

Tourism

In the Region of Valencia 2004

INTRODUCTION

Once again, we present this edition of Tourism in the Region of Valencia for the year 2004, with the aim of providing everyone with the information, evolution and performance of this sector, which is a basic driving force behind Valencia's economy.

The information available on the sector's performance in the year 2004 can be described as good, situated around similar levels to the previous year. A significant detail is the considerable growth in our accommodation capacity, in line with the growth in demand, with increasingly evident results of applying classification, diversification and differentiation policies.

The publication includes statistical figures and analyses of tourist activity in Valencia and in the surrounding national and international environment, with the aim of making it an indispensable tool for the sector's future development.

Finally, I would like to take this opportunity to express my gratitude for the support received throughout the year from entrepreneurs, professionals and groups within the different administrative authorities, without whose collaboration this study could not have been made, a basis for the effective management of tourism.

Milagrosa Martínez Navarro

Minister of Tourism

TOURISM IN 2004

World-wide tourist activity

Tourist activity in 2004 underwent a remarkable evolution, although the year ended in tragic circumstances: the earthquake and tsunami in the Indian Ocean, affecting the results of a large number of tourist destinations. According to advance data provided by the World Tourism Organization (WTO), international tourism made a spectacular recovery in 2004, after three years of stagnation, thanks to a reactivation of the world economy and, in particular, of the major American and European feeder markets and despite a significant increase in petrol prices. As a result, 2004 saw the record figure of 760 million international tourist arrivals, meaning the largest rate of increase in the last twenty years, 10% more in inter-annual terms. In absolute terms, the growth in arrivals was 69 million, benefiting all regions to varying extents. Almost half the new arrivals were registered in Asia and the Pacific.

This increase was generalized over all regions, especially in Asia-Pacific, after the downturns in 2003 arising from health-related SARS issues, with 29% more arrivals, the Middle East (+20%) and America (+10%). Africa (+7%) and Europe (+4%) obtained lower results than the world-wide average, though with substantial improvements in figures compared with previous years.

These figures also show a certain redistribution in general tourist movements in Europe and America, caused by the influence of exchange rates, particularly the dollar against the euro, which benefited destinations with a relatively weak currency compared to the main feeder markets and which, for certain destinations in the Eurozone, brought about some difficulties in competing with other, less expensive destinations around the world; furthermore, this circumstantial situation led to a drop in prices for European travellers outside the Eurozone.

Other significant aspects were the consolidation of holidaymaking trends (increasingly-frequent bookings via internet, the expansion of the low cost airlines, shorter stays and more frequent vacations, last-minute bookings, etc.), the excellent results of business tourism, encouraged by the growth of the world economy, the increase in the number of cruise passengers, etc.

Although definitive data is not yet available with respect to revenues from international tourism, the growth rate is predicted to be equal to or greater than the growth rate of arrivals.

Tourist activity in Spain

Frontur statistics, drawn up by the Institute of Tourist Studies and which records cross-border tourist movements, gave a figure of around 85.7 million foreign visitors entering in Spain in 2004, 4.6% more than the previous year. 62.5% (53.6 million) of them were tourists, representing 1,769,229 tourists more than the year 2003 and an inter-annual increase of 3.4%. The rest were excursionists, showing an increase of 6.6%. The volume of overnight stays generated by these tourists was in excess of 540 million, 3% more than the foregoing year. The primary entry route was via airports (38.5 millions and a growth of 4.3%), while just over 12 million came by road, showing an increase of 0.2% with respect to 2003.

Furthermore, tourists that chose hotels and similar establishments as their type of accommodation surpassed 34 million (2.1% more than in 2003), followed by those who enjoyed free accommodation (11.4 millions). Tourists travelling for leisure and holiday purposes represented 81.8% of the total.

As regards these visitors' main national destinations, it is significant that a high degree of geographical concentration continues to be seen. Consequently, in 2004, nearly 90.6% of foreign tourists were concentrated in six Autonomous Regions: Catalonia, the Canary Islands, the Balearic Islands, Andalusia, the Region of Valencia and Madrid. As regards the main feeder countries for tourism into Spain, the main markets were the United Kingdom (30.6% of total tourists), Germany (18.7%) and France (14%), followed at some distance by Italy, the Low Countries, Belgium and Portugal.

According to the Survey of Tourist Expenditure, Egatur, average expenditure per person by foreign tourists coming to Spain stood at 872 euros, the same figure as the previous year. At the same time, average daily expenditure reached 82 euros in 2004, 0.82% higher than in 2003. Two markets concentrate half of all tourist expenditure made by foreign tourists: tourists coming from the United Kingdom and Germany generated around 50% of the total expenditure, 30% and 19% of expenditure respectively, with a total of 24,946 million euros. A significant detail is the growth in expenditure shown by tourists from Italy (12.6%) and Portugal (20.7%) and, from further-off markets, America (4.2%).

According to data from the Balance of Payments, information provided by the Bank of Spain, revenues from tourism in 2004 amounted to 37,250 million euros, 1% more in inter-annual terms. Furthermore, payments were 8,907 million euros, with a growth of 21.8%. This data gives a positive balance for tourism and trips of 28,343 million euros, a balance that allowed the trade deficit accrued in 2004 to be offset by 54.6%.

RESULTS INCOME AND PAYMENTS TOURISM AND TRIPS

	2001	2002	2003	2004(*)	%Var. 02/01	%Var. 03/02	%Var. 04/03
Income	36.602	35.543	36.871	37.250	-2,9	3,7	1,0
Payments	6.661	7.020	7.315	8.907	5,4	4,2	21,8
Balance	29.941	28.523	29.556	28.343	-4,7	3,6	-4,1

Source: Banco de España. Figures in millions of euros

(*) Datos provisionales

Familitur statistics (Tourist Movements by Spaniards), drawn up by the Institute of Tourist Studies, provides data on journeys made by Spaniards in 2004. According to this source, residents in Spain made nearly 133 million trips with at least one overnight stay outside their habitual residence, 2.9% more in inter-annual terms. 35.4% (47.1 million) of the total number of trips made by Spaniards were tourist trips and the rest were short-term journeys to a second residence. From the subtotal of tourist trips, a little over 96% were to destinations inside our own country.

In terms of geographical distribution, the main destinations for Spaniards on their tourist trips inside Spain in 2004 were, in this order, Andalusia, the Region of Valencia, Catalonia, Castile-León and Madrid. Considering short trips to second residences, the main national destinations by number of trips were Catalonia, Andalusia, Castile-La Mancha, Castile-León and the Region of Valencia. By travellers' residence, the regions that made the largest number of trips were Madrid, Catalonia, Andalusia and the Region of Valencia, thus coinciding with results from the previous year. Furthermore, overnight stays associated with total trips made by Spaniards increased to over 597 million, 2.2% more than the previous year. In this case, 72.4% of overnight stays corresponded to tourist trips.

The results of the Hotel Occupation Survey drawn up by the National Statistics Institute show that the number of travellers accommodated in hotel establishments (66.7 million) was greater than in 2003, with an increase of 6.78% and good results both from Spanish and foreign travellers. In terms of overnight stays, they reached nearly 234.9 million in 2004, representing an inter-annual increase of 2.96%. The average stay numbered 3.52 days, while occupation by bed stood at 53.58%, both figures a little lower than those from the previous year. The main destination Autonomous Regions by volume of travellers were, in this order, Andalusia, Catalonia, the Balearic Islands, Madrid, the Region of Valencia and the Canary Islands. As regards the origin of Spanish travellers, the largest numbers came from Madrid, Catalonia, Andalusia and Valencia. The percentage of travellers from abroad was 41.38%, most of which came from countries in the European Union, particularly residents of the United Kingdom, Germany, France, Italy, the United States, the Low Countries and Belgium.

The Tourist Campsite Occupation Survey, drawn up by the National Statistics Institute, showed a 4.16% drop in the inter-annual growth in numbers of travellers, standing at over 6.7 million visitors, while the number of overnight stays surpassed 30.7 million, 1.16% less, as regards the figure

for the previous year. In both cases, national demand (which represented 67.34% of travellers in 2004) produced excellent results, compensating for the evolution of foreign demand in this type of accommodation. The average stay was 4.56 days, while occupation by bed was 36.45%. For Autonomous Regions, the largest number of travellers were registered in Catalonia, followed by Andalusia and the Region of Valencia, although in terms of overnight stays the Region of Valencia surpassed Andalusia. The largest volume of travellers by Autonomous Region of origin came from Catalonia, Andalusia, the Region of Valencia, Madrid and the Basque Country. As for foreign travellers, they mostly came from France, the Low Countries, Germany and the United Kingdom.

The Tourist Apartments Occupation Survey, carried out by the National Statistics Institute, showed a 4.28% drop in the inter-annual growth in the number of travellers, totalling over 8.4 million visitors, and a 6.24% drop in the number of overnight stays, whose total figure surpassed 73.8 million. The average stay was around 8.7 days, while occupation by bed was about 45%. The regions that showed the greatest volume of overnight stays in this type of accommodation were, in this order, the Canary Islands, the Balearic Islands, the Region of Valencia, Catalonia and Andalusia. The main feeder regions for travellers were Madrid, the Canary Islands, Catalonia, Andalusia and the Region of Valencia. As regards foreign demand, which represented 75% of all travellers in 2004, they came mainly from the United Kingdom (representing over 45% of foreign travellers) Germany and the Low Countries.

The Rural Tourism Accommodation Occupation Survey, also drawn up by the National statistics Institute, showed an 19.6% increase in the number of travellers, numbering over 1.7 million. In terms of overnight stays, growth was 22.66%, surpassing 5.5 million. In this type of accommodation, more than 90% of travellers was from inside the country, mostly from Madrid, Catalonia, the Region of Valencia and the Basque Country.

TOURIST ACTIVITY IN 2004 REGION OF VALENCIA

The analysis of tourist activity in the Region of Valencia carried out below is based on the two surveys of demand drawn up by the Institute of Tourist Studies, Frontur (Cross-Border Tourist Movements) and Familitur (Tourist Movements of Spaniards).

It should be taken into account that the panel of households interviewed has been totally renewed for the year 2004 for the Familitur survey, a fact that may bear an influence on some of the comparisons.

(THOUSANDS)	TOURISTS/TRIPS	OVERNIGHT STAYS	AVERAGE STAGE
Total tourists Foreign	4.886	67.614	14,7
Tourist trips Spanish	5.626	64.023	11,4
Short trips to second homes (Spanish)	10.277	19.831	1,9
Total trips Spanish	15.902	83.854	5,3

Source: Institute of Tourist Studies (Frontur-Familitur)

The Region of Valencia receives 13.2% of domestic tourist trips made by Spaniards, 12% of short-term trips to second residences and 9.1% of foreign tourists.

In the year 2004, the number of tourist trips by Spaniards to the Region of Valencia showed a positive performance that compensated the slight drop in foreign demand. As a whole, the Region of Valencia received over 20.7 million tourists, meaning an increase of 5.4% with respect to 2003. The summer season (June to September) comprised 43.5% of trips, with an inter-annual increase of 2.3%.

National demand

In 2004, domestic trips by Spaniards increased by 2.2%, while in the Region of Valencia this growth stood at 7.5%; this figure is similar for tourist trips (7.8%) and short trips to second residences (7.4%).

The evolution of tourist trips according to season showed a growth of 12% in winter, 8.2% in spring and 6.7% in summer.

The main markets of national origin for the Region of Valencia, in terms of tourist trips, were: the Region of Valencia (29.9%), the Community of Madrid (25%), Catalonia (8.3%), Castile-La Mancha (8.3%), the Basque Country (5.6%), Andalusia (5%) and Castile-León (4.5%). All showed inter-annual growth, in particular the evolution of the Region of Valencia (13.7%), Madrid (6.5%) and Catalonia (6.2%).

The number of overnight stays on tourist trips remained stable, with overnight stays on short trips to second residences increasing by 9.1%.

61.2% of tourist trips took place between the months of June and September, meaning an inter-annual reduction of 6 points, 25.3% taking place in spring and the remaining 15.3% in winter.

64.5% of trips were made without any kind of booking. Nevertheless, in 2004 there was a 32.6% increase in trips with some kind of booking through travel agencies.

Homes of family or friends are the most-used type of accommodation (35.5%), followed by hotel establishments (25.8%), own home or time-share (19.3%) and rented accommodation (12.6%).

Cars (84.4%) are the main means of transport used in the tourist journeys with destinations in the Region of Valencia. Bus (8.4%) and train (4.3%) journeys dropped with respect to 2003.

According to Familitur, trips for leisure purposes represent 80.6% of the total, increasing by 10.8% in 2004. Of these, resting on the beach or in the country represented 63.9% and cultural tourism 10.8%.

Average expenditure per traveller in the Region of Valencia was estimated at 298.23 euros, above the average expenditure on domestic trips by Spaniards. This expenditure was higher in island destinations, partly due to the use of air transport instead of own vehicle. The Region of Valencia registered the longest average stay among the main autonomous tourist regions: 11.4 days - which resulted in a lower average daily expenditure, estimated at 43.17 euros.

EXPENDITURE ON TOURIST TRIPS BY MAIN DESTINATION

	Average expen.traveller	Average stay	Aqverage daily expen.
Domestic tourism	262,33	9,1	47,86
Andalusia	272,4	8,8	44,94
Balearic Islands	556,94	9,2	88,76
Canary Islands	502,52	7,6	92,41
Catalonia	242,79	8,4	47,28
Region of Valencia	298,23	11,4	43,17

Source: Institute of Tourist Studies. Familitur 2004. Tourist trips

In 2004, the average stay for tourist trips with destinations in the Region of Valencia decreased by 0.9 points with respect to 2003, while average daily expenditure increased by 9%. Average expenditure per traveller increased by 6.7% with respect to 2003.

EVOLUTION AVERAGE EXPENDITURE PER TRAVELLER

	Domestic tourism	Andalusia	Balearic Islands	Canary Islands	Catalonia	R.V.
2000	201,99	196,65	474,84	307,2	211,57	228,98
2001	232,67	228,97	453,7	434,16	238,2	265,55
2002	231,36	231,75	451,1	400,44	237,39	281,06
2003	239,96	245,93	447,65	455,6	242,49	279,53
2004	262,33	272,4	556,94	502,52	242,79	298,23
2004-2003	9,3	10,8	24,4	10,3	0,1	6,7

Source: Institute of Tourist Studies. Familitur

Finally, average daily expenditure on short-duration trips to second residences in the Region of Valencia in 2004 stood at 21.46 euros.

Foreign demand

In the year 2004, Spain received around 53.6 million tourists, with an inter-annual growth of 3,4%.

The Region of Valencia was the main destination for 4,885,722 foreign tourists, 0.3% less than in 2003. Evolution shows a recovery from the negative trend as of the fourth quarter with an inter-annual growth of 10.7%.

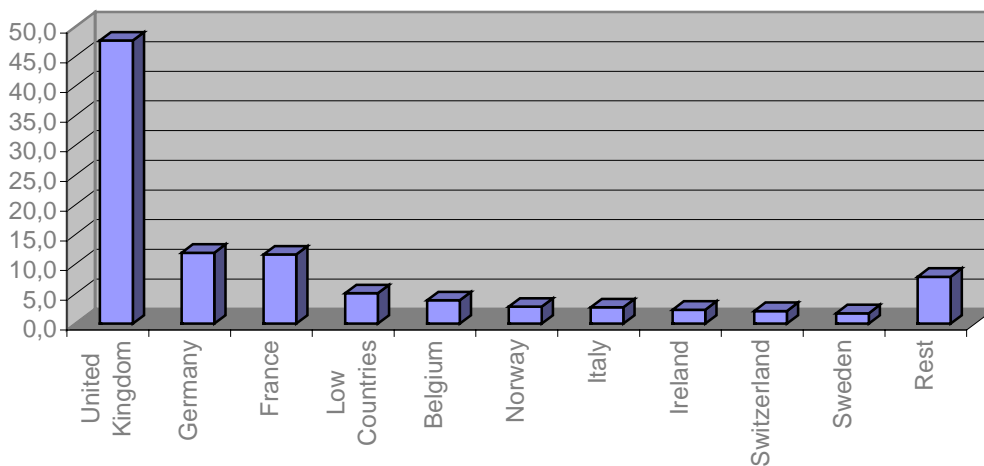
TEMPORAL EVOLUTION TOURISTS

Quarter	2004	% Var.
1º	782.890	-3,4
2º	1.262.394	-4,45
3º	1.766.404	-4,5
4º	1.020.135	10,7

Source: Institute of Tourist Studies. Frontur

The United Kingdom was the main market of origin, with 47.7% of the total, followed by Germany (11.9%), France (11.6%) and the Low Countries (5.1%). The United Kingdom and the Low Countries increased with respect to 2003, with France and Germany decreasing.

MAIN FEEDER MARKETS

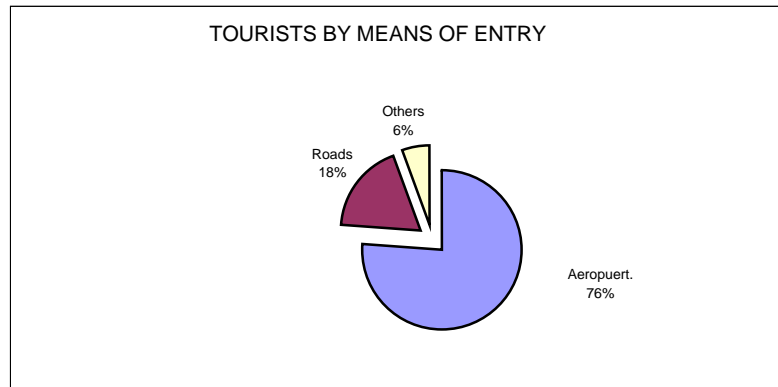


Source: Institute of Tourist Studies. Frontur 2004

The average stay of 14.7 days was slightly greater than the estimate for 2003, which is explained by the evolution of non-hotel accommodation. As a consequence, the number of overnight stays (67.6 million) increased by 0.5% with respect to 2003.

The majority of tourists (59.8%) used non-hotel accommodation, which grew 4.9% with respect to 2003.

The percentage of tourists using the airport as their way into the Region of Valencia was 76% in 2004, showing an inter-annual increase of 1.6%.



Source: Institute of Tourist Studies. Frontur 2004

The number of tourists entering by road decreased by 8.5% due to the lower volume of entries by car, which represented 68.1% of the total. By contrast, there was a growth in the number of tourists entering via the rest of routes (van/people-carrier, caravanette and bus).

Of the total number of tourists entering by airplane, 89.7% landed at El Altet airport, which saw an inter-annual drop of 0.5%. 10.3% used Manises airport, which grew by 43.7% in 2004. The remaining tourists arrived via other Spanish airports.

Among the tourists entering via airports, we should highlight those that used the flights offered by low-cost carriers (LCCs) which, in 2004, surpassed 2 million. This segment has seen growth in the Region of Valencia of 56.4% and 29.8% respectively in the last two years.

In the year 2004, passengers entering via LCC flights with their main destination in the Region of Valencia represented 52.8% of all entries. The majority come from the United Kingdom with El Altet airport as their destination.

Low-cost carrier flights explain the positive evolution in the number of tourists entering on regular flights, which grew by 27.9% and 16% respectively in the last two years.

Foreign tourists whose main destination is in the Region of Valencia entering on regular flights stayed at hotel establishments in 42.5% of cases, 41.3% in free accommodation and in 13.8% in rented accommodation. The three modalities showed inter-annual increases estimated respectively at 6.8%, 30.2% and 9.8%.

By contrast, the number of tourists who visited the Region of Valencia on an organized package tour fell by 28.8% with respect to 2003.

In accordance with the results of the total numbers of tourists, journeys for leisure purposes decreased and those to do with personal reasons (family, health) and business trips increased.

Total tourist expenditure at constant prices by foreigners with a destination in the Region of Valencia in 2004 grew to 3,825 million euros, 8.7% of the national total. This led to a slight inter-annual drop, calculated at 0.2% owing to the 0.3% decrease in the number of tourists received.

