



The Issue of Seasonality:
towards a better distribution of tourist flows

VI EUROMEETING

Together for a more sustainable tourism

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Catalunya: European Mature Destination

Marques Turístiques i Principals Magnituds



- 7,1 Mlnh. (15,9%)
- 32.107 km² (6,3%)
- 212 Inh/km² (BCN=15.156; Val d'Aran=14)
- GDP: 157.124 M€(18,8%)
- Services=59%
- Industry=23%

Data from IDESCAT 2006



Catalunya: European Mature Destination

Catalunya és la principal destinació turística de l'Estat Espanyol i una de les més importants d'Europa.

El turisme és una de les principals fonts de riquesa per a Catalunya:

11% del PIB de Catalunya, (*Comptes Satèl·lit del Turisme'2006*: Restauració: 25,64%; Ind.Alimentària: 10,66%; Transport: 9,24%; Tèxtil: 8,05%; Hotels: 7,71%; Comerç: 4,85%; Serveis empresarials: 4,33% ... Ag.Viatges: 0,11%...)

13.470 M€ anuals d'impacte sobre l'economia catalana.

prop de 30 M de turistes el 2007.

180.000 persones ocupades directament al sector.(Hosteleria, Restauració i Ag.Viatges)

Catalunya, però, tot i tenir una llarga experiència turística, ha de fer front als **reptes del context internacional i a la problemàtica derivada de la congestió ESPAI –TEMPS** de bona part de l'activitat turística



Catalunya: EDestinació Madura Europea

Main Figures (2007)

- Aprox. 30 millions tourists (2d residences not included)
- Més de 165 million overnights
- Importance of international visitors:

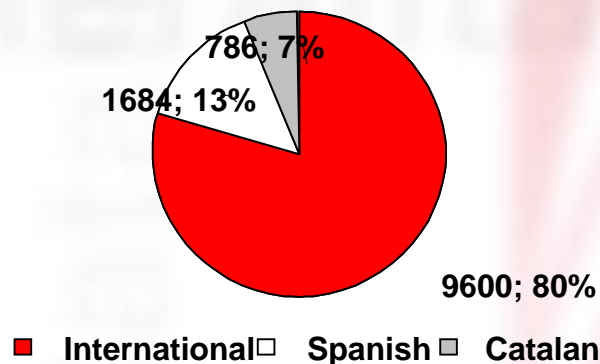
15,9 millions turistes estrangers (• 1,4%) Fr-UK-Deutsch-It

115 millions overnights (• 0,5%)

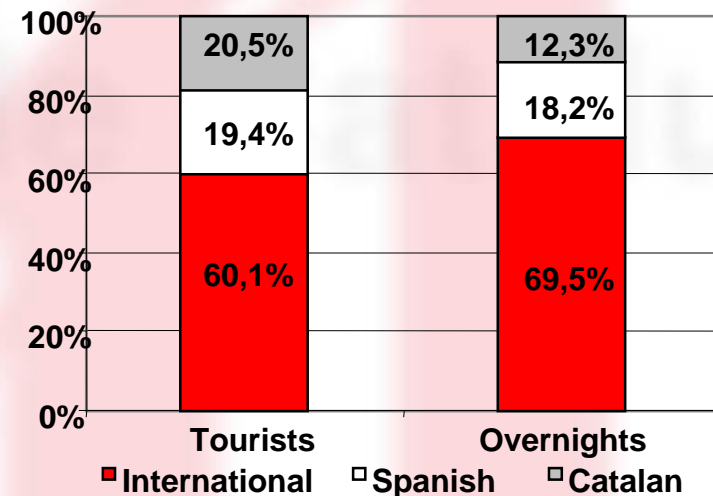
% International Arrivals: 25,8% Spain; 1,8% World; 3% EU

Total Income: 9.600 million € (• 4%)

- **Total Tourism Incomes: 11.768 million €**



Tourists and overnights in Catalonia 2005





The impact of seasonality Time - Space

But...

- **By 50% of the Catalan coast is for urban use**
- **By 75% of the coast of the Metropolitan Area of Barcelona is edified.**
- **In the last 40 years more than 8.000Ha have been urbanised in the Costa Brava:**

Only by 54% of dwellings built are first residences.

In 39 coastal municipalities (from a total of 75), first residences are representing less than 50% of total.



The impact of seasonality Time - Space

But...

**Almost 80% tourism activity concentrates in the coast
(Costa Brava – Costa Daurada – Barcelona)**

The emergence of tourism activity in Catalonia in the 60's was spontaneous, with an important lack of planning during decades.
“Sun and Beach” became the main product of the coastal destinations in the Mediterranean, and so did in Catalunya.



