2014.

Traveller demand for tourist apartments is the only aspect that decreased, with 0.7% fewer travellers and overnight stays, while the supply of beds increased by 1.5%.

Finally, there was an increase in the total expenditure per person per trip, which was an average of €447.88. The total average expenditure per person per day was €81.80, representing a slight increase of 0.7% compared to 2014, and this was split between an average accommodation expenditure per person per day of €38.20, an average expenditure spend per person per day of €28.90 and an average shopping expenditure per person per trip of €17.79.



6

Analysis of the perception
and image of the Asturias
tourist destination brand

6. ANALYSIS OF THE PERCEPTION AND IMAGE OF THE ASTURIAS TOURIST DESTINATION BRAND

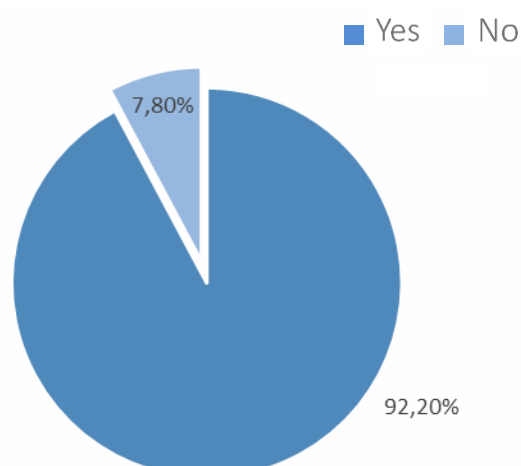
6.1. Analysis of our own perception of the tourist image of Asturias.

During the **consultation of the Asturian sector** for the drawing up of the Sustainable Tourism Programme for the Principality of Asturias, its opinion was sought on the tourist image of the destination, as well as on the most noteworthy and/or distinctive resources and experiences in the region relating to culture.

From the results obtained during the process, it is worth mentioning the **strong link in the sector's perception in terms of the values of the culture existing in the brand image of Asturias, Natural Paradise**, as seen by the fact that 92.2% responded affirmatively to the question: Do you think **the tourist slogan and image of Asturias are based on the real and differentiating values of the region?**

Moreover, questioned in this survey about **elements representing opportunities to differentiate Asturias**, the most important agents in the sector demonstrated a clear preference for **nature and landscapes** as the most important differentiating value, with **90.3%** of responses in the "very important" category. Following that,

gastronomy is the second differentiating value, with 71.35% of responses grouped into the "very important" option, followed by its **rich heritage** with 51.56% of responses in "very important" and 43.23% in "quite important". Further behind are **mountain activities** (55.73% of responses categorised it as "quite important" and 42.19% as "very important") and its **seaside towns** (54.17% of responses categorised it as "quite important" and 38.54% as "very important").



Source: Own development from conducting surveys of the Asturian tourist sector, 2016.

1. Nature and countryside

2. Gastronomy

3. Richness of the heritage

4. Mountain sports

5. Seaside towns

Moreover, complementing these results with those obtained when discussing this topic at the Tourism Sector Meetings held to consult the sector across the region, **some of the values which the sector considers to be associated with the brand image are:**



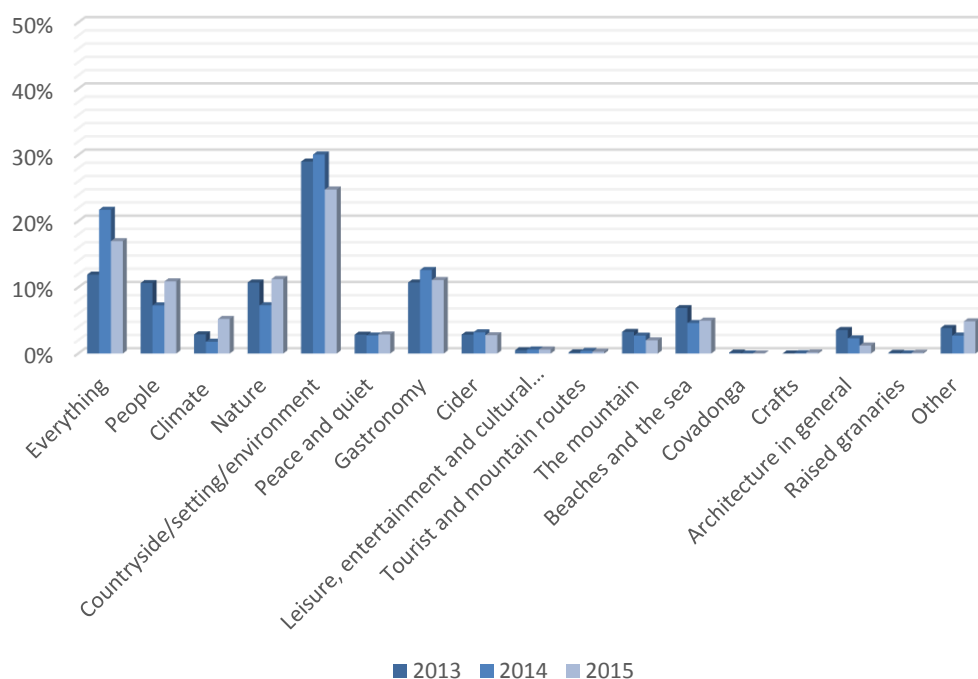
Finally, the **unique resources and experiences available in Asturias**, identified by the sector itself at these Sector Meetings are:

- *Pre-Romanesque art.*
- *Traditional towns and architecture.*
- *The cosmopolitan cities (especially Gijón and Oviedo).*
- *The seaside towns (Bustio, Candás, Castropol, Cudillero, Lastres, Llanes, Figueras, Gijón, Ortiguera, Navia, Luanco, Lueca, San Juan de la Arena, San Esteban de Pravia, Puerto de Vega, Ribadesella, Tazones, Viavélez, Tapia de Casariego).*
- *The language.*
- *Folklore, dance and traditional music.*
- *Festivals of tourist interest.*
- *Museums and interpretation centres.*
- *Traditional professions and ethnographic heritage (iron craftsmen, farmers and ranchers, bee-keepers, etc.).*
- *Industrial heritage.*
- *Crafts.*
- *Caves and Roman mining.*
- *Rock art.*
- *Dinosaur footprints.*
- *The "Prince of Asturias" Awards.*
- *The Way of St. James.*
- *Spiritual and religious tourism: Covadonga.*

6.2. Tourist image in consolidated and emerging issuing markets, positioning of the Asturias brand

Analysing the image and positioning of the Asturias tourist destination among current demand, through data extracted by SITA in 2015 it can be seen that the **most valued aspects and those most liked about the community** are firstly the landscape/environment/atmosphere of the destination, with 24.77% of all responses. Secondly was **everything**, with 16.97% of all responses, although this fell compared to 2014, followed by **nature** with 11.25%, which increased by almost four percent compared to the previous year, and **gastronomy** with 11.1% of all responses. Finally, we have its **people**, with 10.89%.

Figure 30. WHAT IS MOST LIKED ABOUT ASTURIAS FROM 2013 TO 2015

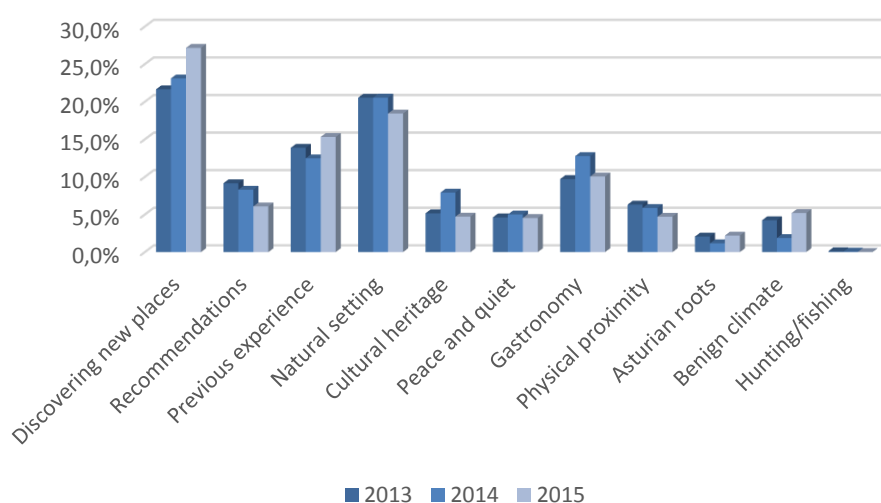


Source: Own development based on data from SITA.

Units: Tourists in collective accommodation

The reasons for travelling to Asturias include **discovering new places**, with 27.2% of all responses, followed by the **natural environment**, with 18.4% of responses and which has gradually increased in recent years, and **previous experience**, with 15.3%, which has increased by almost three percent since 2014.

Figure 31. REASONS FOR CHOOSING ASTURIAS FROM 2013 TO 2015



Source: Own development based on data from SITA. Units: Tourists in collective accommodation

Among the factors that are most important, in addition to those mentioned, are the **benign climate** and **Asturian roots**, factors that must be strengthened, while those that decreased include the **natural environment, cultural heritage, tranquillity and recommendations, aspects that must be worked on in order to not lose competitiveness**.

Finally, the decline in the importance of geographical proximity also indicates greater awareness about Asturias in distant markets, or a more attractive image, which make the distance factor less important when travelling to the destination.

A scenic view of a coastal town at dusk, with mountains in the background. The town is built on a hillside overlooking the sea, with many buildings featuring red-tiled roofs. In the foreground, a woman is holding a young child, both looking out over the town. The sky is a mix of blue and orange, suggesting sunset or sunrise. A dark blue semi-transparent box is overlaid on the bottom right, containing the section number and title.

7 Analysis of promotion and marketing structures and strategies

7. ANALYSIS OF PROMOTION AND MARKETING STRUCTURES AND STRATEGIES

7.1. Study of the promotion and marketing strategies and actions of the different administrations and the business sector

7.1.1. Promotional and marketing actions carried out by public entities promoting the destination.

From 2013 to 2015, different tourist communication and promotion initiatives have been carried out, one of which was the launch of the new tourist information portal www.turismoasturias.es with an advanced accommodation search engine and a sub-portal aimed at professionals.

The following tourist promotion and communication initiatives were carried out by the company *Sociedad Pública de Gestión y Promoción Turística y Cultural del Principado de Asturias* in 2015:

A) Communication actions:

The communication actions carried out in 2015 are split into:

1. *Advertising campaigns*
2. *On-line campaigns*
3. *Promotion campaigns on public transport*

Presented below is a summary table with the actions carried out in this field:

Figure 32. TOURIST COMMUNICATION ACTIONS CARRIED OUT BY THE COMPANY SOCIEDAD PÚBLICA DE GESTIÓN Y PROMOCIÓN TURÍSTICA Y CULTURAL DEL PRINCIPADO DE ASTURIAS IN 2015

Type of action	Scope	Actions	Main markets
Advertising campaigns	Regional	Advertising campaign "Hoy salgo en casa, hoy salgo en Asturias" (Today I am going out at home, I am going out in Asturias)	Asturias
	National	"Guardianes del Paraíso" (Guardians of Paradise) advertising campaign	Madrid, Catalonia, the Basque Country, Castilla León and Galicia
	International	International advertising campaign with Turespaña	United Kingdom, Germany, France, Italy and Portugal
On-line campaigns	National and international	SEM campaign	National and International market
		SEO campaign	
		Social media campaign - SMM	
Promotion on public transport campaign	National and international	Content branding and promotion actions through the Agreement with the JV formed by Iberia, Vueling, Air Nostrum, Iberia express, ALSA and Viajes el Corte Inglés	National and international market

Source: Own development based on data from the "2015 Activities Report" by the SPGPTC of the Principality of Asturias.

1. Advertising campaigns:

The investment in advertising made last year was distributed across three advertising campaigns: Regional, National and International.

- Regionally, the "Hoy salgo en casa, salgo en Asturias" campaign continued, aimed at mobilising the Asturian people, encouraging them to travel around their region in the low season. This campaign was based on spots in the Television in the Principality of Asturias, radio slots and press inserts.



- Moreover, the "**Guardianes del Paraíso**" campaign continued **nationally**. This campaign was mainly focused on Madrid, Catalonia, the Basque Country, Castilla y León and Galicia, although it also touched more distant markets, and involved inserts and reports in graphic media, radio slots, television spots, billboards and panels in metro and bus stations, to which a significant on-line presence can be added.
- Finally, **internationally**, and in collaboration with Turespaña, a campaign was launched in several languages in the United Kingdom, Germany, France, Italy and Portugal, with inserts and reports in written media, external advertising on buses, advertising panels and taxis, and impressions in the on-line campaign.



2. **SEO/SEM campaign and social media campaigns**

An on-line marketing campaign (SEO/SEM and social media) was also carried out in 2015, promoting advertising initiatives in the main Internet search engines (SEM actions) as well as a web content strategy (SEO actions).

3. **National promotion campaign on public transport**

Finally, the national promotion campaign on public transport included various types of brand positioning and content promotion initiatives, carried out under the framework of the agreement signed with the JV formed by Iberia, Vueling, Air Nostrum, Iberia Express, ALSA and Viajes Corte Inglés.

B) Tourist promotion actions

The promotional actions carried out by the *Sociedad Pública de Gestión y Promoción Turística y Cultural del Principado de Asturias* in 2015 can be classified into the following types of action:

- **Trade fairs and forums**
- **Press and agent trips**
- **Destination presentations**
- **Special promotion formats**

Presented below is a summary table with the promotion actions carried out:

Figure 33. TOURIST COMMUNICATION ACTIONS CARRIED OUT BY THE COMPANY SOCIEDAD PÚBLICA DE GESTIÓN Y PROMOCIÓN TURÍSTICA Y CULTURAL DEL PRINCIPADO DE ASTURIAS IN 2015

Type of action	Field	Actions	Main markets
Trade fairs and forums	Regional	Promotion at fairs	Asturias
	National	Promotion at fairs	Madrid, Castilla-León and the Basque
	International	Promotion at fairs	Germany, United Kingdom and Italy
	International	Trade meetings	France, United Kingdom
Press and agent trips	National	Agent trips	Promotion of the MICE product at a national level
	International	Agent trips	United Kingdom and Germany
	National and international	Press trips	Germany, Ireland, United Kingdom, Portugal...
Destination presentations	National and international	Presentations of the Asturias Destination	Sweden, Portugal, Italy, Domestic Market
Specific advertising formats	National and International	Design of specific formats	National and international market

Source: Own development based on data from the "2015 Activities Report" by the SPGPTC of the Principality of Asturias.

It is worth mentioning that in 2015 it participated in highly prestigious tourism fairs, some of them international, such as FITUR in Madrid and the WTM in London.

With regard to the media, there has also been a constant reporting of good news, encouraged by press trips that have attracted various media organisations, many of them international.

Finally we have the influencer trips, presentations of the Asturias destination and trade meetings in 2015, as well as the design of specific promotional formats, such as videos and publications, which achieved a high impact in terms of views.

C) Web portal and social media

In 2015, a section of themed offers and breaks was created within the website www.turismoasturias.es, based on the following main segments: nature, culture, flora and fauna, gastronomy, health, active tourism, golf, plans with children and guided visits. Also on offer are tourist packs which include, for example, "Discover the healthiest plants", "Special springtime moments in Llanes", "Beauty and relaxation experience" and "A romantic weekend in Asturias".