Average expenditure per traveller, calculated at 829 euros, increased by 0.3%, while average daily expenditure, calculated at 57 euros, fell by 0.8%, due to the increase in the average stay (1.2%).

Demand for private homes for tourism uses

Private homes for tourism uses are distributed among own homes, rented houses and use granted free of charge.

Overnight stays in this type of accommodation represents 87% of overnight stays by Spaniards and 67.3% of Overnight stays by foreigners in the Region of Valencia

OVERNIGHT STAYS IN PRIVATE HOMES

Spanish(2004)	Foreign(2004)
73.151.800	45.479.178

Source: Institute of Tourist Studies. Frontur and Familitur

National demand

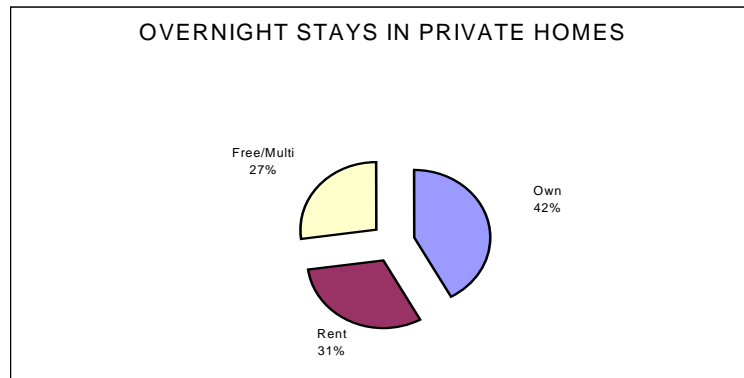
The majority of overnight stays made by Spaniards in private homes for tourism uses (56.05%) correspond to the use of own homes, the rest distributed among the homes of family and friends (30.39%) and rented housing (13,56%).

The main feeder markets in terms of overnight stays at own, rented or free housing are the Region of Valencia (53%), Madrid (20.1%), the Basque Country (4.6%), Catalonia (4.4%) and Castile-La Mancha (3.8%).

The average stay at own homes is 5 days, in privately-rented homes 7.6 days, in homes rented through agencies 12.5 days and in homes granted free of charge 4.7 days. Only counting tourist trips, the average stay stood at 25.1 in own homes, 12.1 in privately-rented homes, 12.5 in homes rented through agencies and 8.5 days in homes granted free of charge.

Foreign demand

With respect to the distribution of Overnight stays by foreigners according to accommodation type, at the top of the list, as in the case of national demand, stands own homes (42%), followed by rented homes (31%).



Source: Institute of Tourist Studies. Frontur 2004

The main feeder markets in terms of overnight stays in own, rented or free homes are the United Kingdom (38.6%), Germany (16.6%), the Nordic countries (10.1%) and France (10%).

The longest average stay is registered when the housing is under ownership (23.87 days), followed by rented homes (19.74 days) and free accommodation (12.36 days).

Trips by Valencians

Destinations in Spain

In 2004, Valencian made 14.8 million trips, of which 96.9% had destinations inside Spain. Of the trips with Spanish destinations, 10.3 million were short-term trips to second residences and the rest were tourist trips.

The Region of Valencia is the fourth national feeder market, with a 9.5% share of tourist trips by Spaniards in the year 2004.

Of the 4.5 million total tourist trips made, 90.1% had Spanish destinations and the rest were abroad. Domestic trips increased by 10.3% and trips abroad by 18,7%.

The Region of Valencia itself is the main national destination for tourist trips by Valencians, with 41.9% of trips.

The average growth in trips by Valencians with destinations inside Spain between 1999 and 2004 was 4.4%; trips with destinations in the Region of Valencia saw a greater average increase, amounting to 5.8%.

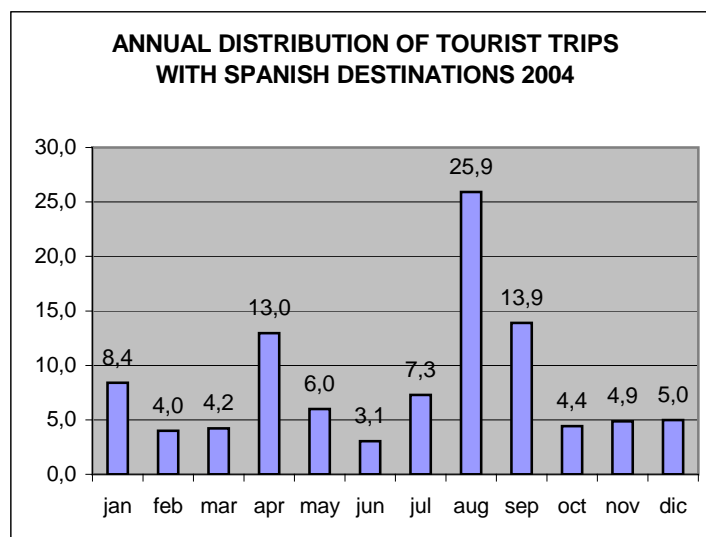
INTERANNUAL VARIATION TOURIST TRIPS BY VALENCIANS

	Spain	%	R.V	%	RV/Spain
1999	3.292.214		1.302.722		39,6
2000	3.752.283	14,0	1.693.074	30,0	45,1
2001	3.788.118	1,0	1.573.826	-7,0	41,5
2002	3.601.186	-4,9	1.411.157	-10,3	39,2
2003	3.638.553	1,0	1.479.307	4,8	40,7
2004	4.012.390	10,3	1.682.657	13,7	41,9
04/99		4,4		5,8	

Source: Institute of Tourist Studies.Familitur

In 2004, tourist trips with destinations in Spain increased by 10.3% and those with destinations in the Region of Valencia grew by 13.7%.

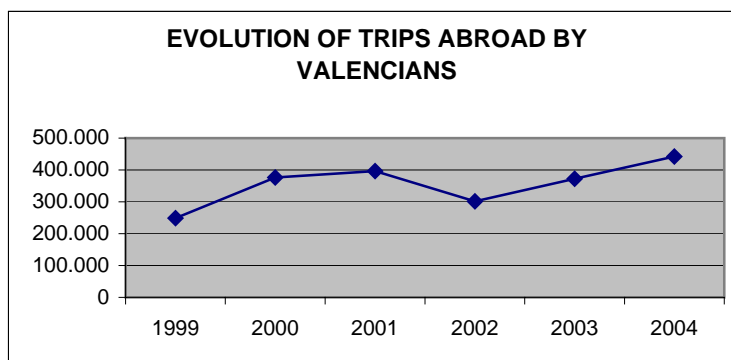
The month of August concentrates 25.9% of the total annual tourist trips by Valencians with destinations in Spain. In 2004, trips made during the month of September (13.9%) stood in second place. Trips made in Holy Week (13%), surpassed those made during the month of July (7.3%).



Source: Institute of Tourist Studies.Familitur

Destinations abroad

In the year 2004, Valencians made a total of 442,092 tourist trips with destinations abroad, representing an increase of 18.7%.



Source: Institute of Tourist Studies. Familitur

Europe is the destination for 69.3% of trips and, more specifically, the European Union concentrates 43.6% of journeys.

MAIN INTERNATIONAL DESTINATIONS

	Nº tourists	% vertical
	442.092	100,00
Europe	306.358	69,30
África	45.867	10,37
America	71.927	16,27
Asia	13.091	2,96
Rest of the world	4.849	1,10

Source: Institute of Tourist Studies. Familitur

The main destinations inside the European Union are France (46.02%), Italy (16.48%), Germany (11.73%) and the United Kingdom (11.65%).

MAIN DESTINATIONS IN EUROPEAN UNION

	Nº Tourists	% vertical
	192.683	100,00
France	88.674	46,02
Italy	31.760	16,48
Germany	22.598	11,73
United Kingdom	22.454	11,65
Portugal	11.352	5,89
Belgium	6.985	3,63

Source: Institute of Tourist Studies. Familitur

67% of trips to the rest of Europe had Andorra as their destination, representing nearly 76,000 annual trips.

August is the month when the largest number of trips abroad are made (22%). Other months that stand out by number of trips are: January, July and September.

TRIPS BY MONTH OF THE YEAR

Trips	% vertical
2004	
Ene	11,1
Feb	4,0
Mar	5,8
Apr	8,7
May	6,7
Jun	3,4
Jul	10,4
Aug	22,7
Sep	10,1
Oct	4,9
Nov	6,5
Dic	5,6

Source: Institute of Tourist Studies. Familitur

Activity in accommodation establishments

Evolution of activity in accommodation establishments

The Hotel Occupation Survey drawn up by the National Statistics Institute provides an overview of the number of travellers staying in hotels and hostels in the Region of Valencia. According to the provisional data available for 2004, the number of travellers stood at 5,820,186, which means an inter-annual increase of 4.3%. The province of Alicante concentrated 53% of these travellers, Valencia 32% and Castellón the remaining 15%, with generalised inter-annual increases in the three provinces.

The number of travellers who are Spanish residents was 4,079,769, which represents 70% of the total, a fact that reflects a significant increase of 8.4% with respect to the previous year. At a provincial level, national demand was 63.5% in Alicante, 81% in Castellón and 76% in Valencia.

As regards the origin of these travellers, the main feeder markets are located, though with slight variations in each province, in the following regions: the Region of Valencia, Catalonia, Andalusia, Madrid, Castile-La Mancha and the Basque Country.

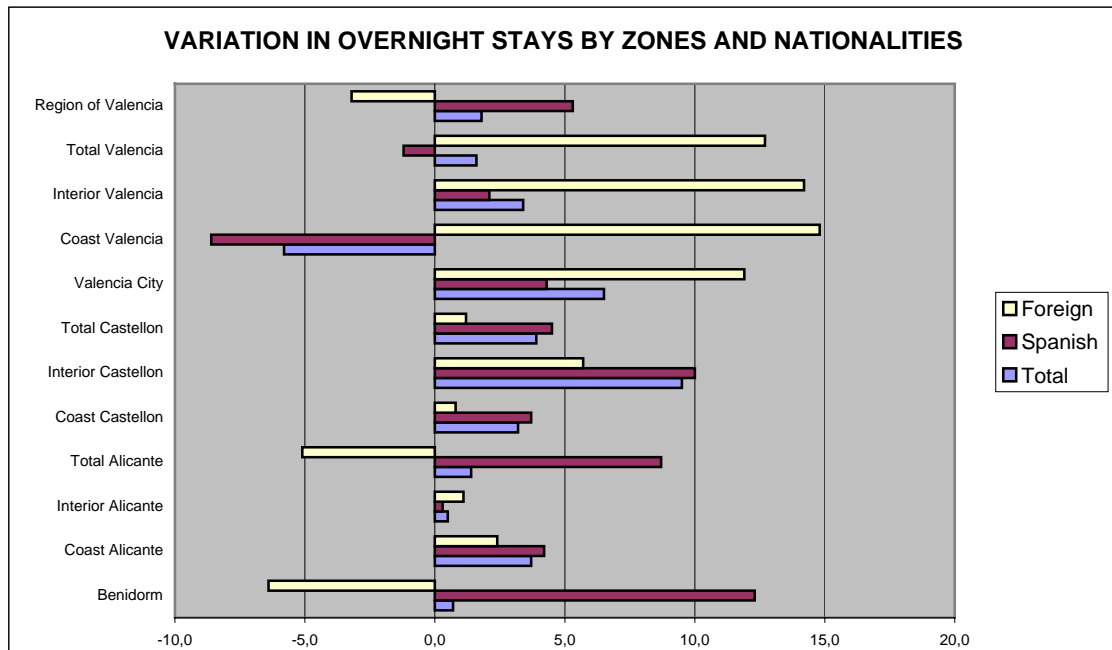
As regards travellers of foreign origin, the figure of 1,740,417 was reached in 2004, meaning a drop in inter-annual growth of -4.19% and represented a 30% share. By nationality, travellers from the United Kingdom represented 10.2% of all travellers and 24.6% of foreigners. Following in order of importance were those from France, Germany, Italy, Belgium, Portugal and the Low Countries. In aggregate terms, and not counting Spain, travellers from European Union countries represented almost 78% of the demand.

As regards the results obtained by hotels and hostels in the Region of Valencia in terms of overnight stays registered, the following analysis is made on the basis of data provided by the "Enquesta Turística" drawn up by the Studies and Planning Service of the Agència Valenciana del Turisme. Although the Hotel Occupation Survey carried out by the National Statistics Institute also gives data relating to overnight stays, preference has been given to the Agència's data because it offers information more closely adapted to the reality of Valencia's tourism, with more appropriate zoning and homogeneous time series, making these statistics unquestionably valuable in analysing tourist demand.

Nevertheless, the differences arising between the two surveys are not too great, because by comparison with the 21,797,319 overnight stays estimated by the National Statistic Institute, the "Enquesta" estimates 21,841,288. Such slight variations are basically due to certain methodological differences in conducting these surveys.

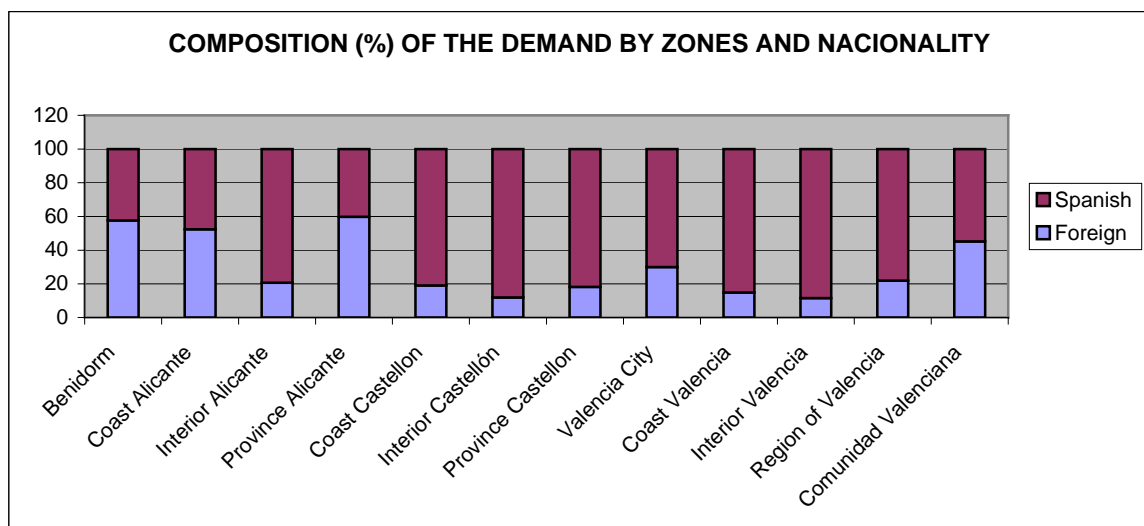
In 2004, overnight stays registered in hotels and hostels in the Region of Valencia continued to grow and surpassed those registered for previous years. The provisional results of the "Enquesta Turística" show an inter-annual growth of 1.78%. If we break down overnight stays into those made by the national and foreign markets, we can see a positive evolution in the case of overnight stays by Spaniards, which represented 60% of the total and grew by 5.35%, while Overnight stays by foreigners dropped by 3.17%. Detailed analysis by nationality with respect to 2003 showed a generalised drop in overnight stays made by tourists from the main foreign markets. As a result, positive results were shown by Italy (+23.5%), Scandinavia (+11.4%) and Portugal (+5.52%), while negative data corresponded to the United Kingdom (-4.21%), France (-6.22%) and Germany (-4.38%).

The zoning determined by the "Enquesta" allows for detailed analysis according to the geographical location of destinations. Accordingly, in 2004, generalised growth was seen in the variation of overnight stays, except on the coast of Valencia, with globally positive results as regards national demand. A significant point was the drop in foreign demand which only occurred in Benidorm.



Source: Agència Valenciana del Turisme. Enquesta Turística.

As regards the composition of demand for the main markets of origin and their territorial distribution in 2004, the following charts position the province of Alicante as the only one where Overnight stays by foreigners demand surpassed those by demand of national origin.



Source: Agència Valenciana del Turisme. Enquesta Turística.

DISTRIBUTION (%) BY ZONES OF FOREIGN DEMAND

	Benidorm	Coast Alicante	Interior Alicante	Coast Castellón	Interior Castellón	Valencia ciudad	Coast Valencia	Interior Valencia
Germany	6,5	27,5	2,0	30,8	1,4	17,4	11,4	2,8
Belgium	82,3	8,8	0,3	4,06	0,2	1,8	2,2	0,2
Holland	68,2	8,4	0,8	17,3	0,47	3,3	0,8	0,67
Scandinavia	30,7	38,4	1,73	14,8	1,14	7,8	4,2	1,07
France	25,2	21	2,7	26,05	1,8	11,8	8,5	2,7
Italy	9,1	17,4	4,4	10	3,14	42,7	7,4	5,7
United Kingdom	88,5	8,28	0,4	0,47	0,06	1,62	0,5	0,16
Portugal	78	6,7	1,8	3,3	0,35	6,9	1,28	1,54
Rest of the world	9,7	25,1	4,0	16,8	2,28	33,8	5,46	2,6

Source: Agència Valenciana del Turisme. *Enquesta Turística*

The province of Alicante stands out thanks to Benidorm, which represents the favourite tourist destination for the foreign visitors and, especially, for those from the United Kingdom (concentrating the largest number of tourists, with 88.5%), Belgium (82.3%), Portugal (78%) and the Netherlands (68,2%). The Scandinavian market is concentrated at 69.1% along the whole Alicante coast. The coast of Castellón and the coast of Alicante (not including Benidorm) are the destination for 30.8% and 27.5%, respectively, of overnight stays originating from Germany. The French mainly distribute their overnight stays between the coast of Castellón (26.05%), Benidorm (25.2%) and the rest of the Alicante coast (21%). The city of Valencia concentrates the largest number of Italian tourists (42.7%) and of the rest of the world (33.8%) who visited the Region of Valencia.

With respect to the seasonality of demand, taken to mean the concentration of overnight stays at hotel establishments in certain months, the following chart shows an analysis of seasonal habits by demand according to origin.

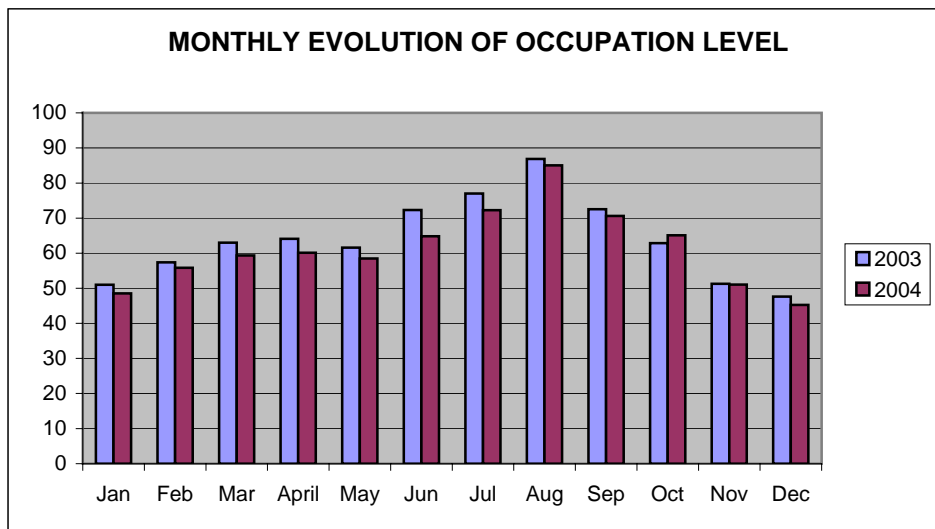
EVOLUTION OF HOTEL SEASONALITY(*) IN THE REGION OF VALENCIA

Year	Spanish	Foreign	Total
1990	41,1	30,1	36,5
1991	40,5	30,5	37,1
1992	41,7	26,1	36,1
1993	42,5	28,5	37,5
1994	41,0	29,2	36,4
1995	40,4	27,5	34,9
1996	40,2	26,3	34,4
1997	41,9	27,0	35,3
1998	42,4	26,8	35,1
1999	41,3	27,5	34,9
2000	39,5	26,7	33,9
2001	40,5	26,3	34,3
2002	39,8	28,1	34,7
2003	38,6	28,1	34,2
2004	38,6	27,9	34,4

(*) Percentage of overnight stays made in high season (July, August and September) with respect to total annual overnight stays.
Source: Enquesta Turística. Agència Valenciana del Turisme.

