

EUROPARC CONFERENCE 2014

Killarney, Ireland

Workshop 13: The value of protected areas as sustainable tourism destinations

Study of the economical impact of tourism in La Garrotxa 2001-2010

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The European Charter for Sustainable Tourism in protected areas

- The European Charter for Sustainable Tourism in Protected Areas is a **practical management tool** that enables protected areas to develop sustainable tourism.
- The European Charter for Sustainable Tourism in Protected Areas (ECST) is a **Europarc Federation programme**.
- The core element of the Charter is **working in partnership** with all relevant stakeholders to develop a common sustainable tourism strategy and an action plan on the basis of a thorough situation analysis



The Charter's success in Europe

- First parks awarded in 2001
- 119 parks awarded in 2013
- From 13 European countries: Demank (1), Finland (3), France (26), Germany (4), Italy (20), Latvia (1), Lithuania (2), Netherlands (3), Norway (1), Portugal (6), Spain (38) and United Kingdom (13).



Time for evaluation

- After 14 years implementing ECST in so many parks, we need to have a clear evaluation of its results, and show how it contributes to conservation and economical and social development.

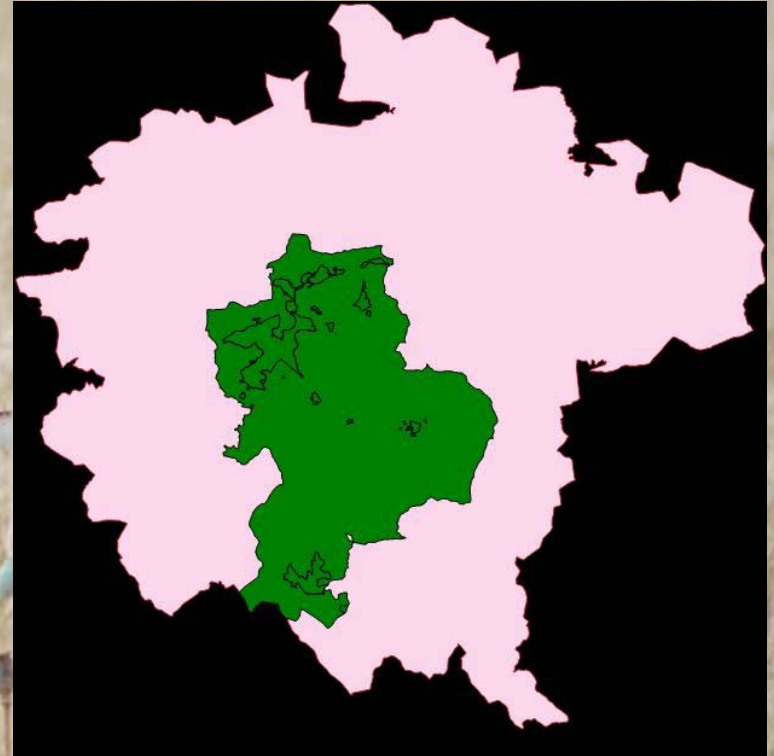


La Garrotxa study of economical impact of tourism during the period 2001-2010

- Ordered by:
 - Consell Comarcal de la Garrotxa.
 - Turisme Garrotxa Tourism Association.
 - Parc Natural de la Zona Volcànica de la Garrotxa.
- Executed by: Advanced Leisure Services (ALS).
- Cost 17.000 €
- Made in 2011



Introducing La Garrotxa: “magic numbers”



- Area: 73.507,96 ha
- Natura 2000 habitats within the Charter area: 39.410,38 ha

The Park



- 15.708 hectares
- 40.000 inhabitants
- Created in 1982 by Law by the Parliament of Catalonia.
- Managed by the Catalan Ministry of Agriculture.
- First Spanish Park awarded with the ECST in 2001.



- 40 volcanic cones
- 20 lava flows
- The best preserved volcanic area in the Iberian peninsula
- Rich flora with more than 900 species of superior plants.
- 60% of the territory are woodlands.



- Population within two hours: 6.038.698
- Visitors per year: 600.000
- This is only a rough estimation. We only know exactly the number of visitors attended in the Park's Information Centres: 79.000 in 2010.





- Organisations involved in the charter process: 37
- Businesses involved in the charter forum: 121.
- Charter partners businesses (Charter Part II): 22

The European Charter in La Garrotxa Volcanic Zone Natural Park

- In 1996 the Park became one of the 10 Pilot parks for the definition process of the ECST.
- In 2001 was one of the first 7 parks awarded with the ECST.
- This first Action Plan in La Garrotxa (2001-2005) with 23 action generated an effective investment of 9.414.450 € In five years.



In 2006 First Renewal of the award

- New Strategy and Action Plan 2006-2010
- Containing 93 actions
- With a final investment of 5,4 M €



Parc Natural
de la Zona Volcànica
de la Garrotxa



2011 Second Re-evaluation

- New strategy and Action Plan 2011-2015
- 95 actions
- With an estimated budget of 2,4 M €



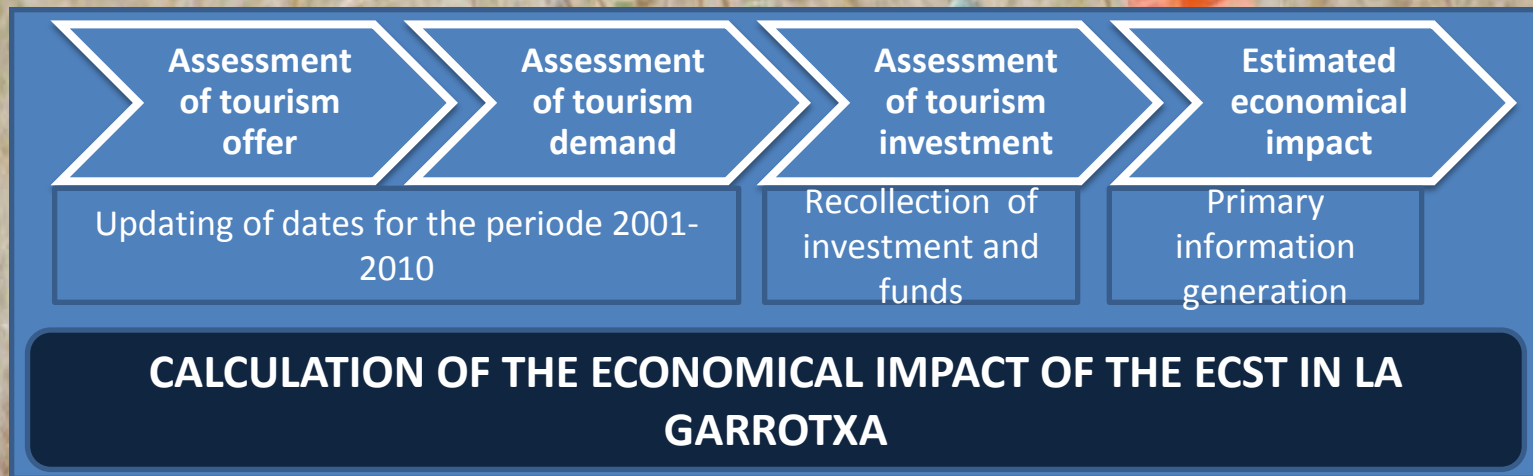
Some results

- Tourism development has been planned in La Garrotxa now for more than 10 years in a sustainable and participative way.
- Direct relationship with more than 60 tourism businesses cooperating with the park and giving its customers reliable information about the park's values and management.



Study of economical impact: aims and methodology

- ❑ To know the **evolution of the tourism offer** from 2001 a 2010.
- ❑ To know the **evolution of the tourism demand** from 2001 a 2010.
- ❑ To Define the **methodology and key variables** in order to assess the economical and social impact of the tourism activity in la Garrotxa in the period 2001 to 2010.
- ❑ **Conclusions and indicators** for a yearly actualization.



Sources for Assessment

Direct Sources

- ☐ Questionnaire submitted to the local council and private tourism businesses asking for figures for the period 2001-2010.
- ☐ From 11th July to 23 September 18 filled questionnaires.
- ☐ 502 questionnaires from July and August to customers in order to know their behaviour in economical terms and proceed to an estimation of the global expenses during the stay.

