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Analysis of domestic language tourism in Spain

Abstract. The general objective of this study was to research the revitalisation of language tourism (LT) activities in Spain. More specifically, the study aimed at describing the LT phenomenon, analysing the global and Spanish LT market, and examining domestic LT options in Spain. A bibliographic and web search was carried out, in addition to a focus group with a convenience sample of four language tourists, and an in-depth semi-structured interview with one study abroad accommodation provider. Qualitative data were processed using content analysis and SWOT analysis, and were categorised before the triangulation stage. Whereas Spanish inbound and outbound LT markets are quite consolidated, only 17 private companies and 5 public programmes have been identified in the Spanish domestic niche, all of them focusing on English as a foreign language. The private offering is very limited and addressed at very specific segments. As for public programmes, in 2019-2020 they received an estimated funding of 4.7 million euros and were attended by over 9000 individuals. This sector has been scarcely investigated to date and offers an excellent opportunity for proximity travel. A more extensive, diversified offering, supported by better promotion is required. This implies the involvement of all stakeholders, as well as the close cooperation of private suppliers and the public administration, in planning and implementing sustainable policies in Spain.

Keywords: Domestic tourism, educational tourism, language tourism, sustainable impacts

JEL Codes: L83, Z13, Z32

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1. Introduction

For some individuals, a genuinely intrinsic passion. For others, just another side effect of globalisation. Learning foreign languages has been an upward trend in the last decades and one of the reasons why people would travel before the COVID-19 pandemic. According to the World Tourism Organisation (UNWTO, 2010), educational trips can be motivated by the desire to learn a foreign language and lead to memorable language tourism (LT) experiences. Such experiences result from a combination of foreign language acquisition and services provided by the tourism industry, like transport, lodging, food and beverages, and entertainment (Iglesias, forthcoming 2022).

Tourism flows have diminished worldwide due to the COVID-19 pandemic, and so have the influx of visitors to LT destinations, including Spain. This article presents a study conducted between October 2020 and April 2021, whose general objective was to research the revitalisation of LT activities in this country. Three specific objectives were set for the study, each corresponding to two research questions (RQ). The 1st specific objective was to describe the phenomenon of LT:

RQ1. What does LT consist in?

RQ2. What are the impacts of LT?

The 2nd specific objective was to analyse the current situation of the global and Spanish LT market:

RQ3. What are the effects of the COVID-19 pandemic on the global LT market?

RQ4. What is the current context of the inbound LT market in Spain?

The 3rd specific objective was to examine domestic LT offering in Spain:

RQ5. What is the current domestic offering of LT in Spain?

RQ6. What are the future prospects for this sector in the short term?

The following section presents a review of the literature on language tourism.

2. Literature review

2.1. Overview of LT

LT can be referred to as “a tourist activity undertaken by travellers (or educational tourists) who take a trip which includes at least an overnight stay in a destination outside their usual place of residence for less than a year and for whom language learning is a primary or secondary part of their trip” (Iglesias, 2016, p. 31). LT is a micro-niche of educational travel (García Laborda, 2007; Gómez et al.,

2018; Iglesias, 2016; Yarymowich, 2005), and it is also a subtype of cultural tourism (Iglesias, 2017b; Piédrola Órtiz, Artacho Ruiz, & Villaseca Molina, 2012; Redondo-Carretero et al., 2017; Taboada Zúñiga Romero, 2012). Iglesias (2014, 2015, 2016, 2017a, 2017b) portrays the LT market as a system where demand and supply are determined by consumers' demographics, motivations, perceptions, and travel behaviours, in addition to product configuration, managing and marketing structures, and destinations' resources. A wide range of LT experiences can therefore result from combinations of these aspects, where trips and travellers can be differently categorised depending on whether or not language learning is complemented with additional activities like sports, or whether the emphasis is on activity-based learning through cultural visits, to name just a few examples (Iglesias, 2017a).

Like all tourist activities, LT can bring benefits to all key stakeholders if local populations and visitors are also involved in its development. LT is a source of revenue and generates employment opportunities all year round, so its economic impact for LT destinations is significant (Barra, Marco, & Cachero, 2019; Castillo, Rodríguez, & López-Guzmán, 2017; Piédrola Órtiz, Artacho Ruiz, & Villaseca Molina, 2012; Redondo-Carretero et al., 2017; Taboada de Zúñiga Romero, 2012). LT not only fosters the development of linguistic and socio-cultural competences (Bruzos, 2020; Carvalho, 2021; Iglesias, 2017a), but also professional and personal progress (Castillo Arredondo et al., 2018; Drozdzewski, 2011; Iglesias, 2017b; Pokojski, Wolejko, & Starszuk, 2021); it can also increase cross-cultural awareness and tolerance (Aliaga et al., 2018; Iglesias, 2014; Iglesias et al., 2019). Furthermore, it bolsters local cultures and heritage (Pardo Abad, 2011; Redondo-Carretero et al., 2017). These aspects are pull factors for language tourists, who build a loyal relationship with the local community and encourage more visitors to come (Iglesias, 2017b; Piédrola Órtiz, Artacho Ruiz, & Villaseca Molina, 2012; Redondo-Carretero et al., 2017; Taboada de Zúñiga Romero, 2012). In this way, language travellers become promoters of destinations they have visited, even among the local residents (O'Rourke & DePalma, 2017).