The table above shows the results corresponding to the percentage of overnight stays made during the high season (traditionally the months of July, August and September) as regards total annual overnight stays made in hotel establishments in the Region of Valencia.

As can be seen, the parameter value for national demand stayed at the same level as the previous year (38.6%). In the case of Overnight stays by foreigners, a slight drop was seen, suggesting much less seasonality by comparison with Spanish demand. We should highlight the fact that 2004 easily surpassed two million overnight stays in each month in season.



Source: Agència Valenciana del Turisme. *Enquesta Turística*

The mean level of occupation in 2004 dropped by 2.6 points with respect to 2003, due partly to the increase in offer which, with a monthly average of 96,602 available beds, represented an inter-annual increase of 5.6%, with a significant increase in the province of Valencia (8.94%).

Benidorm, with 84.4% of the occupied beds, registered the highest levels of occupation, though it dropped slightly with respect to 2003; the evolution by categories at this destination was positive for three-star hotels and negative for the rest.

Evolution of activity in campsites

Provisional data on this type of accommodation provided by the Tourist Campsite Occupation Survey, drawn up by the National Statistics Institute, shows dynamic performance both in terms of travellers and in overnight stays at these establishments in the year 2004. The inter-annual increase in numbers of tourists staying at Valencian campsites stood at 1.55%, amounting to the figure of 640,189 travellers.

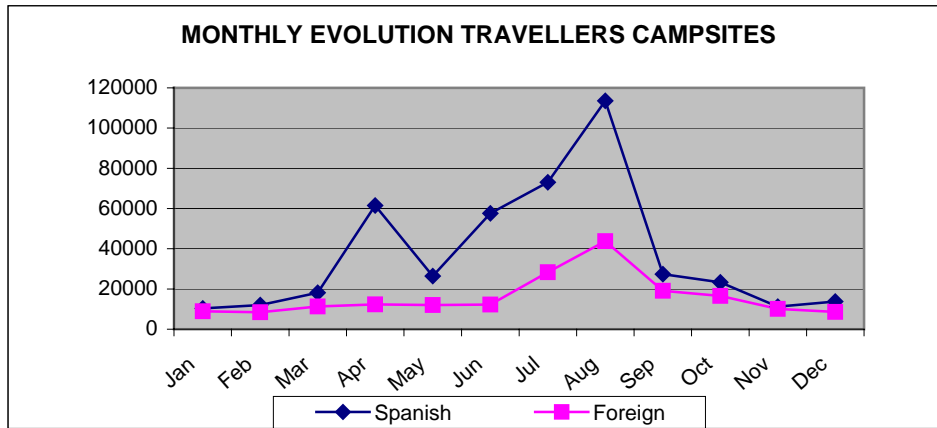
Of the total number of travellers, residents in Spain represented 70% (448,443) and their inter-annual increase amounted to 3.17%. By autonomous region of origin, the largest numbers were travellers from the Region of Valencia itself (around 66%), followed, although at some distance, by those from the Region of Madrid (13.18%), Catalonia (5.28%) and Castile-La Mancha (4.03%).

The total number of travellers from abroad was 191,747. By nationality and in order of importance, Germans represented 22.3% of foreign travellers, a very similar percentage to that of the French (20.7%); 18.4% came from the United Kingdom, 13.34% from the Low Countries and 8.04% from Italy.

The total volume of overnight stays generated by campers was 5,148,917, which means an inter-annual increase of 2.61%, a figure that positions the Region of Valencia in second place within the State as a whole, in absolute terms. 42.32% of overnight stays were by residents of Spain, in particular those from Valencia itself, from Madrid, Catalonia and Castile-La Mancha. Standing out among the foreign markets are, in this order, overnight stays by travellers from France, the United Kingdom, Germany, the Low Countries and Belgium.

The mean level of occupation by sites during 2004 remained similar to the previous year, 51.19%, the second-highest among the main tourist destinations in the State as a whole, with a volume estimated by the survey of 63,493 bed-spaces, 6.62% more than in 2003. The mean stay was also very similar in duration to the previous year, 8.04 days, the second-highest figure among Spain's main destinations.

A detailed analysis of travellers' monthly evolution shows very variable behaviour in national demand, with maximums in Holy Week and in July and August, and more moderate as regards foreign demand, with greater affluence in the high-season summer months of July and August.

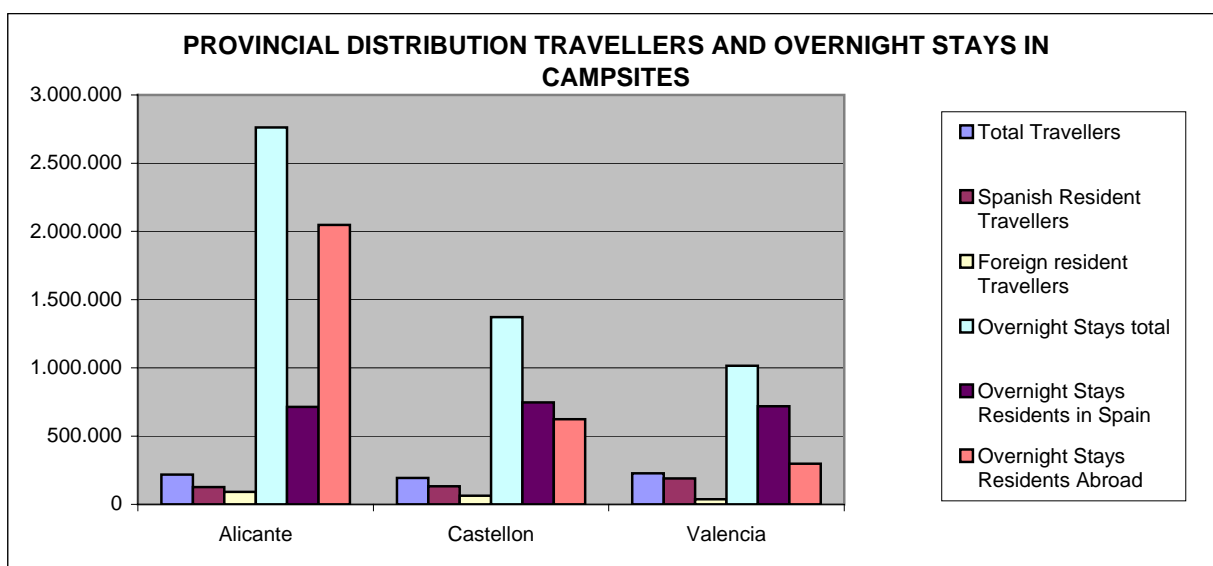


Source: National Statistics Institute. Tourist Campsite Occupation survey

If the results for travellers and overnight stays are broken down to provincial level, a reasonably balanced distribution of total travellers is obtained between the three provinces; but by looking at the data relative to the total number of overnight stays, the province of Alicante stands out (53.66%) ahead of Castellón (26.56%) and Valencia (19.78%).

As regards travellers according to origin, the province of Valencia registers the larger number of Spanish travellers (42.20%) and Alicante receives most foreign travellers (47.86%). With respect to overnight stays, Alicante monopolizes 69.08% of those made by foreigners, while those made by Spaniards are equally distributed among the three provinces.

The predominant countries in the province of Castellón are, by order of preference, Germany, France, the Low Countries and the United Kingdom. The province of Valencia repeats the same situation of tourist affluence, although travellers from Italy come in larger numbers. Finally, the province of Alicante receives most of its visitors from the United Kingdom, France, Germany and the Low Countries.



Source: National Statistics Institute. Tourist Campsite Occupation survey

From the point of view of the offer and according to data from the Registry of Companies under the Agència Valenciana del Turisme, top-category campsites represent a quarter of the total number of establishments and represent a third of the approximately 71,200 bed-spaces in this type of accommodation.

If we consider this offer's spatial distribution, the largest concentration of top-category campsites is in Castellón, with 18 of the 34 existing sites, representing 53.9% of bed-spaces in this modality, while second-category establishments are equally distributed, Alicante standing out in front with 40.5% of bed-spaces.

Evolution of activity in tourist apartments

According to the provisional data compiled by the Tourist Apartment Occupation Survey, drawn up by the National Statistics Institute, tourist apartments in the Region of Valencia accommodated a total of 845,563 travellers in 2004, which in inter-annual terms means a growth of 15.81%.

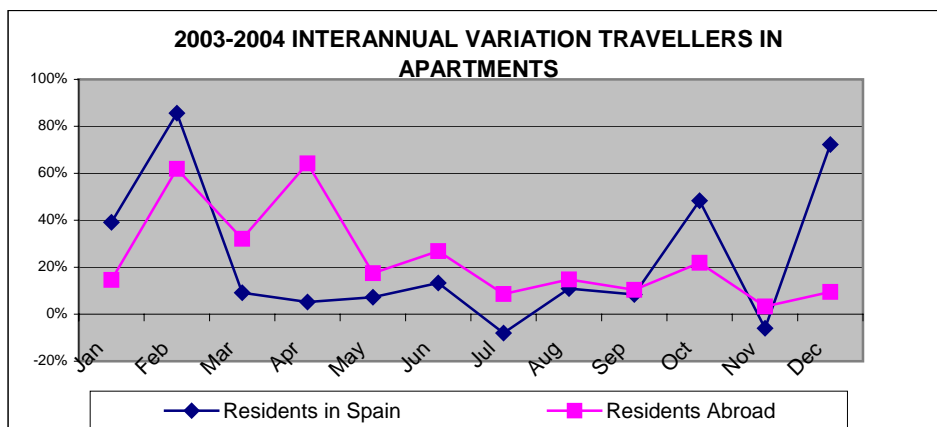
National demand represented 44% of the total number of travellers in tourist apartments. The most representative origins for travellers were the Region of Madrid (33.76%), followed by those from the Region of Valencia itself (26.79%). Some distance behind came travellers from Catalonia (7.75%), Castile-La Mancha (6.21%), Castile-León (4.75%) and the Basque Country (3.43%). Among foreign visitors, the volume of travellers from the United Kingdom was significant, representing 60.1% of foreign demand, followed by travellers from France (13%), the Low Countries (7.05%) and Germany (4.6%).

Total overnight stays generated in this type of accommodation numbered 8,612,090, a figure that means 11.97% more than the previous year. By origin, distribution was similar the results shown by travellers, that is, among overnight stays by Spanish residents, the most significant markets were Madrid (37.83%), Valencia (21.64%) and Catalonia (7.1%), and some way behind, the market from Castile-La Mancha, Castile-León and the Basque Country, while among Overnight stays by foreigners residents, the most significant numbers came from the United Kingdom, France, the Low Countries, Germany and Belgium.

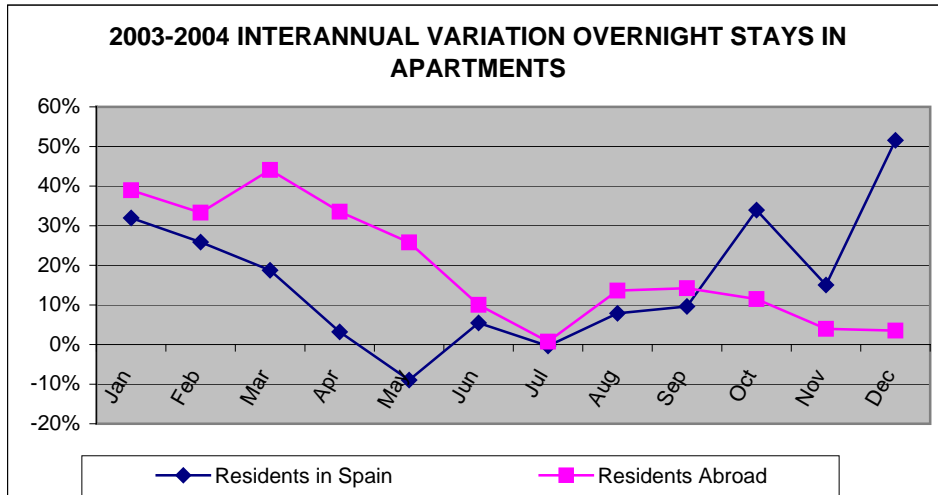
The mean level of occupation for the year 2004, 31.54% by bed-spaces and 46.4% by apartments, was 3 points lower than in 2003. The annual average of bed-spaces according to the survey was 74,280, meaning an increase of 22.3%; this growth came about mainly as a result of updating the directory, which mainly affects the province of Alicante. Average stay dropped slightly to 10.21 days.

The favourite months for Spanish residents to stay in apartments are April, coinciding with the Holy Week vacation, and the summer months (June, July, August and September). On the other hand, the behaviour of foreign demand coincides to a considerable extent with domestic demand, although showing greater homogeneity in its distribution throughout the year.

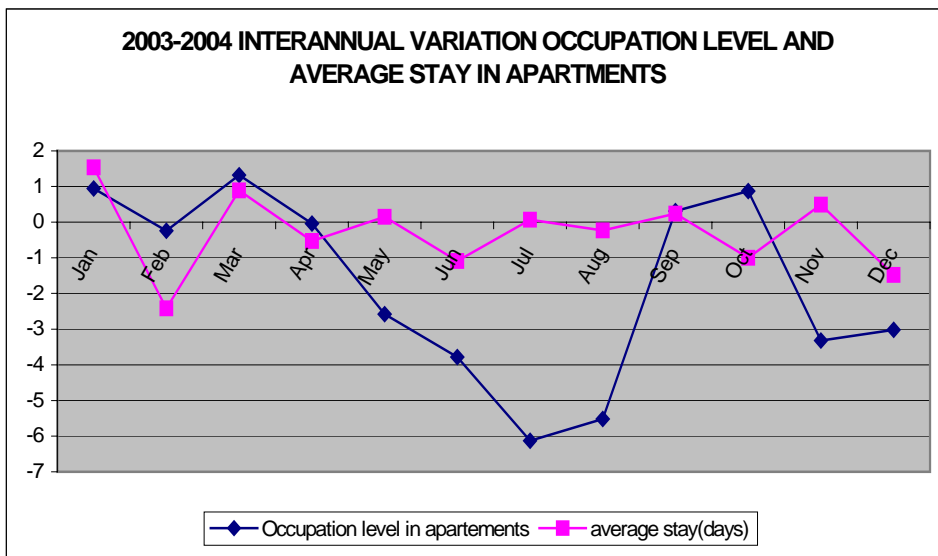
A detailed monthly analysis of inter-annual variations shows a significant increase in Spanish resident travellers with respect to 2003, at the beginning of the year 2004, specifically during the month of February (85.63%) and at the end, during the month of December (72.29%). It also reveals a drop in Spanish resident travellers during the month of July (- 7.98%), although in absolute data it continues to be the second-busiest month for visitors, after August.



Source: National Statistics Institute. Tourist Apartment Occupation Survey.



Source: National Statistics Institute. Tourist Apartment Occupation Survey



Source: National Statistics Institute. Tourist Apartment Occupation Survey

As regards the offer in this type of accommodation, there exists a prevalence of second-category establishments both in number and in bed-spaces (94% in both cases). These figures refer to apartments that are registered with the Agencia Valenciana del Turisme's administrative registry, in accordance with its governing regulations. Inter-annual growth in these establishments' overall volume slipped back with respect to the previous year, standing at around 1%.

A detailed analysis of provincial distribution shows a larger number of establishments located in the province of Alicante in absolute terms, followed by the provinces of Castellón and Valencia.

Evolution of activity in rural tourism establishments

Valencia legislation (Decree 253/94 of the Valencian Regional Government, amended by Decree 207/99) classifies rural tourism accommodation as including the modalities of rural houses - shared with the owners or otherwise -, hostels for tourist uses and campsites on private agricultural property.

As of December 31st, 2004, information available in the Registry of Companies and Tourist Activities of the Region of Valencia counted 2,366 bed-spaces in the modality of hostels and 4,877 in rural houses. The campsite on private property modality is of little significance by comparison with the other accommodation options.

INTERANNUAL VARIATION RATE OF BED-SPACES

Year	Hostels	Rural houses
1997	23,3	77,0
1998	73,0	85,7
1999	40,8	47,7
2000	16,2	57,6
2001	14,6	34,1
2002	13,9	34,6
2003	17,6	21,1
2004	-4,0	14,0

Source: Agència Valenciana del Turisme.
Registry of Companies and Tourist Activities.

Bed-spaces in hostels have grown between 1996 and 2004 at an average of 51.79%. In 2004, a drop of 4% took place in the number of bed-spaces on offer, indicating a stabilisation in this type of accommodation.

The average growth in the offer of bed-spaces in rural homes over the last 8 years has been very high, amounting to 225.63%. In 2004, this growth was maintained, though at more moderate levels (14%).

The province of Valencia concentrates 47.5% of bed-spaces in hostels, followed by Castellón (27.9%) and Alicante (24.6%). The largest offer in the modality of rural houses lies in the province of Castellón (47%), followed by Valencia (29.2%) and Alicante (23.8%).

In 2004, the province of Castellón increased its offer in hostels by 4.6%, the province of Valencia remained stable while Alicante reduced its offer by 17.9%.

Evolution in the modality of rural houses has been positive in all three provinces, with the greatest increase in the province of Alicante (17.9%), followed by the province of Valencia (13.1%) and Castellón (12,6%).

The Rural Tourism Accommodation Occupation Survey conducted by the National Statistics Institute estimated an average of 6,148 bed-spaces opened in 2004 in the Region of Valencia, which represents an inter-annual increase well in excess of the average growth for this type of offer in Spain, partly due to the offer in hostels being added to the directories. This offer positions the Region of Valencia in third place in Spain's overall offer in rural accommodation.

Using this same source as a basis, the average level of occupation per bed-space in 2004 was estimated at 16.47%, a figure that reaches 24.61% at weekends. August, with 32.26%, is the month with the highest level of occupation.

In 2004, rural establishments in the Region of Valencia accommodated a total of 114,823 travellers, staying for an average of 3.25 days. 94% of the demand in rural accommodation is of domestic origin. 88.59% of this comes from the Region of Valencia; some way behind comes Madrid and Catalonia with 3.54% of travellers. The total number of overnight stays was 373,247.

The inter-annual comparison of overnight stays, not counting the effect of updating the directory, shows that the rural tourism product in the Region of Valencia is maintaining high growth levels, amounting to 27.39% for the travellers variable and 37.42% for the overnight-stays variable.

Diversification of the Valencian tourist product Tourist segments

The Region of Valencia is a consolidated "sun and sand" tourist destination, whose positive evolution is complemented by the progressive consolidation of a more and more diversified tourist offer, by incorporating and planning new activities from the Valencian Tourist Administration which, through design, promotion and reinforcement of new products and their subsequent adaptation, meet the requirements of the current and potential tourist demand.

In this context, significant aspects include the introduction and reinforcement of products like rural, cultural and urban tourism, health tourism, sports, nautical or golfing tourism, among others. Special attention is being given to actions aimed at tourist differentiation, intended to create a unique product, equipping Valencia's tourist offer with major infrastructures that form the essential basis of our strategy in tourism, through projects like Terra Mítica, the Ciudad de

las Artes and las Ciencias, Castellón Cultural, the Ricardo Tormo Race-Track, the Palacio de Congresos in Valencia, etc.

Below is a summarised analysis of certain tourist segments for which relevant information is available.

Conference tourism

Conference tourism is one of the high-priority lines of action within the scope of the Ministry of Tourism's diversification policies, because holding congresses, fairs, workshops and conventions generates a significant contribution to tourism in the Region of Valencia, not only due to its direct economic effects but also because of its fundamental contribution to reducing seasonality in tourist activity. This type of tourism requires a modern, quality hotel network, a varied commercial offer, the existence of specific infrastructures, the necessary backing of a solid, varied offer in culture and leisure, plus other, widely-ranging types of services.