The website turismoasturias.es received a total of 1,677,891 visits in 2015, more than double the visits in the previous year, of which 7.6% came from the international market.

More than 40,000 visits were also received by the on-line reservations page, 180,000 hits for accommodation pages and 160,000 hits for the offers and breaks section, which was only launched that same year, and which has almost 200 themed breaks.

With regard to the social media strategy, in 2015 the Asturian destination's channels exceeded 200,000 followers, placing it in the following positions in the ranking of autonomous communities on social media:

- 2nd destination on **Facebook**, with 165,592 followers, after Catalonia.
- 2nd destination on **Google+**, with 1,916 followers.
- 3rd destination on **Youtube**, with 1,804 followers, after Catalonia and the Canary Islands.
- 3rd destination on **Instagram**, with 9,313 followers.
- 4th destination on **Pinterest**, with 964 followers.
- 5th destination on **Twitter**, with 46,464 followers, after Madrid, Andalusia, Catalonia and Valencia.

Publications on the tourist blog also made visits to the website increase by 140% compared to 2014. Asturias was the community most talked about on the social media during the week of the FITUR fair, reaching almost two million users with the publications on a single day.

D) Special actions: 30 years of Rural Tourism Campaign and Sponsorship.

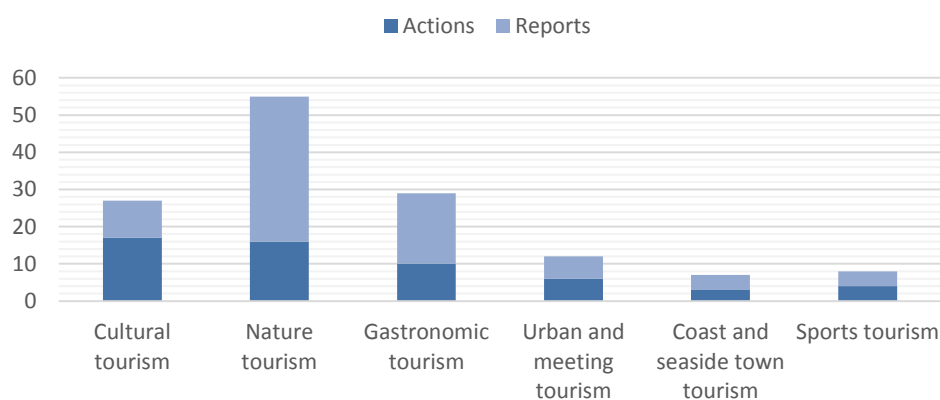
30 years of the "Asturias, Natural Paradise" tourist brand was also celebrated in 2015, establishing it as one of the longest-standing tourist brands in Spain; this was the reason behind a programme of commemorative events throughout the year, including those such as the "30 years, 30 routes" programme of excursions organised throughout the entire Asturian region, in which more than 600 people participated, the "Are you a millennial?" on-line video campaign, the "This is my Natural Paradise" children's drawing competition, for which 160 drawings were presented, and the creation of special breaks and offers in a separate section within the website.

Finally, other special initiatives carried out during 2015 were the sponsorship of sporting events such as the Cycling Tour of Asturias, the "Princesa de Asturias" Rally, the International Descent of the Sella River and the "Vuelta a España" (Cycling Tour of Spain), along with the creation of a number of associative sponsorships aimed at supporting the marketing of tourist companies in the region.

ACTIONS BY TOURISM PRODUCT

Classifying the promotional actions carried out by the *Sociedad Pública de Gestión y Promoción Turística y Cultural del Principado de Asturias* in 2015 by type of tourism product leads to the following distribution:

Figure 34. **PROMOTIONAL ACTIONS BY TOURISM PRODUCT – 2015**



Source: Own development based on data from the "2015 Activities Report" by the SPGPTC of the Principality of Asturias.



As can be observed in the above graph, taking into account all the types of action, **nature tourism** is the product with the highest number of impacts, followed by **gastronomic tourism** and **cultural tourism**. This is due to the fact that the first two product types have had a higher number of reports. If we look exclusively at the promotional actions carried out, cultural tourism is the product that has received a higher number of impacts, followed by nature tourism and gastronomic tourism.

7.1.2. Promotion and marketing actions carried out by the destination's business sector.

In addition to those carried out in collaboration with the public sector, through agreements and partnerships, it is necessary to analyse the promotional and marketing strategies of the Asturian companies in relation to tourist experiences.

As has been mentioned, in 2015 a section with information on themed offers and breaks was created within the website www.turismoasturias.es. This has almost 200 themed breaks designed around the following main segments: nature, culture, flora and fauna, gastronomy, health, active tourism, golf, plans with children and guided visits.

Additionally, as a pioneering response to the needs of the new digital tourist, the marketing of the Spanish tourism product has been included in the "Experiences" section of the **Spain tourism portal**, www.spain.info, since 2013. This section offers the private sector a sales channel based on the main instrument of institutional tourist promotion, and the final purchase is always carried out through the service provider's website. Spain.info also includes all of the information relating to the autonomous communities and destinations, with links to their respective websites.

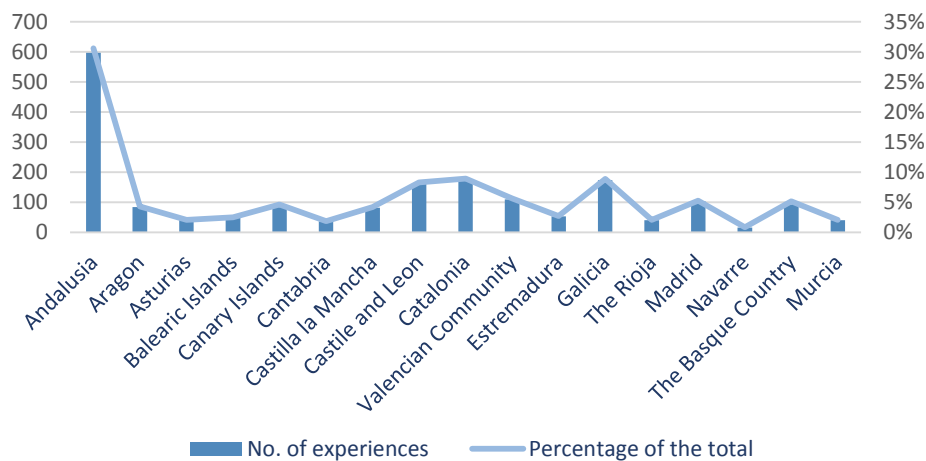
The platform allows the experiences available on the website to be filtered by different criteria, among which are geographical location (either selecting the province/island or through an interactive map) and category, depending on the user's general reason for the visit, classified into: tours and visits, sports and adventure, culture and traditions, nature, gastronomy, health and beauty, sailing, shopping, leisure parks or premium Spain, and each of these have different sub-categories. Moreover, each of the experiences is segmented, including a specification of the visitor profiles on which they are focused (young people, families, adults without children, seniors, LGBT)

This platform is available in 18 languages and has 25 local versions, for both the traditional and the emerging markets, making it a very important sales channel for accessing the international tourist market.

Analysing the distribution of the 1,950³³ experiences in this section by autonomous community, it can be seen that **Andalusia** has the most available, representing 30.6% of the total with its 597 experiences. This is followed, in order of importance but a long way behind, by **Catalonia** with a total of 174 experiences, 8.92% of the total, and **Galicia** with 173 experiences and 8.87% of the total.

³³ Data for May 2016

Figure 35. DISTRIBUTION OF EXPERIENCES ON THE SPAIN.INFO WEBSITE BY AUTONOMOUS COMMUNITY



Source: Own development based on data from Spain.info

Asturias, with a total of 40 experiences, is **last but two in the ranking of autonomous communities with regard to the number of experiences included on this platform**, along with La Rioja and Murcia, each representing 2.05% of the total, and only exceeding the supply of Cantabria and Navarre. Thus, we can see that there is clearly room for improvement in terms of the **configuration and promotion of tourist experiences through this website, taking better advantage of the potential of this sales channel**.

Included below is a summary table with the experiences in the Principality of Asturias included on the website Spain.info:



Tourist experience	Experience category	Duration (no. days)	Places	Municipalities of Asturias	Languages	Segments	Marketing entity	Type of entity
EXCURSION TO TARAMUNDI – OSCOS	Tours and visits. Culture and traditions. In nature	1	Asturias	Taramundi	Spanish	Young people. Families. Adults without children. Seniors. LGBT	Company	Travel agent
"MOUNTAIN BIKING" WITH A CYCLIST'S DINNER IN THE CENTRAL MOUNTAINS OF ASTURIAS	Tours and visits. Nature. Sports and adventure. In nature. Ecotourism. MTB	1	Asturias	Aller, Lena, Mieres, Morcín, Ribera de Arriba, Riosa	Spanish, English	Young people. Adults without children. Seniors. LGBT	Tourist Consortium	Central Mountains of Asturias
HUNTING EXPERIENCE IN NAVA (ASTURIAS), CIDER REGION	Tours and visits. Sports and adventure. In nature	4	Asturias	Nava	English	Young people. Families. Seniors. LGBT	Company	Travel agent
MINDFULNESS	Health and beauty. Sports and adventure. Equestrian tourism	3	Asturias, A Coruña, Lugo	Caso	Spanish, English	Young people. Families. Adults without children. Seniors. LGBT	Company	Accommodation (Rural Apartments)
PHOTOGRAPHY WORKSHOP - PORTRAITS OF A SUNSET	Tours and visits. Nature. In nature. Ecotourism	1	Asturias	Colunga	Spanish	Young people. Families. Adults without children. Seniors. LGBT	Company	Travel agent
ENJOY A GOLF EXPERIENCE AT HOTEL TORRE DE VILLADEMOROS	Sports and adventure	2	Asturias	Valdés	Spanish, English	Young people. Adults without children. Seniors. LGBT	Company	Reservations Centre
ENJOY THE BEST ADVENTURE IN AMADA CARLOTA	Nature. Sports and adventure. Ecotourism. Equestrian tourism	2	Asturias	Cabranes	Spanish, English	Young people. Families. Adults without children. Seniors. LGBT	Company	Reservations Centre
HORSE RIDING THROUGH A NATURE PARK, BIOSPHERE RESERVE.	Nature. Sports and adventure. Equestrian tourism	3	Asturias	Teverga	Spanish, English, French, German	Young people. Families. Adults without children. Seniors. LGBT	Company	Accommodation (Rural Apartments)
BASIC "MOUNTAIN BIKING" IN THE CENTRAL MOUNTAINS OF ASTURIAS	Nature. Sports and adventure. Ecotourism. MTB	1	Asturias	Aller, Lena, Mieres, Morcín, Ribera de Arriba, Riosa	Spanish, English	Young people. Adults without children. Seniors. LGBT	Tourist Consortium	Central Mountains of Asturias
CUSTOMISED "MOUNTAIN BIKING" IN THE CENTRAL MOUNTAINS OF ASTURIAS	Nature. Sports and adventure. Ecotourism. MTB	1	Asturias	Aller, Lena, Mieres, Morcín, Ribera de Arriba, Riosa	Spanish, English	Young people. Adults without children. Seniors. LGBT	Tourist Consortium	Central Mountains of Asturias
CHARMING BREAK: ASTURIAN GASTRONOMY BETWEEN THE SEA AND THE MOUNTAINS	Tours and visits. Culture and traditions	2	Asturias	Llanes	Spanish, English, French	Young people. Families. Adults without children. Seniors. LGBT	Company	Accommodation (Hotel)
ENJOY THE BEST ADVENTURE IN QUINTA DE VILLANUEVA	Nature	2	Asturias	Ribadedeva	Spanish, English	Young people. Adults without children. Seniors. LGBT	Company	Reservations Centre
BIRD WATCHING IN THE PICOS DE EUROPA: FEATHERS ON LIMESTONE RIDGES	Nature. Observe flora and fauna. Hiking	3	Asturias	Peñamellera Alta	Spanish, English	Young people. Families. Adults without children. Seniors. LGBT	Company	Travel agent
THE LEGACY OF THE GOD ARAMU: PREHISTORIC MINES OF TEXEO	Tours and visits. Nature. In nature. Hiking	3	Asturias	Aller, Lena, Mieres, Morcín, Ribera de Arriba, Riosa	Spanish, English	Young people. Adults without children. Seniors. LGBT	Tourist Consortium	Central Mountains of Asturias
ENJOY THE BEST GASTRONOMY IN AMADA CARLOTA	Gastronomy	2	Asturias	Cabranes	Spanish, English	Young people. Adults without children. Seniors. LGBT	Company	Reservations Centre
ENJOY THE BEST GASTRONOMY IN CASONA DE LA PACA	Gastronomy	2	Asturias	Cudillero	Spanish, English	Young people. Adults without children. Seniors. LGBT	Company	Reservations Centre
ENJOY THE BEST GASTRONOMY AT HOTEL TORRE DE VILLADEMOROS	Gastronomy. Premium Spain. Haute cuisine	2	Asturias	Valdés	Spanish, English	Young people. Adults without children. Seniors. LGBT	Company	Reservations Centre
BREAK WITH AN ASTURIAN DINNER AND VISIT TO THE PREHISTORIC MUSEUM	Tours and visits. Gastronomy. In nature	2	Asturias	Teverga	Spanish, English	Young people. Adults without children. Seniors. LGBT	Company	Accommodation (Hotel)
GASTRONOMIC BREAK IN CANGAS DE ONIS	Gastronomy	1	Asturias	Cangas de Onís	Spanish, English	Young people. Adults without children. Seniors. LGBT	Company	Accommodation (Hotel)
CIDER TOURISM	Gastronomy. Wine tourism	1 hour	Asturias	Villaviciosa	Spanish, English	Young people. Adults without children. Seniors. LGBT	Company	Cider bar
PURE & BALANCE	Health and beauty. Sports and adventure. Equestrian tourism	3	Asturias	Caso	Spanish, English	Young people. Adults without children. Seniors. LGBT	Company	Accommodation (Rural Apartments)

Source: own development based on data from website Spain.info-May 2015.