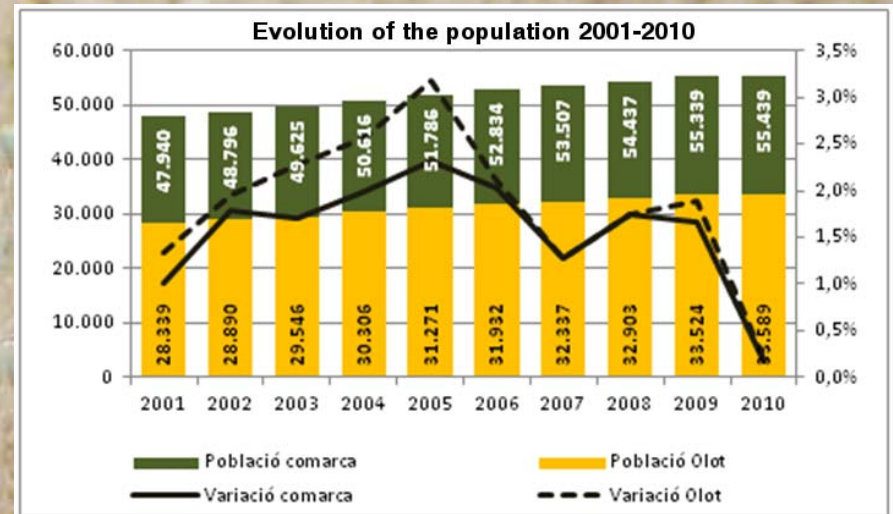
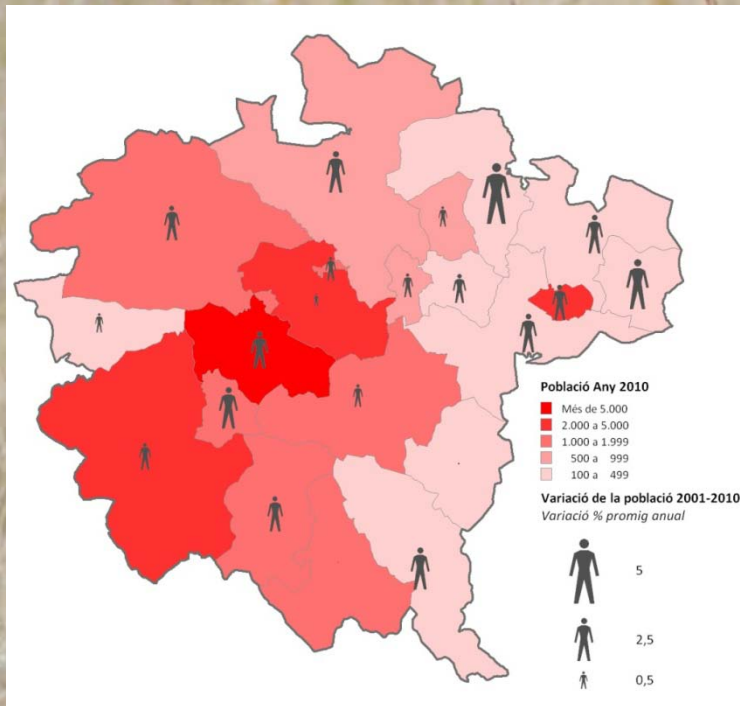
Indirect sources

- ☐ National and Regional economical annuals.



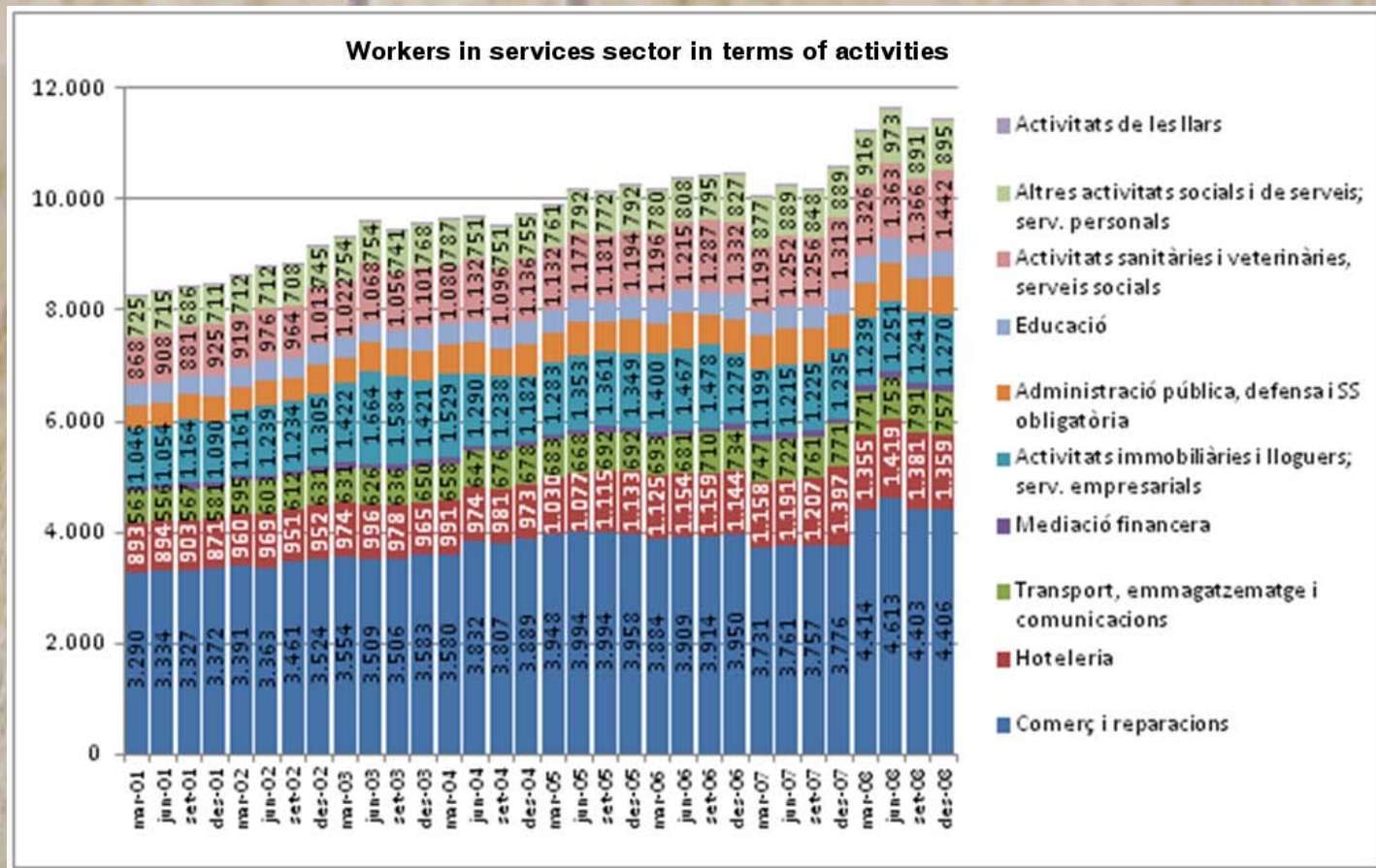
Evolution of the population 2001-2010

- ❑ The evolution of the population during the period registers an average increase of 1,6% in the whole La Garrotxa territory and of 1,9% in Olot city.