The city of Valencia revitalized its tourist activity considerably by opening and starting up the Palacio de Congresos. In other urban destinations, a range of bodies and establishments have been making up for the lack of specific facilities for holding these kinds of events, a lack that is expected to be corrected through the intervention of the Valencian authorities with the conclusion of the Conference Centres / Auditoriums in Castellón and Peñíscola, and the future construction of the Conference Centre in Alicante.

A detailed analysis of the business meetings market shows an excellent evolution in conference activity in Valencia's main destinations. As a result, according to information provided by the Turismo Valencia Convention Bureau, in 2004 the city of Valencia held a total of 661 events, representing an inter-annual increase of 9.3%. The total number of assistants at these meetings was 147,862, 6.37% fewer than the previous year.

The Palacio de Congresos in Valencia was the venue for 134 events and accommodated 30.5% of all participants in events in the city of Valencia in 2004, compared with 26.5% in 2003. These figures position the Palacio de Congresos as the venue that registers the most participants and, therefore, as the driving force behind the offer in conferences.

As regards events that took place in the city of Alicante, according to information provided by the Municipal Board of Tourism, the number of meetings held in 2004 was 148, while the number of participants was 20,873.

It is to be expected that, in general terms, the advances made in recent years will consolidate in the future, as the major infrastructure works in progress help to significantly improve easy access to the Region (high-speed train, Castellón Airport and extension to Alicante Airport).

By starting up specific, multi-purpose facilities for holding this kind of event, as is the case of the Conference Centres / Auditoriums in Castellón and Peñíscola, the aim is to give solid support and consolidation for the conference market in the Region of Valencia. These facilities are soon to include the inauguration of Alicante's Conference Centre.

Cruise tourism

The high level of expenditure by users in this type of tourist modality, the Region of Valencia's ideal conditions and other optimum factors have led to a situation where, in recent years, the ports of Valencia, Alicante and Castellón have started to pay considerable attention to attracting cruise ships as home ports or as ports of call. Valencian destinations' high potential for tourism makes it interesting for the major cruise companies to stop over in the Region of Valencia's ports.

The city of Valencia is currently making inroads into cruise tourism and proof of its potential in this segment is the fact that major specialised companies choose Valencia as their home port for cruises in the Mediterranean.

In 2004, the number of cruises received by the port of Valencia was 98, meaning an inter-annual growth of 42%, while the number of passengers received grew by 81.1% to the figure of 105,461. This evolution in cruise tourism is to be boosted by the Valencia's designation as the base for the 32nd America's Cup, by inaugurating new infrastructures and by the city's international promotion as a destination for this type of tourism.

With respect to the port of Alicante, last year it received nearly 50,000 passengers on 50 stop-overs by tourist cruise ships. Furthermore, the port of Castellón is implementing a policy aimed at attracting cruise ships, assigning a terminal and a dock for these ships, offering all the services and facilities that they require.

Health tourism

This kind of tourism's evolution over the last year continued to be as dynamic as in recent times, with remarkable growth both in qualitative and quantitative terms, taking shape as a permanent process of modernisation, adaptation and improvement of facilities and the incorporation of new treatment techniques.

Valencia's offer in thermal tourism comprises five spas, although there also exist other types of establishments that complement these spas' activities, such as thalassotherapy centres, fitness, health and beauty centres, spa-hotels and other establishments offering services designed for non-therapeutic health vacations.

The results obtained from this type of tourist over the 2004 have again surpassed the figures of recent years relating both to the number of patients in thermal centres and treatments applied, and to the number of overnight stays registered.

Accordingly, the data provided by the Asociación Valenciana de Estaciopnes Termales number 42,714 users of the Chulilla, Cofrentes, Montanejos, Verche and Villavieja Spas, which means an interannual increase of 20.1% and an overall volume of 308,508 overnight stays, 12% more than the previous year.

Thermal centre clients were distributed as follows: 40.7% corresponded to private customers, 38.6% to clients from the Imsero Social Programme and the remaining 20.6% came from the Valencian Regional Government's Thermal Centre Programme.

Finally, it is significant to note the revitalising effects caused by this type of tourism on the socio-economic situation of the areas where the establishments are located, in particular as regards job-creation, stabilisation of the population and a boost in the creation of complementary offers.

Golf tourism

The demand and offer for golf in the Region of Valencia is currently booming. Of the 216 existing golf courses in Spain, 21 are comprised within the Region of Valencia as one of the regions that concentrates the largest number of courses.

They stand out for the quality and individuality of their design, a factor which, combined with an excellent accommodation infrastructure, an extensive, varied complementary offer and climatic conditions that allow golf to be played all year round, create an attractive product, capable of meeting the most demanding requirements, whether national or foreign.

This product has a two-fold effect: as a boost for economic activity and as a complement to "sun and sand" tourism. At present, it may be said that the Region of Valencia is consolidating a prominent position among Spain's most important destinations.

Another significant factor to be noted is the major promotional work carried out by the Agència Valenciana del Turisme, in collaboration with the sector's entrepreneurs, through a range of activities and actions. The 21 existing golf courses in the Region represent over 8% of the total number in Spain, making it one of the areas with the largest number of courses, alongside Madrid, Catalonia and Andalusia. The number of federation licenses, 17,440 as of December 31st, 2004, 6% more than in 2003, position the Region of Valencia among the first in the State as a whole.

After-sales service: points of interest in tourist demand

Through the Network of Tourist Information (Tourist-Info) Offices, the Agència Valenciana del Turisme coordinates the tourist information offices of the Region of Valencia, in collaboration with local bodies comprised within it and provides a service of attention and welcome directly to tourists through the 6 offices it owns. The aim is to add quality to the tourist product via this after-sales services network at destination, improving visitors' satisfaction levels and their loyalty to the product, offering tourists a service and a balanced, quality image for the whole area.

With the aim of assessing some points of interest relating both to tourist demand and offer within the Region of Valencia, in the months with the largest numbers of visitors (July, August and the first fortnight in September), the Agència Valenciana del Turisme conducted the Tourist Info Summer Survey on visitors to tourist information offices or points in the Tourist-Info Network, which comprised, during this period, 101 TI offices and 20 TI points. Different aspects of the information provided to Tourist Info Network users was examined, with a view to its use in a quality improvement scheme for these services, promoted by the department responsible for it. The survey provides information on the profile of Network users, the quality of after-sales service at the offices and how the tourist offer in the Region of Valencia is perceived, plus how trips to tourist municipalities are organised, the use of internet as a channel of information on tourist destinations and other relevant points.

Structure of the demand

The number of valid questionnaires assessed was 6,582, of which just over 54.6% corresponded to residents of the Spanish State and 40.5% to foreigners, while 4.9% did not indicate the interviewee's place of the residence.

The most common place of residence among interviewees, considering percentages of most frequent answers in the survey, is the Region of Madrid (15.9%), followed by the Region of Valencia (13.1%), France (12.4%), the United Kingdom (10.8%) and Germany (6.2%). Broken down into residents in Spanish territory and residents from abroad, it may be seen that the demand residing in Spain comes mostly from the Region of Madrid (29.2%) and from the Region of Valencia (24%). As regards residents abroad, the most numerous demand is from France (30.7%), the UK (26.6%) and Germany (15.4%).

Distribution of demand by gender resulted in 50.8% men and 45.4% women, while 3.8% of interviewees did not answer this question. Breaking figures down by age-group, 10.8% of those interviewed were aged between 16 and 24, 53% in the group from 25 to 44, 26.1% in the group between 45 and 64 and 3.3% were 65 years old or above. 6.7% did not answer this question.

Another point of interest is the level of studies achieved by survey group. In this respect, 49% had university studies, 34.1% secondary studies, 11.4% primary studies and 1.2% had no studies. 4.3% of interviewees did not answer this question.

It may therefore be deduced that users of the Tourist Info Network have a high level of education, which suggests that they require and appreciate quality information services and this is demonstrated by analysing the data regarding assessment of the after-sales services provided by these offices.

Travel organisation

Most of the interviewees had travelled by making a prior booking (49%), compared with those who had not made any kind of booking (46.9%). Within the group who had made some kind of prior booking when organizing their vacation, 11% made full booking, that is, they bought a package tour. 29.4% booked accommodation through an agency, 29.8% booked accommodation directly with the company, 7.2% booked transportation directly with the company, 8.2% booked transportation through an agency and 2.8% made some kind of reservation via internet. If the information is broken down into interviewees residing in Spain and those residing abroad, it may be seen that:

- Residents on Spanish territory who say they made some prior booking in organising their vacations, made a full booking (package tour) in 7.9% of cases; 36.8% booked accommodation through an agency, 41.1% booked accommodation directly with the company, 4% booked transportation via the services of an agency, 4.2% booked transportation directly with the transport company and 10.5% said they made some kind of booking via internet.

- Foreign residents who said they made some kind of prior booking in organising their vacations made a full booking (package tour) in 13.9% of cases; 21.4% booked accommodation through an agency, 18.7% booked accommodation directly with the company, 12.4% booked transportation via the services of an agency, 10.2% booked transportation directly with the transport company and 35.4% said they made some kind of booking via internet.

As regards type of accommodation used during the stay, the most prominent is hotels (22.5%), rented accommodation (20.9%), own homes (20.4%) and the homes of friends or family (19%). If this data is broken down, we can see that, within Spanish residents, the most prominent are those who stay at a hotel during their vacations (23.5%), those that use their own homes (22.7%), those that use rented accommodation (18.8%) and those who stay at friends' or family homes. The most numerous among foreign residents are those who stay in rented accommodation (23.9%),

Those who stay in friends' or family's homes (22.2%), those who stay at hotels (21%) and those who use their own homes (17%).

Means of transport used on journeys to holiday destinations

The most-used means of transport is the car (69.5%) followed, with a rather smaller percentage, by the airplane (22.8%).

There are significant differences, however, according to the interviewees' place of residence. 83.1% of residents in Spain make use of the car and 3.4% the airplane. Residents abroad, on the other hand, travel to their destination using cars less (50.3%) and rather more airplanes (49.9%).

Means of travel: individual vs. group

There are no significant differences in this section according to place of residence. The survey showed that trips are mostly made with the family (45.9%), then in couples (30.7%) and, to a lesser extent, with friends (18.4%).

Channels of information about tourist destinations

An aspect that does not change is that information about tourist destinations comes mostly through friends or family (53.3%). The second most-used channel of information is now internet (16.9%), followed by brochures available through travel agencies (10.7%). These results corroborate the importance that internet is acquiring as a means of information and tourist promotion for destinations and, at the time, verifies one of the strategies that the Agència Valenciana del Turisme has given its full commitment, the use of the new technologies in tourism.

92.1% of the population interviewed answered that internet is a useful channel of tourist information. Nevertheless, this figure drops to 77.2% when asked if they have used internet at any time to get information about tourist destinations.

The population segments in the survey who most frequently said they had used internet at any time to get information about tourist destinations were the youngest and those with the highest level of education. Furthermore, it was seen that those who had used information office services in an urban environment were those who had used internet to the largest extent, 87.1% compared with 80.6% in the interior and 74.4% on the coast.

Another point of interest is the evolution shown as regards knowledge of the Region of Valencia's web page, designed by the Information and Publications Technologies Service of the Valencian Tourist Agency. 40.9% of the population interviewed who said they had used internet to get information about tourist destinations knew the Region of Valencia's tourist web.

In this respect, among the interviewees who said they knew the page web, 64.8% resided in Spain, compared with 30.8% residing abroad. These results are, to a large extent, due to knowledge of the portal among residents in the Region of Valencia (19.8%) and the Region of Madrid (16.2%), significantly higher than the rest of regions and countries.

Among the foreign interviewees, the French (8.8%), the British (7.1%) and the Germans (5.5%) were the most aware of the web.

Main reasons for visiting the Region of Valencia

A very significant point is to know why tourists decide to visit the municipalities around the Region of Valencia to spend their leisure and vacation time. The five main reasons are, by order of importance, the beach, the climate, the tranquillity of the place, leisure and fun, the food and drink and the cultural, historical and monumental sights.

No major differences are detected between residents on Spanish territory and those from abroad. Both residents abroad and residents in Spain put the climate and the beach in the top two positions, tourist attractions closely associated with a mass-tourism product commonly known as sun and sand. A larger percentage of foreigners (28.5%) can be seen whose reasons for visiting their destination is food and drink (compared with 19.4% of Spaniards).

Activities carried out during the stay

The five main activities carried out or which are planned to be carried out by interviewees during their stay at their chosen destination in the Region of Valencia are, by order of importance: going to the beach (75.7%), strolling (70%), visiting museums and monuments (43.9%), trying food and drink (37.6%) and fiestas (34.8%). Predictably, differences can be seen according to the type of office in the town where the survey questionnaire was filled in. Interviewees in urban and coastal offices go or plan to go to the beach to a greater extent than those interviewed in the interior, while the latter devote their time to visiting museums and monuments to a greater degree than the rest.

Loyalty to destination

31.1% of the population interviewed said that it was their first visit to the Region of Valencia, this percentage rising to 43.9% among those who visited tourist information offices in urban areas. Another point of interest is that 43.6% of interviewees who reside abroad said that it was their first visit to the Region of Valencia, compared with 21.5% of Spanish residents. This presumably shows that municipalities in the Region of Valencia have a loyal demand from the Spanish State. On the other hand, 70.9% of the survey population said they intended to visit the destination again, there being no major differences according to possible classification variables. This fact is significant as it shows loyalty in the Region of Valencia's demand.

Evaluation of quality in the Tourist-Info Network

One of the main reasons for conducting the annual survey process in tourist information points offices of the Tourist Info Network is to know how users assess the quality of its services and infrastructures.

The average evaluation of the points included in the survey (staff friendliness and tone of voice used, attention received, staff presence and appearance, waiting time, atmosphere and image of the information point or office, image and appearance of brochures, office location and accessibility) is excellent in tourist offices of the Tourist Info Network, with an average score of 9.3 on a scale of 0 to 10, which means recognition for the effort made by the Agència Valenciana del Turisme as regards the satisfaction of visitors to the Region of Valencia.

Other aspects that showed a lower performance than the average evaluation were considered factors to be improved in the future.

Aspects which could show improvement (situated below the above-mentioned overall average) to increase the satisfaction of Tourist-Info Network users are the image, the atmosphere and the localization and accessibility of offices, plus the image and appearance of brochures.

Information they would like to have received

One of the questionnaire's sections asks for the information that interviewees would like to have received, though the section returned a high rate of non-responses, showing that the information received by users of Tourist-Info Network offices has been satisfactory for the majority.

The overall calculation of data provided in this section informs us of a high non-response rate (73.3%), which shows that the information received by users of the Tourist Info Network offices has been satisfactory for the great majority of them.

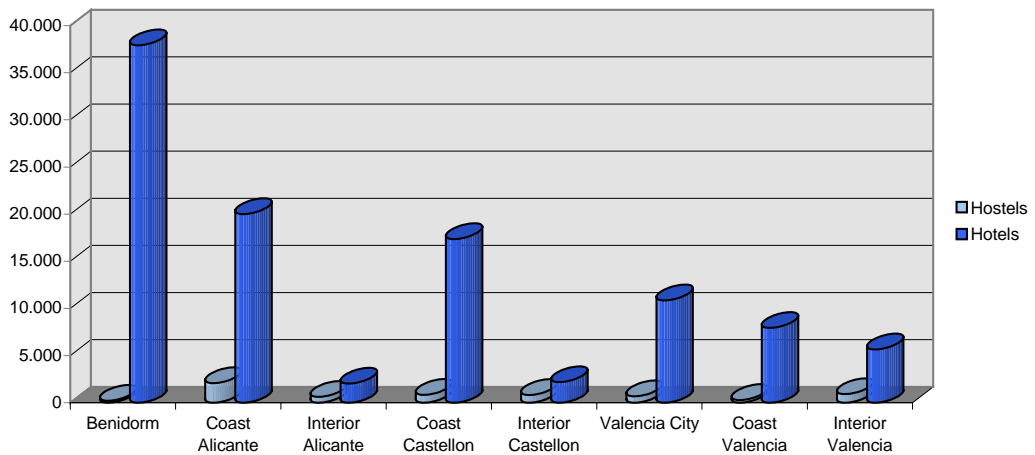
Intention to visit areas of tourist interest

One of the questionnaire's sections asks visitors to the Tourist Info Network as to their intention to visit certain infrastructures and areas where the Region of Valencia, through the different institutions involved, is making an effort and providing support to diversify and create awareness with respect to resources. The Ciudad de las Artes and de las Ciencias and the protected natural areas are attractions for tourist demand and which, consequently, are intended to be visited during holiday stays.