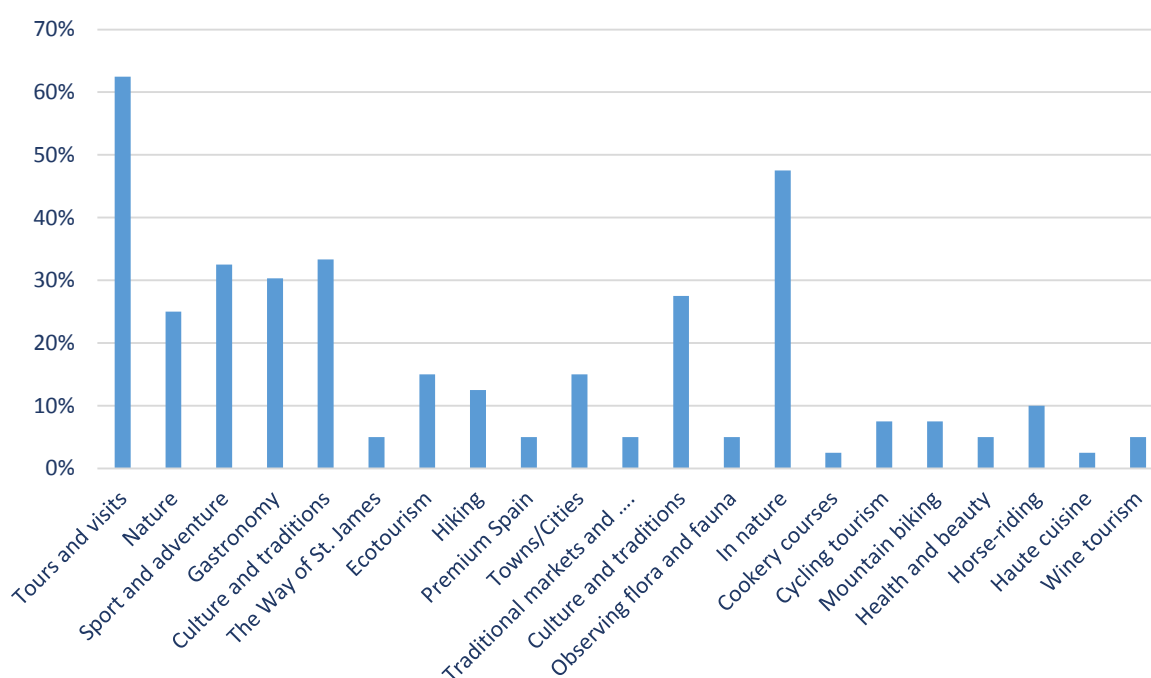
Carrying out a more detailed analysis of the characteristics of these experiences allows us to observe that they have an **average duration of 2.5 days** and an **average price of €229.50 per experience, which represents an average of €120 per day**.

With regard to the places where these experiences are offered, 17.5% of them are offered in other autonomous communities besides Asturias, including Galicia (57.7%), followed by Cantabria, the Basque Country and Castilla y León (28.5% of them each). In terms of the places in Asturias where they are offered, **only 35% of these are offered in more than one municipality**, whereas the remaining 65% are offered in just one municipality. This is strongly related to the type of **marketing entity** as **most of the experiences included** (35% of the total) are organised by **accommodation companies**, followed by travel agents (30% of the total) and reservation centres (12.5%).

The languages in which they are offered are mostly **Spanish and English (55% of the experiences)**, followed by Spanish, English and another language (22.5% of the total) and just Spanish (20% of the total), which offers good opportunities for marketing in markets where Spanish is not spoken.

Finally, analysing the **categories and segments** on which these experiences focus, the highlight is **tours and visits** with 62.5% of the total, this experience category also being the most important across all of Spain. Next is **culture and traditions** (33.3% of the total), **adventure sports** (32.5% of the total) and **gastronomy** (30.3% of the total). With regard to **nature**, and although 47.5% of the experiences are classified under "in nature", only 25% of them fit this category, which generally appears as the second in order of importance across all the autonomous communities. Therefore, and with nature being one of the main emblems of the tourist destination, it would be helpful to encourage the design and promotion of a larger number of experiences in this category.

Figure 36. CATEGORIES OF TOURIST EXPERIENCES IN ASTURIAS ON THE WEBSITE SPAIN.INFO



Source: Own development based on data from website Spain.info, 2016.

In terms of segments, most of the experiences are focused on all of the segments included, except in the case of **families, where opportunities for the further development of specific experiences can be seen**.

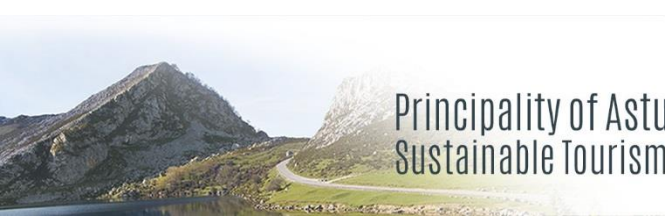
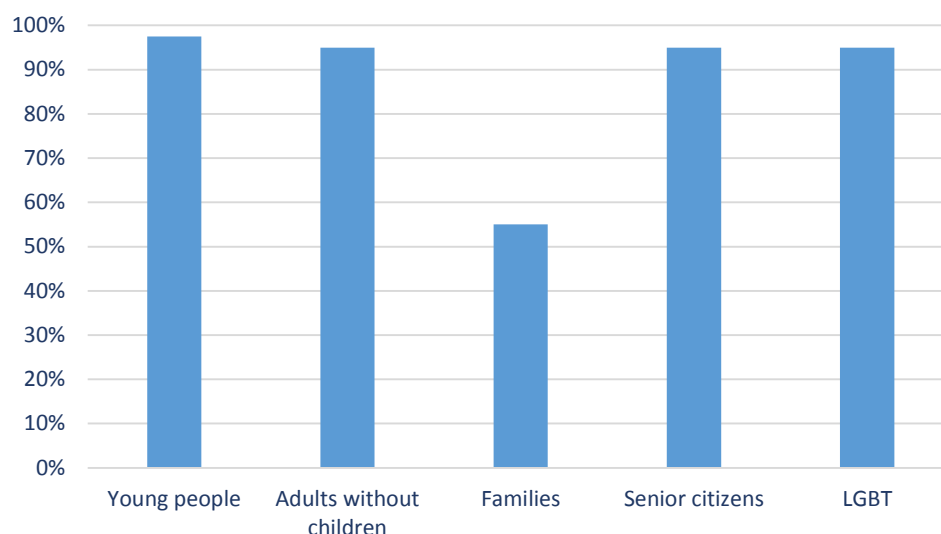


Figure 37. SEGMENTS OF TOURIST EXPERIENCES ON THE WEBSITE SPAIN.INFO



Source: Own development based on data from website Spain.info, 2016.

7.2. Study of the promotion and marketing strategies and actions of the competitor markets and their effectiveness

Due to the similarities with Asturias in terms of the landscape, climate and tourist resources, but mainly because together with this community they form the well-known **España Verde/Green Spain**, the main competitor markets are identified as the communities along the Cantabrian coast: **Galicia, the Basque Country and Cantabria**.

Analysing the total number of travellers who select these communities, we can see that Galicia is the one growing most strongly over the last year, with the number of travellers arriving in 2015 being 11.8% higher than in the previous year. This is followed by Asturias with 10.9% and the Basque Country with 8%. Cantabria is the community with the weakest growth in the number of travellers over the last year, at 3.26%³⁴.

GALICIA

An exhaustive study of the tourist image of Galicia³⁵ was carried out in 2008, which revealed the emotional importance of this community. This was the starting point for building a new tourist brand where the experiences of the traveller played an important role, adopting this idea as the main communication and promotion strategy that it began to develop.

Thus, Galicia's new promotion strategies are aimed at managing the destination's tourist brand, developing a series of leading branded products that revolve around these emotional values.

³⁴ Data extracted from the Hotel Occupancy Survey by INE, INEbase, 2016.

³⁵ General Framework of Tourism in Galicia 2020, (Government of Galicia, 2014)

Over recent years, ten branded products have been created: "Hidden heritage", "Magical shrines", "Lighthouses and wild beaches", "Top 10", "The Way of St. James", "Strolling through vineyards", "The route of the Camellia", "Galician Springs", "Galician Woodlands" and "Marine tourism".

A Wine and Gastronomy Tourism Plan has also been developed in recent years as something that cuts across different areas, as well as other products that have been promoted by Galicia Tourism, such as the "Bono Iacobus" bus pass, ornithological tourism, language tourism, routes on tourist trains, MTB centres and starlight destinations, among others.

Lastly, one point of interest from the recent period is the use of the "Galicia, the Best Way" campaign, with the Way of St. James, that appears in all its official releases. This has become the main emblem of the Galicia brand.

BASQUE COUNTRY

The Basque Country has a Marketing Plan until 2017, which will follow the strategic marketing lines listed below³⁶:

- Loyalty strategy: establishing a system to create, organise and develop a database for running loyalty initiatives for both leisure and business.
- Specific strategies for promotion and study in certain market niches such as sustainable tourism, adapted tourism, health tourism, etc.
- Establish links with international issuing agents.
- Improved connections for travellers in international markets.
- Co-operation with delegations abroad.
- Sale of Basque Country products and experiences.
- Communication actions for attracting domestic travellers.
- Communication actions aimed at the specialist press, bloggers, guides, etc.
- Promotion of social media to improve our recognition and generate comments about the Basque Country destination.
- Storytelling.
- Review of audiovisual content.
- Communication aimed at Basque society to raise awareness about the benefits of tourism.

CANTABRIA

Cantabria ended 2014 with 3.08 million trips to the community, 1.54 million travellers who stayed, 4.29 million overnight stays and 284,000 foreign tourists.

Cantabria has a Tourist Marketing Plan for 2016 and 2017 for the Tourist Promotion Campaign, based on three main areas: positioning, lines and guides of the media plan and a socialisation plan.

The priority objectives of the Cantabrian community with this Tourist Marketing Plan are³⁷:

- To tackle the seasonality of tourism products and services.
- To diversify the composition of the demand, in order to avoid the risks of depending on a small number of domestic issuers.
- To complete the transition to a customer driven promotion and marketing model, based on a multi-experience supply.

³⁶2014-2017 Marketing Plan. Executive Summary of the marketing strategy and action (Government of the Basque Country, 2015)
³⁷ Cantabrian Marketing Plan 2016-2017 (Government of Cantabria, 2015).

Offering private companies channels and resources with versatile procedures and a high return on investment (ROI).

Looking in more depth at the process for the professionalisation and specialisation of the sector; in order to facilitate its response to challenges such as the higher number of foreign tourists and competition from holiday rental platforms.

In short, the intention is to present Cantabria in the future as promising unforgettable moments that can be experienced here and now, built on an experiential and multi-product basis.



8

Definition of the sector's
current challenges and
critical success factors
for the Horizon 2020

8. DEFINITION OF THE SECTOR'S CURRENT CHALLENGES AND CRITICAL SUCCESS FACTORS FOR THE HORIZON 2020

8.1 Definition of the sector's current challenges

8.1.1. Vision, objectives, general principles and key criteria of the Principality of Asturias Sustainable Tourism Programme

The Principality of Asturias 2020 Sustainable Tourism Programme, prepared with the collaboration of the private sector and all the agents involved, is a management tool and roadmap for Asturian tourism. It sets the common guidelines not only for the Tourism area of the Ministry of Employment, Industry and Tourism, but also for all public and private players making up the tourist sector in the region, a sector that is clearly characterised by transversality.

This Programme, which has a time horizon of 2020, has the main purpose of **achieving the generation of wealth and greater economic activity, increasing sustainable competitiveness and improving the economic and social profitability of the tourist sector and the region.**

The design of this new tourism strategy in the Principality of Asturias is based on a series of **general principles and key criteria**, which are reflected in its challenges, critical success factors, and specific product, promotion and marketing plans.

The Sustainable Tourism Programme for the Principality of Asturias is based on **four general principles**:

- A. Sustainability**
- B. Internationalisation**
- C. Capability to remove seasonality**
- D. Balance between the different territories**, urban and rural, coastal and inland, in the Principality of Asturias.

The key principles guiding this Programme are **quality, professionalism, sustainability, innovation, talent and public-private cooperation.**

8.1.2 Challenges for the Principality of Asturias Sustainable Tourism Programme.

Following the conclusions reached during the analysis and diagnosis stages, **5 major challenges** are established in the Principality of Asturias Sustainable Tourism Programme with the time horizon 2020:

CHALLENGE 1	<i>SOCIALLY, ECONOMICALLY AND ENVIRONMENTALLY SUSTAINABLE TOURIST DEVELOPMENT MODEL, FOLLOWING CRITERIA OF EXCELLENCE, INNOVATION AND TERRITORIAL BALANCE</i>
CHALLENGE 2	<i>UNITARY VISION, AWARENESS AND POSITIONING OF THE ESSENTIAL VALUES OF THE DESTINATION AT A TOURIST LEVEL</i>
CHALLENGE 3	<i>PORTFOLIO OF STRATEGIC TOURISM PRODUCTS, STRENGTHENERS OF THE ASTURIAS TOURIST BRAND</i>
CHALLENGE 4	<i>COMPETITIVENESS AND SPECIALISATION OF THE PRIORITY TOURISM PRODUCTS, FOCUSING ON THE VALUE CHAIN, AND ATTRACTING NEW TOURIST FLOWS THROUGHOUT THE ENTIRE YEAR</i>
CHALLENGE 5	<i>STRUCTURING OF THE TOURISM MODEL, ITS PROMOTION AND MARKETING, TO THE PRIORITY SEGMENTS AND ISSUER MARKETS</i>

CHALLENGE 1

SOCIALLY, ECONOMICALLY AND ENVIRONMENTALLY SUSTAINABLE TOURIST DEVELOPMENT MODEL, FOLLOWING CRITERIA OF EXCELLENCE, INNOVATION AND TERRITORIAL BALANCE

- Asturias must become a sustainable tourist development model, from a social, economic and environmental perspective. Therefore, it must ensure that the endogenous resources of the region are exploited, promoting and ensuring a rational and responsible use of the most vulnerable resources and promoting tourist development following the principles of territorial balance which ensure the reduction of the impact in specific areas and the sharing of the financial benefits from tourist activity throughout the territory.
- Quality, the professionalisation of services, both public and private, and talent as a driver of innovation will be key for achieving excellence in visitor care, and continuing to lead tourist satisfaction.

CHALLENGE 2

UNITARY VISION, AWARENESS AND POSITIONING OF THE ESSENTIAL VALUES OF THE DESTINATION AT A TOURIST LEVEL

- Obtain a shared vision - through the participation of all agents.
- Carry out coordinated planning, public-private and between administrations, always involving the associations and the population itself.
- Ensure its implementation and continuity in essential strategic actions as these will be key instruments for achieving sustainable growth in the tourist activity and the region.
- At the same time, it must be ensured that this vision, and the roadmaps in which it is captured, are transferred to all agents involved. All of these must know and share the essential values of the destination, as well as the actions planned at all times for promoting tourist activity, each contributing in their area of responsibility in order to achieve the tourist development of the destination.
- Governance is seen as the essential instrument for the consistent and participative management of the tourist destination and products, where public administrations, society and private entities come together and coordinate their commitments and skills for tourist and territorial development.
To achieve all of this, mechanisms must be put in place that ensure permanent and continuous public-private cooperation, promoting the creation of bodies for cooperation and coordination between agents, as well as the creation of channels for the participation of society in tourist policies.

CHALLENGE 3

PORTFOLIO OF STRATEGIC TOURISM PRODUCTS, STRENGTHENERS OF THE ASTURIAS TOURIST BRAND

- Define a portfolio of strategic products or a "Portfolio of leading branded products" which are identified with the general image and values of the destination and contribute to creation and reinforcement of the image as a result of being offered.
- Ensure that the identifying and positioning values of the destination are transferred to tangible aspects, strengthening the specific tourist supply in which the brand image of Asturias is translated at a tourist and territorial level.
- These products will create the region's tourist emblem, establishing a more unique, competitive and differentiating supply for the Principality of Asturias.