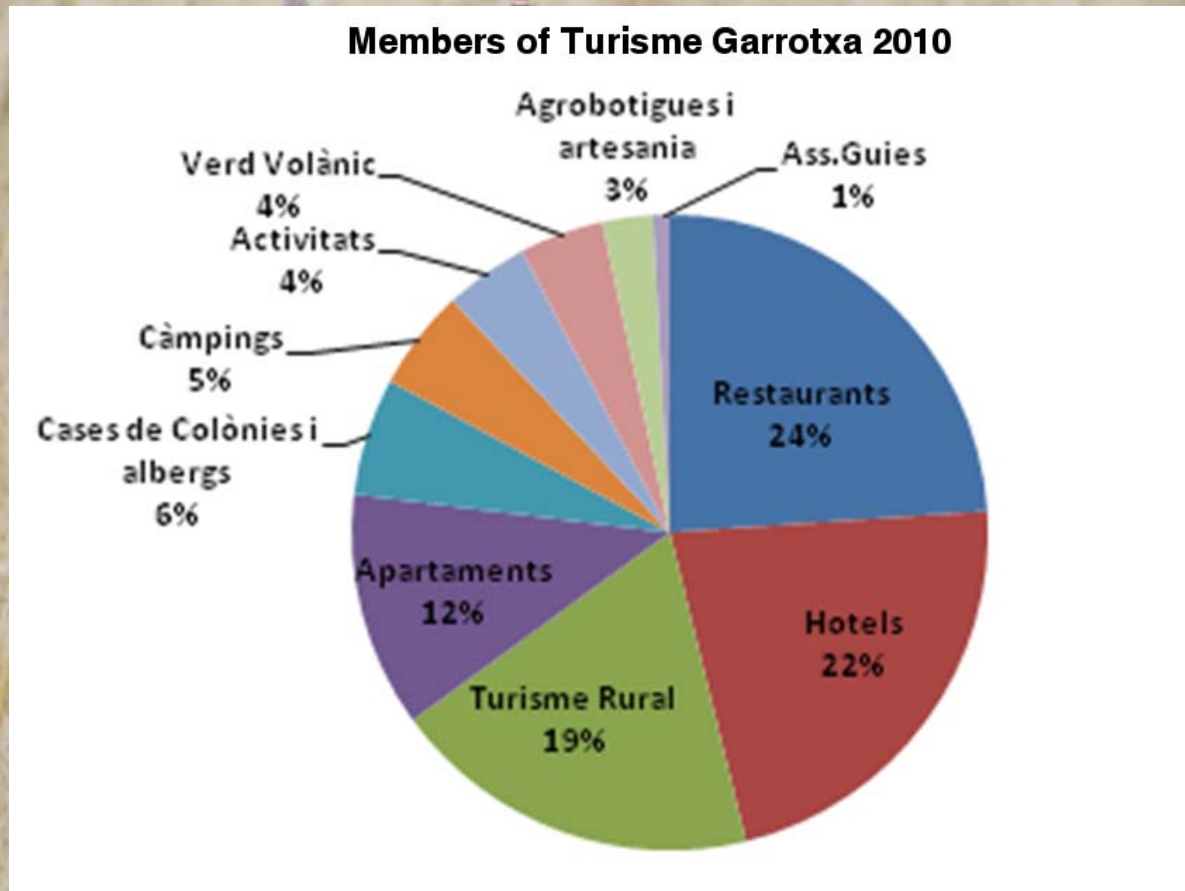
Socio-economical assessment of services sector

- Trade is the activity with more workers as it represents 38% of the total amount in services sector. Concerning accommodation, it represents only 12% in this sector, 35% of them autonomous workers.



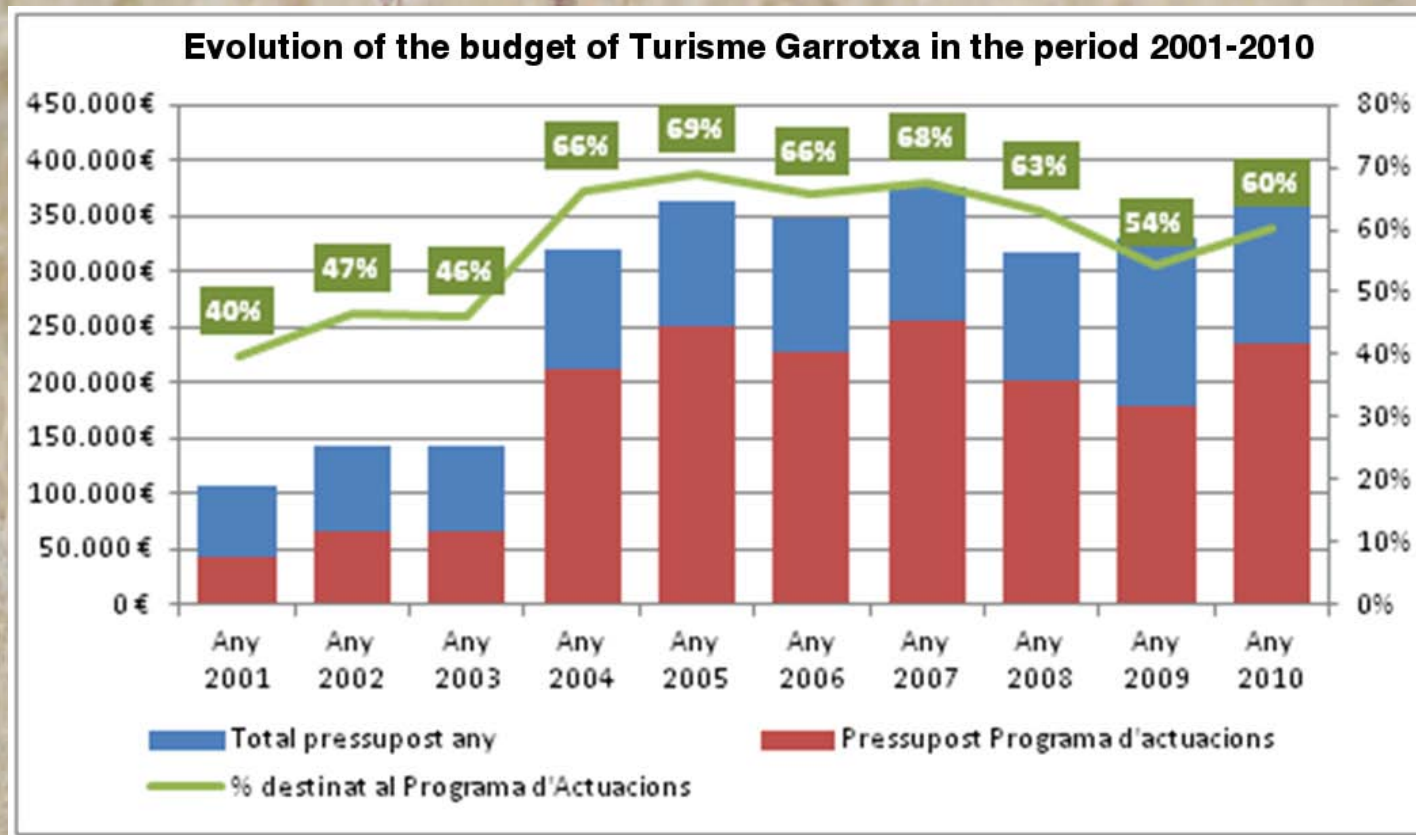
The tourism association TURISME GARROTXA

31 partners and 117 directly joint businesses. Indirectly offers its services to more than 200 tourism businesses in La Garrotxa.