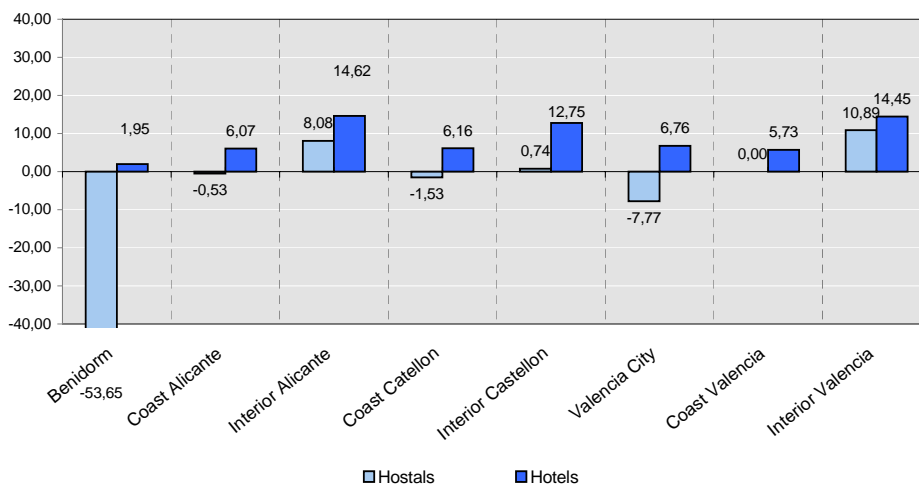
GRAPHIC ANALYSIS

1. TOURIST OFFER

1.1. Maximum available bed-spaces in hotel establishments

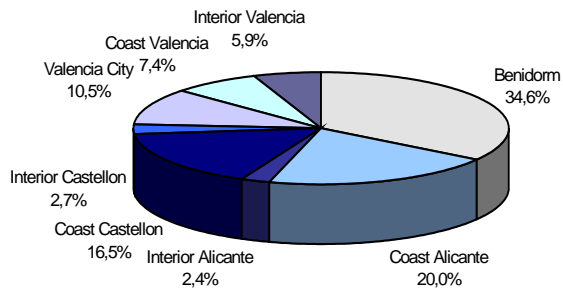


Variation in number of bed-spaces in hotels 03/04

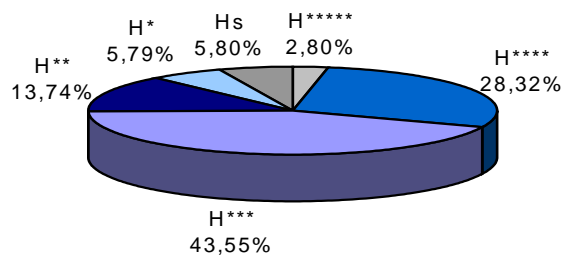


1.2 Hotel bed-spaces

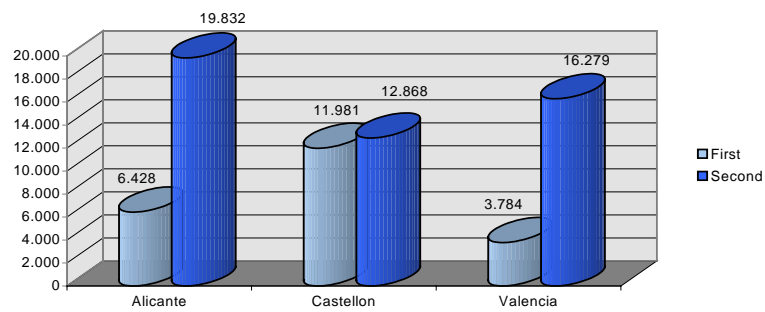
By tourist zone



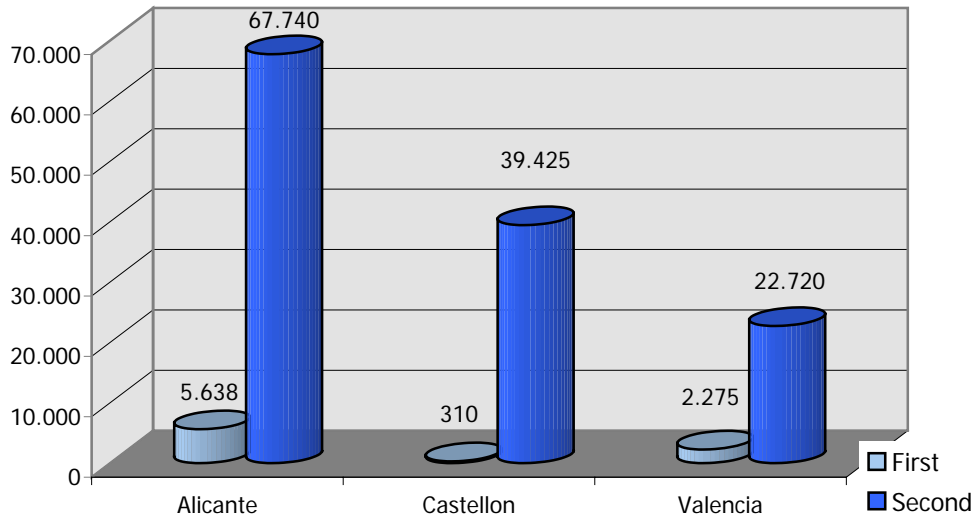
By category



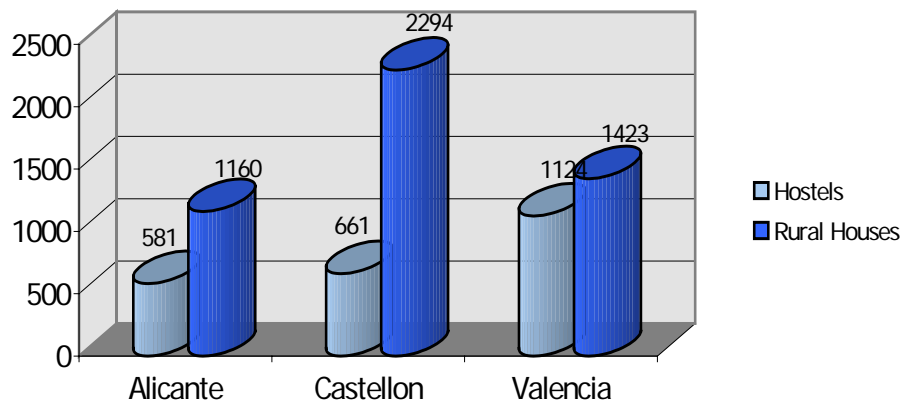
1.3 Bed-spaces available in campsites



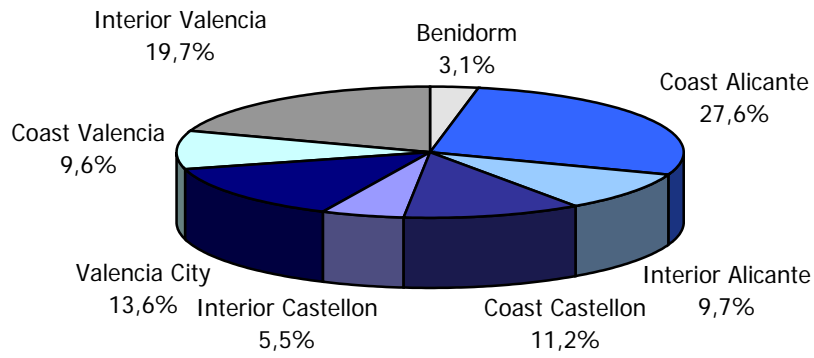
1.4 Bed-spaces available in apartments



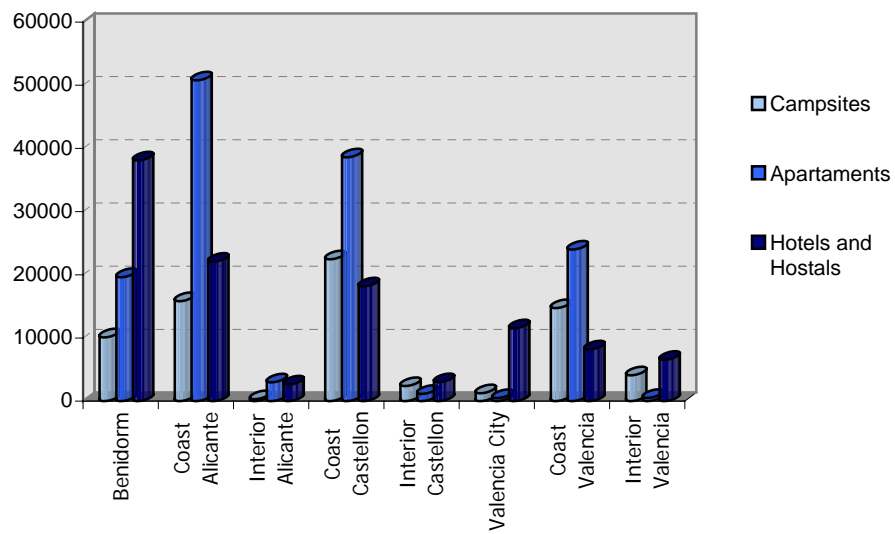
1.5 Bed-spaces available in hostels and rural houses



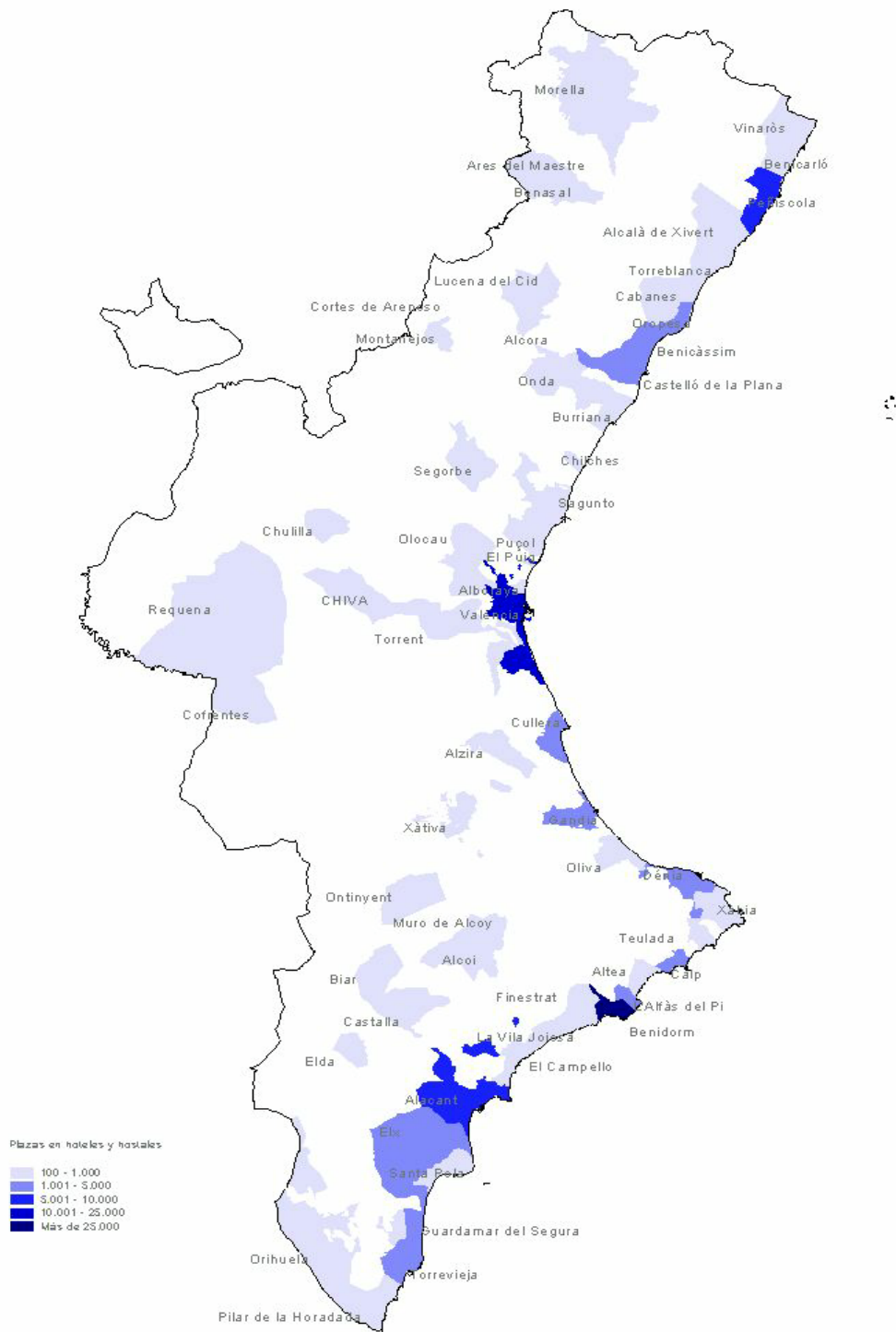
1.6 Seats in restaurants. By tourist zone



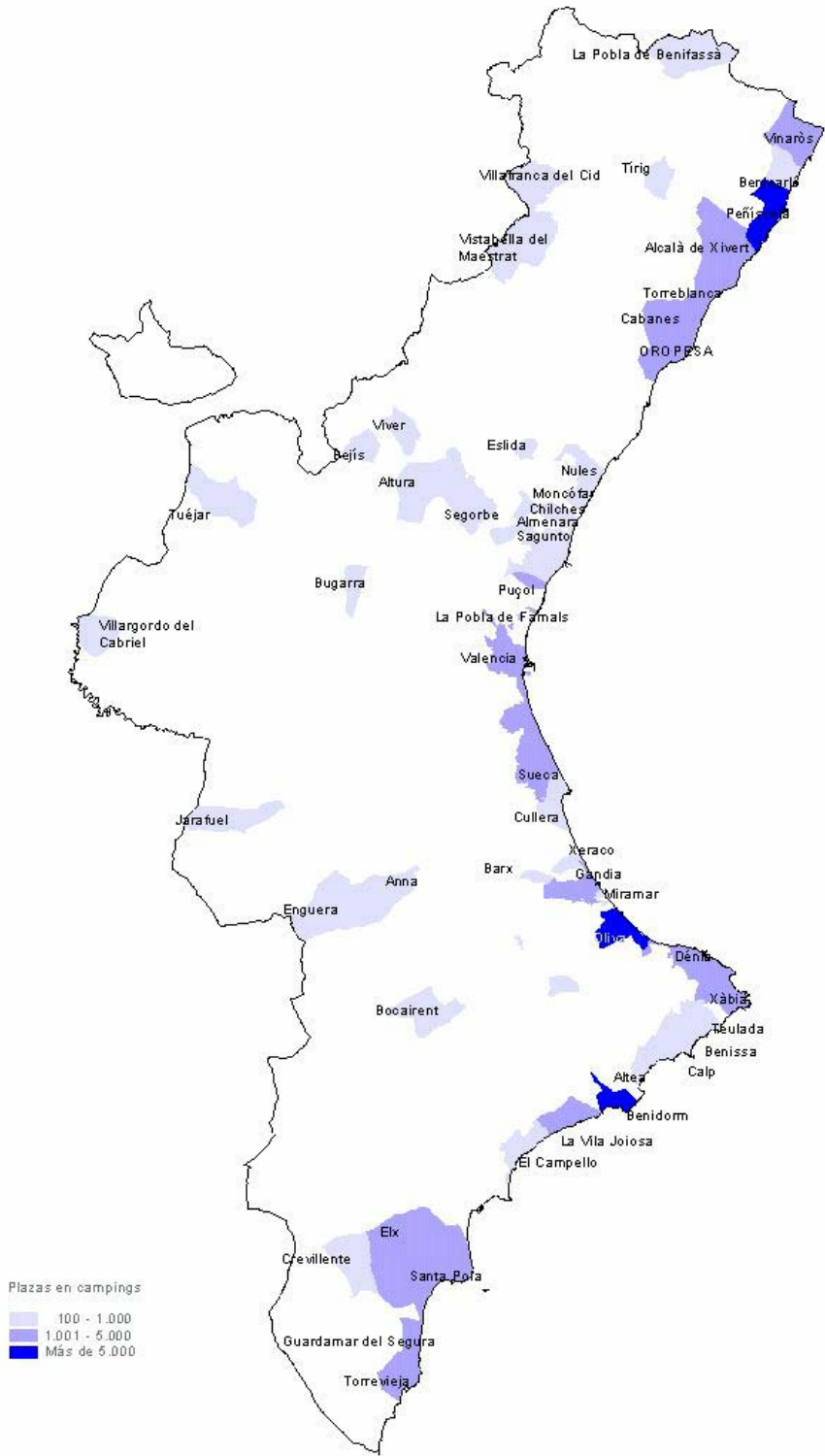
1.7 Offer in accommodation (bed-spaces)



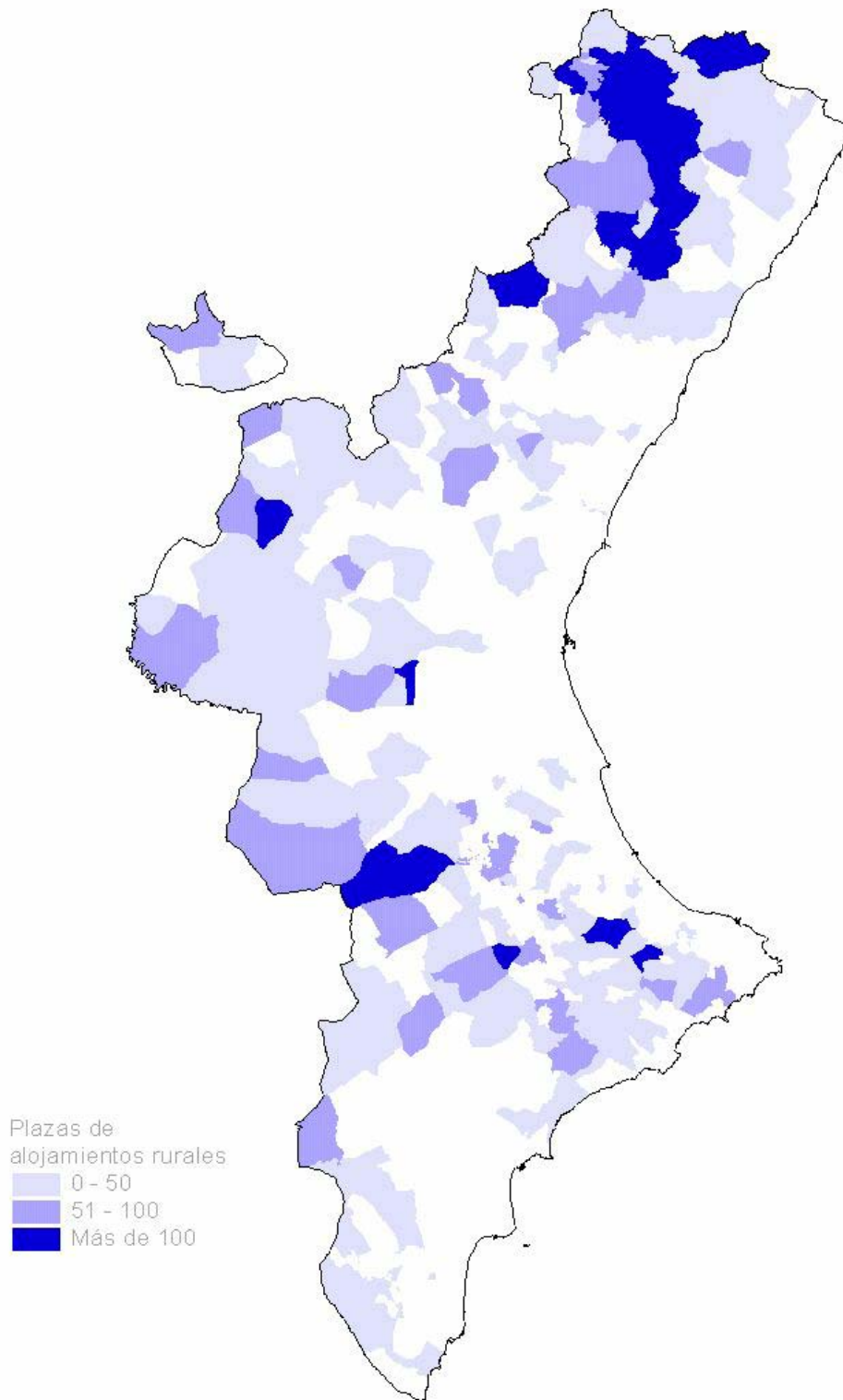
1.8 Distribution of bed-spaces in hotel establishments. Hotels and Hostels



1.10 Distribution of bed-spaces in campsites

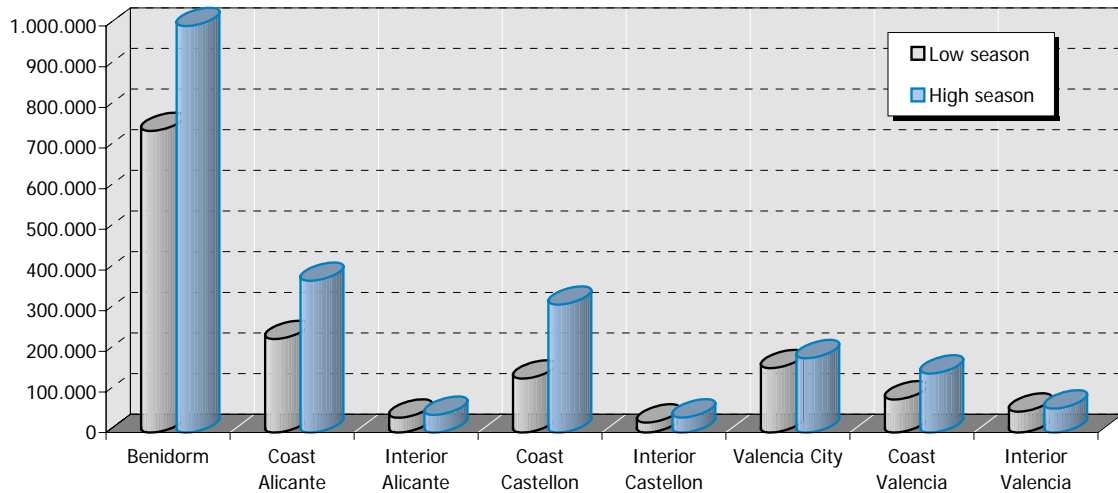


1.11 Distribution of bed-spaces in rural accommodation

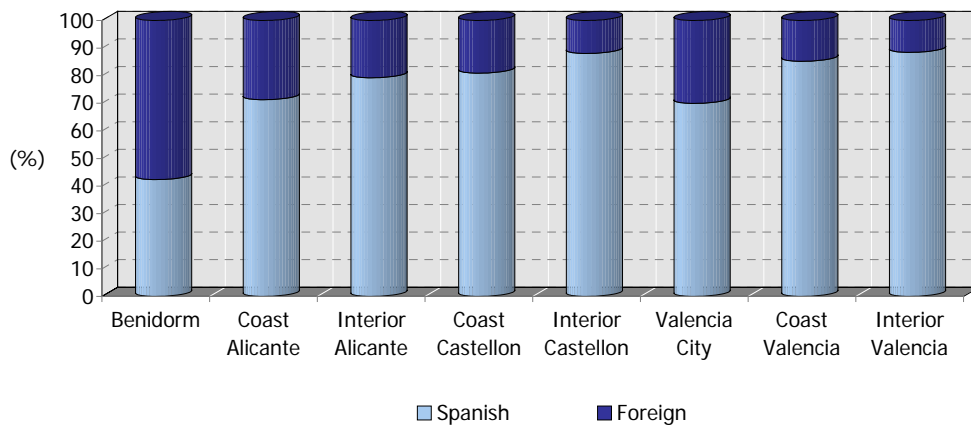


2. TOURIST DEMAND

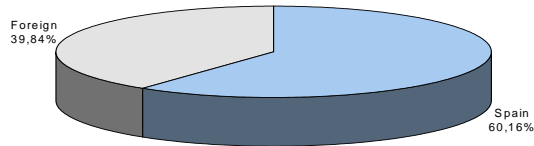
2.1 Overnight stays in hotel establishments. Monthly averages by zones



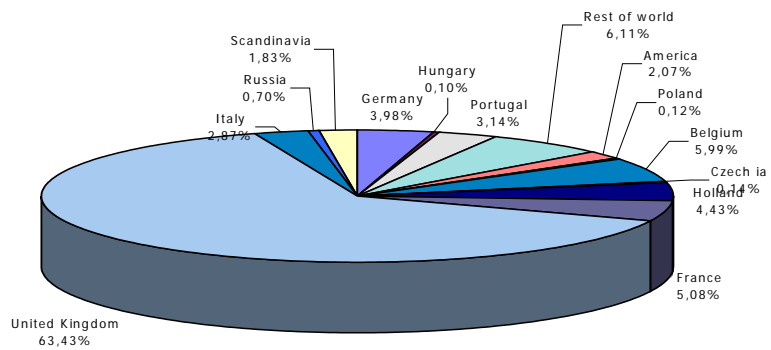
2.2 Overnight stays in hotel establishments. Participation by origin.