2.2. The Spanish LT market

The language spoken at LT destinations is a key pull factor and a major tourism resource. In the case of Spanish, it is the third most spoken language in the world, after English and Mandarin Chinese. More than 22 million individuals studied Spanish as a foreign language in 2020 (Fernández Vítóres, 2020). According to Turespaña, the Spanish Tourist Board, Spain is the main destination for tourists eager to learn this language, followed by Mexico and Argentina (Turespaña, 2008).

Turespaña promotes Spain as a LT destination together with Instituto Cervantes and Federación Española de Escuelas de Español como Lengua Extranjera (FEDELE), i.e. the Spanish federation of schools of Spanish as a foreign language. FEDELE is made up of seven regional associations of 98 language schools. As part of the Association of Language Travel Organisations (ALTO), the Federation regularly publishes sector reports, economic studies, and strategic plans. FEDELE members constitute an important share of the current supply for inbound LT in Spain.

According to a FEDELE report for 2019 (2020), there was a very significant upward trend in the number of language tourists and weeks spent in Spain. In 2019 FEDELE schools welcomed approximately 138600 students, who stayed for 3.42 weeks on average. With weekly average revenue per student amounting to €500, the total turnover for almost 474000 weeks was nearly 237 million euros, including tuition, accommodation, catering, leisure activities, and domestic transfers, but excluding flights (FEDELE, 2021). International students predominantly enrolled in intensive courses with more than 15 teaching hours per week, and 75% were interested in programmes focusing on the Spanish language and culture. The majority of students were women (64%) and not older than 45: aged 12-18 (32%), 19-25 (25%), and 26-45 (26%). Over 65% of language tourists came from Europe, mainly from Italy, Germany, France, and the United Kingdom (FEDELE, 2020).

Asociación Española de Promotores de Cursos en el Extranjero (ASEPROCE), i.e. the Spanish association of promoters of study-abroad programmes, represents the outbound LT market. Nowadays, ASEPROCE includes 65 private companies from all over Spain. Although its role is similar to that played by FEDELE, ASEPROCE does not carry out macro-studies. Therefore, there are no publicly available data about outbound LT activities in Spain.

It is even more difficult to find information about the domestic LT in Spain. While a number of private and public products stimulate language tourism across different Spanish regions, there is no representative body that caters for the interests of these providers. The following example serves to illustrate activities undertaken in this market niche.

The Universidad Internacional Menéndez Pelayo (UIMP), together with the Ministry of Education and Vocational Training of the Government of Spain, offers immersion English courses for students and teachers on a yearly basis. Since 2008, over 150000 individuals have participated in this programme as language tourists. The main objective of these courses, designed for students at an intermediate or advanced level, is to improve their oral competences in English as a foreign language. In addition, the programme provides participants with opportunities to develop their interpersonal skills and to establish bonds with other participants from different backgrounds during their stay in a Spanish city or region. This programme is targeted at two main groups: on the one hand, youngsters who have

obtained a scholarship from the Ministry of Education as a means to facilitate access to language acquisition resources to less-favoured segments of society; on the other hand, graduates with master's degrees in education. Those who fulfil the requirements can apply for grants to take part in a five-day immersive programme in any of UIMP's eleven headquarters around Spain. On average, each headquarter welcomes around 40 new students each week for six months every year.

Participants can choose between a general English course or specialised courses. Groups of five to seven students are created depending on the course selected and results of placement tests. In order to obtain a certificate, students have to attend classes for 40 hours and join a minimum number of complementary activities, which include one-to-one oral sessions, exam preparation classes or city tours. All private companies willing to develop programmes regarding the provision of accommodation, catering, and leisure activities have to take part in a public bidding process, while students are responsible for arranging their own transport to their destination. The programmes had been running at full capacity for over 10 years until mobility ceased abruptly in March 2020 due to the outbreak of the COVID-19 pandemic, ensued by a period of travel restrictions.

2.3. The impact of COVID-19 on LT

As for the effects of COVID-19 in the LT market worldwide, according to a survey conducted by the Federation of Education and Language Consultant Associations (FELCA), turnover between February and August 2020 dropped between 80% and 100% compared to the same period in 2019 (FELCA, 2020). Another survey carried out by ALTO concludes that pre-COVID levels will not be reached until 2022. The market is predicted to eventually recover, but numbers will be far below those recorded in 2019. Global agents and schools ranked government policies, air travel (in terms of costs, availability, and safety), and school policies and protocols regarding COVID-19 as critically important in regaining students' confidence in the near future. Even though some of these aspects mainly depend on medical and political considerations, some major adaptations and actions are required on the part of the LT industry. In addition, ALTO considers that this new global context can also be seen as a good chance to welcome new perspectives and opportunities that have never been given enough attention in this market (ALTO, 2020).