CHALLENGE 4

COMPETITIVENESS AND SPECIALISATION OF THE PRIORITY TOURISM PRODUCTS, FOCUSING ON THE VALUE CHAIN, AND ATTRACTING OF NEW TOURIST FLOWS THROUGHOUT THE ENTIRE YEAR

- Encourage the diversification and structuring of the supply of themed tourism products, integrating the resources and services of the destination with a focus on the value chain and the experience, through the comprehensive and coordinated management of the supply.
- Improve the supply, taking into account the market, to make it competitive through the establishment of leading products and the implementation of quality brands that guarantee compliance with the standards associated with each product and maximise their impact, and strengthen the use of new technologies to improve the visitor experience and promote the direct promotion and marketing of the products.
- Increase the returns from tourism through greater consumption per visitor, the selection of more profitable segments, greater permanence, a lengthening of the tourist seasons and providing a greater added value to the products, generating more expenditure per activity and service and therefore multiplying the performance of the tourist activity.
- Achieve an appropriate positioning in products and experiences not linked to the climate, and in markets whose main motivations are not directly linked to this aspect, in order to provide the destination with a greater ability to mitigate the problems of seasonality.

CHALLENGE 5

STRUCTURING OF THE TOURISM MODEL, ITS PROMOTION AND MARKETING, TO THE PRIORITY SEGMENTS AND ISSUER MARKETS

- Diversify the supply: segments, markets, seasons, etc. through a better selection of segments, with a motivational and experiential approach, and the adaptation of the products to the standards defined by the demand and the market for them.
- Work on promoting the Asturias brand and its products in a circular manner: implementing models that allow us to identify the target audience's preferences through market intelligence; promoting it in a way that inspires the visitor to choose the destination; facilitating the planning, booking and purchase once the decision has been made in order to prevent the loss of the customer and ensure their satisfaction; meeting their needs and expectations during the trip; providing them with the tools to share their experiences, encouraging them to act as influencers and ambassadors for the destination; assessing their satisfaction through market intelligence; and establishing the necessary corrective actions.
- Promote the maximisation of the promotion strategies, on and off-line, adapting the message and portfolio of products to each geographic area, segment and market; enhance the interactivity and involvement of the visitor; offer a story that connects with the target audience to capture: implement the communication, promotion and marketing strategy that is most suited to each specific group of consumers (reservation centres, channel managers, marketing strategies through specialised brokers, etc.).

8.2 Proposed target audience segments: profile, needs and expectations

As we saw in the first chapter, one of the trends that has led to profound global changes in the tourist market is the new consumption patterns of travellers. Tourists are increasingly motivated by the set of activities and experiences they wish to enjoy on their trips, which is now one of the main factors in the choice of a destination. This has meant that **tourist demand** has become increasingly **complex and micro-segmented** and in recent years the structuring of **supply** has become **increasingly universal and motivational**.

Given this situation, a need has arisen for destinations to work to integrate all service providers and activities involved in the tourism product in a more aligned way, with a **focus on the value chain or aggregation of services**. This approach allows all of the needs linked to the customer's motivations to be satisfied as far as possible, **ensuring their overall satisfaction and the competitive positioning of the destination**. For this reason, tourist segmentation is a key factor for any agent involved in the value chain of the tourist industry since knowing the profile, motivations, expectations and preferences of the tourists allows them to work on generating products and activities adapted to them.

So, the first step in establishing a successful portfolio of products for the destination is identifying its potential markets, segmenting these through the establishment of homogeneous groups of tourists which can be used to configure the portfolio.

To classify and characterise these segments, the **"Public opinion study of demand in issuer markets"** was used as an essential source, prepared by the Spanish Tourism Institute in 2013 and focused on carrying out a segmentation analysis of international tourism based on primary information collected in 17 priority markets for the destination of Spain. This study was designed with a double strategic interest, first to determine the priority products by market, and second to achieve a segmentation of tourists by motivation. This has allowed for the determination of the variables used to prioritise markets, and the products and segments within these markets for Turespaña in the coming years, as contained in the "2014-2015 Strategic Marketing Plan".

Thus, the interest in incorporating this segmentation structure into this Programme is also double. First, it allows for the incorporation of a segmentation developed using a **widely validated methodology**, since the sample used for the classification of segments by motivation uses **quantitative, representative and unbiased information, obtaining results that can be extrapolated with a guarantee of statistical reliability**. Second, **having a prioritisation of segments aligned with the state marketing activity will maximise the international market capture strategies of the Principality of Asturias**, as it allows for tourism products to be configured in a way that allows them to be integrated into Turespaña's portfolio of products, therefore allowing them to be more attractive internationally.

This Study proposes a **double segmentation system**, identifying a series of traveller or tourist types classified depending on both their motivations for taking the trip (*Motivational segments*) and their consumption preferences once at the destination (*Experiential segments*).

Presented below are the main characteristics of each of the segments analysed:

8.2.1. Motivational segments

In order to determine the segments for this classification type, the **motivations of tourists to travel abroad** have been analysed **through items that measure both the motives for the trip (push factors) and the factors decisive in the choice of the destination (pull factors)**.

This segmentation is important in **establishing the target audience and positioning**, determining which factors must be highlighted through the brand image and promotion strategies, these being the ones to attract these segments of interest.

From this analysis, **6 motivational segment categories** have been established: **Discoverer, Vital, Family and ethnic, Generalist, Holiday-cultural and Holiday**.

Presented below is a description of each segment, as well as a summary matrix with the main characteristics of each and their importance in terms of the total volume of travellers. The analysis of these factors will allow us to determine which segments are priority for Asturias.

1. Discoverer:

This is a segment of travellers motivated to learn about new cultures and how people from other countries live, see monuments and works of art, experience new things, discover landscapes, new places, open their mind and learn. When choosing a destination, they fundamentally look for heritage (the existence of historical and cultural places), the environment, the countryside and nature.

2. Vital:

This segment seeks fun, disconnection, new experiences and doing something exciting, with a bit of adventure or even risk, discovering fashionable or prestigious places and practising and enjoying hobbies, as well as fun in the countryside.

Within this category we can also identify the sub-segment of pure active travellers, very well defined in their preferences. This sub-segment shows an experiential profile dominated by sport and a motivational profile where an interest in fun and discovering new places, people and experiences are of special importance.

3. Family and ethnic:

Travels primarily for family reasons (spending time with a partner, family, children or friends) and due to ties of origin, or even religion, with the destination. In terms of their experiential profile, it is the group that claims to have taken part in the fewest activities on their last trip abroad.

4. Generalist

This is the group with less specific and more general motivations. They are travellers motivated by everything when it comes to travelling: discovering, relaxing, enjoying..., so to capture them it is very important for the destination to offer variety. In terms of the factors that prevail when choosing the destination, the importance of safety stands out, which points to the lesser travel experience of this segment.

5. Cultural-holiday

This traveller is interested in relaxing and disconnecting, but also pays attention to the natural environment and countryside and the cultural richness of the destination. They seek to spend time with their partner or family, enjoy the gastronomy and shopping, visiting museums, taking excursions and attending more cultural events than average. When deciding on a destination, the countryside and the richness of the cultural heritage are factors that guide their choice, also placing special importance on the treatment received from the locals.

6. Holiday

The travel motivations of this segment are relaxing, enjoying the good climate, having fun and spending time with their partner or family. This traveller will focus on beach destinations, with good temperatures and more competitive in terms of price and hotel.

Matrix 1: Motivational segment of international tourism in Spain

Motivational segments	Importance in volume (% of the entire sample) – characteristics	Motivation		Experiential profile and preferences	Socio-demographic profile			Markets		
		Reasons for travel (push factors)	Pull factors of the destination		Age	Education	Profession	Market types	Regional areas	Countries
1 Discoverer	12% (5th in size)	(+) Discovering new cultures; seeing monuments and works of art; having experiences, discovering landscapes, discovering new places, opening the mind and learning.	(+) Qualities associated with the destination: existence of historical and cultural sites, the environment, landscapes and nature.	(+) Culture: attending cultural events, discovering art and culture, practising languages or taking a course. (++) Urban tourism and nature: doing routes, tours and excursions, visiting cities, visiting natural spaces, rural tourism and going on cruises	Middle Aged	Specially trained (67% higher education)	Self-employed, pensioners, students and business owners	(+) Mature European markets, emerging markets and mature distant markets.	(+) Southern Europe, Latin America	(+) France, Turkey, Brazil
	Very homogeneous in their distribution.	(-) Relaxing, enjoying the sun, disconnecting and taking a break from the routine. Visiting relatives or friends and reconnecting with roots.	(-) Beaches, warm climate, peace and quiet and quality of the accommodation.	(-) Relaxing on the coast and wellness. (--) Sporting activities: neither attending events nor doing sport.						
2 Vital	16% (3rd in size)	(+) Adventure, what is fashionable and hobbies (++) Fun and nature; Sub-cluster: (+) Interest in having fun and discovering new places, people and experiences, adventure and risk	(+) Factors linked to the competitiveness of the tourist and leisure supply: Variety of services and activities, price and quality of restaurants and catering	(+) Sports, sporting events and camping (consume less than average)	Very young (18-34 years)	Highly educated (62% graduates)	Students	Mature distant markets	(+) Asia-Pacific	
	Pure active (2.4% very well-defined)	(-) Time with partner or family (--) Discovering new cultures, monuments and works of art	(-) Richness of heritage, climate or beaches	Sub-cluster: (+) Doing sport					(-) Eastern Europe	
3 Family-ethnic	96% (6th in size)	(+) Time with partner and family (++) Visit to relatives or friends (++) Reconnecting with roots (++) Visiting sacred places, religious reasons	(+) Emotional ties to the destination (+) Safety, peace and quiet and treatment received (--) Natural or cultural attractions (--) Price		Young (18-44)	(+) Basic education	(+) Pensioners and housewives/husbands	(+) Emerging markets	(+) Eastern Europe	(+) Poland
		(-) Having fun, having new experiences, disconnecting or adventure						(-) Mature distant markets	(-) Latin America	
4 Generalist	28% (1st in size)	Undefined in motivations, although mainly Relaxing and having fun (+) Having fun, enjoying yourself and taking pleasure, peace and quiet, relaxing and resting, learning about and discovering new places, new people and new experiences, disconnecting and escaping the routine, learning about new cultures and how people from other countries live, discovering landscapes and being in contact with nature, spending time with their partner or family, sunshine and a good climate, opening their mind and acquiring new knowledge and learning about heritage (++) Doing something exciting, with adventure and risk, visiting fashionable places and practising hobbies	(-) Variety in the destination's supply (++) safety (++) Organisation of the trip and facilities at the destination	(+) Urban tourism, relaxing on the coast and shopping	Average	Average	(+) Business owners, unqualified employees and Students	(+) Emerging markets	(+) Latin America Southern Europe and North America	(+) Turkey
		(-) Visit to relatives and friends (--) Cultures and monuments	(-) Historical and cultural heritage, climate, treatment and environment.	(-) Activities aimed at looking after their health and beauty, attending sporting events and cultural events and doing sport			(-) Pensioners	(-) Mature European markets	(-) Central Europe and from the North	
5 Holiday-cultural	18% (2nd in size)	Combination of discovering and relaxing (+) Learning about heritage and culture (monuments, works of art), Learning about new cultures and spending time with their partner and family (++) Relaxing, experiences, partner/family, cultures, disconnection, sun and monuments	(+) Landscape environment, cultural wealth and treatment received (++) Price and safety	(+) Art and nature: urban tourism, museums and attending cultural events, routes and excursions and rural tourism (++) Gastronomy	Older segment. Seniors (55+)	Average (+) Secondary Studies	(+) Pensioners and housewives/husbands	(+) Mature European markets	(+) Eastern Europe	
		(-) Seeking adventure and risk or going to fashionable places.		(-) Sporting and camping products			(-) Students and housewives/husbands		(-) Asia-Pacific	(-) Turkey
6 Holiday-pure	15% (4th in size)	(+) Relaxing, enjoying the good climate, having fun and spending time with their partner or family	(+) Climate, quality of the accommodation, price, beaches and tranquillity	(+) Sun and beach product, with gastronomy and shopping. (++) Sport.	Adult and senior profile (+35)			(+) Central and Northern Europe		
		(-) Monuments, religion, learning, cultures and landscape/nature	(-) Cultural heritage and the environment			Lower general level of education (+) secondary studies, no education and basic education	(-) Pensioners, business owners and self-employed	(-) Emerging Markets and mature distant markets	(-) Latin America and Southern Europe	(-) Turkey

Source: Own development based on data from the "Public opinion study on issuer markets", prepared by the Spanish Tourism Institute in 2013. (+) Factors with greater importance for this segment.
(-) Factors with lesser importance for this segment.

8.2.2. Experiential segments

This segmentation allows tourists to be grouped **depending on their favourite tourism products and the specific experiences they look for when travelling**, classifying them through items that measure experiential profiles depending on the activities they have taken part in during their travels.

This segmentation is important for configuring the most appropriate **product portfolio** for each market, as well as for designing the marketing initiatives to implement in order to attract the experiential tourist segments of most interest to the Asturias tourist destination.

From the motivations that push tourists to travel abroad, **6 experiential segments** have been defined: *Beach, gastronomy and shopping, Rural-nature, Peaceful, Sports, Cosmopolitan, Cultural and Open to everything.*

Presented below is a description of each segment, as well as a summary matrix with the main characteristics of each and their importance in terms of the total volume of travellers. The analysis of these factors will allow us to **select the segments most suited to Asturias as a tourist destination, depending on the tourism products already existing or those that, given their potential in the destination, may be successfully developed.**

- **Beach, gastronomy and shopping**

This segment is mainly, and almost exclusively, interested in a sun and beach product, with food and drink and shopping options (not understood as gourmet options, but as basic food and drink options). When choosing a destination for their trip, the main factors are the price, the climate and the quality of the accommodation, the quality and variety of the food and drink options, tranquillity and the beaches.

- **Rural-nature**

Characterised by the importance placed on taking part in activities in rural areas, natural spaces and camping, but also relaxing on the coast. From a motivational viewpoint, there are two profile types: one that is more peaceful, interested in resting and relaxing in natural settings, and another that is livelier, with a greater component of activity and experiences. In any case, the main factor when choosing the destination is the environment, countryside and nature.

- **Peaceful**

Interested in almost all activities and products except those that have a more active component. This is a relaxed experiential profile, they prefer products relating to resting or involving a moderate effort and, although they consume urban and gastronomic tourism, also of note is the high percentage of them who have been to the beach or countryside, as well as those who have seen art or gone on tours or excursions. The main decision factors when choosing the destination are price, safety and the environment.

- **Sports**

This is the most active experiential profile. They stand out from all the other segments due to their interest in activities such as sports, sporting events and learning (languages). In general their consumption is lower, taking part in fewer activities than average, although in these three product types their consumption is higher.

- **Cosmopolitan**

This is a well-defined experiential profile, characterised by their interest in urban tourism, gastronomy and shopping. Their consumption of products associated with the supply of cities is above average: urban tourism, with some culture (museums and events), excursions between cities, eating and drinking and shopping. When choosing a destination, what stands out is the importance they place on the historical and cultural heritage, the quality and variety of the eating and drinking options and the infrastructures, although price and safety are the factors with the greatest weight in their decision.

- **Cultural**

This segment of travellers shows a marked interest in art and natural spaces, with their consumption of products and experiences related to art, urban tourism, routes and tours and cultural events standing out. The main factors when choosing a destination are the historical and cultural heritage and, to a lesser extent, the natural and landscape environment, being interested in factors inherent to the destination and linked to its characteristics more than in factors linked to the competitiveness of its tourist and leisure supply.