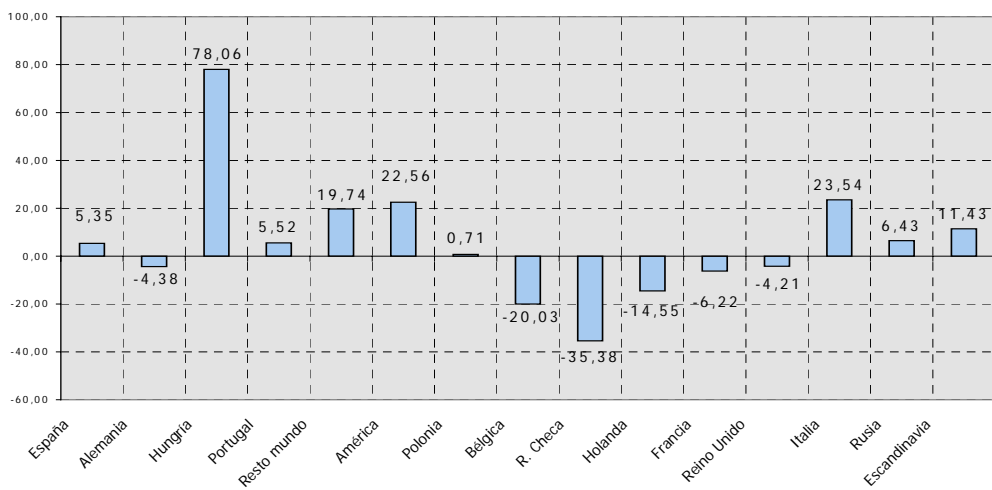
2.3 Total overnight stays by origin



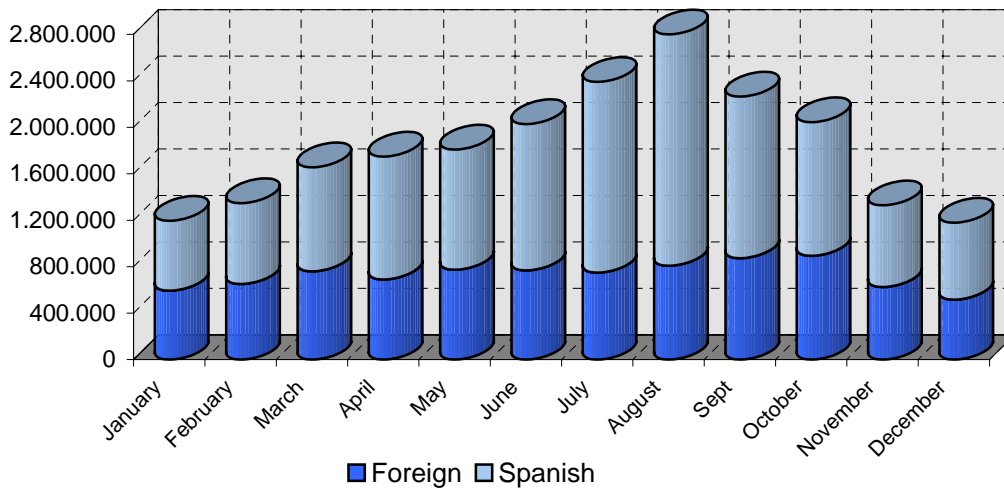
Overnight stays by foreigners by origin



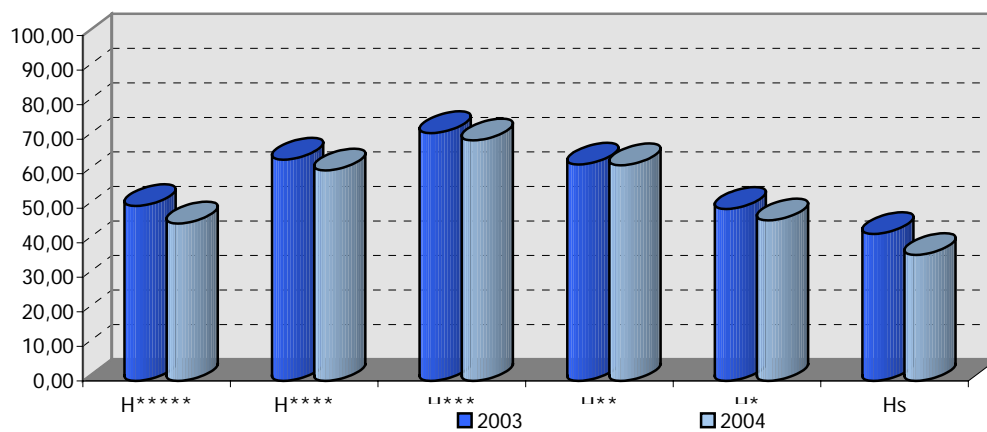
Variation in number of overnight stays with respect to 2003



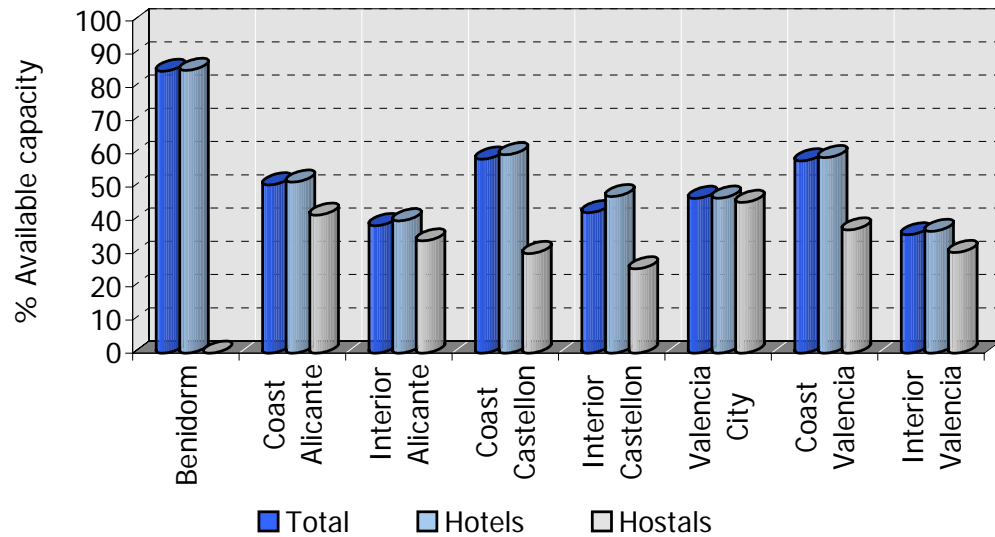
2.4 Overnight stays by origin. Monthly evolution



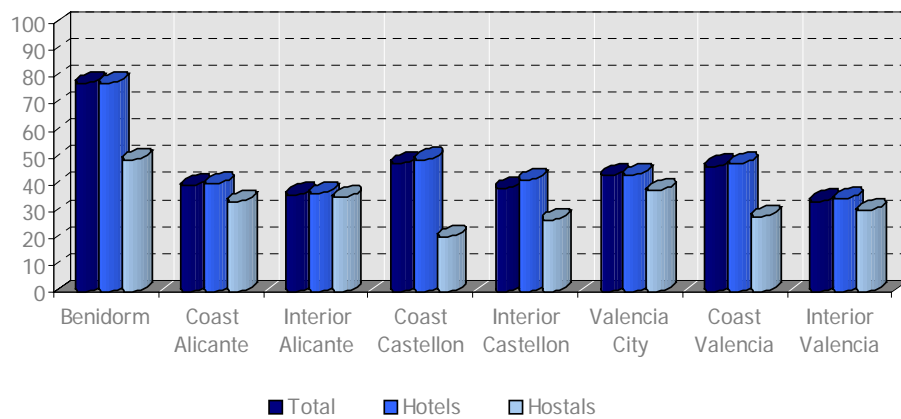
2.5 Mean annual level of occupation by establishment category. Years 2003 and 2004



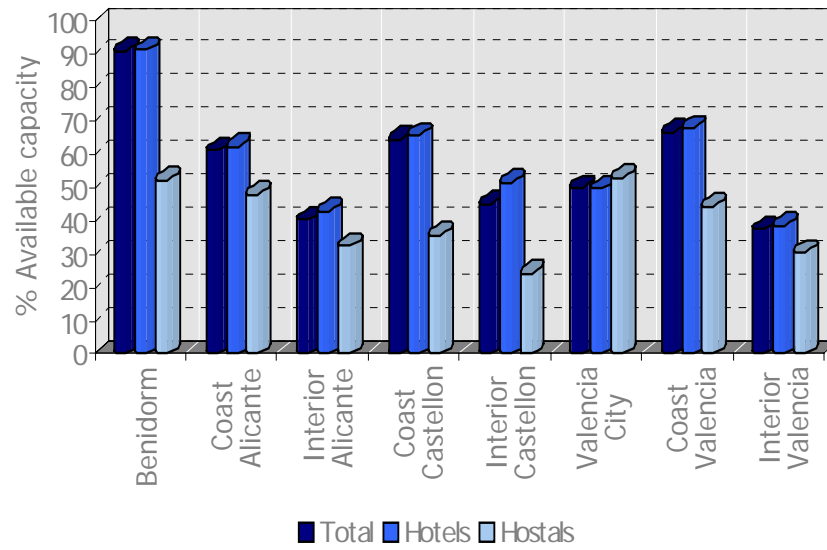
2.6 Mean annual level of occupation by zones



2.7 Mean occupation level by zones. Low season



2.8 Mean occupation level by zones. Low season



STATISTICAL TABLES

1. TOURIST OFFER

1.1. ACCOMMODATION

1.1.1. Number of hotel establishments (Hotels)

ZONES PROVINCES	GOLD STARS					TOTAL
	1	2	3	4	5	
Benidorm	13	34	58	24	0	129
Coast	30	31	47	19	6	133
Interior	15	12	9	3	0	39
ALICANTE	58	77	114	46	6	301
Coast	29	32	28	14	1	104
Interior	10	17	11	2	0	40
CASTELLÓN	39	49	39	16	1	144
Valencia city	4	6	20	20	2	52
Coast	9	19	18	8	1	55
Interior	13	23	23	7	1	67
VALENCIA	26	48	61	35	4	174
REG. VALENCIA	123	174	214	97	11	619

Source: Agència Valenciana del Turisme, Registry of Hotel establishments. (Information on 31st December, 2004)

1.1.2. Number of bed-spaces in hotel establishments (Hotels)

ZONES PROVINCES	GOLD STARS					TOTAL
	1	2	3	4	5	
Benidorm	813	6.132	19.912	11.051	0	37.908
Coast	1.449	2.847	9.178	5.064	1.461	19.999
Interior	451	483	739	350	0	2.023
ALICANTE	2.713	9.462	29.829	16.465	1.461	59.930
Coast	1.932	2.405	7.310	5.325	374	17.346
Interior	347	949	703	177	0	2.176
CASTELLÓN	2.279	3.354	8.013	5.502	374	19.522
Valencia city	219	520	3.346	5.755	1.009	10.849
Coast	444	896	3.966	2.463	162	7.931
Interior	734	917	2.868	1.043	84	5.646
VALENCIA	1.397	2.333	10.180	9.261	1.255	24.426
REG. VALENCIA	6.389	15.149	48.022	31.228	3.090	103.878

Source: Agència Valenciana del Turisme, Registry of Hotel establishments. (Information on 31st December, 2004)

1.1.3. Number and bed-spaces in hotel establishments (Hotels)

ZONES PROVINCES	SILVER STARS						TOTAL	
	1		2		3		Number	B-spac
	Number	B-spac	Number	B-spac	Number	B-spac	Number	B-spac
Benidorm	4	203	0	0	0	0	4	203
Coast	41	1.406	14	662	0	0	55	2.068
Interior	17	454	6	161	0	0	23	615
ALICANTE	62	2.063	20	823	0	0	82	2.886
Coast	22	663	4	171	0	0	26	834
Interior	18	628	6	191	0	0	24	819
CASTELLÓN	40	1.291	10	362	0	0	50	1.653
Valencia city	8	316	6	252	1	109	15	677
Coast	6	156	4	117	0	0	10	273
Interior	24	602	8	240	1	64	33	906
VALENCIA	38	1.074	18	609	2	173	58	1.856
REG. VALENCIA	140	4.428	48	1.794	2	173	190	6.395

Source: Agència Valenciana del Turisme, Registry of Hotel establishments. (Information on 31st December, 2004)

1.1.4. Bed-spaces in Hotels open by month

ZONES PROVINCES	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
Benidorm	29.668	30.982	32.803	35.569	35.500	37.232	37.232	37.823	37.851	37.524	29.786	29.745
cCoast	16.025	17.067	17.522	17.636	17.603	17.844	18.378	19.150	19.150	18.867	18.287	18.199
Interior	2.269	2.310	2.310	2.396	2.726	2.796	2.799	2.745	2.799	2.790	2.772	2.756
ALICANTE	47.962	50.359	52.635	55.601	55.829	57.872	58.409	59.718	59.800	59.181	50.845	50.700
Coast	6.685	6.949	10.151	14.676	14.800	15.795	16.256	16.210	15.640	14.535	7.786	7.160
Interior	1.364	1.687	1.721	1.794	1.813	2.260	2.243	2.258	2.195	1.909	1.762	1.745
CASTELLÓN	8.049	8.636	11.872	16.470	16.613	18.055	18.499	18.468	17.835	16.444	9.548	8.905
Valencia city	11.001	11.001	11.001	11.073	11.073	11.659	11.659	11.659	11.659	11.659	11.838	11.950
Litoral	5.344	5.522	5.897	5.912	6.474	7.147	7.221	7.361	7.291	5.648	5.718	5.718
Interior	3.390	4.012	4.117	4.147	4.401	4.395	4.395	4.480	4.541	4.560	4.831	4.781
VALENCIA	19.735	20.535	21.015	21.132	21.948	23.201	23.275	23.500	23.491	21.867	22.387	22.449
REG. VALENCIA	75.746	79.530	85.522	93.203	94.390	99.128	100.183	101.686	101.126	97.492	82.780	82.054

Source: Agència Valenciana del Turisme, "ENQUESTA TURÍSTICA"

1.1.5. Bed-spaces in Hostels open by month

ZONES PROVINCES	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
Benidorm	179	179	199	438	199	199	438	438	199	199	179	179
Coast	1.361	1.376	1.573	1.741	1.708	1.786	1.842	1.842	1.801	1.543	1.501	1.469
Interior	741	777	789	815	831	872	872	848	853	860	823	835
ALICANTE	2.281	2.332	2.561	2.994	2.738	2.857	3.152	3.128	2.853	2.602	2.503	2.483
Coast	466	466	578	645	588	568	815	858	742	387	367	367
Interior	383	383	467	479	479	479	789	789	789	467	473	473
CASTELLÓN	849	849	1.045	1.124	1.067	1.047	1.604	1.647	1.531	854	840	840
Valencia city	584	594	642	612	596	596	601	601	601	567	567	567
Coast	229	229	305	305	305	329	339	339	329	305	214	229
Interior	766	780	840	840	840	819	869	799	879	880	858	858
VALENCIA	1.579	1.603	1.787	1.757	1.741	1.744	1.804	1.739	1.809	1.752	1.639	1.654
REG. VALENCIANA	4.709	4.784	5.393	5.875	5.546	5.648	6.560	6.514	6.193	5.208	4.982	4.977

Source: Agència Valenciana del Turisme, "ENQUESTA TURÍSTICA"

1.1.6. Number and bed-spaces in camping

PROVINCES	CATEGORÍ ES				TOTAL	
	FIRST		SECOND			
	Number	B-spac	Number	B-spac	Number	B-spac
ALICANTE	8	6.428	35	19.832	43	26.260
CASTELLÓN	18	11.981	35	12.868	53	24.849
VALENCIA	8	3.784	29	16.279	37	20.063
REG. VALENCIA	34	22.193	99	48.979	133	71.172

Source: Agència Valenciana del Turisme, Registry of Companies and Tourist Activities. (Information on 31st December, 2004)

1.1.7. Number and bed-spaces in Apartments (*)

PROVINCES	CATEGORIES						TOTAL	
	LUX.		FIRST		SECOND			
	Númer	B-spac	Number	B-spac	Number	B-spac	Number	B-spac
ALICANTE	0	0	1.481	5.638	17.862	67.740	19.343	73.378
CASTELLÓN	0	0	69	310	7.769	39.425	7.838	39.735
VALENCIA	1	12	342	2.275	4.448	22.720	4.791	25.007
REG.VALENCIA	1	12	1.892	8.223	30.079	129.885	31.972	138.120

Source: Agència Valenciana del Turisme. (Information on 31st December ,de 2004)

(*) Comprises No. of tourist accommodation units registered in the " Registry of operating companies and tourist apartments" of the Agència Valenciana del Turisme.

