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

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

Josep M. Prats
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: Denmark (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 €
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.

CALCULATION OF THE ECONOMICAL IMPACT OF THE ECST IN LA GARROTXA
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.
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.

<table>
<thead>
<tr>
<th>Accommodation</th>
<th>2001</th>
<th>2002</th>
<th>2003</th>
<th>2004</th>
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<td>Hotel</td>
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<td>40</td>
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<td>B&amp;B</td>
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<td>93</td>
<td>96</td>
<td>101</td>
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<td>Camping</td>
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<td>Apartments</td>
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<td>TOTAL</td>
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<td>130</td>
<td>140</td>
<td>162</td>
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<th>Registered equipments</th>
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<td>Hotel</td>
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<td>761</td>
<td>808</td>
<td>808</td>
<td>882</td>
<td>922</td>
<td>967</td>
<td>1,010</td>
<td>1,016</td>
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<td>B&amp;B</td>
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<td>539</td>
<td>590</td>
<td>638</td>
<td>722</td>
<td>784</td>
<td>823</td>
<td>872</td>
<td>933</td>
<td>985</td>
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<td>Apartments</td>
<td>80</td>
<td>120</td>
<td>236</td>
<td>288</td>
<td>412</td>
<td>420</td>
<td>436</td>
<td>476</td>
<td>548</td>
<td>548</td>
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</tbody>
</table>
Evolution of the tourism offer: accommodation establishments

Number of regulated accommodation equipments by typology 2001 and 2010

- **Allotjament hoteler**
  - Establiments 2001: 23
  - Establiments 2010: 42

- **Allotjament rural**
  - Establiments 2001: 49
  - Establiments 2010: 116

- **Allotjament de càmping**
  - Establiments 2001: 16
  - Establiments 2010: 17

- **Apartaments turístics**
  - Establiments 2001: 5
  - Establiments 2010: 36

*Parc Natural de la Zona Volcànica de la Garrotxa*
Evolution of the tourism offer: accommodation places

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

- **Allotjament hoteler**: 721 (2001), 1,016 (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 demand: estimated number of customers

<table>
<thead>
<tr>
<th></th>
<th>2001</th>
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<tr>
<td><strong>Accommodation</strong></td>
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<tr>
<td>Hotel</td>
<td>32.324</td>
<td>31.805</td>
<td>35.884</td>
<td>35.457</td>
<td>41.808</td>
<td>44.472</td>
<td>47.826</td>
<td>48.061</td>
<td>44.845</td>
<td>49.273</td>
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<td>Camping</td>
<td>71.871</td>
<td>70.406</td>
<td>87.322</td>
<td>75.558</td>
<td>72.571</td>
<td>72.176</td>
<td>76.330</td>
<td>74.988</td>
<td>75.090</td>
<td>74.667</td>
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<td>Others</td>
<td>67.000</td>
<td>67.000</td>
<td>67.000</td>
<td>67.000</td>
<td>67.000</td>
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<td><strong>Collective</strong></td>
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<td></td>
<td></td>
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<tr>
<td>accommodation</td>
<td>185.416</td>
<td>186.174</td>
<td>211.471</td>
<td>199.517</td>
<td>205.712</td>
<td>210.003</td>
<td>222.527</td>
<td>222.698</td>
<td>221.582</td>
<td>222.690</td>
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<td><strong>Private</strong></td>
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<td></td>
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<td></td>
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<td></td>
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<tr>
<td><strong>One day visitors</strong></td>
<td>85.007</td>
<td>85.355</td>
<td>96.952</td>
<td>91.472</td>
<td>94.312</td>
<td>96.279</td>
<td>102.021</td>
<td>102.100</td>
<td>101.588</td>
<td>102.096</td>
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<tr>
<td><strong>TOTAL</strong></td>
<td>296.192</td>
<td>297.403</td>
<td>337.813</td>
<td>318.717</td>
<td>328.613</td>
<td>335.468</td>
<td>355.474</td>
<td>355.748</td>
<td>353.965</td>
<td>355.735</td>
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<tr>
<td><strong>Absolute yearly</strong></td>
<td></td>
<td></td>
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<td></td>
<td></td>
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<tr>
<td><strong>Increasing</strong></td>
<td>0.41%</td>
<td>13.59%</td>
<td>-5.65%</td>
<td>3.10%</td>
<td>2.09%</td>
<td>5.96%</td>
<td>0.08%</td>
<td>-0.50%</td>
<td>0.50%</td>
<td></td>
</tr>
</tbody>
</table>
Evolution of the tourism demand: estimated number of visitors attended in the Information Points network 2001-2010
Visitors survey: place of origin