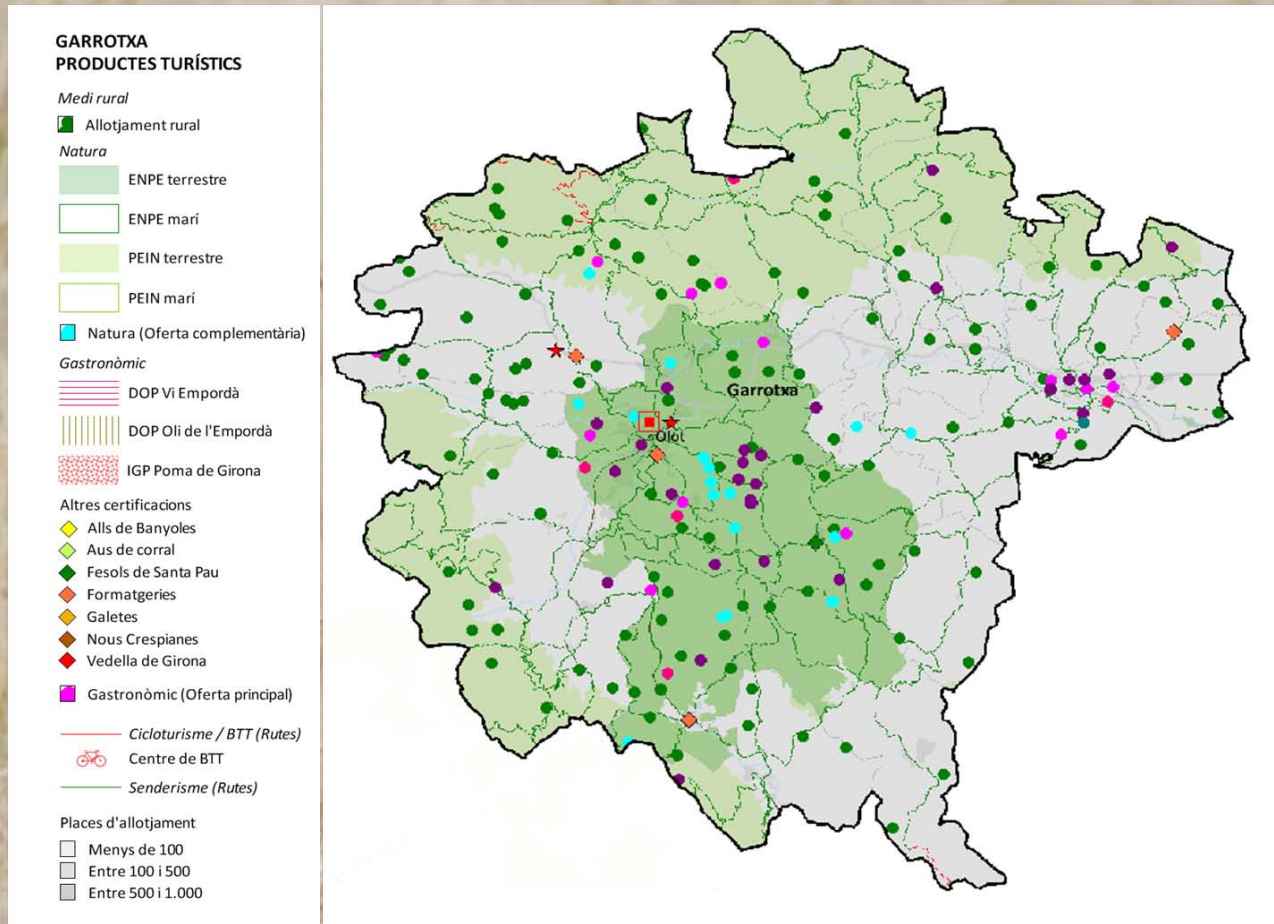


Evolution of the budget of Turisme Garrotxa in the period 2001-2010

The global budget for the period from 2001 to 2010 was of 2.832.349,01€, and of it, 1.731.350,89€ were invested in the fulfilment of the Action Programmes. This means 61% of the global budget.



Distribution of natural and cultural resources in the territory



Evolution of the tourism offer: accommodation

Accommodation 2001-2010: + 118 establishments, + 1.449 places.

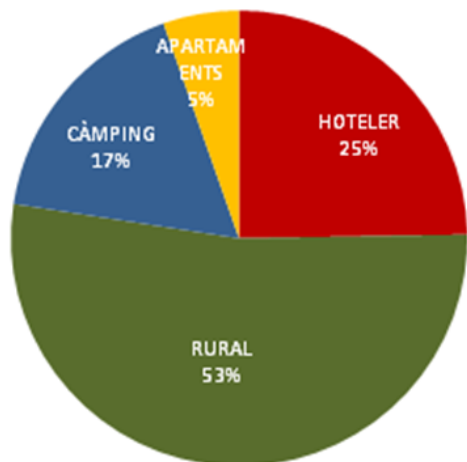
Average increase rate for the period of 9,7% for establishments and of 2,9% in terms of available places.

Accommodation		Registered equipments								
Allotjament	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Hotel	23	26	29	29	34	37	40	41	42	42
B&B	49	62	70	76	85	93	96	101	108	116
Camping	16	16	16	16	16	16	16	17	17	17
Apartments	5	7	15	19	27	29	32	35	36	36
TOTAL	93	111	130	140	162	175	184	194	203	211

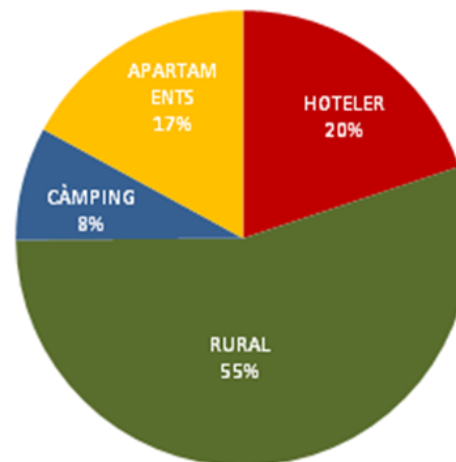
		Registered places								
Allotjament	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Hotel	721	761	808	808	882	922	967	1.010	1.016	1.016
B&B	445	539	590	638	722	784	823	872	933	985
Camping	3.729	3.729	3.729	3.729	3.729	3.729	3.729	3.915	3.915	3.915
Apartments	80	120	236	288	412	420	436	476	548	548
TOTAL	5.015	5.265	5.415	5.587	5.753	5.871	5.995	6.345	6.412	6.464