In Spain, FEDELE reported a drop of nearly 83% in the number of international students who took part in their programmes in 2020, a figure that contrasts with excellent results of the previous year. Given an annual growth of 9.93% before the pandemic, a turnover of over 260 million euros had been forecast for 2020. Instead, from 1st January to 30th September 2020 operations slumped to 17% of

2019 levels, corresponding to an estimated loss in revenue due to COVID-19 of over 216 million euros (FEDELE, 2021). Although seasonality in this sector is lower, the summer season is still considered to be fundamental for the vast majority of language schools, so the reduced mobility of language tourists in that period had a particularly negative impact. Actually, not only schools have been affected by this situation, but also a great number of stakeholders that are directly or indirectly dependent on this tourism niche, such as educational intermediaries, host families, the hospitality industry, transportation firms, retail businesses, tour guides, and a wide range of leisure companies, among others.

FEDELE has created a certification system based on several guidelines, recommendations, and protocols for accredited Spanish schools, which is used to confirm that they are following all the measures set by the authorities. Each certified school needs to prepare a specific contingency plan to increase safety in their facilities, ensure a distance of at least 1.5 meters between students, impose the obligation of using hydroalcoholic gels and masks, inform users about hygiene and safety, provide signs to respect social distancing, and reduce decorative elements that may be prone to contagion (ALTO, 2020).

Domestic LT providers have also adapted to the new requirements necessitated by the COVID-19 pandemic in Spain. This has been one of the aspects examined in the study reported hereinafter.

3. Research methods

Considering the objectives set for this bibliographic and exploratory study, qualitative methods were used. Data collected by means of different techniques and tools were processed by applying content analysis, categorisation, and SWOT analysis, following the approach adopted in previous studies conducted in this line of research (Alcázar et al., 2019; Aliaga et al., 2018; Iglesias & Feng, 2017).

To start with, a bibliographic exploration was conducted to identify the main characteristics of the LT micro-niche. A TITLE-ABS-KEY search for the phrases {language tourism} and {linguistic tourism} in the Scopus database returned a list of 22 valid documents where these terms appear in the title, keywords, or abstract. 11 of them were primary documents, whereas another 11 were secondary documents mentioned in the lists of reference included in the 11 primary documents. Off-topic text contents and repeated manuscripts were discarded.

A bibliographic database was created including the following information: the year when these contributions were published, their authors, the LT destination they refer to, the type of document, the language of publication, and the database of origin. Full details are provided in Table 3. Additionally, a term co-occurrence

map based on text data extracted from the titles and abstracts was created using VOSviewer, a software tool for building and displaying bibliometric networks (Van Eck & Waltman, 2010). After selecting a threshold of 5 minimum occurrences of a term, 17 terms out of 359 met this requirement. For each of the 17 terms, a relevance score was calculated automatically.

Secondly, a web search was carried out in order to find information about the Spanish LT market and the impact of COVID-19. To identify domestic LT experiences in Spain, this study only focused on immersive courses offered by private companies. Other types of domestic LT experiences, like summer camps or linguistic exchanges, were excluded from the study.

Thus, the target population consisted of the following 17 private LT companies: Diverbo-Pueblo Inglés, Optima Communication, Vaughan, Speak and Live, Estación Inglesa, Eloquentia, El Valle Inglés, Inmersity, Astex, All in English, American Language, BC Facilitation, English Getaway, Idiomas Top, Eduma, English Systems – Sunny England and Summer Natura. A database was created containing information obtained from each company's website about its location, LT destinations, target market, types of accommodation, programme length, and implemented COVID-19 measures.

The public offering of domestic LT experiences in Spain was also examined by looking at the official website of the Ministry of Education and Vocational Training, which promotes and subsidises immersive LT programmes available in Spain every year. A second database was created including information about programmes offered between 2019 and 2020, namely:

- Grants for an intensive language immersion course in English, 2019.
- Scientific, artistic, and literary routes with linguistic immersion in English, 2019.
- Language immersion programme in holiday camps, 2019.
- Language immersion programme, 2020.
- UIMP Scholarships, 2020.

The database comprised the following details: programme name, amount of subsidy, description and objectives, target, stakeholders involved, duration, and destination(s).