- **Open to everything**

These travellers have a great interest in a wide range of products, they do not reject anything and score well above average in all their preferences. However, they generally take part in fewer activities than average; i.e., they are enthusiastic travellers but also inexperienced or just potential travellers.

Matrix 2: Experiential segmentation of international tourism in Spain

Experiential segments	Importance in volume (% of the total sample)	Experiential profile and preferences	Motivation		Socio-demographic profile			Markets		
			Reasons for travelling (push factors)	Decision factors for the destination (pull factors)	Age	Education	Profession	Market types	Regional areas	Countries
1 Beach, gastronomy and shopping	12%	(+) Sun and beach product, with gastronomy and shopping.	(+) Relaxation and sun, spending time with the partner and family, and having fun	(+) Price, climate and quality of the accommodation (++) Quality and variety of eating and drinking options, tranquillity and beaches	(+) Upper middle age (45-64)		(+) Non-qualified employee, housewife/husband and qualified employee	(+) European markets	(+) North Europe, Central Europe	
				(-) Safety of the destination, treatment received, environment and historical-cultural heritage		Less training than average (-) Higher education		(-) Emerging markets	(-) Latin America, Asia Pacific, South Europe and Eastern Europe	(-) Turkey
2 Rural-nature	11%	(+) Nature and rural products; Coast; Camping; practising sports in nature	(+) Rest and relaxation, sun and good climate, discovering landscapes and being in contact with nature	(+) Environment, landscapes and nature (++) Tranquillity and						
		(-) Going shopping, enjoying the gastronomy and wine or visiting cities	(-) Learning about new places, new people and new experiences, having fun and enjoying themselves. (-) (-) Learning about heritage and culture	(-) Price and safety (-) Cultural heritage	(+) Upper middle aged (45-64)	Average	(+) Pensioners, qualified employees and self-employed people		(+) Central Europe	(+) Germany, Poland and China
3 Peaceful	16%	Relaxed experiential profile, restful products with moderate effort. (+) Almost all activities and products; (++) Urban and gastronomic tourism, beach or countryside, viewing art and/or going on routes and tours.	(+) Being at peace, relaxing and resting (++) Learning about new places, new people and new experiences	(+) Price, safety and environment. Climate and cultural heritage.	Advanced age (+45 years, and a high presence of senior citizens)	Below average	Lower status than average (+) Pensioners, qualified employees, housewives/husbands	(+) European countries, central and north, but especially in the south; North America		(+) Italy, Portugal
		(-) Products and activities with a more active, participatory or youthful component (sports, sporting events, learning courses, camping)					(-) Business owners and students.	(-) Latin America		
4 Sports	12%	Active experiential profile, consumes fewer products than average (+) Sports and sporting events	(+) Sports and sporting events (++) Courses, cruises and camping		Youthful profile	Below average	Lower status than average (+) Students and non-qualified employees; Unemployed people			(+) Japan
		(-) Rural tourism, cultural events, art and culture, visiting natural spaces, beaches or hikes	(-) Rural tourism, cultural events, art and culture, visiting natural spaces, beaches or hikes				(-) Pensioners			(-) Turkey
5 Cosmopolitan	13%	(+) Products associated with the supply of cities: urban tourism, with some culture (museums and events), excursions between cities, eating and drinking and shopping. Art and culture, tours and cultural events.	(+) Discovering and learning about: new places and experiences, discovering heritage, acquiring new knowledge or learning. (++) Fun, entertainment and disconnection	(+) Historical-cultural heritage, quality and variety of eating and drinking options and facilities (++) Price and safety	Profile similar to the average, with a prevalence of extreme age groups (18-24 and +65)	Higher education (+) Graduates	High status level (+) Business owners and self-employed people, housewives/husbands and students	(+) Distant and emerging markets	(+) Latin America, Eastern Europe	(+) Japan, Brazil, Mexico, Turkey (-) Germany, China, India
		(-) Rural tourism, camping, nature and beach.		(-) Sun and good climate, environment, landscapes and nature						
6 Cultural	12%	(+) A marked interest in art and cultural events, urban tourism and routes. (++) Natural spaces	(+) Learning about new places and discovering new experiences, learning about other cultures, heritage and culture (++) Learning about and discovering landscapes and being in contact with nature	Factors inherent to the destination and linked to its characteristics: (+) Historical and cultural heritage, natural and landscape environment	Older aged segment	Above average (+) Graduates	(+) Pensioners	(+) Mature markets (European and distant)	(+) Southern Europe, Central Europe and North America	(+) France, Belgium
		(-) Sun and beach, shopping and gastronomy	(-) Having fun, sun and good climate. Being peaceful and relaxing	(-) Price, safety, tranquillity, quality of accommodation, climate and quality and variety of eating and drinking options					(-) Asia Pacific	
7 Open to everything	24%	Great interest in a wide range of products; although they generally take part in fewer activities than average	(+) Enthusiastic but inexperienced travellers; they do not reject any products and rate everything above average	(+) Extraordinarily sensitive to the safety of the destination	Young segment	High status level (+) Higher education		(+) Emerging markets	(+) Latin America, Asia Pacific	(+) Turkey, India, Mexico and China
								(-) Mature European markets		

Source: Own development based on data from the "Public opinion study on issuer markets", prepared by the Spanish Tourism Institute in 2013.

(+) Factors with greater importance for this segment.

(-) Factors with lesser importance for this segment.

8.2.3. Determination of priority segments for the Asturias tourist destination

Given the characteristics of each of these groups of segments, it has been determined that the priorities for the Asturias tourist destination, both motivational and experiential, are as follows:

Matrix 3: Priority segments for the Asturias tourist destination

Priority Segments	High Priority	Medium-high priority (in certain areas/products)	Low priority
Motivational	Discoverer	Vital - Pure active	Holiday
	Generalist	Family and ethnic	
	Holiday-cultural		
Experiential	Rural-nature	Cosmopolitan	Beach-gastronomy and shopping
	Peaceful Sports		
	Cultural		
	Open to everything		

Source: Own elaboration.

With regard to the **motivational segments**, due to their characteristics, needs and expectations, the priority segments for the Asturias tourist destination are considered to be **Discoverer, Generalist and Holiday-Cultural**.

In order to capture these segments, Asturias has qualities inherent to the destination that are very important motivational factors for all three. **Enhancing its positioning and brand image as a nature and culture destination and highlighting the variety of options given the combination of its great cultural wealth and the natural and landscape environment, in both the urban and rural setting**, are key to capturing these segments.

Moreover, Asturias also has a supply and differentiating values that are appropriate for the **Vital-pure active** and **Family and ethnic** segments. However, it is considered that capturing these two segments is of a lower priority, especially due to their smaller size in quantitative terms and the characteristics of their socio-demographic profile and lower consumption, as well as their prevalence in distant markets, which makes them more difficult to capture. Thus, in order to maximise the promotional efforts in these two segments, a **clear commitment must be made to developing well structured products and experiences and making use of specialist promotional and marketing channels, which will magnify the efforts made**. For example, it is considered that Asturias can target the large market of Asturian emigrants, or their descendants, living in Latin American countries. However, in order to take advantage of this it must develop a specialised strategy focused on capturing this disperse market. For this, it must propose a specific strategy that combines off-line marketing techniques, running specific campaigns in the places where these groups gather, such as Asturian Centres Abroad and/or specialised fairs and events, with specialist on-line marketing techniques that make the most of the Internet's advantages in this area, such as the use of specific profiles for this group on social media, or the Long tail SEO.

Finally, there is one motivational segment that is clearly less interesting in terms of positioning for Asturias: the holiday segment. This is due to the fact that although Asturias has a long coastline and many attractive beaches with good services, the offer is not competitive when it comes to capturing foreign tourism if we compare it to the Mediterranean coast of Spain, the south of Spain and the Balearic and Canary islands. It is therefore a segment that does not support the diversification of markets. Moreover, nor does it notably support the destination's geographic diversification or help to remove seasonality, given that this type of tourism is solely focused on the summer season.

With regard to the **experiential segments**, it is considered a priority to work on developing products and experiences focused on the **Rural-nature, Peaceful, Sports, Cultural and Open to everything segments**. And, as a medium priority, we have the **Cosmopolitan** segment involving urban tourism in particular. As was found with the motivational segments, the Beach-gastronomy and shopping experiential segment does not meet the objectives of market diversification, territorial balance and removing seasonality so there is little need to develop a specific supply aimed at this segment.

As has been mentioned, the experiential segments, linked to the preferences in tourism products and their consumption at the destination, serve to determine the product portfolio in each market.

Therefore, in each geographic area and market, when prioritising the product portfolio to highlight, it must be taken into account whether the objective for that market is to capture a segment that is very well defined in its preferences and consumption, or a more general one.

In the first case, for example with the **Cultural, Sports and Cosmopolitan** segments, a **strategy** must be presented **that is highly focused on a few products that attract their attention, building a unique destination image, developing strategies of differentiation and specialisation in the tourism products and experiences offered to capture these segments**. And, in any case, the products developed on the basis of the interests of these segments **must be structured around resources and activities that are differentiating, unique and with a high degree of specialisation** (routes of unique cultural resource, specialist sports in unique environments, a complete and well organised supply of events and activities based around the three main cities, etc.).

In contrast, in the case of the more generalist experiential segments, among which we find the **Rural-nature, Open to everything and Peaceful** segments, the destination must sell an **image of diversity, offering a wide range of products and experiences in both the natural and urban environments**. This is in relation to both experiences **focused on discovery**, such as cultural activities, **on enjoyment and fun**, such as sporting activities, **and on rest and relaxation**, such as activities based around rural tourism, camping or relaxing on the coast.

Lastly, a final segment to consider would be **business or MICE** tourism (Meetings, Incentives, Conventions and Exhibitions), which is not included among the motivational or experiential segments since the purpose of this type of traveller is professional and not personal. Thus, the capture, promotion and marketing strategies must be focussed on attracting them through different channels and strategies, specific to this type of activity.

8.3 Product conceptualisation

A tourism product is a **set of tangible and intangible elements and features, which are offered to meet the motivations, wishes and expectations of a target audience or specific group of consumers**. Among the components of the tourism product are resources and attractions, equipment and facilities, recreational services and activities, as well as symbolic images and values, organised and structured to attract a certain segment of tourists. Thus, the characteristics of the tourism product are defined by the interaction and combination between all of these components with their widely differing attributes. In other words, **the same attracting resources may be structured differently to create different tourism products reflecting the main motivation, needs and expectations the product is designed to meet, as determined by the requirements of demand**.

For this reason, it is very important for a destination to identify the characteristics of the current and potential demand, as well as the new market trends, in order to configure its portfolio of tourism products, since being aware of the motivations guiding the target audience on which the destination wants to focus is key to developing a strategy that maximises market capture based on its endogenous resources (tangible and intangible) and differentiating elements. In addition, nowadays we can find in the market certain tourism products that are already established and others that are still growing, whose characteristics now show a high degree of standardisation since those consuming them have associated references.

So in order to configure the destination's product portfolio, different types of factors must be taken into account that allow for the establishment of objective criteria for the selection of priority tourism products.

For this purpose, in the framework of this Sustainable Tourism Programme for the Principality of Asturias, a **matrix for rating tourism products** has been designed. This **tool is made up of a series of variables that make it possible to compare tourism products that are very diverse and distinct from each other**. Once these have been rated they can be classified into different levels depending on their interest for the destination's tourist development and positioning strategy.

Presented below are the different variables making up the different rating criteria, and which are classified into four themed fields: **general aspects, supply, demand and promotion and marketing**.

Matrix 4: *Tourism product rating variables*

Description of the rating levels of products		
Area	Variable	Rating criteria
General aspects	G1. Identification	The product is identified with the general image and identifying values wished to be transmitted for the destination, and contributes to its creation and reinforcement.
	G2. Positioning	The product already has a level of positioning in the appropriate market.
	G3. History	Work has been successfully carried out to create and promote the tourism product in public tourist policies in recent years.
	G4. Deseasonalisation	The product contributes, or has the potential to contribute, to the deseasonalisation of tourist activity.
	G5. Public-private management	There is some type of public-private management structure for the product, and/or the tourist agents involved have a high degree of organisation.
	G6. Territorial balance	The product has the capacity to contribute to ensuring the territorial balance of the tourist activity at the destination, either because the location of its supply is in areas with low tourist activity, or because the activities associated with it are able to contribute to distributing these visitors across the territory and reducing the concentration of tourist activity.
	G7. Differentiation	This is a differentiating product compared to close competitor destinations.
	G8. Excellence	There is a quality mark, its own or generic, associated with the product, that is implemented or can be implemented in the destination
Supply	O1. Uniqueness	There are prominent attractor resources at the destination, or factors inherent to the destination, that give a unique touch to the product supply which in itself justifies the destination's capacity to attract.
	O2. Exploited	There is a suitable exploitation of the resources associated with the product and/or availability of sufficient facilities and support services.
	O3. Specialisation	There is a sufficient supply of specialised services adapted to the product.
	O4. Competitiveness	The standards associated with the product due to the current or potential demand are suited to the structure of the supply of current tourist and leisure services.
Demand	D1. Consolidation	The product is consolidated among the destination's current demand.
	D2. Orientation	The product fits into the new market trends.
	D3. Potentiality	The product has an attraction capacity in potential domestic and international markets (adapted to the motivational or experiential profiles defined as priorities for the destination).
Promotion and marketing	P1. Promotion	The product is suited to the promotion channels used globally by the destination.
	P2 Distribution and marketing	The product may be distributed through specialised marketing channels accessible for the destination.

Source: Own development..

In addition, a table has been defined which establishes the **requirements for considering a tourism product as strategic**, depending on its compliance with **variables considered key with regard to the positioning and territorial development of the destination**, and it sets **different priority levels** depending on the degree of compliance in each area.

Matrix 5: Tourism product rating levels

Description of the rating levels of products				
Product type	General aspects	Supply	Demand	Promotion and marketing
Strategic product	Complies with G1, G6 and G7	Complies with O1 and O4	Complies with D2 and D3	Complies with P2
Priority	General aspects	Supply	Demand	Promotion and marketing
High	Complies with between 100% and 63% of the variables.	Complies with between 100% and 75% of the variables	Complies with 100% of the variables	Complies with 100% of the variables
Medium	Complies with between 63% and 50% of the variables	Complies with between 75% and 50% of the variables	Complies with at least 67% of variables	Complies with at least P1
Low	Complies with less than 50% of the variables	Complies with less than 50% of the variables	Complies with less than 50% of the variables	Complies with at least P2

Source: Own development.

Strategic or leading brand products are those that are significant for the positioning and brand image of the Asturias tourist destination, and that therefore **must play an essential role in representing the destination's values and identities in the market, maximising the capture of the segments deemed a priority.**

Moreover, a scale is established in terms of the priority of development and/or incorporation of each product into the general supply of the Asturias tourist destination, classifying them as **high priority, medium priority and low priority.**

Presented below is an assessment matrix for tourism products which analyses a total of **33 tourism products**, all of them based on resources, equipment and facilities, recreational services and activities present in the territory and therefore able to be developed in the Asturias tourist destination.

It is worth mentioning that among these tourism products are **broad global categories or product lines** (such as, for example, nature tourism and cultural tourism), **along with others** that, forming part of these categories, are considered to **already be established in the market as products with their own identity**, given that they reflect the specific motivations of large groups of consumers (for example, ecotourism or industrial tourism).