Evolution of the tourism offer: accommodation establishments

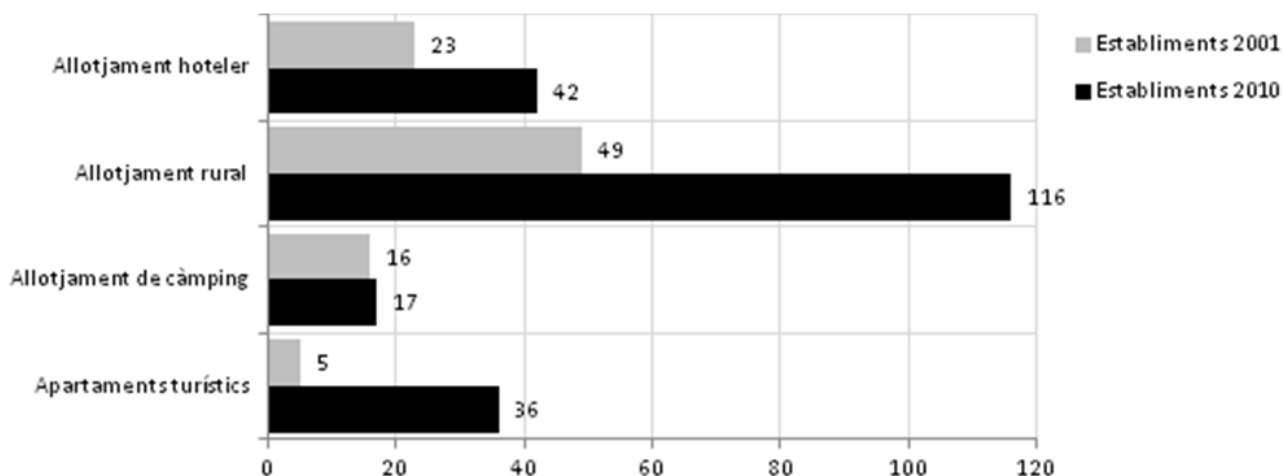
Accommodation equipments 2001



Accommodation equipments 2010

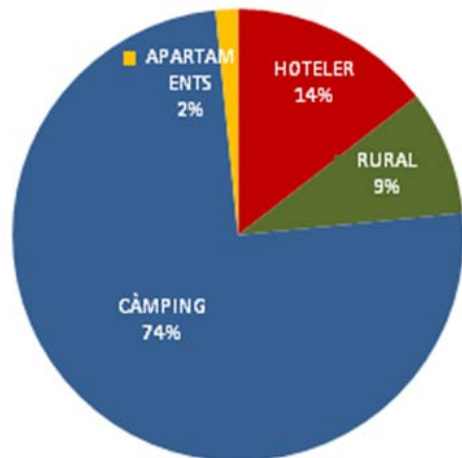


Number of regulated accommodation equipments by typology 2001 and 2010

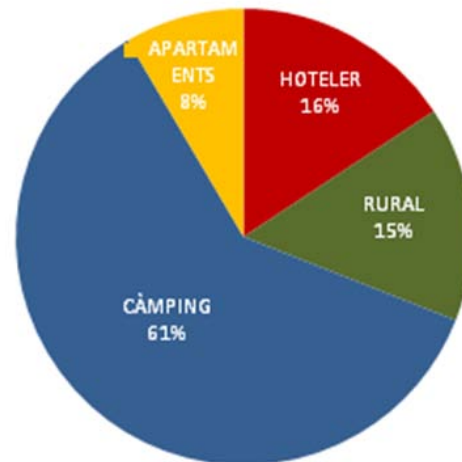


Evolution of the tourism offer: accommodation places

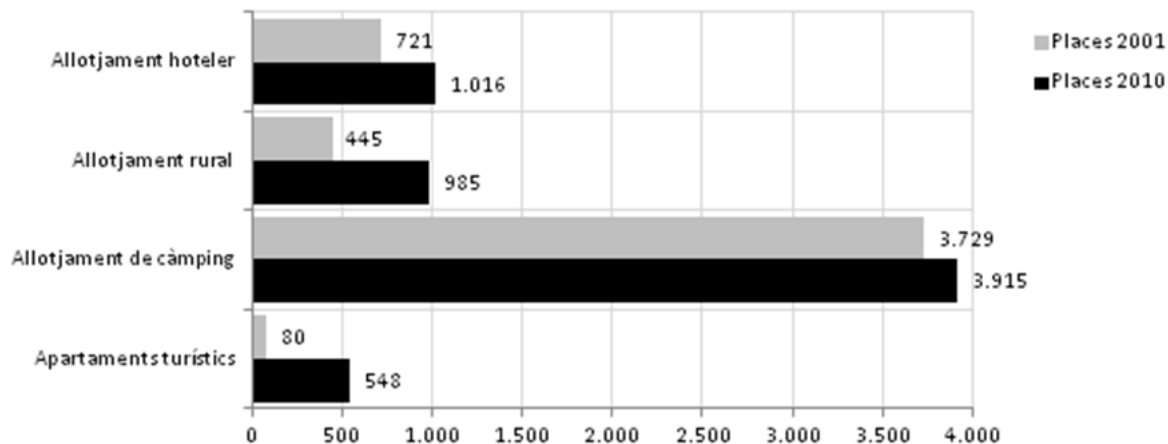
Accomodation places 2001



Accomodation places 2001



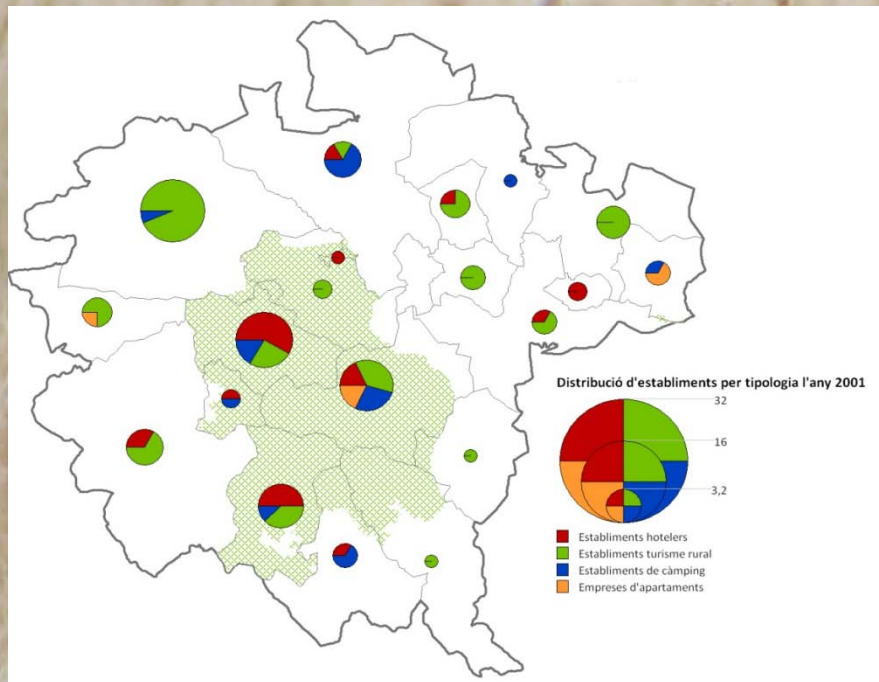
Number of places of regulated accommodations by typology, 2001 and 2010



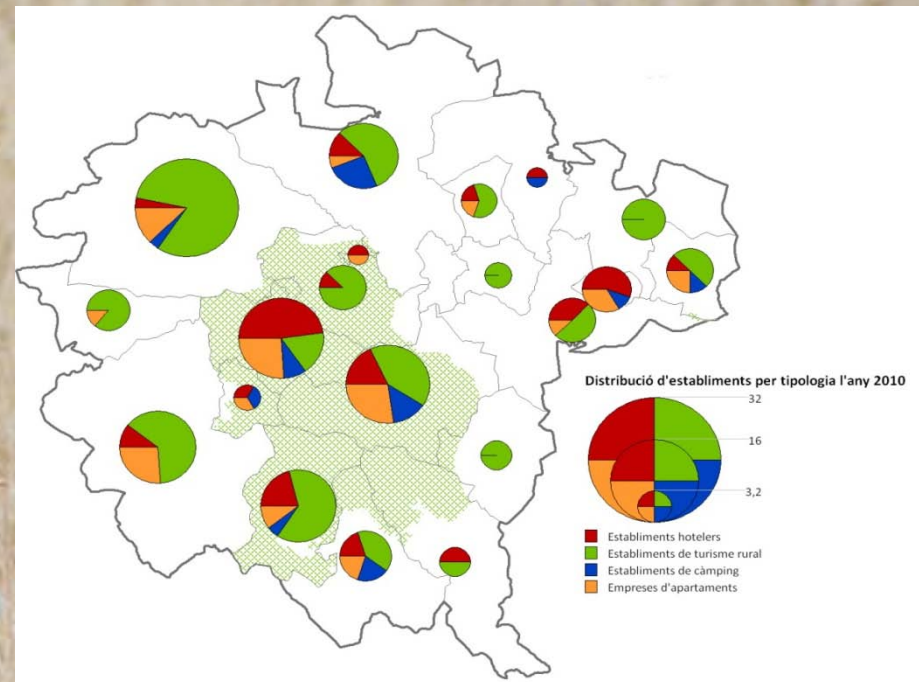
Evolution of the tourism offer: accommodation.

Territorial distribution by typologies

2001



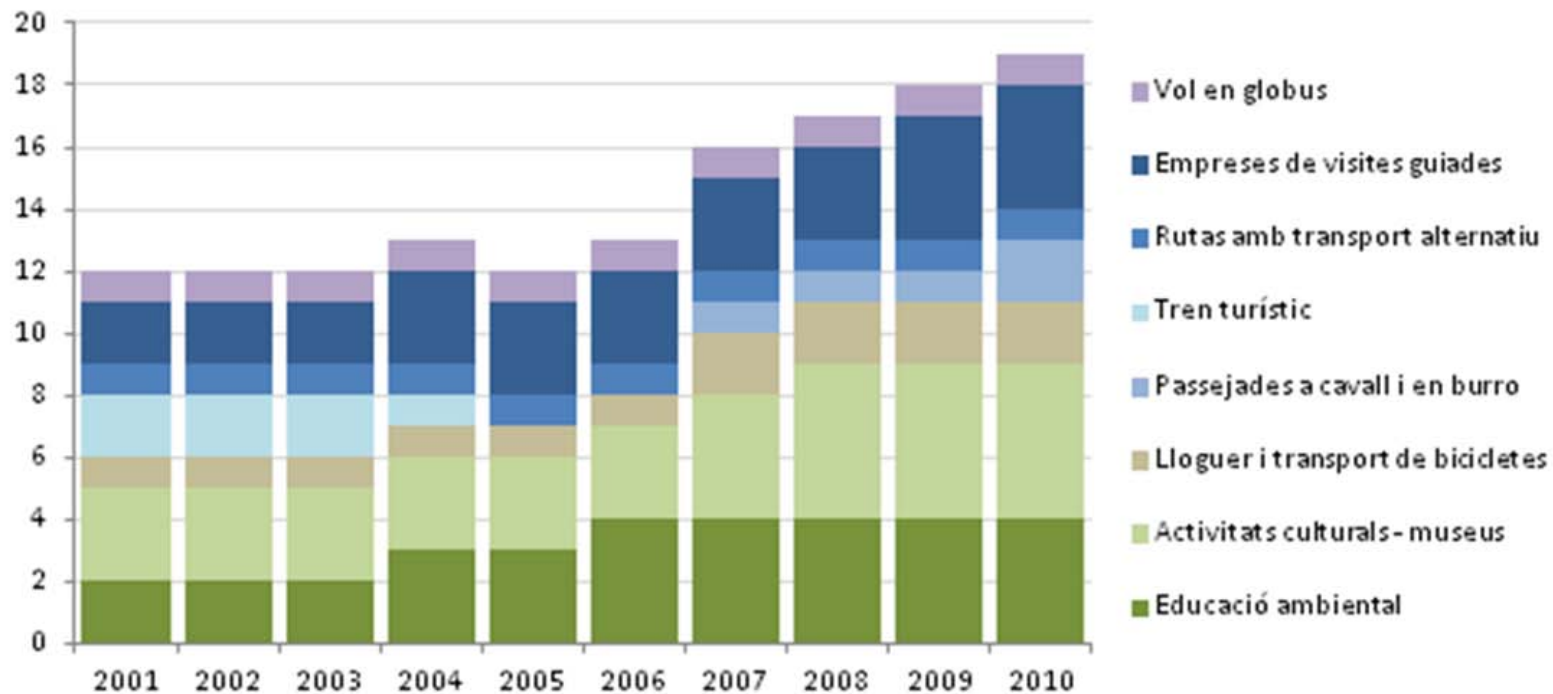
2010



Evolution of the tourism offer: Sporting and nature activities businesses

Sporting and nature activities linked to the enjoyment and interpretation of the territory, its natural and cultural resources, and open air activities registered a shift from 12 to 19 in the period 2001-2010.