Thirdly, an online focus group was arranged to identify interests and needs regarding LT demand. A set of open-ended questions was created to foster discussion among a group of former participants of a public domestic LT programme offered by the Spanish government and organised by the UIMP, as described in the Literature Review. The session was recorded, with participants' prior consent, and one of the central parts was a debate about the internal and external factors that affect the UIMP programme, which was later taken into account in the SWOT analysis. A convenience sample of four respondents was selected from among those who took part in the programme in 2019 and 2020. Three of them took part in the

Table 1. Questions used in the focus group and during the in-depth interview

Technique	Questions
Focus group (FG)	FGQ1. Do you know what LT is? FGQ2. When you participated in the UIMP programme, were you aware that you were actually language tourists? FGQ3. Would you say you were somehow influenced by your LT experience? FGQ4. Which aspects of the UIMP programme could be highlighted positively? FGQ5. Which qualities differentiate this programme from other similar ones? FGQ6. What is your opinion regarding this programme's resources? FGQ7. Did you perceive any lacking aspect during your experience? FGQ8. What aspects of the UIMP programme could be improved? FGQ9. Did you perceive any limitation of resources from the organisation? FGQ10. Do you consider that this programme could benefit from any opportunities? FGQ11. What are the main threats to this programme in your opinion? FGQ12. Have you had any previous LT experience in the public or private sectors? FGQ13. Would you be interested in undertaking a similar experience in a language other than English? FGQ14. What kind of LT experience related to another language do you imagine? FGQ15. How do you see the future of LT?
Interview (I)	IQ1. Which was the role of Ágora BCN in the UIMP programme? IQ2. How did Ágora BCN become involved in this programme? IQ3. What do you think of this programme's design? IQ4. How did language tourists behave during their stay in Ágora BCN? IQ5. What are the demand's needs? IQ6. Would you say all targets have the same offer in the domestic LT sector? IQ7. Do you consider that there is room for languages other than English in today's LT domestic market? IQ8. How would you address future implementations in this sector?

Source: own research.

programme in 2019 and one in 2020. The focus group moderator also participated in the programme as a student in 2019. All four respondents were females, aged between 20 and 24 years old, and lived in Spain.

The supply perspective was considered on the basis of information obtained during an online in-depth interview with the Sales Manager and Commercial Director of Ágora BCN, a student hall of residence in Barcelona (Spain), which had hosted participants in the UIMP programme in 2015 and 2016. Another set of open-ended questions was created to guide this semi-structured interview. The conversation was also recorded with the interviewee's prior consent. The questions used in the focus group and during the in-depth interview are provided in Table 1.

Responses collected from the focus group participants and during the in-depth interview were categorised as shown in Table 2.

Table 2. Categorisation

Technique	Category	Subcategory
Focus group (FG)	FG1. LT as a construct FG2. Sociocultural impacts of LT FG3. The UIMP programme FG4. The LT experience	FG1.1. Conceptualisation FG1.2. Self-awareness as language tourists FG3.1. Strengths FG3.2. Weaknesses FG3.3. Opportunities FG3.4. Threats FG4.1. Previous LT experiences FG4.2. Interest in new LT experiences FG4.3. Future courses of action
Interview (I)	I1. The UIMP programme I2. Future courses of action in the Spanish LT sector	I1. Ágora BCN as a LT stakeholder I2. Analysis of the UIMP programme I3. Sociocultural impacts I2.1. Demand needs I2.2. Offer and target I2.3. Language diversification I2.4. Forthcoming developments

Source: own research.

4. Findings and analysis

4.1. Bibliometric analysis

The fact that the first document dealing with LT in Scopus dates back to 2005 indicates that research on this tourism micro-niche is relatively recent, which is one of the reasons for its scarcity. The most prolific year was 2017, when 22.7% of all contributions on this topic were published. Out of the 22 documents included in the database, 72.7% are journal articles, 18.2% are book chapters, and 9.1% are conference proceedings. Of the 49 authors associated with these documents, the most recurrent is Iglesias, with 7 publications.

Although 27.3% of these publications are not related to a specific region, as much as 54.5% focus on inbound LT in Spain, while other geographical areas are less represented, including English-speaking countries. However, almost all of the publications are in English. The bibliometric details are provided in Table 3.

As for term co-occurrence, the most relevant terms, based on the score calculated by VOSviewer are visualised in Fig. 1, where they are grouped in 3 clusters shown in different colours within a network of 102 links that connect all the terms. The size of particular terms represents their frequency of occurrence. Among the most frequent items are obvious terms, such as “language”, “language tourism”,