- Domestic: 81.2%
- Foreign: 18.7%

- Barcelona: 42.4%
- Tarragona: 6.4%
- Girona: 6.2%
- Madrid: 5.4%
- València: 4.2%
- Altres: 16.7%
Visitors survey: reasons for the visit

- Gaudir de la natura: 68.9%
- Descans: 31.7%
- Patrimoni cultural: 25.5%
- Realització d’activitats: 17.1%
- Volcans: 7.0%
- Visita familiars i/o amics: 6.8%
- Ferturisme/Vacances: 2.6%
- Gastronomia: 1.2%
- Tinc segona residència: 0.8%
- Multiresposta
Visitors survey: where are they accommodated

- Allotjament col·lectiu: 62.2%
- Allotjament privat: 6.8%
- No s'allotja a la comarca: 28.7%
- Altres: 1.9%
- Casa de colònies: 0.4%

Base = 484 enquestats
Visitors survey: budget for accommodation and restaurants

**Budget for accommodation: Per night fares room**

- 0 €: 34.2%
- 1€-20€: 5.6%
- 21€-40€: 16.2%
- 41€-60€: 15.5%
- 61€-100€: 11.3%
- 101€-120€: 9.9%
- Más de 120€: 4.5%
- Total: 100%

**Restaurant budget day/person**

- 0 €: 5.2%
- 1€-10€: 10.3%
- 11€-20€: 34.3%
- 21€-30€: 22.4%
- 31€-40€: 13.9%
- 41€-50€: 8.5%
- 51€-70€: 3.1%
- Más de 70€: 2.2%
- Total: 100%
Visitors survey: budget for activities and shopping
Visitors survey: distribution of average budget

<table>
<thead>
<tr>
<th>Average budget</th>
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<tbody>
<tr>
<td>Accomodation</td>
<td>38.20 €</td>
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<tr>
<td>Restaurant</td>
<td>23.41 €</td>
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<tr>
<td>Activities</td>
<td>10.24 €</td>
</tr>
<tr>
<td>Shopping</td>
<td>14.11 €</td>
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</table>
Socio-economical estimated impact: concepts

Direct effect → Indirect effect → Induced effect
Socio-economical estimated impact: direct impact

<table>
<thead>
<tr>
<th>Investment by agents in tourism activities</th>
<th>Estimated amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>European Charter for Sustainable Tourism (ECST)</td>
<td>3.651.312,00€</td>
</tr>
<tr>
<td>Parc Natural Zona Volcànica de la Garrotxa (PNZVG)</td>
<td>1.871.293,51€</td>
</tr>
<tr>
<td>Consorci de l’Alta Garrotxa (CAG)</td>
<td>1.167.195,97€</td>
</tr>
<tr>
<td>Municipalities</td>
<td>18.095.450,47€</td>
</tr>
<tr>
<td>Second home investments</td>
<td>34.491.047,15€</td>
</tr>
<tr>
<td>Private investments: setting up of tourist offer</td>
<td>38.508.333,00€</td>
</tr>
<tr>
<td>Private investments: improvement of tourist offer</td>
<td>1.525.429,09€</td>
</tr>
<tr>
<td><strong>TOTAL AGENTS</strong></td>
<td><strong>99.330.116,19€</strong></td>
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</table>
Total socio-economical estimated impact

<table>
<thead>
<tr>
<th>Global economical impact</th>
<th>Employment</th>
<th>Income</th>
<th>Human resources costs</th>
<th>Salaries</th>
<th>Social Security</th>
<th>Taxes</th>
<th>IRPF</th>
<th>SS worker</th>
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<tbody>
<tr>
<td>Indirect</td>
<td>1.961</td>
<td>329.943.738 €</td>
<td>53.890.201 €</td>
<td>40.956.553 €</td>
<td>74.627.823 €</td>
<td>4.505.221 €</td>
<td>7.298.688 €</td>
<td>3.128.009 €</td>
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<tr>
<td>Induced</td>
<td>688</td>
<td>63.750.605 €</td>
<td>16.103.073 €</td>
<td>12.368.561 €</td>
<td>3.531.420 €</td>
<td>203.092 €</td>
<td>1.731.599 €</td>
<td>742.114 €</td>
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<tr>
<td>TOTAL</td>
<td>8.639</td>
<td>706.166.924 €</td>
<td>161.129.789 €</td>
<td>122.588.865 €</td>
<td>100.032.006 €</td>
<td>30.831.021 €</td>
<td>18.727.212 €</td>
<td>8.025.948 €</td>
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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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