Matrix 6: Assessment matrix of tourism products within Asturias tourist destination

Tourism product	General aspects								Supply				Demand			Promotion and marketing	
	G1. Identification	G2. Positioning	G3. History	G4. Deseasonalisation	G5. Public-private Management	G6. Territorial balance	G7. Differentiation	G8. Excellence	O1. Uniqueness	O2. Valuing	O3. Specialisation	O4. Competitiveness	D1. Consolidation	D2. Orientation	D3. Potentiality	P1. Promotion	P2. Distribution and marketing
GASTRONOMIC TOURISM	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
NATURE TOURISM	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Ecotourism	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Observation of flora and fauna	Yes	No	No	Yes	No	Yes	Yes	No	Yes	No	Yes	Yes	No	Yes	Yes	Yes	Yes
Hunting and fishing	No	No	No	Yes	Yes	Yes	No	No	No	No	No	Yes	No	No	No	Yes	No
Astro-tourism	Yes	No	No	No	No	Yes	No	Yes	No	No	No	No	No	Yes	Yes	Yes	Yes
Geo-tourism	Yes	No	No	Yes	No	Yes	No	Yes	Yes	No	No	No	No	Yes	Yes	Yes	Yes
Hiking	Yes	Yes	Yes	Yes	No	Yes	No	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes
RURAL TOURISM	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Ethnographic tourism	Yes	Yes	Yes	Yes	No	Yes	Yes	No	Yes	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes
ACTIVE AND SPORTS TOURISM	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Active and adventure sports	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Winter sports	Yes	Yes	Yes	Yes	Yes	No	No	No	Yes	No	Yes	No	Yes	Yes	Yes	Yes	Yes
Golf	No	No	Yes	Yes	No	No	No	No	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Other sports (cycling tourism)	Yes	Yes	No	Yes	Yes	Yes	No	No	Yes	No	Yes	Yes	No	Yes	Yes	Yes	Yes
CULTURAL TOURISM	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Unique art and patrimonial resources	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Cultural activities and events	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Film tourism	Yes	No	Yes	Yes	No	Yes	No	No	Yes	No	No	No	No	Yes	Yes	Yes	Yes
Religious tourism	No	Yes	Yes	Yes	Yes	Yes	No	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
INDUSTRIAL TOURISM	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
THE WAYS OF ST. JAMES	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
CITIES OF ASTURIAS	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Cruise tourism	No	No	Yes	Yes	Yes	No	Yes	No	Yes	Yes	Yes	Yes	No	Yes	Yes	Yes	Yes
Business tourism	No	Yes	Yes	Yes	Yes	Yes	No	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Major events	No	Yes	Yes	Yes	Yes	No	Yes	No	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes	Yes
HEALTH TOURISM	Yes	No	No	Yes	No	No	No	Yes	Yes	Yes	Yes	Yes	No	Yes	Yes	Yes	Yes
Wellness	Yes	No	No	Yes	No	No	No	No	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
COAST AND SEASIDE TOWNS	No	No	No	No	No	No	No	No	No	Yes	No	No	No	Yes	No	Yes	Yes
Seaside towns/Marine tourism	Yes	No	Yes	No	Yes	Yes	Yes	No	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes	Yes
Nautical and water sports	Yes	No	No	Yes	Yes	No	No	Yes	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
SHOPPING TOURISM	No	No	Yes	Yes	Yes	No	No	No	No	Yes	Yes	No	No	Yes	Yes	Yes	Yes
LANGUAGE TOURISM / OTHER COURSES	No	No	No	Yes	No	No	No	No	No	No	Yes	Yes	No	Yes	Yes	Yes	Yes
SPECIAL INTERESTS: Roots tourism	No	No	No	No	No	Yes	Yes	No	Yes	Yes	No	Yes	No	Yes	Yes	Yes	Yes

Source: Own development.

Analysing compliance with the different variables for each of the products, and applying the table or ratings, leads to the following **classification of tourism products for the Asturias tourist destination**:

Matrix 7: Prioritisation matrix for the tourism products of the Asturias tourist destination

	PRIORITY	
Strategic products	High	Medium
GASTRONOMIC TOURISM	GASTRONOMIC TOURISM	
NATURE TOURISM	NATURE TOURISM	
Ecotourism	Ecotourism	Observation of flora and fauna
Observation of flora and fauna	Hiking	
RURAL TOURISM	RURAL TOURISM	
Ethnographic tourism	Ethnographic tourism	
ACTIVE AND SPORTS TOURISM	ACTIVE AND SPORTS TOURISM	
Active and adventure sports	Active and adventure sports	Other sports (Cycling tourism)
	Large sporting events	Winter sports
CULTURAL TOURISM	CULTURAL TOURISM	
Unique art and patrimonial resources	Unique art and patrimonial resources	
Cultural activities and events	Cultural activities and events	
	Religious tourism	
INDUSTRIAL TOURISM	INDUSTRIAL TOURISM	
THE WAYS OF ST. JAMES	THE WAYS OF ST. JAMES	
CITIES OF ASTURIAS	CITIES OF ASTURIAS	
		Cruise tourism
	Large events	
	Business tourism	
COAST AND SEASIDE TOWNS	COAST AND SEASIDE TOWNS	
		Water and aquatic sports

Source: Own development.

As can be seen in the above table, **9 strategic lines** are considered for the Asturias tourist destination: **gastronomic tourism, nature tourism, rural tourism, active and sports tourism, cultural tourism, industrial tourism, the Ways of St. James, cities of Asturias and coast and seaside towns**.

These lines of products, as can be seen in the analysis of target audience segments, fit perfectly with the preferences of the motivational segments determined as priority: **Discoverer, Generalist and Cultural-holiday**, and allow the development of an experiential supply that is completely suited to the Rural-nature, Peaceful, Sports, Cultural and Open to everything segments.



Moreover, as a result of their compliance with the variables considered key for the positioning of the brand, the following are seen as **strategic products: ecotourism, observation of flora and fauna, ethnographic tourism, active and adventure sports, unique art and heritage resources and cultural activities and events**. The identification and strengthening of the general image and identifying values to be conveyed by the destination, the product's ability to contribute to territorial balance, the differentiation compared to close competitor destinations, the uniqueness and differentiation of the resources and supply supporting them, the suitability of the supply given the standards associated with the product, its reflection of the new market trends, the attraction capacity for these motivational and experiential segments, and the possibilities presented by the product if distributed and marketed through specialised channels accessible for the destination, are considered essential factors in order for **these products to play a dominant role in the positioning of the destination and the image to convey**.

It can be seen that the same lines and products identified as strategic are also **high priority** (except observation of flora and fauna), added to which are the product lines of **religious tourism, business tourism and large events**, both cultural, linked to urban tourism, and sports, falling under urban and sports tourism. While they do not comply with all of the variables required to identify them as strategic, and therefore do not play a key role in terms of the brand's positioning, these lines **do show a high degree of compliance with the criteria considered and are therefore configured as essential in the design and development of the destination's tourism product portfolio**.

Moreover, there is also a series of **medium priority** products, or in other words, those that comply with a smaller number of variables meaning that either a greater dedication of resources would be necessary to exploit them and/or the impact generated for the territory as a whole would be lower. Saying this, their development would contribute to generating income and the long-term development of tourism and/or specific tourist areas or activities. These medium priority tourism products are: **observation of flora and fauna, other sports (cycling tourism), winter sports, cruise tourism and water and aquatic sports**.

These products will in some cases configure a supply with their own identity within the product portfolio, and in other cases they will be integrated as products to complement other strategic products, as will be established in the different specific product plans. To determine the way in which the supply of each must be presented, one essential element to be analysed will be their fit with the preferences of the priority and medium-high priority motivational and experiential segments.

Finally, there is a series of products whose **priority is low**, either because of their low level of development or their minimal contribution to sustainable tourism (as is the case for beach and sun). It is thought that **they should not be added to the product portfolio as products with their own identity and the dedication of resources for their development and promotion is not essential**. Some of these, such as **health and wellness tourism and shopping tourism**, will be integrated as a complementary supply to other priority products, such as urban tourism.

Included below is a description and brief justification of the essential criteria relating to each of the tourism products analysed, whose development and promotion strategies will be specified in the individual product plans.

8.3.1 Gastronomic tourism

Gastronomic tourism includes **trips planned in order to enjoy a place's gastronomy**. The current traveller does not only seek to try good products, but also to enjoy a gastronomic experience, such as learning about the cheese making process, from the milking of the animal to the cheese being ready to eat, interacting with that entire process.

Gastronomic tourism is considered to be a **strategic product** within the leading brand products defining the Sustainable Tourism Programme for the Principality of Asturias. This is due to the high culinary diversity and gastronomic quality existing in the region. Asturian cuisine is characterised by the use of first-class raw materials that, along with a deeply rooted culinary tradition, have positioned it over time as a leading gastronomic region nationally. It is committed to tradition and innovation in food preparation, incorporating concepts such as slow food, show-cooking, collaborative gastronomy, fusion cuisine, etc. It also promotes the use of Km0 products and ecological products sourced from the Asturian countryside, which makes it a tourism product that contributes significantly to territorial sustainability.

Asturias is also committed to gastronomic excellence: it has two of its own quality and guarantee marks, **"Mesas de Asturias, Excelencia Gastronómica"** and **"Sidrerías de Asturias, Calidad Natural"**.

Due to the importance of gastronomy in the Principality of Asturias, the Gastronomic Tourism Competitiveness Plan was developed in 2009 to convert the gastronomy of Asturias into a tourism product in its own right. The implementation of this Plan has served, among other things, to create a wide variety of gastronomic experiences, brought together under the **"Savouring Asturias"** brand.

As reflected in the surveys rating the destination, prepared by SITA in 2015, **gastronomy is currently the third most important reason for tourists to visit Asturias, with almost 16%** of responses, which is only behind the natural environment (24.4%) and learning about new places (18.2%). Moreover, gastronomy stays in third place for those who have visited the destination, with 16.6% of responses, being one of the highest rated aspects behind the landscape, environment and atmosphere (30.5%) and everything in general (30%). As a result of this, gastronomy is seen as an essential pillar for attracting visitors to Asturias.

There are many **differentiating gastronomic resources** in Asturias due to its rich gastronomy. We can make a distinction between products from the sea, land, vineyards, cider, Asturian cheeses, etc.

The region has a high concentration and variety of cheeses, recognised with different protected indications and international awards. One example is Cabrales cheese, which won the bronze medal at the 2015 World Cheese Awards.

Asturias has 6 products with Protected Designation of Origin and 3 with Protected Geographic Indication. It also has the Principality of Asturias Council of Ecological Agricultural Production, which certifies the organic products of a growing number of producers.

Finally, one of Asturias' leading products is cider, a unique product that strengthens its gastronomic culture. Throughout the year there are various unique experiences linked to cider, such as participating in an "espicha" (gathering of friends) or pouring a "serving" of cider with around 8,500 people, an annual event held in Gijón where a pouring record has been set.

To these high quality, unique and well-recognised products we must also add the excellent variety of top quality restaurants and their good value for money, a factor that is highly rated by travellers motivated by good food.

During the implementation of the Asturias Gastronomic Tourism Competitiveness Plan, and in order to exploit all of these food products, work was carried out to obtain a diverse multi-experiential supply of local gastronomy options. In addition, 5 routes around the Asturian region have been created: Tastes of the Sea Route, Cheese and Dairy Route, Cider Route, Gangas Wine Route, and Tastes of the Countryside Route, which are nowadays configured as a competitive and differentiated tourism product.

In this category we also have activities that allow the visitor to learn first-hand about the production processes involved in producing the typical gastronomy through guided visits to factories, canning companies, livestock farms, etc. These are activities linked to industrial tourism but within the framework of gastronomic products.

In addition, small delicatessens or markets, places where visitors can purchase products typically found in Asturian gastronomy, also occupy an important place in the framework of this tourism product.

8.3.2 Nature tourism

Nature tourism is that carried out in the natural environment and which tries to preserve it, taking into account the welfare of the local population. Nature tourism is closely associated with the interpretation of the natural heritage, being in contact with nature, performing outdoor activities, learning about flora and fauna, etc.

There are many areas that can fall under the title of nature tourism and that nowadays can be considered as unique tourism products with their own identity. Thus, we can talk about **ecotourism, astro-tourism, geo-tourism, observation of flora and fauna, etc.**, these all having the same philosophy albeit with specific and distinct motivations and experiences associated with each.

It is estimated by Hosteltur (2015), in the first global study on nature tourism in protected areas, that National Parks and Natural Reserves receive approximately 8 billion visits per year worldwide. In this study it is also estimated that the turnover achieved is around €527.8 billion in tourist expenditure each year, which is more money than is invested in maintaining and preserving this natural heritage, standing at around €8.8 billion per year.

Asturias has one of the best preserved territories in Spain with a third of its surface area having some form of protection. It has the Regional Network of Protected Natural Areas in Asturias (RRENPA) and a large amount of land belongs to the Natura 2000 Network.

There are many and varied **motivations** for the visitors to enjoy nature tourism but these have a common factor: being in contact with the natural environment. One of the main motivations is visiting National Parks, Nature Parks and Biosphere Reserves, since natural areas with this level of protection will inevitably have a rich biodiversity that is difficult to find elsewhere.

Learning about flora and fauna, especially about the native species in each area, is another main motivation. Relaxing, being in contact with nature, enjoying a peaceful environment, looking to disconnect from routine and escaping urban living are some of the reasons why this type of tourism is increasingly popular.

There are also other concerns relating more to the study, research and awareness of the biodiversity of the natural heritage.

According to studies carried out by SITA, one of the factors most valued by current tourists when visiting Asturias is the good conservation of the land.

In addition to the Regional Network of Protected Natural Areas in Asturias, the Biosphere Reserves and areas under the Natura 2000 Network, there are other **very important natural resources such as:**

- “Coast of the dinosaurs”, coastal strip located between Gijón and Ribadesella where various footprints of dinosaurs and other Jurassic reptiles can be found. There is also the Asturias Jurassic Museum which provides complementary information on this unique resource.
- Sierra del Sueve, a massif located in central-eastern Asturias, characterised in terms of flora by the beech tree forest and in terms of fauna by the Asturcón pony breed.

Nature tourism must be implemented and developed following the regulatory legislation corresponding to the protected area where these activities are carried out. Some activities may be authorised or prohibited in accordance with the regulations in force in the territory and some may require a study on the impact, damage or environmental processing involved to ensure that they are developed correctly.

As has been mentioned, nature tourism covers a wide range of products related to the natural environment, those specified below being defined as **strategic products for Asturias Tourism:**

A. Ecotourism

This form of tourism, although defined in a wide variety of ways, is associated with sustainable tourism that, according to the UNWTO, is understood as **tourism that is respectful of the natural environment and considers the current and future economic, social and environmental repercussions in order to meet the needs of visitors, the sector and the destination**. This concept is closely linked to that of sustainable development, as defined at the 1992 Rio Summit by the UN.

This type of responsible tourism or ecotourism is a growing trend, this fact being supported by the UNWTO which predicts a considerable growth in this type of tourism over the coming decades.

Asturias undoubtedly has enormous potential to establish itself as a leading destination for this type of tourism, which is included in this Sustainable Tourism Programme as a **strategic and priority product**.