Evolution of the tourism offer: Sporting and nature activities businesses, 2001 and 2010

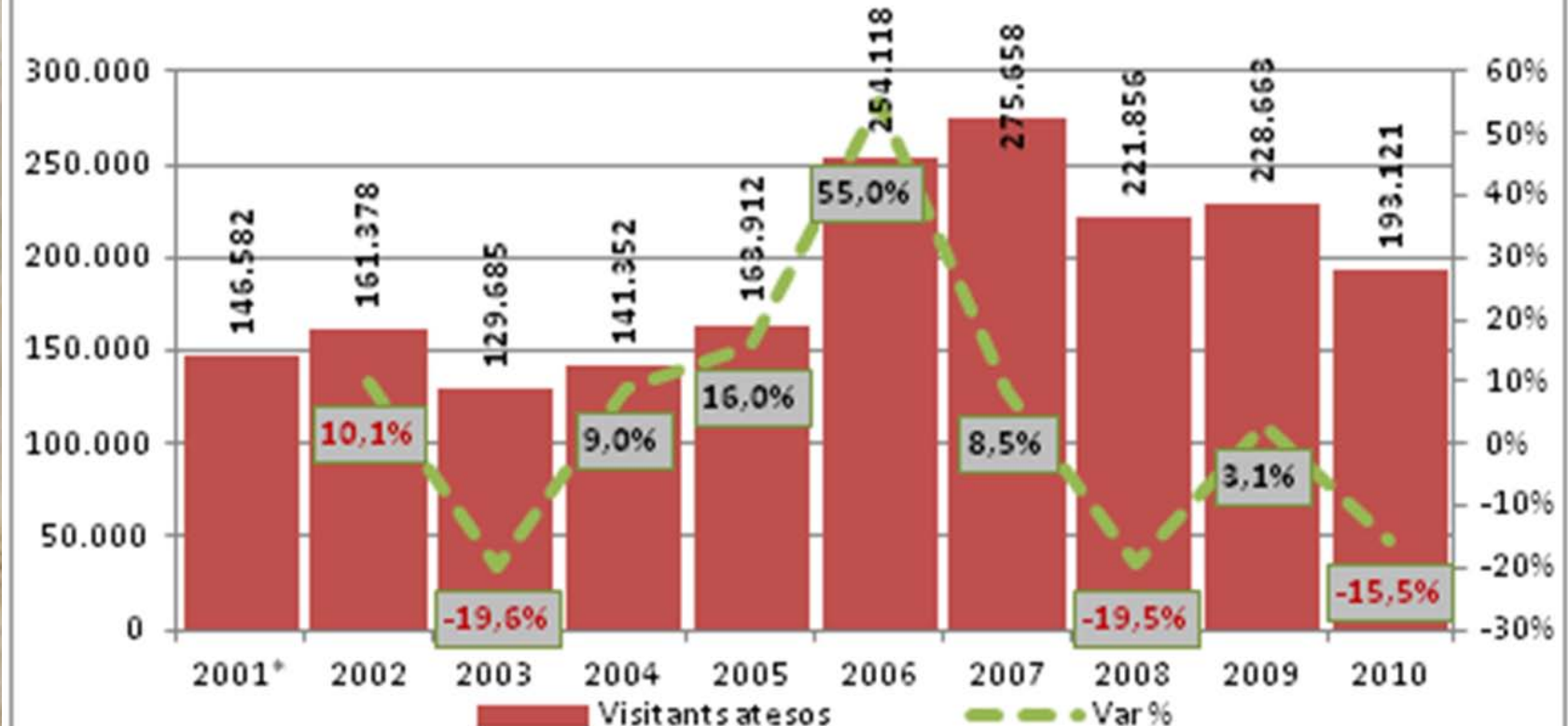


Evolution of the tourism demand: estimated number of customers

Estimated number of customers 2001 - 2010										
Accommodation	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Hotel	32.324	31.805	35.884	35.457	41.808	44.472	47.826	48.061	44.845	49.273
B&B	12.786	14.962	17.551	17.953	19.642	21.700	26.011	27.014	28.323	25.216
Camping	71.871	70.406	87.322	75.558	72.571	72.176	76.330	74.988	75.090	74.667
Appartments	1.434	2.001	3.714	3.548	4.691	4.654	5.360	5.636	6.325	6.533
Others	67.000	67.000	67.000	67.000	67.000	67.000	67.000	67.000	67.000	67.000
Collective accommodation	185.416	186.174	211.471	199.517	205.712	210.003	222.527	222.698	221.582	222.690
Private accommodation	25.769	25.874	29.390	27.728	28.589	29.186	30.926	30.950	30.795	30.949
One day visitors	85.007	85.355	96.952	91.472	94.312	96.279	102.021	102.100	101.588	102.096
TOTAL	296.192	297.403	337.813	318.717	328.613	335.468	355.474	355.748	353.965	355.735
Absolute yearly increasing		1.211	40.411	-19.096	9.896	6.855	20.006	273	-1.783	1.770
Increasing per year %		0,41%	13,59%	-5,65%	3,10%	2,09%	5,96%	0,08%	-0,50%	0,50%

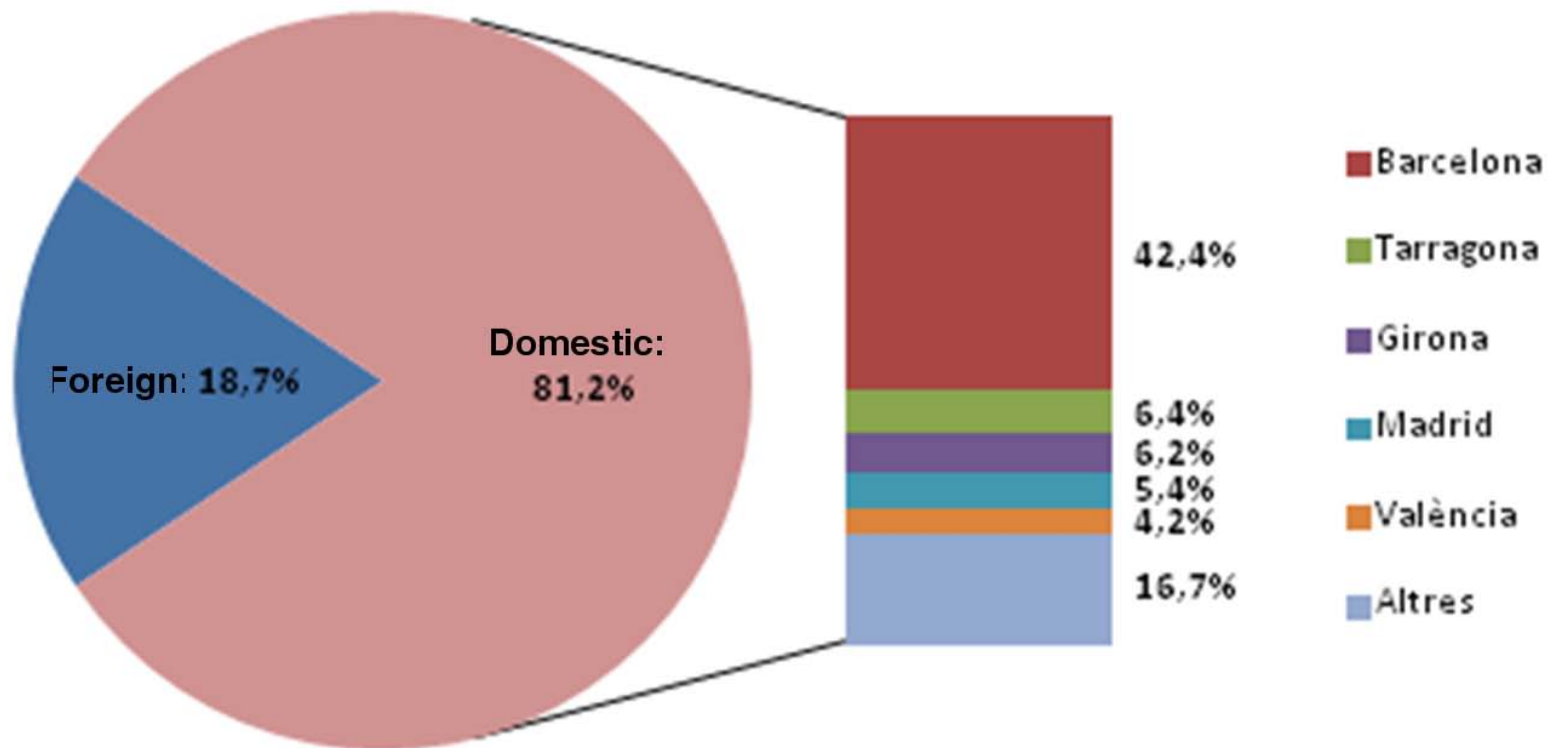
Evolution of the tourism demand: estimated number of visitors attended in the Information Points network