1.1.8. Number and bed-spaces in Rural Houses and Hotels

Province	HOSTELS		RURAL HOUSES		TOTAL RURAL ACCOMODATION	
	nº	B-spac	nº	B-spac	nº	B-spac
ALICANTE	11	581	153	1160	164	1.741
CASTELLÓN	17	661	332	2294	349	2.955
VALENCIA	19	1124	198	1423	217	2.547
REG.VALENCIA	47	2.366	683	4.877	730	7.243

Source: Agència Valenciana del Turisme, Registry of Companies and Tourist Activities. (Information on 31st December, 2004)

1.2. INFORMATION AND TRIPS

1.2.1. Travel agencies

ZONES PROVINCES	Main offices				Sucursales				TOTAL GENERAL
	Wholesaler	Whole/Retail	Retailer	Total	Wholesaler	Whole/Retail	Retailer	Total	
Benidorm	2	15	24	41	2	17	6	25	66
Coast	1	17	89	107	1	102	37	140	247
Interior	0	2	46	48	0	52	23	75	123
ALICANTE	3	34	159	196	3	171	66	240	436
Litoral	0	3	23	26	0	29	6	35	61
Interior	0	1	7	8	0	16	1	17	25
CASTELLÓN	0	4	30	34	0	45	7	52	86
Valencia city	3	29	84	116	14	121	38	173	289
LCoast	0	2	33	35	0	25	5	30	65
Interior	1	8	82	91	0	86	27	113	204
VALENCIA	4	39	199	242	14	232	70	316	558
REG.VALENCIA	7	77	388	472	17	448	143	608	1.080

Source: Agència Valenciana del Turisme, Registry of Companies and Tourist Activities (Information on 31st December, 2004)

1.2.2. Information Offices

ZONES AND PROVINCES	Tourist Info Network	Municipal
Benidorm	3	0
Coast	40	0
Interior	12	6
ALICANTE	55	6
LCoast	19	1
Interior	9	1
CASTELLÓN	28	2
Valencia ciudad	4	0
LCoast	19	0
Interior	11	2
VALENCIA	34	2
REG.VALENCIA	117	10

Source: Agència Valenciana del Turisme

1.3. RESTAURANTS

1.3.1. Number of restaurants

ZONES PROVINCES	FORKS					TOTAL
	One	Two	Three	Four	Five	
Benidorm	185	134	2	1	0	322
Coast	2.007	1.204	22	6	1	3.240
Interior	702	296	3	0	0	1.001
ALICANTE	2.894	1.634	27	7	1	4.563
Coast	778	312	9	5	0	1.104
Interior	450	96	2	2	0	550
CASTELLÓN	1.228	408	11	7	0	1.654
Valencia city	853	598	11	3	0	1.465
Coast	575	347	7	0	0	929
Interior	1.238	463	8	1	0	1.710
VALENCIA	2.666	1.408	26	4	0	4.104
REG.VALENCIA	6.788	3.450	64	18	1	10.321

Source: Agència Valenciana del Turisme, Registry of Companies and Tourist Activities. (Information on 31st December, 2004)

1.3.2. Number of seats in restaurants

ZONES PROVINCES	FORKS					TOTAL
	One	Two	Three	Four	Five	
Benidorm	12.971	8.572	86	80	0	21.709
Coast	111.779	80.640	2.059	582	40	195.100
Interior	44.776	23.242	474	0	0	68.492
ALICANTE	169.526	112.454	2.619	662	40	285.301
Coast	52.014	25.496	1.233	224	0	78.967
Interior	28.394	9.967	590	121	0	39.072
CASTELLÓN	80.408	35.463	1.823	345	0	118.039
Valencia city	44.960	49.802	1.215	296	0	96.273
Coast	35.624	31.232	721	0	0	67.577
Interior	84.672	53.568	1.172	90	0	139.502
VALENCIA	165.256	134.602	3.108	386	0	303.352
REG.VALENCIA	415.190	282.519	7.550	1.393	40	706.692

Source : Agència Valenciana del Turisme, Registry of Companies and Tourist Activities (Information on 31st December)

1.3.3. Number of cafés

ZONES PROVINCES	CATEGORÍES			TOTAL
	Special	First	Second	
Benidorm	1	7	239	247
Coast	0	10	471	481
Interior	1	1	81	83
ALICANTE	2	18	791	811
Coast	0	13	377	390
Interior	0	0	87	87
CASTELLÓN	0	13	464	477
Valencia city	1	28	363	392
Coast	1	2	204	207
Interior	1	9	344	354
VALENCIA	3	39	911	953
REG.VALENCIA	5	70	2.166	2.241

Source: Agència Valenciana del Turisme, Registry of Companies and Tourist Activities. (Information on 31st December)

1.3.4. Number of seats in cafés

ZONES /PROVINCES	CATEGORIES			TOTAL
	Special	First	Second	
Benidorm	264	828	11.308	12.400
Coast	0	1.091	26.062	27.153
Interior	45	72	5.841	5.958
ALICANTE	309	1.991	43.211	45.511
Coast	0	797	19.539	20.336
Interior	0	0	4.455	4.455
CASTELLÓN	0	797	23.994	24.791
Valencia city	132	3.036	26.066	29.234
Coast	130	292	11.642	12.064
Interior	58	689	19.185	19.932
VALENCIA	320	4.017	56.893	61.230
REG.VALENCIA	629	6.805	124.098	131.532

Source: Agència Valenciana del Turisme, Registry of Companies and Tourist Activities. (Information on 31st December,2004)

1.4. SPORTS AND LEISURE

1.4.1. Hygiene and leisure facilities installed by the Agència Valenciana del Turisme on beaches and inland tourist areas.

ZONES PROVINCES	Games Areas (*)	Duckboards (m)	Special duckboards	Waste-baskets	Showers	Floating	Foot-washing platforms	Tables benches
Benidorm	23	2.430	351	274	0	96	3	0
Coast	226	14.345	2.188	1.514	4	802	4	0
Interior	40	0	0	0	0	0	0	96
ALICANTE	289	16.775	2.539	1.788	4	898	7	96
Coast	187	12.890	1.141	836	197	230	2	0
Interior	65	0	0	0	0	0	0	149
CASTELLÓN	252	12.890	1.141	836	197	230	2	149
Valencia city	50	2.660	367	270	22	0	1	0
Coast	243	25.322	2.486	1.369	93	495	2	0
Interior	57	0	0	0	0	0	0	192
VALENCIA	350	27.982	2.853	1.639	115	495	3	192
REG.VALENCIA	891	57.647	6.533	4.263	316	1.623	12	437

Source: Agència Valenciana del Turisme

(*) Games areas comprise sports units and children`s and youth games

1.4.1. Sports facilities

ZONES PROVINCES	Marinas		Golf Courses	Aquaparks
	Number	Berths		
Benidorm	1	120	0	1
Coast	23	9.831	9	2
Interior	0	0	4	1
ALICANTE	24	9.951	13	4
Coast	8	2.227	1	2
Interior	0	0	2	1
CASTELLÓN	8	2.227	3	3
Valencia city	1	1.202	1	0
Coast	7	2.826	1	1
Interior	0	0	3	0
VALENCIA	8	4.028	5	1
REG.VALENCIA	40	16.206	21	8

Source Agència Valenciana del Turisme

1.4.3 Protected natural areas

	Surface Area	Municipal Districts
Lagunas de La Mata y Torrevieja Natural Park	3.708 ha.	Torrevieja, Guardamar de Segura y Los Montesinos
Parque Natural de la Albufera	20.932 ha.	Valencia, Silla, Sueca, Cullera, Albal, Beniparrell, Catarroja, Sedavi, Sollana, Alfafar, Massanassa, Algemesi y Albalat de la Ribera
Las Salinas Natural Park	2.574 ha.	Santa Pola y Elx
Desierto de las Palmas Natural Park	3.293 ha.	Benicàssim, Cabanes, Puebla Tornesa, Borriol y Castellón
Marjal Pego-Oliva Natural Park	1.253 ha.	Oliva y Pego
Prat de Cabanes-Torreblanca Natural Park	917 ha.	Cabanes y Torreblanca
El Hondo Natural Park	2.495 ha.	Elx y Crevillente
Montg Natural Park	2.475 ha.	Denia y Jávea
Penyal de Ifach Natural Park	48 ha.	Calp
Carrascal de la Font Roja Natural Park	2.450 ha.	Alcoi e Ibi
Illes Columbretes Natural Reserve	12.306 ha.	Castellón
Cabo de San Antonio (Marine) Natural Reserve	110 ha.	Denia
Isla de Tabarca o Illa Plana Natura Reserve	1.000 ha.	Alicante
Serra Calderon Natural Park	17.782 ha.	Albalat dels Tarongers, Algimia de Alfara, Altura, Estivella, Gátova, Gilet, Marines, Náquera, Olocau, Segart, Segorbe, Serray Torres Torres
Serra de Mariola Natural Park	12.510 ha.	Agres, Alcoi, Alfafara, Banyeres de Mariola, Bocairent, Cocentaina y Mur de Alcoy
Serra d'Irta Natural Park	12.000	Alicala de Xivert, Peníscola y Santa Magdalena de Pulpis
Sierra de Espadán Natural Park	30.000 ha.	Alfondeguilla, Algimia de Almonacid, Artana, Ayódar, Matet, Sueras, Tales Vall de Almonacid, Alcludia de Veo, Ain, Almedjar, Azuébar, Chóvar, Esilda Fuentes de Ayódar, Higuera, Paviás, Torralba del Pinar y Villamalur

Source: Territory and Housing Ministry

1.4.4. Health and relaxation

ZONES PROVINCES	Hotels and youth camps		Health tourism	
	Number	B-spac	Spas	Other facilities
Benidorm	0	0	0	6
Coast	6	797	0	8
Interior	4	275	0	1
ALICANTE	10	1.072	0	15
Coast	6	814	0	3
Interior	3	158	2	0
CASTELLÓN	9	972	2	3
Valencia city	3	257	0	1
Coast	1	94	0	2
Interior	11	1.290	4	1
VALENCIA	15	1.641	4	4
REG. VALENCIA	34	3.685	6	22

Source: Agència Valenciana del Turisme

1.4.5. Blue Flags

MUNICIPALITIES PROVINCES	Beaches	Marinas	MUNICIPALITIES PROVINCES	Beaches	Marinas
ALICANTE			ALICANTE		
Alacant	3	2	Guardamar del Segura	3	-
Altea	1	2	La Vila Joiosa	2	-
Benidorm	3	-	L'Alfàs del Pí	1	-
Benissa	1	1	Orihuela	5	-
Calp	3	1	Pilar de la Horadada	3	-
Dénia	4	1	Santa Pola	3	-
El Campello	2	1	Teulada	3	1
Elx	3	-	Torreveja	4	1
Finestrat	1	-	Xàbia	3	-
CASTELLÓN			CASTELLÓN		
Alcalà de Xivert	3	-	Moncofa	2	-
Almenara	1	-	Orpesa	2	1
Benicàssim	5	-	Torreblanca	2	-
Benicarló	1	-	Peñíscola	1	-
Castelló de la Plana	2	-	Vinaròs	1	-
Chilches	2	-			
VALENCIA			VALENCIA		
Canet d'En Berenguer	1	-	Sagunt	2	-
Cullera	5	-	Sueca	1	-
Gandia	1	1	Valencia	2	1
Miramar	1	-	Xeraco	1	-
Oliva	2	-			

Source: territory and Housing Ministry, General Directorate for Environmental Quality

1.5. CULTURE

1.5.1. Cultural activity

ZONES PROVINCES	Museums and museum collection	Tourist sites of cultural interest
Benidorm	2	5
Coast	54	211
Interior	76	264
ALICANTE	132	480
Coast	22	83
Interior	40	175
CASTELLÓN	62	258
Valencia city	47	74
Coast	21	38
Interior	72	252
VALENCIA	140	364
REG.VALENCIA	334	1.102

Source: Agència Valenciana del Turisme

1.6 OTHER INFORMATION

1.6.1. Demography and territory

ZONES / PROVINCES	Population	Surface area (km2)	Density (Inhab/km2)	Forested surface (Ha.)
Benidorm	51.873	39	1.347	
Coast	792.354	1.623	488	
Interior	617.698	4.157	149	
ALICANTE	1.461.925	5.818	251	247.376
Coast	292.688	917	319	
Interior	191.878	5.715	34	
CASTELLÓN	484.566	6.632	73	399.149
Valencia city	738.441	135	5.486	
Coast	294.665	581	507	
Interior	1.183.179	10.091	117	
VALENCIA	2.216.285	10.806	205	568.554
REG. VALENCIA	4.162.776	23.256	179	1.215.079

Source: Population Census 2001, Institut Valencià d'Estadística, Agriculture and Territory and Housing Ministry

1.6.2. Climatology

	Average temperature			Number of sunlight hours			Total Precipitation in millimetres		
	Observatory Alicante	Observatory Castellón	Observatory Valencia	Observatory Alicante	Observatory Castellón	Observatory Valencia	Observatory Alicante	Observatory Castellón	Observatory Valencia
Januar	12,0	11,4	12,3	189	184	182	9,1	4,5	9,8
Februar	11,6	10,9	11,4	140	148	142	16,9	34,7	41,7
Mars	14,1	13,7	14,2	216	193	196	18	41,9	30,5
April	16,4	16,2	16,6	239	246	241	29	87	63,4
May	19,5	19,6	19,6	312	291	277	34,6	151,9	77,7
June	25,5	26,5	26,3	313	305	281	3,4	1,2	1,2
July	27,2	27,4	27,8	339	342	322	0	31,6	0,2
August	27,8	28,1	28,1	327	346	318	0,9	39,2	2
Septembre	24,2	23,2	23,8	259	210	227	8,1	62,1	33,8
October	19,8	18,6	19,6	165	142	144	47,8	47,9	71,6
November	16,1	15,3	16,0	151	151	134	35,6	42,8	13,9
December	12,6	11,9	13	191	167	179	30,5	34,2	21,9

Source: National Statics Institute, INE

2. TOURIST DEMAND

2.1 OVERNIGHT STAYS

2.1.1 Total overnight stays in hotel establishments

ZONES PROVINCES	TOTAL	SPANISH TOURIST		FOREIGN TOURISTS	
		HOTEL	HOSTALES	HOTELS	HOSTALS
Benidorm	10.605.386	4.454.088	38.402	6.106.313	6.583
Coast	3.620.678	2.406.676	174.358	968.332	71.312
Interior	482.974	295.825	87.026	85.318	14.805
ALICANTE	14.709.038	7.156.589	299.786	7.159.963	92.700
Coast	2.685.577	2.124.841	48.971	498.571	13.194
Interior	372.500	280.950	47.090	41.925	2.535
CASTELLÓN	3.058.077	2.405.791	96.061	540.496	15.729
Valencia ciudad	2.048.350	1.368.757	64.094	581.930	33.569
Coast	1.361.086	1.127.320	32.948	194.896	5.922
Interior	664.737	506.254	81.746	66.137	10.600
VALENCIA	4.074.173	3.002.331	178.788	842.963	50.091
REG.VALENCIA	21.841.288	12.564.711	574.635	8.543.422	158.520

Source: Agència Valenciana del Turisme. ENQUESTA

2.1.2 Monthly overnight stays in hotel establishments by origin

ZONES PROVINCES	JAN		FEBR		MARCH		APRIL		MAY		JUNE	
	Spanish	Foreign	Spanish	Foreigns	Spanish	Foreign	Spanish	Foreign	Foreign	Foreign	Spanish	Foreign
Benidorm	177.175	481.232	218.172	479.586	260.800	530.806	364.725	483.341	368.586	542.414	423.852	533.821
Coast	126.080	47.590	157.506	78.484	190.260	87.452	211.995	91.817	184.463	93.296	253.187	94.238
Interior	24.636	6.254	24.166	7.764	27.621	7.921	31.668	6.786	35.727	6.775	36.387	7.134
ALICANTE	327.891	535.076	399.846	565.834	478.681	626.181	608.392	581.944	588.776	642.487	713.426	635.193
Coast	78.835	9.378	89.545	11.002	123.972	38.259	166.295	38.564	172.265	56.616	226.416	57.350
Interior	12.062	2.175	12.088	3.086	20.582	3.529	27.375	3.882	22.221	4.200	27.988	2.169
CASTELLÓ	90.897	11.553	101.633	14.088	144.554	41.788	193.674	42.446	194.490	60.816	254.404	59.519
Valencia	95.318	33.087	112.405	41.027	124.261	71.883	137.884	49.196	133.371	46.893	115.775	48.983
Coast	57.941	9.449	47.702	23.951	90.980	13.918	68.852	12.082	66.322	17.838	127.352	17.248
Interior	29.893	4.464	34.146	5.785	56.980	6.687	49.382	4.227	52.156	5.809	48.687	6.843
VALENCIA	183.152	47.000	194.257	70.763	272.221	92.488	256.120	65.505	251.845	70.540	291.818	73.074
REG.VALEN	601.940	593.625	695.736	650.685	895.456	760.457	1.058.184	689.895	1.035.115	773.843	1.259.648	767.786

ZONES PROVINCES	JULY		AUGUST		SEPTEMBER		OCTOBER		NOVEMBER		DECEMBER	
	Spanish	Foreign	Spanish	Foreign	Spanish	Foreign	Spanish	Foreign	Spanish	Foreign	Spanish	Foreign
Benidorm	580.633	476.458	763.003	530.346	491.937	594.010	447.422	583.312	206.182	480.305	190.003	397.263
Coast	301.364	99.167	417.632	95.459	283.407	114.108	189.278	116.290	132.243	70.297	133.613	51.444
Interior	39.483	9.841	34.499	7.421	35.720	10.635	34.146	12.098	27.613	8.263	31.185	9.231
ALICANTE	921.480	585.466	1.215.134	633.226	811.064	718.753	670.846	711.700	366.038	558.865	354.801	457.938
Coast	342.656	62.250	396.626	66.261	238.492	64.584	184.745	86.375	81.454	11.207	72.503	9.919
Interior	37.592	5.117	50.671	5.232	33.128	4.057	35.122	4.941	31.058	2.508	18.153	3.564
CASTELLÓN	380.248	67.367	447.297	71.493	271.620	68.641	219.867	91.316	112.512	13.715	90.656	13.483
Valencia ciudad	125.083	51.062	139.062	67.761	120.423	61.837	128.404	69.232	99.508	38.350	101.347	36.188
Coast	158.466	37.212	194.423	26.601	128.464	16.774	78.890	14.045	68.148	7.988	72.728	3.712
Interior	57.160	7.281	48.037	9.028	59.535	7.370	52.567	7.690	56.772	6.549	42.685	5.004
VALENCIA	340.709	95.555	381.522	103.390	308.422	85.981	259.861	90.967	224.428	52.887	216.760	44.904
REG.VALENCIA	1.642.437	748.388	2.043.953	808.109	1.391.106	873.375	1.150.574	893.983	702.978	625.467	662.217	516.325

Source: gència Valenciana del Turisme. ENQUESTA TURÍSTICA

2.1.3 Monthly overnight stays in hotels by origin

ZONES AND PROVINCES	JANUARY		FEBRUARY		MARCH		APRIL		MAY		JUNE	
	Spanish	Foreign	Spanish	Foreign	Spanish	Foreign	Spanish	Foreign	Spanish	Foreign	Spanish	Foreign
Benidorm	175.391	479.972	215.096	479.586	258.303	530.808	359.101	483.199	364.261	542.398	419.951	533.821
Coast	115.402	43.653	145.937	73.200	176.012	82.980	197.231	85.757	169.610	86.341	236.398	88.133
Interior	16.476	4.593	17.956	6.416	19.995	7.065	24.615	5.922	29.235	5.929	28.863	6.105
ALICANTE	307.269	528.218	378.989	559.202	454.310	620.853	580.947	574.878	563.106	634.668	685.212	628.059
Coast	76.514	8.367	87.980	10.850	121.286	37.777	161.163	37.722	168.753	56.049	222.150	56.762
Interior	9.285	1.956	10.830	2.815	18.830	3.413	26.022	3.763	21.210	3.898	26.128	1.876
CASTELLÓN	85.799	10.323	98.810	13.665	140.116	41.190	187.185	41.485	189.963	59.947	248.278	58.638
Valencia City	91.541	31.915	107.693	39.804	117.321	68.023	130.881	46.525	127.676	44.205	110.441	45.191
Coast	56.241	9.136	46.080	23.706	87.899	13.114	65.585	11.707	63.780	17.327	124.165	16.778
Interior	24.221	3.889	28.225	5.173	48.040	5.940	41.935	3.109	47.000	4.853	42.252	6.078
VALENCIA	172.009	44.940	181.998	68.688	253.260	87.077	238.405	61.341	238.456	66.385	276.858	68.053
REG. VALENCIA	565.077	583.481	659.797	641.555	847.686	749.120	1.006.537	677.704	991.525	761.000	1.210.348	754.750

ZONES AND PROVINCES	JULY		AUGUST		SEPTEMBER		OCTOBER		NOVEMBER		DECEMBER	
	Spanish	Foreign	Spanish	Foreign	Spanish	Foreign	Spanish	Foreign	Spanish	Foreign	Spanish	Foreign
Benidorm	578.243	476.094	757.951	528.629	489.975	591.204	442.413	583.034	205.074	480.305	188.329	397.263
Coast	278.258	92.067	392.051	83.170	268.457	106.800	179.404	111.178	123.601	66.213	124.315	48.840
Interior	31.134	8.912	28.756	5.684	28.463	8.388	26.016	10.660	21.198	7.157	23.118	8.487
ALICANTE	887.635	577.073	1.178.758	617.483	786.895	706.392	647.833	704.872	349.873	553.675	335.762	454.590
Coast	335.028	60.338	386.220	61.303	234.356	62.788	181.405	86.168	79.093	11.035	70.893	9.412
Interior	30.571	4.731	38.769	4.773	29.784	3.821	28.183	4.880	24.569	2.508	16.769	3.491
CASTELLÓN	365.599	65.069	424.989	66.076	264.140	66.609	209.588	91.048	103.662	13.543	87.662	12.903
Valencia City	119.721	48.443	133.068	60.674	113.201	59.490	124.018	67.263	95.574	35.751	97.801	34.611
Coast	153.751	36.284	188.350	25.682	126.187	16.019	76.461	13.509	66.853	7.938	71.968	3.706
Interior	50.820	6.061	40.223	7.862	52.796	5.868	43.211	7.044	50.900	5.823	36.623	4.437
VALENCIA	324.298	90.788	361.643	94.214	292.192	81.377	243.687	87.838	213.331	49.508	206.194	42.754
REG. VALENCIA	1.577.532	732.930	1.965.390	777.773	1.343.227	854.378	1.101.108	883.758	666.866	616.726	629.618	510.247