Table 3. Bibliometric data

Year	Author	Destination	Source	Language	Scopus database
2005	Yarymowich	Canada	Book chapter	English	Secondary
The author studies through content analysis some strategies used by schools to deliver LT experiences.					
2007	García Laborda	UK	Journal article	English	Secondary
The author aims at distinguishing from different types of language travel depending on the focus on language learning, outcomes and supplementary activities.					
2011	Drozdewski	Poland	Journal article	English	Main
The author examines the motivations of international students with Polish heritage who travel to Poland to learn the Polish language, and for whom cultural immersion and personal development are fundamental.					
2011	Pardo Abad	Spain	Journal article	Spanish & English	Secondary
The author investigates some indicators of LT and focuses on two major Spanish world heritage cities.					
2012	Piédrola Órtiz, Artacho Ruiz, & Villaseca Molina	Spain	Book chapter	English	Main
The authors examine through a mixed-methods approach the economic relevance of LT for a Spanish world heritage city, as well as the profile of the foreign students who choose this destination and their satisfaction degree.					
2012	Taboada de Zúñiga Romero	Spain	Book chapter	English	Main
The author explores the nature of LT activities undertaken in Spain by learners of Spanish as a foreign language and compares the development of two Spanish world heritage cities as LT destinations.					
2014	Iglesias	Global	Proceedings	English	Secondary
The author examines LT as a transformational experience in terms of second language acquisition, self-discovery, educational and professional development. The positive and negative sociocultural impacts of contact with the host community for both language tourists and residents are also discussed.					
2015	Iglesias	Global	Proceedings	English	Secondary
The author explores language tourists' demographic factors in relation to LT demand and their role in developing communicative competence in a foreign language in study-abroad contexts.					
2016	Iglesias	Global	Journal article	English	Secondary
The author analyses conceptually the LT phenomenon and its market system from the perspectives of the demand and the supply.					
2017	Castillo, Rodríguez, & López-Guzmán	Spain	Journal article	Spanish	Secondary
The authors research the motivations of inbound students in international mobility programmes at a Spanish university, mainly driven by their desire to learn the Spanish language and because of its geographical location.					
2017a	Iglesias	Global	Journal article	English	Secondary
The author examines the sociolinguistic and pragmatic gains of study-abroad stays for second language acquisition, as well as the main components of LT products.					
2017b	Iglesias	Global	Journal article	English	Secondary
The author analyses the tourist components of language travel. The results of a survey conducted at a Spanish university among international students with a primary interest in learning the Spanish language to identify the profile and travel behaviour of international learners of Spanish.					

cont. Table 3

Year	Author	Destination	Source	Language	Scopus database
2017	O'Rourke & DePalma	Spain	Journal article	English	Main
The authors investigate the motivations of foreign students who travel to Spain to learn a minoritised language, their ideologies and search for authentic LT experiences.					
2017	Redondo-Carretero et al.	Spain	Journal article	English	Main
The authors study the profile of international learners of Spanish as a foreign language in a Spanish city. An account of language tourists' motivations and perceptions is provided, as well as a discussion about the influence of these two aspects on their expenditure.					
2018	Castillo Arredondo et al.	Spain & Germany	Journal article	English	Main
The authors examine by means of a survey the push and pull factors that determine inbound LT at a Spanish university in contrast to a German university. The results show that language learning is a key driver that enhances language tourists' personal and professional growth.					
2018	Gómez et al.	Spain	Journal article	English	Main
The authors study the factors that influence the choice of a LT destination by means of a Partial Least Squares regression. The role of consumption values and the perceived beneficial image among American university students learning the Spanish language in Spain are reported.					
2018	Aliaga et al.	Spain	Journal article	English	Secondary
The authors conduct a qualitative research of several aspects related to inbound LT in a Spanish city, namely providers and services, the demand's profile, and the impact of accommodation and interaction on both residents and language tourists.					
2019	Barra, Marco, & Cachero	Spain	Journal article	English	Main
The authors measure the significant economic impact of language travel on a Spanish summer destination to show the relevance of diversifying tourism activities.					
2019	Iglesias et al.	Spain	Journal article	English	Secondary
The authors follow a mixed-methods approach to examine the sociocultural impacts of inbound LT in a Spanish city. In addition to linguistic gains, the interaction between tourists and the host community has an effect on their identities and values, as participants become more aware of cultural diversity. Integration needs to be boosted.					
2020	Bruzos	Spain	Book chapter	English	Main
The author explores how learning Spanish as a foreign language in a Spanish city is fostered through social and political contextualisation so that study-abroad sojourners develop their linguistic and sociocultural competences and acquire a critical, dynamic perspective of Spanish culture.					
2021	Carvalho	Global	Journal article	English	Main
The author studies through interviews the influence of second language acquisition on language travel patterns. Language tourists' communicative competence in the target language and their active involvement in the language learning process can be conducive to enhanced contact with residents and knowledge of the local culture.					
2021	Pokojski, Wolejko, & Star-szuk	Malta	Journal article	Polish	Main
The authors present a case study of a language trip undertaken by a group of Polish secondary students to Malta. In addition to linguistic and cultural gains, other benefits related to learning how to make travel arrangements and use new technologies are reported.					

Source: own research.