B. Observation of flora and fauna

With regard to the observation of flora and fauna, this is seen as a differentiated product but falling under this category because while the activities are provided by active and sports tourism companies, the motivations of the users who travel in search of these activities are very closely linked to nature tourism. Thus, this form of tourism focuses on observing animal and plant species in their natural habitat, and is aimed at both general visitors and specific audiences.

As well as being an ideal territory for ornithological tourism, a practice that is strongly established worldwide and of great importance in markets such as Britain, Asturias has the unique attraction of learning about and observing species that are characteristic and specific to this region, including the Cantabrian brown bear, the wolf, the bellowing of the deer, the Asturcón pony breed, etc. All of this, to which we can add the presence of other essential factors relating to image, the configuration of the supply and its adaptation to the new demand trends and target audiences, positions this tourism product as a **strategic and medium priority** product for the coming years.

C. Hiking

One of the products most closely linked to nature tourism is hiking. The Principality of Asturias has around one hundred routes and trails throughout the territory, along which visitors can enjoy the rural and mountain landscape, contemplate the flora and fauna and take part in outdoor sports, all in a very beautiful natural setting. Many of the routes in Asturias also allow visitors to discover different towns, both coastal and inland, passing through charming rural villages and towns, enjoying the best viewpoints and finding places of great natural, cultural and ethnographic interest.

Hiking is very popular and is one of the activities enjoyed most by travellers whose main motivation is being in contact with nature and enjoying the countryside. In Asturias there are hiking routes of different distances and levels of difficulty, adapted to different audience segments, from simple hikes suitable for almost everyone to harder routes along the most spectacular mountain trails for people with more experience.

Some of the most popular routes in Asturias are Llanes-Celorio, Luanco-Nieva, the Monte Camba Route, the Pino River and Aller River Gorge Route, San Antolín–Guadamía Beach Route, the Tapia de Casariego-Vegadeo Route, Arenal de Morís-La Griega Beach, Barayo-Navia, Celorio- San Antolín, Bustio-Pendueles, La Carisa Hill Range, La Ñora-Gijón, Pendueles-Llanes, Navia-Vilavélez, Tabayón Waterfall Route, Arnao Beach-San Juan de la Arena, Cueto de Arbás Route, Ordiales Viewpoint Route, Los Molinos Route, Route to Pienzu Peak, Saliencia Lakes Route, Moal Forest Route, Seimeira Waterfall Route, Cares Route, Pierzu Peak Route, San Esteban de Pravia - Aguilar Beach, Alba Route, La Regueirina Path, the Bear Path, Vía Verde de Turón, etc.

8.3.3 Rural tourism

Rural tourism is understood to cover those activities carried out in a rural setting in order to learn about the traditions, ways of life and attractions of the territory.

Asturias is a pioneer of rural tourism, as the first hotel of this type in Spain was opened in Taramundi in 1986. We can therefore talk about the region as a leader in this area nationally, with an increase in the length of overnight stays which stood at an average of 4.8 nights in 2014. This figure is in line with the growth seen across Spain, registering an increase of 12.5% nationally (SITA, 2014) and reversing the declines seen in recent years.

Rural tourism is intrinsically linked to nature tourism and is of a cross-cutting nature when it comes to gastronomy, hiking, observation of flora and fauna and other activities designed to be performed in the countryside. Traditional gastronomy and artisan products are very closely linked to this type of tourism and there is a supply of gastronomic experiences combined with rural accommodation.

The main **motivations** of the visitor when deciding to travel to Asturias for this form of tourism are to enjoy natural environments away from the city, gastronomy, the comfort and relaxation of accommodation with a certain rustic and/or charming character, and the search for peace and quiet. This is complemented with learning about Asturias' native flora and fauna and enjoying unique experiences related to the rural environment. Another important factor when enjoying rural tourism is learning about the natural environment and ethnography that surrounds its way of life and its people.

As has already been mentioned, rural tourism in Asturias is a national benchmark. The existence of the "*Casonas Asturianas*" quality mark for rural accommodation in Asturias and the "*Aldeas, Asturias Calidad Rural*" guarantee mark enhance the quality of this type of accommodation and contribute to establishing a more competitive supply in the region.

The latest trends in rural tourism associate it with unique experiences or new forms such as agro-tourism, in which visitors interact with country life, agriculture, livestock production, milk production, etc.

All of these factors position rural tourism as a **strategic and priority tourism product for Asturias**.

Due to the close relationship between the two, the ethnographic tourism product falls within the rural tourism category:

A. Ethnographic tourism

Ethnographic tourism is that type of tourism carried out by visitors who want to understand a new culture, visiting towns and getting to know the people, customs, and tangible and intangible heritage bequeathed by the ancestors of that society. The interests of tourists who consume ethnographic tourism products are fundamentally related to people and their traditions and ways of life.

Asturias has a network of ethnographic museums dedicated to raising awareness about the habits and customs of the Asturian people from ancient times to the present day. It also has unique resources throughout the territory with their own identity, both tangible (raised granaries, cereal stores, etc.) and intangible (activities such as shepherding, ranching, agriculture, etc.) which continue to have great relevance in this region and which tourists can have the opportunity to experience.

For all of these reasons, most important of which is the strong link between the values associated with this type of tourism and the general image of the destination, along with the uniqueness and differentiating nature of its supply, this tourism product is identified as **strategic and of high priority**.

8.3.4 Active and sports tourism

The Adventure Travel Trade Association (ATTA) defines adventure tourism as trips which include at least two of the following three elements: performing physical activity, enjoying the natural environment and learning about the culture of the place being visited. The ATTA also differentiates between different types of adventure tourism according to the intensity of the physical activity.

It is an increasingly popular form of tourism that generates significant income. According to the UNWTO, 65% of expenditure generated by this type of visitor stays in the destination, which **contributes to diversifying and growing the local economy**.

Asturias is a privileged natural setting for this type of tourism with an extensive offer of adventure activities suitable for different target audience segments.

In a study carried out by SITA, the active tourism activities most demanded by visitors in 2014 were: kayaking, river canoeing, horse riding and off-road vehicles (4x4, quad, etc.).

The **motivations** that encourage visitors to take part in active tourism are strongly related to adventure and taking on challenges. The search for fun and new adventures and doing sport in extremely beautiful natural settings are the other key reasons why Asturias is chosen as the destination for active, adventure or sports tourism.

All of these factors position **active, adventure and sports tourism as a strategic and priority line of products** with various types of tourism products related to it.

Active, adventure or sports tourism must be performed and developed following the regulatory legislation corresponding to the protected area where these activities are carried out. However, some of these may be authorised or prohibited in accordance with the regulations in force in the territory and some may require a study on the impact, damage or environmental processing involved to ensure that they are developed correctly.

A. Active and adventure sports

This refers to doing sport or activities in a natural setting. Here we can distinguish between **land, air and water**.

Land:

- Mountain: hiking, climbing, abseiling, caving, etc.
- Multi-adventure park: Tibetan bridge, zip line, abseiling, etc.
- Environmental workshops and excursions. Observation of flora and fauna.
- Horse riding
- Vehicles: 4x4, quads, bikes, buggies, etc.

Air:

Hot-air balloon, paragliding, microlight aircraft, helicopter, etc.

Water:

Kayaking, river canoeing, rafting, river sledging, canyoning, etc.

The International Descent of the Sella River stands out as a **Major Sporting Event**, declared a Festival of International Tourist Interest. This festival is of a sporting nature, has been held since 1930 and is considered a very important event for canoeists from around the world. The event attracts a large number of people who arrive using different forms of transport with the intention of not only taking part in sport but also making the most of the journey to discover new places in the region.

With regard to sporting and recreational activities in mountainous areas, according to a study on mountain tourism in Spain conducted in 2007 by the Spanish Tourism Institute, this tourism product generates significant flows of tourism in European mountainous areas, mainly for snow sports. However, it is not exclusively about snow as there are also mountain resources associated with activities in the natural environment, linked to cultural heritage, observation of flora and fauna, climbing, hiking, mountain biking, health and wellness, etc.

Picos de Europa is one of the leading destinations in the Principality of Asturias for this type of tourism. It has great potential to become a socio-economic driver in that area and a point of attraction for domestic and international travellers. For these reasons, this form of tourism is considered a **priority supply** to be promoted within active and adventure tourism sports.

Moreover, as defined in that mountain tourism study, hiking, understood as taking trips in order to follow signposted routes or paths and learn about the environment, is another strategic product nationally. In Asturias there is currently a supply of signposted routes and paths open to the visiting public of different degrees of difficulty and in different locations, some well-established and with a strong image in the market, such as the Cares Route. However, as identified in this study, the region has the potential to develop a much more attractive supply of this form of

tourism, so it is considered that it must also be promoted over the coming years through the creation of new routes, products and unique experiences.

Finally, it is worth mentioning the enormous supply of active tourism activities on rivers provided by highly specialised companies. As has been discussed, these are positioned as one of the activities in most demand from visitors.

Thus, Asturias is strongly positioned in this form of tourism, having a supply of varied, high quality activities, as well as events linked to these internationally important sporting activities, with the ability to attract visitors and grow in segments and markets considered a priority. All of these reasons justify why active and adventure sports are seen as a **strategic and priority tourism product** for Asturias.

Other tourism products falling under the active and sports tourism category which are not strategic but are a high or medium priority are:

B. Winter sports

This refers to **sports related to snow and ice**. Asturias has the Winter Sports Federation of the Principality of Asturias and high quality facilities such as the Pajares and Fuentes de Invierno Ski Resorts and companies running sporting activities of this kind that offer options such as the use of snowshoes, trekking, etc.

The availability of these infrastructures, along with other unique features of the region, gives this product great potential for domestic and international development, positioning it as **medium priority**. However, there is a need to work on promoting and exploiting this area, diversifying activities and improving the profitability and use of these facilities.

C. Other sports: cycling tourism

Asturias is one of the settings for the Cycling Tour of Spain (another Major Sporting Event), which has very important stages passing through the community. Another highlight is its supply of mountain biking (or MTB) routes which, together with the growing demand for this sport and the unique features offered by Asturias, means that this sport has the potential and organisation to be considered **medium priority**.

8.3.5 Cultural tourism

Cultural tourism is where people travel, either abroad or within their own country, in search of **cultural products that generate aesthetic, emotional, authentic and exclusive experiences for the tourist**. As was argued at the 1982 UNESCO World Conference on Cultural Policies, it is where cultural and tourist policies converge, valuing and respecting both cultural and natural resources.

This type of tourism has an impact on the social, economic, cultural, educational, environmental and political aspects of destinations. Two profile types are dominant when it comes to this type of tourist: those who travel solely for cultural reasons and those who, with a different main motivation for the trip, take advantage of the tourist - cultural supply of the destinations as a complementary activity.

In recent years cultural tourism has grown in importance, especially in urban areas, historic cities, etc., due to the increase in the number of visitors to these places. The political and economic interests of the destinations have supported this trend, implementing improvements in the cultural heritage and resources, which is generating a rich and varied tourist-cultural supply in the tourist market, in many cases even exceeding demand itself.

As a characteristic intrinsic to this type of tourism we can highlight its ability to combat seasonality, which generates job stability and considerable local development.

Reference must also be made to the medium-high purchasing power of the cultural tourist which is a favourable characteristic, as their spending at the destination is normally higher than average. Another aspect to outline is the normal pre-planning of visits to the destination. This level of organisation ensures occupancy in accommodation and the availability of services before the tourists reach the destination.

However, it is also true that this may lead to crowds in many of the areas visited in a way that can be detrimental or overexploited, even selling services as cultural tourist services when they are clearly not (theme parks for example). Cultural heritage is generally perceived as perpetual, something that is going to be there forever, although heavy investment is needed for its preservation; but it also generates such a large market and volume of business that destinations are encouraged to focus on it, for example by applying to be on UNESCO's World Heritage list in order to gain greater prestige and climb higher in the rankings for such destinations.

Spain has many advantages as a cultural tourist destination. It continues to beat records in terms of the number of tourist arrivals and it is in third place on UNESCO's World Heritage list. Thus, it is especially important to continue taking advantage of the benefits generated by this product within the country's tourist activity.

In Asturias this tourism is of importance because, according to data provided by SITA in 2015, visitors are motivated to learn about Asturias from a cultural perspective. What particularly stands out is the fact that during their visit the places of greatest interest to visitors are the towns, monuments and museums.

Among other cultural treasures, Asturias has caves that have been declared a World Heritage Site by UNESCO, Pre-Romanesque art buildings, a style which is intrinsic to Asturias and has also been declared a World Heritage Site, cities with historic quarters, centres of international importance, museums, etc., but it also has an important intangible cultural heritage that can be seen from deeply rooted traditions of



interest for this type of tourism (shepherding, farming and livestock rearing, folklore, etc.) along with native and gastronomic festivals, etc.

The **main objectives** of tourists who travel for cultural reasons are to discover new places and learn about the people from those places in a more first-hand and active way, have experiences with the natives that provide knowledge about new cultures and how people from other countries, regions or cultures live, etc. Additionally, in the search for new knowledge we also have the interpretation of the tangible testimony of the destinations visited through their heritage, be it architectural, landscape, etc.

Within this important line of products, considered as **strategic and priority** for all these reasons, are a series of tourism products with their own identity which also have all the factors required to be treated in the same way.

A. Unique art and heritage resources

Asturias has many and varied experiences based around artistic and heritage resources. Tourists have the option to combine them or enjoy them in a complementary way on trips taken for other main reasons. In the case of those tourists who visit unique cultural resources, it can be affirmed that **their motivation for that visit is to increase their artistic and historical-heritage knowledge**.

These are unique experiences due to their exclusivity: the Pre-Romanesque legacy, the Ways of St. James that cross the Principality, the culture of the emigrants who crossed the Atlantic and came back rich, the Sanctuary of the Virgin of Covadonga and the Trans-Cantabrian train are included in Asturia's tourist supply.

As for unique art and heritage, it is worth mentioning the particular importance of Asturian Pre-Romanesque art.

There are also other unique resources such as the **Sanctuary of the Virgin of Covadonga**, important at a religious, heritage, historic and natural level, and unique buildings **built by the emigrants to Latin America on returning home**, such as the Latin American Archives Foundation, La Solana, Villa las Palmeras and Villa Ignacia.

All of the resources in Asturias linked to **rock art** are also of great importance and relevance, **such as the caves of** Tito Bustillo (Ribadesella), Covaciella (Cabrales), Llonín (Peñamellera Alta), El Pindal (Ribadedeva) and La Peña (Candamo), all of which have been declared a World Heritage Site. To these we can add others such as El Buxu, Fresnedo Rock Shelter, Los Azules Cave, Santo Adriano Rock Shelter, La Lluera Cave, La Loja Cave, Ardines Cave, Demo Cave, El Conde Cave and El Fornu.

This entire supply, its uniqueness and its adaptability to priority tourist segments, both domestic and international, shows that these products are **strategic and priority** for the tourist destination.

B. Cultural activities and events

The cultural tourist can find a varied supply of cultural activities and events in Asturias. Tourists who travel for this type of activity tend to have a **specific interest in the activity itself**, such as opera, music concerts, sports, etc., although on many occasions the event itself is used as an excuse to enjoy the tourist destinations and their supply in general.