Evolution of the tourism demand: estimated number of visitors attended in the Information Points network 2001 -2010

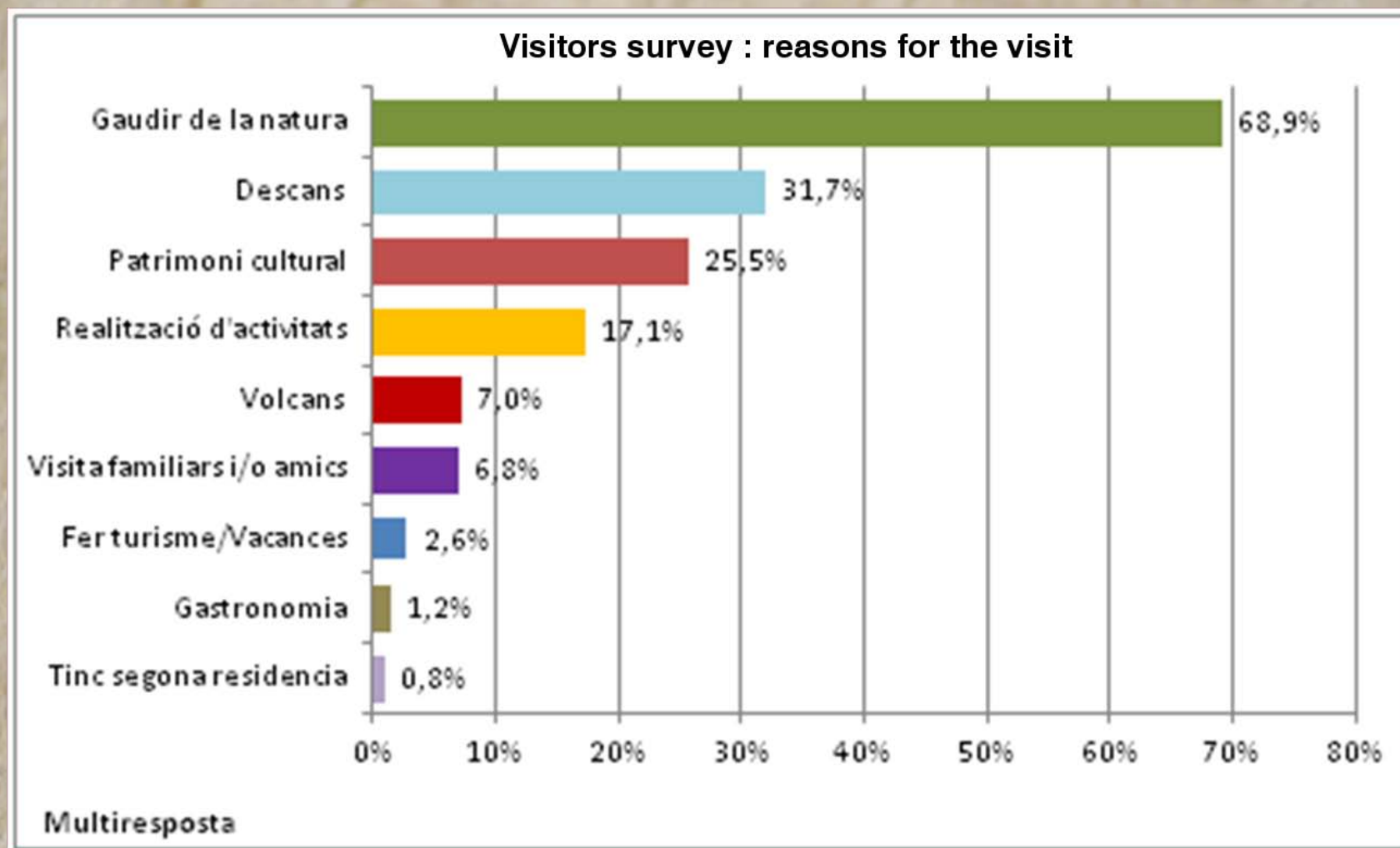


Visitors survey : place of origin

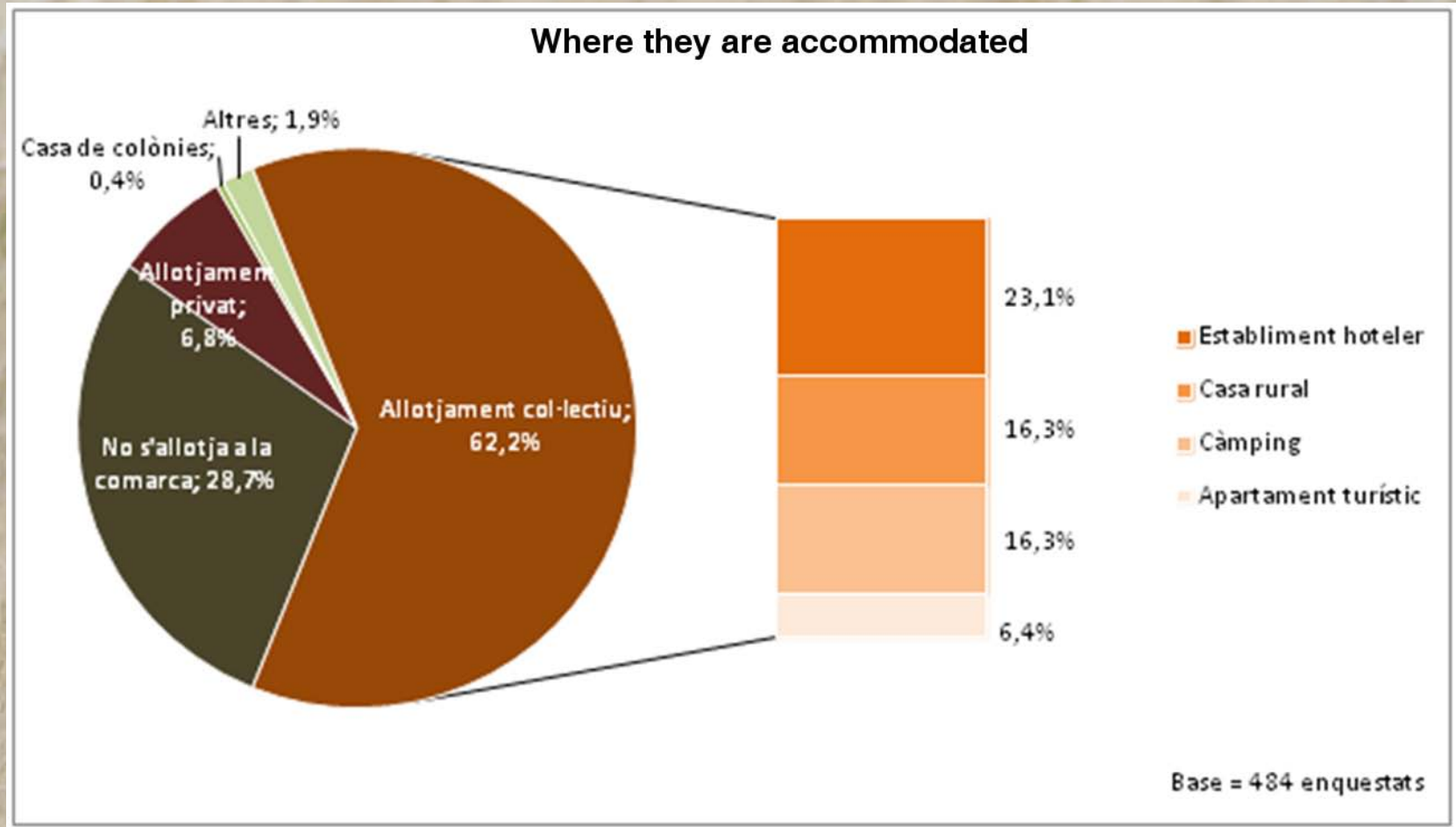
Visitors survey : they place of origin



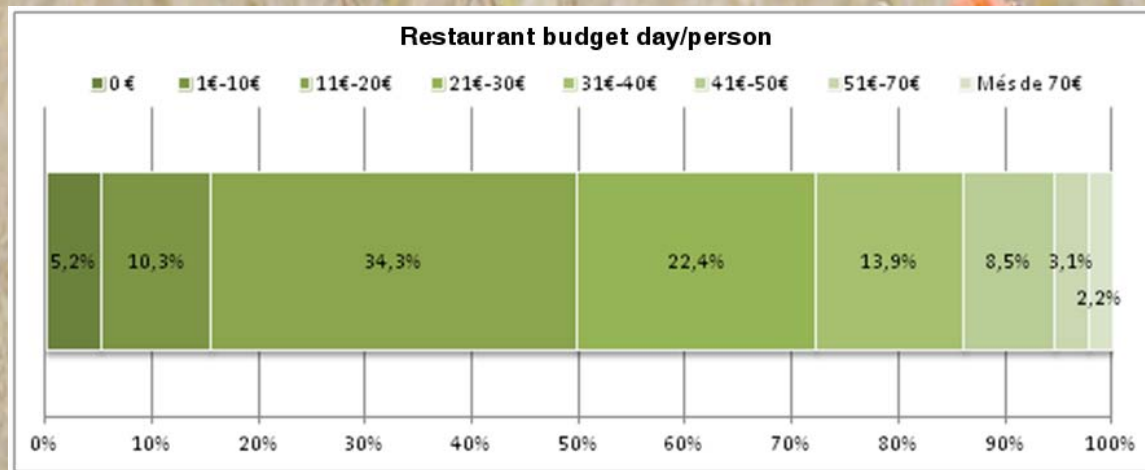
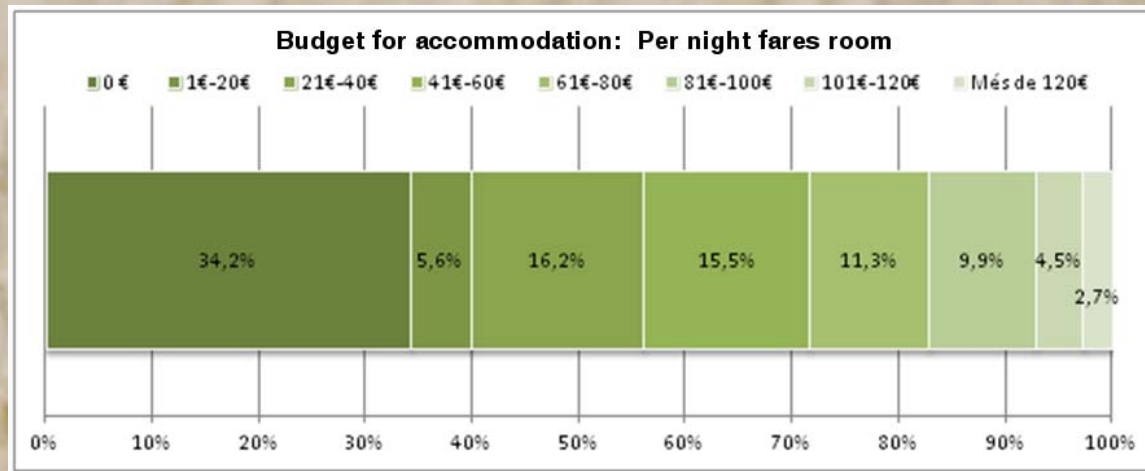
Visitors survey : reasons for the visit



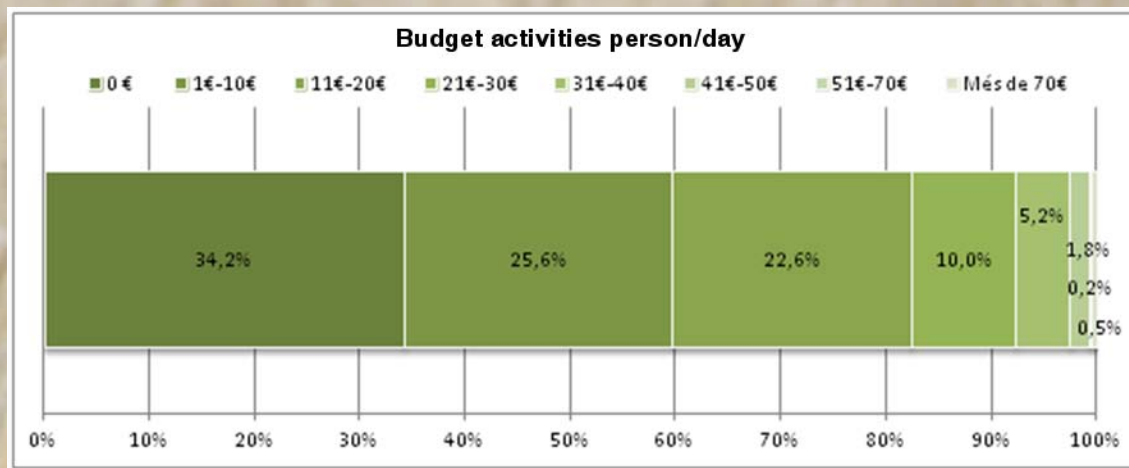
Visitors survey : where are they accommodated



Visitors survey : budget for accommodation and restaurants



Visitors survey : budget for activities and shopping



Visitors survey : distribution of average budget

Average budget	
Accommodation	38,20 €
Restaurant	23,41 €
Activities	10,24 €
Shopping	14,11 €



Socio-economical estimated impact: concepts

Direct
effect

Indirect
effect

Induced
effect



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de la Garrotxa



Socio-economical estimated impact: direct impact

Investment by agents in tourism activities	Estimated amount
European Charter for Sustainable Tourism (ECST)	3.651.312,00€
Parc Natural Zona Volcànica de la Garrotxa (PNZVG)	1.871.293,51€
Consorti de l'Alta Garrotxa (CAG)	1.167.195,97€
Municipalities	18.095.450,47€
Second home investments	34.491.047,15€
Private investments: setting up of tourist offer	38.508.333,00€
Private investments: improvement of tourist offer	1.525.429,09€
TOTAL AGENTS	99.330.116,19€

Total socio-economical estimated impact

Global economical impact	Employment	Income	Human resources costs	Salaries	Social Security	Taxes	IRPF	SS worker
Direct	5.990	312.472.581 €	91.136.514 €	69.263.751 €	21.872.763 €	26.122.708 €	9.696.925 €	4.155.825 €