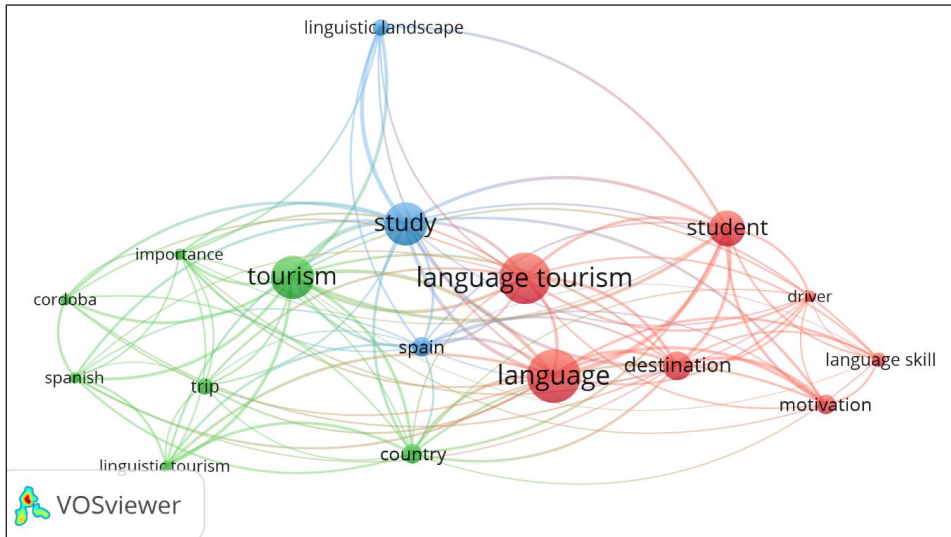


Fig. 1. Term co-occurrence map

Source: own research.

“tourism”, “study”, “student”, and “destination”, as well as “motivation” and “Spain”. The identified clusters seem to indicate relevant research topics and contexts. One of them is related to students’ aims and reasons for language travel. The second one refers to the relevance of the Spanish world heritage city of Córdoba as a popular destination for tourists interested in the Spanish language and culture. The third cluster confirms the status of Spain as a major LT destination.

4.2. Analysis of the domestic LT market

Information collected about the private providers of immersive LT programmes in Spain indicates that 35% are located in Madrid, the capital, and 11.8% in Barcelona. Most of the companies offer their packages with transport, accommodation, excursions, and language classes in more than one geographical region. The LT providers try to reach more than one market segment. 88.2% of the programmes are aimed at adults in general, 47% are targeted at corporate customers, 29.4% – at children up to the age of 12, 29.4% – at people aged between 13 and 25, and 11.7% – at families. The prevailing accommodation options are student halls of residence, villas, rural houses, and hotels, while 17.6% are homestays.

Private LT providers offer a range of programmes that last mostly between 5 and 8 days (88.2%) or between 1 and 4 days (82.3%). 17.6% last up to 26 days.

Prices range from €110 to €500 for the shortest programmes, from €579 to €1445 for 5- to 8-day programmes, and from €990 to €2100 for longer programmes.

During the COVID-19 pandemic, 88% of private LT providers were able to resume their activity right after the national lockdown imposed in Spain in March and April 2020, and are currently active, having implemented health protocols within their premises to offer their services safely. The number of participants per group has been decreased, collective rooms have been replaced by individual rooms, and specific group activities have been cancelled. While international mobility has been severely interrupted, private LT providers have seen the demand for their services grow, as more people looking for foreign language immersion have opted for domestic rather than international experiences. What is more, even though online language classes are commonly available during the pandemic, face-to-face experiences have now gained a unique competitive advantage.

With respect to state-funded language programmes offered in domestic LT, during 2019 and 2020 the Spanish government spent an estimated 4.7 million euros to subsidise five domestic LT programmes for around 9500 individuals. Involved in the organisation of these programmes are the Ministry of Education and educational providers, mainly primary schools and high schools, as well as suppliers of tourist services (accommodation, catering, and leisure), who need to follow a public administrative procedure in order to be licensed. Most programmes last from five to seven days, except one lasting 15 days, and are held in various destinations across Spain. The target audience for these programmes are scholars, teens, and young adults. Adults and seniors are excluded.

4.3. Analysis of the focus group

With regard to category FG1 in Table 2, the four participants were able to provide a correct albeit rather rough definition of LT and give specific examples of language trips, but none had thought of themselves as language tourists. All the participants agreed that the main motivation for their LT stay was not just the linguistic component itself but the overall experience. They were mainly driven by a desire to visit a new destination, get to know new people, and engage with them in a welcoming new environment.

As for category FG2, all the participants emphasised that they had experienced personal development as a result of facing new challenging scenarios that helped them to become more open-minded and inclusive. Some participants also pointed out that they later returned to the LT destinations, which they felt particularly attached and loyal to. They shared their positive opinions with relatives and friends, which means that could be regarded as good ambassadors of those destinations.