For cultural activities and events, Asturias has important facilities such as the Jovellanos Theatre, La Laboral in Gijón, the Campoamor Theatre in Oviedo, the Niemeyer Centre in Avilés, Oviedo Auditorium, the Palacio Valdés Theatre in Avilés, birth houses of various important people, museum houses, mansions, castles, centres such as the Sports Arena in Gijón, the Sports Arena in Oviedo, etc. which regularly host activities of significant importance and interest. Therefore, this tourism product is also positioned as **strategic and high priority**, and strategies must be developed to enhance and exploit it.

C. Religious tourism:

The cultural heritage of the Principality of Asturias includes significant religious resources of great importance such as **Covadonga Sanctuary** (visited by 33.5% of tourists visiting Asturias, according to SITA) which is one of the Principality's main tourist attractions and the place where the Spanish Reconquest began, giving it real historic value in addition to its religious and spiritual value. Added to these as a unique resource is the **Holy Chamber** (Oviedo) where the **Holy Ark and Holy Shroud** can be found, both emblems of religious tourism.

As has been mentioned, this unique supply is also reinforced by other very important resources such as the Holy Ark Route, San Antonio chapel in Pedroveya (Quirós) and those intrinsic to the "Silver route" including the towns of Lena, Aller, Mieres, Riosa, Morcín, Ribera de Arriba, Llanera and Gijón. These resources receive visitors throughout the year, moved by their faith, thus contributing to reducing the seasonal nature of tourism in the region.

Therefore, although it does not establish a differentiated supply that sets Asturias apart from other close competitor destinations, meaning that religious tourism is not a strategic product for its brand image, it is positioned as a **high priority product**, and it must play a very important role in the destination's portfolio of tourism products.

8.3.8 Industrial Tourism

As defined by AENOR in its UNE 302001 Standard on Industrial Tourism, the activity of industrial tourism consists of taking a predefined tour (guided or not) inside interpretation centres or industrial facilities or those providing services, rendered by organisations that are active in or belong to industrial heritage, which through explanations, active participation, experimentation and/or direct observation seek to offer the user the best information about certain processes, working systems, products or services. Thus, industrial tourism is a form of cultural tourism which starts from a motivation to learn about elements related to production

processes. This motivation includes architectural and technological elements, as well as others linked to the context of the production, be this social, geographic or environmental, and included within industrial tourism are both industrial archaeology and living industry resources, which include visits to active industries.

It is undeniable that the industrial tourism product is closely linked to Asturias in a broad sense, given that the industrial heritage law from 2001 outlines the national importance given to including this type of asset into the Cultural Heritage Inventory of Asturias.

The guide produced by Incuna, "Industrial Heritage of Asturias: 33 Proposals for Industry, Culture and Nature" contains 33 possible routes associated with this product in Asturias, along with the landscapes of the Silver Way and the Mining Landscapes. As established in this guide, in Asturias there are three different types of resources: elements isolated by nature but of historic, heritage or architectural value in themselves, as is the case of the Tobacco Factory in Gijón. There are also industrial sites, evidence of a certain industrial activity that took place in the past, such as the Arnao Industrial Historic Site in the Royal Asturian Company of Mines and the San Luis Mine in La Nueva Valley in Langreo. There are also the industrial landscapes where the complete process of certain industries is visible, such as a Mining Basin; the Turón Mining Valley and the Samuño River Valley in Langreo.

Industrial Heritage is a hallmark of Asturias and it has examples of international importance such as the Royal Asturian Company of Mines in Arnao and San Juan de Nieva, the Weapons Factories of La Vega and Trubia in Oviedo and the different mines and facilities of the state company Hunosa. Others are the hydroelectric power stations of La Malva, Salime, Proaza and Arbón, the El Gaitero cider factory and its industrial museums: the Mining Museum in El Entrego, Railway Museum in Gijón, Cider Museum in Nava; Maritime Museum of Asturias in Luanco, and the Iron and Steel Museum (MUSI).

The Historical Industrial Site of Arnao, the Nalón Valley and the Caudal Valley reflect its mining landscapes. With regard to the "Silver Way" there is an educational itinerary showing the legacy of the Marquis de Comillas with the highlight here being the industrial heritage of Mieres and Aller ("Casa de los Gatos", former head offices of SHE, the building in Sovilla, working village of Bustiello, San Jorge mine, Santiago mine, San Antonio mine, La Esperanza de Boo mining centre, Caudal River, Aller River, Negro River, etc.).

In terms of living industries, in relation to the marine and sea industry the public can visit the fish markets of Avilés and Llanes, sea museums, fishermen's guilds, ports, etc., as well as the important resources and experiences linked to agro-industry (visits to cheese factories, cider presses, etc.), of such importance to Asturian society.

Thus, it is clear that all of this heritage has generated a legacy that provides a large number of experiences linked to this type of product, which due to all of these reasons is positioned as **strategic and priority** for Asturias.

8.3.7. The Ways of St. James

Asturias is one of the most important pilgrimage destinations in northern Spain, along with Santiago de Compostela. The number of pilgrims and tourists attracted by the opportunity to walk the Original Way of St. James is undeniable.

With regard to the **Way of St. James, five routes** run through the community, including the Original Way, considered the first Jacobean Route to be established. Along with this is the Coastal Way, two connections between the two that have been declared a World Heritage Site by UNESCO, and the connection between the French Way and Oviedo through the Salvador Way. The Ways of St. James, in addition to establishing an important resource for religious tourism, are an internationally important tourism product as they have their own unique motivations, and as a product it can be included in itinerary tourism. Itinerary tourism is characterised by the presence of a main motivation that justifies this activity, in this case it is a religious, spiritual and/or experiential motivation. It involves an overnight stay away from the visitor's home (so it does not include day trips for example) and in many cases it also involves activities complementary to the itinerary itself, therefore contributing to factors such as reducing the seasonality of the tourist destinations with this type of supply. For all these reasons, the Way of St. James is identified as a product with its own identity in the product portfolio of the Principality of Asturias, and as a **strategic and high priority product**.

8.3.8. Cities of Asturias

The autonomous communities with a less well-established tourist tradition have seen a very significant development of their tourist facilities, the highlight being the commitment of the hotel sector to urban tourism, with innovative characteristics, since **urban tourism comprises all of the activities a tourist does during their stay in a city**. Visits to parks, museums, historical buildings and commercial buildings all form part of this type of tourism.

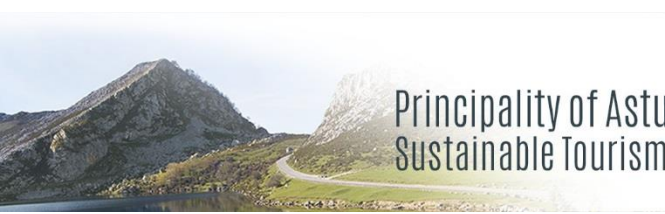
Looking at the motivations for visiting urban destinations, these include an interest in visiting museums, monuments and art exhibitions at that destination for the purpose of cultural enrichment, activities for professional reasons such as visits to trade fairs, conferences or symposia, tourism for recreational purposes and visiting theme parks, concerts, and shows, among others. In general, these also include discovering the tourist and cultural supply of the cities, their streets, architecture, the uniqueness of their districts, ways of life, urban models, etc.

According to figures from Hosteltur, from 1995 to 2008 there was economic growth due to city tourism. This category of tourism requires cities to be at the cutting-edge in order to offer the visitor a high quality supply, so it is very important to exploit all of the resources and generate an attractive tourist supply to be able to compete and position the city in the competitive market of cities as tourist destinations.

This activity is not linked to tourist seasonality, so it encourages the arrival of visitors throughout the year through so-called city breaks, and is related to other complementary activities such as shopping, business, gastronomy, crafts, culture, etc.

In Spain, Barcelona and Madrid stand out as the best examples in this sector, with an established supply and marketing strategies that have positioned them strongly in the international market.

In the case of Asturias, the largest cities are Oviedo, Gijón and Avilés. Oviedo is the administrative capital and Gijón and Avilés are the commercial and trade centres due to their ports. Moreover, as a differential factor for structuring a competitive urban tourism supply, it is worth mentioning the proximity and good connections between these three cities, which offer interesting possibilities for promoting this type of tourism.



These cities have both historic quarters and modern centres. Factors such as the positive rating in terms of cleanliness (Oviedo has won awards for its waste management), the support of celebrities such as Woody Allen in its promotion, the "Princesa de Asturias" awards ceremony, the construction of internationally famous centres such as the Niemayer Centre in Avilés, and even the presence of natural elements in cities, such as the beaches in Gijón, establish the supply of this product as attractive and unique.

Thus, although it is necessary to work on competitiveness factors in order for this supply to have a bigger impact internationally, due to both its importance and its being complementary to other tourist activities, this product is considered **strategic and high priority**.

Also forming part of this tourism product are the following:

A. Business tourism

Business tourism or MICE (Meetings, Incentives, Congresses and Events) encompasses **all trips made within the professional field in order to attend work-based events**. We are therefore talking about **business tourism**, about trips associated with work activities. There are different criteria for classifying events, although the main types associated with business tourism are: congresses, conventions, business days/seminars/symposia. Business tourism is comprised of some elements associated with leisure (transport, accommodation, restaurants) and others associated with knowledge transfers (exhibitors, organisation, etc.), fairs, exhibitions and incentive trips.

Business tourism is largely of a "non-seasonal" nature, given that it maintains its activity throughout the entire year, and it is essentially the urban destinations that benefit from this segment, traditionally associated with a high level tourist profile with a high average expenditure.

Information from Hosteltur indicates that this tourism is increasingly important for the sector and the economy, given that more than 20% of international tourists registered in 2013 travelled for professional reasons.

In Spain we have the Spain Convention Bureau (SCB), a non-profit association of provinces and cities made up of 57 destinations which, in collaboration with Turespaña, offer services related to running training days or events for this tourist segment, as well as studies on the sector's activity nationally.

Asturias offers very good conditions as a destination for Conferences, Incentives and Meetings, as it has great facilities and unique buildings where these activities can be carried out:

- The city of Oviedo has **the Oviedo Convention Bureau**, the **Príncipe Felipe Auditorium and Palace of Congresses** and **the Convention and Exhibition Centre (PEC) of Oviedo**.
- Located in Gijón are the **Laboral City of Culture**, the **Luis Aldaro Trade Fair Venue** and the **Gijón Conference Centre**.

- Finally, Avilés has the **Niemeyer Centre**, along with the **Magdalena Conference and Exhibition Centre**.

It is also important to mention that these three cities have a highly professionalised business sector which is an essential competitive factor (hotels, event organisation, etc.), good connections between them, the option to take part in complementary activities in the neighbouring rural environment, and, of course, gastronomy. This product is of **high quality** and, given its characteristics, its development will be linked to that of urban tourism.

B. Cruise tourism

Cruise tourism came about from the merger between the leisure industry and the maritime passenger transport industry.

The main motivations for choosing a cruise as a tourist option include **the chance to see different destinations in a single trip**, the tourist destinations visited by the ship, the technological innovations offered by cruise ships, value for money, the facilities available on the ship, the leisure options on the ship and the loyalty of travellers to this segment.

According to the report on cruise tourism by the General Secretary of the World Tourism Organisation in 2008, there has been a sharp increase in the number of passengers, as well as the creation, diversification and consolidation of destinations for this segment.

Based on information from the Ministry of Development, Spain occupies second position in the European market with a share of 16.8%, establishing itself as an option in the cruise tourism sector with 57.8% of the cruise passengers in the Mediterranean and the Atlantic, growing to 19.6%.

Moreover, as outlined by Hosteltur, 40% of passengers who enjoy a tourist destination they visit during a cruise return to see it in more depth. This is a very important factor for destinations, particularly when taking into account that the expenditure level is high.

In Asturias, Gijón Port stands out as the most important resource for this tourist segment. Reforms have been carried out in recent years to accommodate stopovers by cruise ships and the spending of the passengers visiting the city has been boosted with commercial campaigns such as "Gijón welcomes cruise ship passengers", which has more than 55 member businesses and offers advantages when cruise ship passengers purchase something, either discounts or free gifts.

It is considered necessary to continue promoting the development of this type of supply and this product is considered **medium priority**. As in the previous case, because of its characteristics the development of the supply for this type of product is linked to urban tourism.



C. Major events

This is a type of tourism where the objective is to **attend cultural or sporting events that take place in destinations of special interest to the visitor**.

This type of tourism entails a very significant public investment, as well as strong collaboration between private companies, given that any major event requires the significant mobilisation of all the resources and organisations in the destination, including everything from the police, civil protection, and the health service to small companies that benefit from all the large activities taking place in towns.

However, destinations that want to increase awareness of their brand in the market promote this type of tourism, as the impact is very large and it allows them to climb the brand-quality rankings.

Asturias has various nationally and internationally famous events that contribute to its positioning in the tourist market. The ceremony for the "Princesa de Asturias" Awards is highly prestigious and attended by many people of great importance who receive the awards in the city of Oviedo, which greatly increases its tourist numbers and even attracts famous people such as Woody Allen, giving the destination international exposure.

The specialisation of events is also of value when the event proves popular as this increases the loyalty of the attendees. Examples include the Black Week or Semana Negra in Gijón for fans of this type of literature and the International Film Festival of Gijón.

Mainly due to its importance for supply, and the fact that the major Asturian cultural events are held in the cities, this product is linked to urban tourism and is **high priority**. It is worth mentioning that the Principality of Asturias also has major sporting events held throughout the region, such as the Cycling Tour of Spain and the International Descent of the Sella River, both associated with the active and sports tourism product.

8.3.9 Coast and Seaside Towns

Lastly, and although this could be included under either cultural tourism or coastal tourism, included as a separate **strategic product with a high priority is the supply of seaside towns, marine tourism and nautical and water sports**, which stands out in Asturias due to the large number of towns along the Asturian coast and the great impact they have on the Principality's tourist activity.

Marine tourism, as defined by the Ministry of Industry, Energy and Tourism, "is that offered by marine professionals with a focus on raising awareness about their work, customs, traditions, heritage and culture, which represents a complementary or alternative activity to professional fishing". This type of tourism can include various activities: fishing on boats, cookery courses, visits to markets, sea exhibitions and museums, tours, etc.

Turespaña created the Marine Tourism Product Club which includes Llanes and Avilés, towns where initiatives such as the "Llanes Marino" guided visit and visits to the Avilés market or Ribadesella market, among others, stand out. As well as this type of visit, marine tourism contains complementary activities such as gastronomic days or seafood cookery courses, a seal of quality for promoting the sale and consumption of fish from the market, courses for learning about fish varieties, sea exhibitions and museums, rehabilitation of lighthouses, visits to traditional shipyards, carpenter's workshops on the shore, canning factories, etc.

Nautical and water sports

Finally, within the supply of coastal tourism is the tourism of nautical and water sports in the sea, including resources such as marinas, rental of recreational boats, water sport companies, etc.

Asturias has a network of marinas along the coast, as well as a Nautical Station in Llanes, which creates an extensive supply for those wishing to take part in these activities, this product being seen as **medium priority**.

Thus, due both to the uniqueness of its offer, strongly linked to the image of Asturias, and its complementarity with other strategic tourism products (cultural tourism, industrial tourism, gastronomic tourism, etc.), this tourism product is positioned as **strategic and priority**.



Asturias
paraíso natural