Indirect	1.961	329.943.738 €	53.890.201 €	40.956.553 €	74.627.823 €	4.505.221 €	7.298.688 €	3.128.009 €
Induced	688	63.750.605 €	16.103.073 €	12.368.561 €	3.531.420 €	203.092 €	1.731.599 €	742.114 €
TOTAL	8.639	706.166.924 €	161.129.789 €	122.588.865 €	100.032.006 €	30.831.021 €	18.727.212 €	8.025.948 €



Socio-economical estimated impact highlights

Summary

The monetary amount generated by tourism in La Garrotxa during the studied period 2001-2010 has risen to **700 Million EUROS**

➤ It has created **8.500 new jobs**.

- 70% directly
- 22% indirectly
- 8% induced.

➤ The Total amount of income taxes generated has been of **160 Million EUROS**



Socio-economical estimated impact highlights

Summary

- The economical activity generated by tourism in La Garrotxa represents between **7% and 9%** of the Gross Domestic Product.
- It's a sector clearly in development, generating direct jobs and contributing to generate jobs in other sectors, specially in the commercial one.
- As the main aim for visitors in La Garrotxa are nature and landscape, both relevant features of this territory, the existence of current nature conservation politics (protected areas) are clearly compatible with the tourism activity.
- It's worth to be highlighted that all the tourism politics developed in La Garrotxa are implemented with the full agreement of all it's partners, public and private, and following the model inspired by the European Charter for Sustainable Tourism in Protected Areas, the EUROPARC Federation star programme.



Thank you very much for your attention



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