Regarding category FG3, Table 4 summarises the SWOT analysis based on the focus group discussion.

Table 4. SWOT analysis

Strengths	Weaknesses
<ul style="list-style-type: none"> • Innovative methodological approach, based on group dynamics and conversational activities. • Meaningful linguistic input in an immersive learning environment. • Experienced teachers with an excellent command of English and the ability to create a relaxed learning atmosphere. • Excellent organisation from the very first day, with quick registration procedure, as well as outstanding management of staff and activities. • Economic affordability, as most of the costs were covered. • Inclusion of participants from different geographical regions and diverse cultural backgrounds. 	<ul style="list-style-type: none"> • Occasional lack of materials, especially technological equipment or experimental tools. • Precarious catering service, not adapted to special needs or diets. • Stressful time management with tight schedules. • Insufficient information about the programmes in online public platforms. • Lack of promotion through public educational institutions. • Very limited leisure activities during the COVID-19 pandemic.
Opportunities	Threats
<ul style="list-style-type: none"> • Substantial volume of followers of UIMP on social media. • Relevance of foreign language acquisition and language diversification in global economies. • Greater interest in the public offering derived from reduced purchasing power due to economic recession. • Domestic options perceived as valid alternatives to reduced international mobility. 	<ul style="list-style-type: none"> • Stricter restrictions on national mobility in critical COVID-19 scenarios. • Fear of travelling and reluctant consumer behaviour affecting tourism flows. • Cutbacks to resources from public administrations as a result of financial readjustment.

Source: own research.

As for category FG4, three participants reported having previous positive LT experiences, either in domestic summer camps or overseas. All the participants were interested in new LT experiences in the future, especially in Spain, and stated that the price would be the most decisive factor. There was a suggestion to include new foreign languages in the offering.

4.4. Analysis of the in-depth interview

With respect to category I1, the interviewee regarded the excellent organisation and general management as key strengths of the UIMP programme. She praised its domestic perspective, since the programme was affordable for consumers with medium-high purchasing power. She also highlighted participants' sense of respect for one another.

In regard to category I2, the interviewee believed that potential language tourists nowadays look for programmes which are economically affordable and that there is no specific offering for people aged 15-18. She was convinced that LT experiences would always be in demand, as foreign language competence is an asset, and that they should combine many different components in addition to the linguistic input. In her view, learning English is a must for Spanish kids, teenagers, and especially adults, so she did not see the need for a greater selection of languages. Since many language programmes in Spain are mainly aimed at foreign language tourists, the interviewee thought it was necessary to increase the offering for domestic tourists, particularly during the COVID-19 pandemic, when such options can be an attractive alternative to courses abroad.

5. Discussion

A number of differently priced programmes of varying length and targeted at different customers were identified in the Spanish domestic LT sector. Thanks to its rapid adaptation to the COVID-19 pandemic, this market has become competitive in comparison to international markets, which are currently struggling with serious operational difficulties. Yet, there is a significant lack of suppliers. The domestic LT market cannot be considered a mature sector, as the number of companies operating in this micro-niche is very low in comparison to options offered by Spanish providers for those interested in inbound or outbound tourism. Much of the existing activity tends to concentrate in larger urban areas, which may be an obstacle for tourists from more remote parts of the country. Besides, some market segments, such as families or younger people seem to have fewer options.

The main purpose of state-funded domestic LT programmes is to provide low cost but high-quality opportunities to improve participants' foreign language skills. This contributes to more qualified labour force in the future, which can benefit not only the participants, but also the whole society.

On the other hand, the focus group emphasised the benefits of domestic LT experiences, so the LT market definitely needs to develop the domestic offering by including new foreign languages and a wider range of complementary activities, paying more attention to food arrangements, and employing more effective ways of reaching potential language tourists. The interdependence between the factors identified in the SWOT analysis can be converted into actionable strategies, for example by boosting visibility through social media. The affordability of state-funded domestic programmes can meet the needs of individuals with a decreasing purchasing power and thus aid social inclusion, so public administrations should keep investing in them.

The most relevant course of action mentioned during the interview is the need to balance international LT flows with domestic alternatives, which at the moment seem insufficient. In this regard, the UNWTO described domestic options as one of the main ways of restarting tourism in the COVID-19 era. Tour operators and travel agencies are encouraged to “incentivize domestic tourism, short trips and visits to nearby destinations in the short term” (UNWTO, 2020: 20). Furthermore, hospitality marketers are urged to “promote proximity and domestic tourism in the short-term enhancing the local value chain” (UNWTO, 2020, p. 17). On the other hand, domestic tourism activities are also aligned with sustainable development goals. For instance, proximity trips usually have a more environmentally-friendly carbon footprint than long-haul transportation.