2.1.4 Monthly overnight stays in hostels by origin

ZONES AND PROVINCES	JANUARY		FEBRUARY		MARCH		APRIL		MAY		JUNE	
	Spanish	Foreign	Spanish	Foreign	Spanish	Foreign	Spanish	Foreign	Spanish	Foreign	Spanish	Foreign
Benidorm	1.784	1.260	3.076	0	2.497	0	5.624	142	4.325	16	3.901	0
Coast	10.678	3.937	11.571	5.284	14.248	4.472	14.768	6.060	14.853	6.957	16.789	6.105
Interior	8.160	1.661	6.210	1.348	7.626	856	7.053	864	6.492	846	7.524	1.029
ALICANTE	20.622	6.858	20.857	6.632	24.371	5.328	27.445	7.066	25.670	7.819	28.214	7.134
Coast	2.321	1.011	1.565	152	2.686	482	5.136	842	3.516	567	4.266	588
Interior	2.777	219	1.258	271	1.752	116	1.353	119	1.011	302	1.860	293
CASTELLÓN	5.098	1.230	2.823	423	4.438	598	6.489	961	4.527	869	6.126	881
Valencia City	3.771	1.172	4.716	1.218	6.940	3.860	7.005	2.671	5.695	2.688	5.338	3.786
Coast	1.700	313	1.622	245	3.081	804	3.267	375	2.542	511	3.187	470
Interior	5.672	575	5.921	612	8.940	747	7.443	1.118	5.156	956	6.435	765
VALENCIA	11.143	2.060	12.259	2.075	18.961	5.411	17.715	4.164	13.393	4.155	14.960	5.021
REG. VALENCIA	36.863	10.148	35.939	9.130	47.770	11.337	51.649	12.191	43.590	12.843	49.300	13.036

ZONES AND PROVINCES	JULY		AUGUST		SEPTEMBER		OCTOBER		NOVEMBER		DECEMBER	
	Spanish	Foreign	Spanish	Foreign	Spanish	Foreign	Spanish	Foreign	Spanish	Foreign	Spanish	Foreign
Benidorm	2.390	364	5.052	1.717	1.962	2.806	5.009	278	1.108	0	1.674	0
Coast	23.106	7.100	25.581	12.289	14.950	7.308	9.874	5.112	8.642	4.084	9.298	2.604
Interior	8.349	929	5.743	1.737	7.257	2.247	8.130	1.438	6.415	1.106	8.067	744
ALICANTE	33.845	8.393	36.376	15.743	24.169	12.361	23.013	6.828	16.165	5.190	19.039	3.348
Coast	7.628	1.912	10.406	4.958	4.136	1.796	3.340	207	2.361	172	1.610	507
Interior	7.021	386	11.902	459	3.344	236	6.939	61	6.489	0	1.384	73
CASTELLÓN	14.649	2.298	22.308	5.417	7.480	2.032	10.279	268	8.850	172	2.994	580
Valencia City	5.356	2.619	5.994	7.091	7.214	2.347	4.389	1.947	3.930	2.593	3.746	1.577
Coast	4.715	928	6.073	919	2.277	755	2.429	536	1.295	60	760	6
Interior	6.340	1.220	7.812	1.166	6.739	1.502	9.356	646	5.872	726	6.060	567
VALENCIA	16.411	4.767	19.879	9.176	16.230	4.604	16.174	3.129	11.097	3.379	10.566	2.150
REG. VALENCIA	64.905	15.458	78.563	30.336	47.879	18.997	49.466	10.225	36.112	8.741	32.599	6.078

2.1.5. Total overnight stays of foreign visitors by origin

ZONES AND PROVINCES	Germany	Belgium	Holland	Scandin.	France	Italy	U.K
Benidorm	22.614	429.083	263.325	48.990	111.318	22.737	4.884.367
Coast	95.298	45.945	32.437	61.288	92.997	43.470	457.399
Interior	6.968	1.615	3.116	2.769	12.153	10.987	21.997
ALICANTE	124.880	476.643	298.878	113.047	216.468	77.194	5.363.763
Coastl	106.779	21.201	66.720	23.686	115.198	25.056	26.211
Interior	4.759	987	1.831	1.816	8.096	7.837	3.789
CASTELLÓN	111.538	22.188	68.551	25.502	123.294	32.893	30.000
Valencia city	60.414	9.661	12.719	12.437	52.537	106.614	89.760
Coastl	39.388	11.585	3.123	6.682	37.876	18.573	27.062
Interior	9.903	1.258	2.597	1.707	11.910	14.204	9.161
VALENCIA	109.705	22.504	18.439	20.826	102.323	139.391	125.983
REG.VALENCIA	346.123	521.335	385.868	159.375	442.085	249.478	5.519.746

ZONES AND PROVINCES	Portugal	Russia	Poland	Czechia	Hungary	America	R. of world
Benidorm	213.181	32.465	2.269	4.809	1.908	24.167	51.675
Coast	18.323	12.497	2.563	2.082	1.633	39.960	133.756
Interior	4.998	2.224	318	558	701	10.029	21.683
ALICANTE	236.502	47.186	5.150	7.449	4.242	74.156	207.114
Coast	9.037	2.525	1.211	2.497	2.331	19.881	89.436
Interior	961	155	253	98	0	1.737	12.134
CASTELLÓN	9.998	2.680	1.464	2.595	2.331	21.618	101.570
Valencia city	18.850	3.988	2.707	1.316	1.021	63.504	179.968
Coast	3.498	5.691	626	439	95	17.135	29.054
Interior	4.221	1.226	908	694	815	4.120	14.001
VALENCIA	26.569	10.905	4.241	2.449	1.931	84.759	223.023
REG.VALENCIA	273.069	60.771	10.855	12.493	8.504	180.533	531.707

Source: Agència Valenciana del Turisme. ENQUESTA TURÍSTICA

2.2. LEVEL OF OCCUPATION

2.2.1. Mean general occupation level. All year

ZONES AND PROVINCES	TOTAL GENERAL	TOTAL HOTELS	TOTAL HOSTALS
Benidorm	84,84	85,08	(n.d)
Coast	50,65	51,48	41,52
Interior	38,38	39,82	33,79
ALICANTE	70,35	71,85	40,00
Coast	58,39	59,74	30,00
Interior	42,29	47,13	25,37
CASTELLÓN	55,81	58,03	27,75
Valencia city	46,57	46,63	45,36
Coast	57,86	58,83	37,09
Interior	35,63	36,67	30,30
VALENCIA	47,28	48,11	36,63
REG.VALENCIA	62,40	63,97	36,49

Source: Agència Valenciana del Turisme. ENQUESTA TURÍSTICA

2.2.2. Mean occupation level in Hotels. All year

ZONES PROVINCES	GOLD STARS				
	5	4	3	2	1
Benidorm	--	79,31	88,97	84,48	69,53
Coast	45,10	44,08	55,33	55,33	44,44
Interior	--	46,00	37,45	36,65	42,60
ALICANTE	45,10	68,42	76,97	70,71	50,96
Coast	43,30	72,08	59,88	51,42	31,89
Interior	--	23,00	48,60	54,76	39,06
CASTELLÓN	43,30	69,88	58,54	52,36	33,57
Valencia	49,88	43,10	50,24	56,94	50,27
Coast	48,48	53,21	70,95	43,74	44,40
Interior	17,20	26,48	36,22	35,90	57,53
VALENCIA	46,92	44,36	53,00	43,16	51,34
REG.VALENCIA	45,59	60,96	69,62	62,45	46,48

Source: Agència Valenciana del Turisme. ENQUESTA TURÍSTICA

2.2.3. Mean monthly occupation level in hotel establishments

ZONES PROVINCES	January	February	March	April	May	June
Benidorm	72,3	77,5	77,67	80,37	82,4	85,84
Coast	32,37	45,18	47,28	52,38	46,4	59
Interior	33,29	36,34	37	40	38,54	39,62
ALICANTE	56,04	63,93	64,89	68,75	67,86	74,33
Coast	39,86	47,45	51,29	47,69	47,98	57,83
Interior	26,29	26,47	35,92	45,84	37,19	38,11
CASTELLÓN	37,19	42,98	48,6	47,44	46,58	55,1
Valencia	35,94	45,67	54,39	53,37	49,87	44,85
Coast	41,61	42,96	55	44,4	40,9	65,5
Interior	26,7	31,5	42,05	36,87	35,68	35,78
VALENCIA	35,52	42,1	51,9	47,42	44,18	49,09
REG.VALENCIA	48,53	55,88	59,38	60,13	58,5	64,83

ZONES PROVINCES	July	August	September	October	November	December
Benidorm	90,52	109,04	95,13	90,04	78,11	67,08
Coast	63,9	78,85	63,44	48,47	34,15	30,51
Interior	43,34	37,64	42,47	40,87	33,26	36,69
ALICANTE	78,96	94,87	81,49	73,22	58,54	51,05
Coast	76,51	87,48	62,77	60,67	38,98	36,38
Interior	45,44	59,18	41,54	54,39	50,06	33,37
CASTELLÓN	71,83	83,2	59,45	59,78	41,42	35,71
Valencia city	46,4	54,46	49,66	52,15	37,04	35,47
Coast	83,49	92,59	63,84	50,59	44,09	45,76
Interior	39,5	34,87	41,15	35,73	37,1	28,52
VALENCIA	56,14	62	52,09	47,97	38,76	36,24
REG.VALENCIA	72,26	85,04	70,62	65,11	51,09	45,23

Source: Agència Valenciana del Turisme. ENQUESTA

2.2.4. Monthly occupation level in hotels

ZONES PROVINCES	January	February	March	Aprill	May	June
Benidorm	72,41	77,61	77,9	80,5	82,47	85,95
Coast	32,1	45,42	48,07	53,49	46,9	60,62
Interior	30,18	36,79	37,79	42,6	41,61	41,69
ALICANTE	56,82	64,98	66,23	70,17	69,25	75,96
Coastl	40,96	49,82	53,31	48,49	49	58,89
Interior	26,58	29,52	42,25	55,34	44,67	43,25
CASTELLÓN	38,52	45,98	51,65	49,28	48,53	57,01
Valencia city	36,24	46,27	54,4	53,4	50,12	44,53
Coast	42,22	43,58	55,73	44,65	41,31	66,83
Interior	26,75	32,07	42,77	37,47	38,01	37
VALENCIA	36,12	43	52,5	47,92	45,11	49,91
REG.VALENCIA	49,5	57,29	60,89	61,54	60,01	66,43

ZONES PROVINCES	July	August	September	October	November	December
Benidorm	91,35	109,73	95,21	90,06	78,46	67,32
Coast	65	80,05	65,47	49,81	34,63	30,84
Interior	46,15	40,47	44,1	42,4	34,1	37,51
ALICANTE	80,89	97,03	83,32	74,8	60,04	52,15
Coast	78,46	89,06	64,38	61,53	39,76	37,24
Interior	50,77	62,2	51,03	55,87	51,22	39,14
CASTELLÓN	75,1	85,77	62,72	60,85	41,93	37,61
Valencia city	46,56	53,64	49,42	52,93	36,98	35,71
Litoral	84,89	93,8	65,23	51,53	44,98	47,3
Interior	41,75	34,62	43,06	35,55	39,14	29,17
VALENCIA	57,55	62,6	53,09	48,94	39,45	37,1
REG.VALENCIA	74,4	87,03	72,69	66,61	52,38	46,45

Source: Agència Valenciana del Turisme. ENQUESTA TURÍSTICA

2.2.5. Monthly occupation level in hostels

ZONES PROVINCES	January	February	March	April	May	June
Benidorm	(n.d)	(n.d)	(n.d)	(n.d)	(n.d)	(n.d)
Coast	35,54	42,24	38,57	40,88	41,19	42,73
Interior	42,75	34,94	34,68	32,38	28,48	32,93
ALICANTE	39,46	41,2	37,51	40,97	39,46	41,33
Coast	23,71	12,71	17,68	30,89	22,4	28,49
Interior	25,23	13,77	12,9	10,24	8,84	14,98
CASTELLÓN	24,41	13,18	15,55	22,09	16,31	22,31
Valencia	29,74	34,45	54,27	52,7	45,37	51,03
Coast	28,36	28,11	41,09	39,8	32,29	37,05
Interior	26,44	28,88	38,44	33,97	23,47	29,3
VALENCIA	27,89	30,83	44,67	41,51	32,51	38,19
REG.VALENCIA	32,89	32,7	35,58	37,41	32,82	36,83

ZONES PROVINCES	July	August	September	October	November	December
Benidorm	(n.d)	(n.d)	(n.d)	(n.d)	(n.d)	(n.d)
Coast	52,9	66,32	41,69	31,88	28,26	26,42
Interior	34,32	28,45	37,14	35,89	30,46	34,04
ALICANTE	43,23	53,75	43	37,38	28,44	29,27
Coast	37,76	57,76	27,84	29,57	23,01	19,37
Interior	30,28	50,54	15,12	48,35	45,73	10,94
CASTELLÓN	34,08	54,3	21,15	39,84	35,8	14,74
Valencia city	43,16	70,23	54,44	36,05	38,35	30,28
Coast	53,7	66,53	31,88	32,55	21,11	10,84
Interior	28,09	36,25	31,25	36,66	25,63	25,04
VALENCIA	37,89	53,9	38,98	35,77	29,44	24,88
REG.VALENCIA	39,52	53,93	36,47	37,24	30,01	25,47

Source: Agència Valenciana del Turisme. ENQUESTA

STATISTICAL SOURCES

In drawing up the sections describing how tourist activity has evolved in the Region of Valencia, a number of information sources have been used.

Accordingly, for analysing activity in hotel establishments, two very similar sources have been used. On one hand, the level of breakdown required for a more in-depth analysis of tourist demand for hotels in the Region of Valencia, together with the availability of homogeneous series of historical data, led to the use of information provided by the Hotel Establishments Survey by the Region of Valencia, "Enquesta Turística", carried out by the Studies and Planning Service under the Agència Valenciana del Turisme (www.comunidad-valenciana.org). These are statistics drawn up on a monthly basis and broken down on territorial level by province and tourist area. The main reference variables are overnight stays according to country of residence and establishment category and the level of occupation according to bed-spaces and categories. For tourism purposes, the Region of Valencia is divided into 8 areas: three coastal zones that comprise the coastal municipalities of each of the three provinces with a very specific, deeply-rooted tourist structure; Benidorm and the city of Valencia which, in view of their importance and tourist individuality, form independent areas; and three inland areas that comprise the rest of the municipalities with more varied characteristics. This information is also complemented with the rest of variables estimated by the National Statistics Institute in the Hotel Occupation Survey.

The statistics used in drawing up the sections on demand in campsites, tourist apartments and rural tourism accommodation are entitled, respectively, Tourist Campsite Occupation Survey, Tourist Apartment Occupation Survey and Rural Tourism Accommodation Occupation Survey, all conducted by the National Statistics Institute (www.ine.es).

The Institute of Tourist Studies carries out three statistical operations relating to demand at destination. Frontur, which analyses the flow of international tourism towards Spain;

Egatur, which shows information on the expenditure and behaviour of visitors from abroad who come to Spain by road or air and Familitur, which examines the tourist behaviour of Spanish residents (www.iet.tourspain.es).

INDEX

INTRODUCTION	2
TOURISM IN 2004.....	3
GRAPHIC ANALYSIS	
1.- OFFER	36
2.- DEMAND	44
STATISTICAL TABLES	
1.- OFFER	49
1.1. Accommodation.....	49
1.2. Information and trips.....	53
1.3. Restaurants	54
1.4. Sports and leisure.....	55
1.5. Culture.....	57
1.6. Other information.....	58
2.- DEMAND	59
2.1. Overnight stays.....	59
2.2. Level of occupation	61
STATISTICAL SOURCES	65

INDEX OF GRAPHS

1.- TOURIST OFFER

1.1. Maximum available bed-spaces in hotel establishments	36
Variation in hotel bed-spaces 03/04.....	36
1.2. Hotel bed-spaces	37
By tourist zone	37
By establishment category	37
1.3. Bed-spaces available in campsites.....	37
1.4. Bed-spaces available in apartments.....	38
1.5. Bed-spaces available in rural hostels and houses	38
1.6. Seats in restaurants by tourist zone	39
1.7. Offer in accommodation (bed-spaces).....	39
1.8. Distribution of bed-spaces in hotel establishments. Hotels and Hostels.....	40
1.9. Distribution of bed-spaces in tourist apartments.....	41
1.10. Distribution of bed-spaces in campsites.....	42
1.11. Distribution of bed-spaces in rural accommodation.	43

2- TOURIST DEMAND

2.1. Overnight stays in hotel establishments. Monthly averages by zones	44
2.2. Overnight stays in hotel establishments. Participation by origin	44
2.3. Total overnight stays by origin.	45
Overnight stays by foreigners by origin.	45
Variation in number of overnight stays with respect to 2003.	45
2.4. Overnight stays by origin. Monthly evolution	46
2.5. Mean annual level of occupation By establishment category Years 2003 and 2004.....	46
2.6. Mean annual level of occupation by zones	47
2.7. Mean occupation level by zones. Low season	47
2.8. Mean occupation level by zones. High season.....	48

INDEX OF STATISTICAL TABLES

1. TOURIST OFFER

1.1. ACCOMMODATION	49
1.1.1. Number of hotel establishments (Hotels)	49
1.1.2. Number of bed-spaces in hotel establishments (Hotels).	49
1.1.3. Number and bed-spaces in hotel establishments (Hostels).....	50
1.1.4. Bed-spaces in hotels open by month	50
1.1.5. Bed-spaces in hostels open by month	50
1.1.6. Number and bed-spaces in Campsites	51
1.1.7 Number and bed-spaces in Apartments.....	51
1.1.8 Number and bed-spaces in Rural houses and Hostels	51
1.2. Information and trips.....	52
1.2.1. Travel agencies.....	52
1.2.2. Information Offices	52
1.3. Restaurants.....	53
1.3.1. Number of restaurants	53
1.3.2. Number of seats in restaurants	53
1.3.3. Number of cafeterias	53
1.3.4. Number of seats in cafeterias	54

1.4. Sports and leisure	54
1.4.1. Hygiene and leisure facilities installed by the Agència Valenciana del Turisme on beaches and inland tourist areas.	54
1.4.2. Sports facilities	54
1.4.3. Protected natural areas	55
1.4.4. Health and relaxation	55
1.4.5. Blue flags.....	56
1.5. Culture	56
1.5.1. Cultural activity	56
1.6. Other information	57
1.6.1. Demography and territory	57
1.6.2. Climate	57
2. TOURIST DEMAND	
2.1. Overnight stays	58
2.1.1. Total overnight stays in hotel establishments	58
2.1.2. Monthly overnight stays in hotel establishments by origin	58
2.1.3. Monthly overnight stays in hotels by origin.....	59
2.1.4. Monthly overnight stays in hostels by origin	59
2.1.5. Total overnight stays by foreign visitors, by origin	60
2.2. Level of occupation	60
2.2.1. Mean general occupation level. All year	60
2.2.2. Mean occupation level in hotels. All year	61
2.2.3. Monthly occupation level in hotel establishments.....	61
2.2.4. Monthly occupation level in hotels.	62
2.2.5. Monthly occupation level in hostels.	64