The bibliographic exploration of LT revealed that this micro-niche has not been investigated extensively, that most publications are relatively recent, and that domestic LT activities have received very little attention. Therefore, results of the market research reported in the previous section offer a valuable insight into the Spanish domestic LT sector. They also seem to suggest that this industry is still far from constituting a solid option in Spain, despite the fact that there is interest in holistic LT experiences on the part of providers and potential customers. The findings indicate that domestic LT has great potential in the current context and should therefore be given deeper consideration. The existing offering should be increased, diversified, and better promoted. Another problem that should be addressed is that providers and destinations tend to concentrate in just a few regions. Some market segments are poorly catered for, and programmes focus on teaching English as a foreign language. Finally, demand and supply differ in their views regarding the idea of offering additional foreign languages.

This study also confirms the relevance of Spain in the LT sphere, both for academia and for the tourism industry. Therefore, insights from the study can serve as a reference for other LT destinations with similar characteristics, potentially leading to fruitful alliances between them.

6. Conclusion

The triangulation of the outcomes and perspectives obtained in this study lead to conclude that the initial research questions were answered and the objectives were also met. A theoretical approach to the LT phenomenon as well as the theoretical and practical implications regarding its impacts has been presented in this article. Moreover, the effects of the COVID-19 pandemic on the LT micro-niche globally and in Spain have been outlined. Additionally, both the private and public supply of domestic LT experiences in this country have

been examined, and insights towards the rebound of LT activities in the short run have been provided.

Owing to the scarcity of information on LT and restricted access to commercial sensitive data, for example regarding flows of language tourists travelling abroad, the scope of this study is limited. Another limitation is the small sample of respondents.

Future investigations could expand the range of variables taken into account in the analysis of the domestic private market. The target population could be extended to include companies offering summer language camps in Spain. Regarding state-funded programmes, further longitudinal research could compare how different governments or regional administrations implement domestic LT programmes. Such studies could provide interesting conclusions concerning amounts of subsidies provided by different administrations, the number of beneficiaries, or resulting impacts on individuals, sectors and destinations in order to evaluate the significance of domestic LT activities in more detail. Likewise, domestic language learning projects launched by non-for-profit organisations could be stimulated and included in the market analysis. Future studies could also be undertaken to analyse demand and supply in post-COVID scenarios. Insights from these studies could help to design valid strategies responding to future threats and preparing for opportunities associated with the growing interest in digitalisation and sustainable tourism practices.

In line with Iglesias et al. (2019), the creation of a LT observatory might be useful to address some of this industry's challenges. An observatory could provide scientific knowledge and play a role in promoting this micro-niche, especially in view of the fact that there is currently no organisation that represents domestic LT providers and that could function as a counterpart of FEDELE or ASEPROCE.

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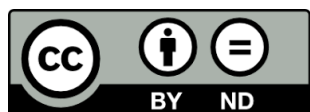
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Analiza turystyki językowej w Hiszpanii

Streszczenie. Ogólnym celem niniejszej analizy było zbadanie procesu rewitalizacji turystyki językowej w Hiszpanii. Zadanie to zostało zrealizowane poprzez opis zagadnienia turystyki językowej, analizę hiszpańskiego rynku turystyki językowej i przegląd krajowej oferty turystyki językowej w Hiszpanii. W ramach badania dokonano przeglądu literatury i wielu stron internetowych poświęconych temu tematowi. Przeprowadzono zogniskowane wywiady grupowe z czterema nielosowo wybranymi osobami korzystającymi z turystyki językowej. Ponadto przeprowadzono pogłębiony, częściowo ustrukturyzowany wywiad z podmiotem oferującym zakwaterowanie w czasie studiów za granicą. Dane jakościowe zostały opracowane na podstawie analizy zebranych treści, analizy SWOT oraz zostały poddane kategoryzacji przed ich triangulacją. Choć hiszpański rynek turystyki językowej wyjazdowej i przyjazdowej jest dość skonsolidowany, w kraju zidentyfikowano zaledwie 17 prywatnych firm i tylko 5 publicznych programów specjalizujących się w nauce języka angielskiego jako języka obcego. Oferta prywatna jest bardzo ograniczona i skierowana do bardzo konkretnych segmentów. Programy publiczne w latach 2019-2020 były wspierane środkami w łącznej kwocie 4,7 mln euro, a skorzystało z nich ponad 9000 osób. Sektor ten był do tej pory słabo zbadany i stanowi doskonałą okazję do bliskich podróży. Przeprowadzona analiza pozwala stwierdzić, że potrzeba większej i bardziej zróżnicowanej oferty, a także lepszej promocji. Będzie to wymagało zaangażowania wszystkich zainteresowanych stron, tzn. ścisłej współpracy dostawców prywatnych oraz administracji publicznej w planowaniu i wdrażaniu zrównoważonych polityk.

Słowa kluczowe: turystyka krajowa, turystyka edukacyjna, turystyka językowa, oddziaływania zrównoważone



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