The impact of seasonality Time - Space

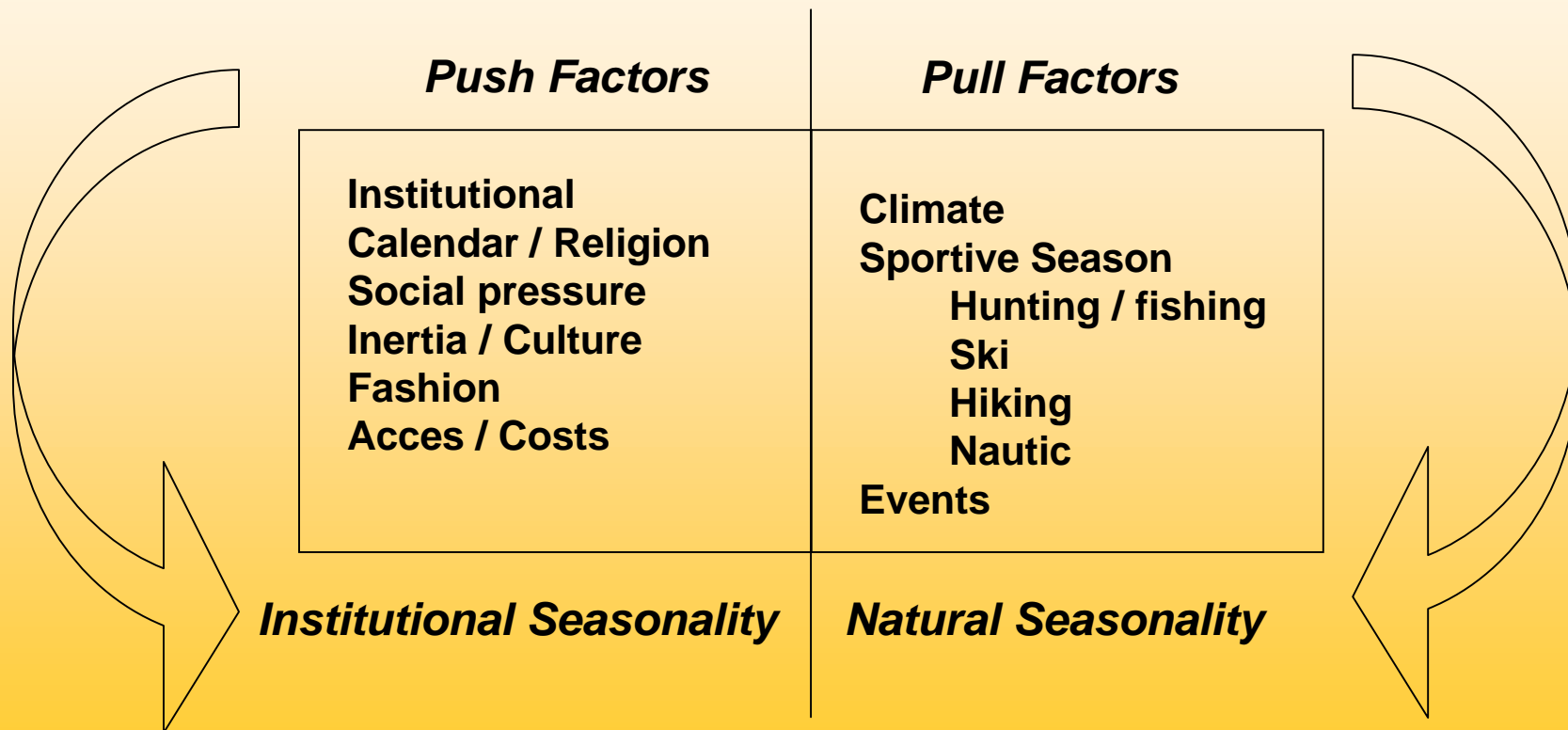
But...

Some implications on sustainability and competitiveness of congestion Time – Space in Mediterranean Tourism model:

- Crowding out effects on local activities, culture and population
- Generation of residues, pollution, and environmental degradation
- Dramatic transformations on coastal landscape (urbanisation)
- Negative Impact on Image Destination (High season – Low season)
- Lack of sensitivity regarding the sea as part of living nature and heritage
- Unemployment in low season – Lack of Qualified Employment in High Season (precarious labour market)
- Decrease of Annual Earnings; Decrease of Investment Interest in Tourism Sector.
- Negative impact on Destination competitiveness

Conceptualization of seasonality

Seasonality Factors



Font: Lundtrop (1999); Butler (1994); Comas Trayter (2005)

Conceptualization of seasonality

Influence Factors on Destination Seasonality Model

Demand Factors

Natural reasons
response
Institutional Holidays
Inertia / Tradition
Preferences



Supply Attributes

Climate conditions
Geografic Atractions
Activity Opportunities
Specialization Degree Events
Heritage (Tangible and Intangible)

Modification Actions

Institutional actions
Tourism Policies
Public private strategies

Destination Seasonality Model Features

Font: Based on Butler (1994); Comas Trayter (2005)



Pla Estratègic de Turisme 2005-2010: A basic tool

Unseasonality Strategy: it's not a single policy

Variety of policies on Seasonality Modification Actions

Institutional actions
Tourism Policies
Public private strategies



Pla Estratègic de Turisme 2005-2010: A basic tool

Non-Seasonality Strategy: it's not a single policy

Inspiring Strategic Plan Criteria

- 1. Sustainability**
- 2. Cultural Identity**
- 3. Quality**
- 4. Innovation**
- 5. Focus on Demand**
- 6. Competitiveness**
- 7. Tourism as a Citizenship Service**
- 8. Territorial Balance**
- 9. Non-seasonality**
- 10. Collaboration, Coordination, Cooperation**



Pla Estratègic de Turisme 2005-2010: A basic tool

STRATEGIC PLAN FRAME PROGRAMMES

- 10 key objectives, 10 frame programmes and 48 specific actions to be developed are defined.
- All stakeholders are involved: Government (coordinated and global action from different areas); local administration, private sector, NGO's, civil society.
- It includes a territorial vision which is combined with the sectoral one. This is the first time that tourism is considered under a broad scope, being the territory and society the priority of the CTSP.



Pla Estratègic de Turisme 2005-2010: A basic tool

STRATEGIC PLAN FRAME PROGRAMMES

- 1.- Territory, landscape and society
- 2.- Promoting and integrating tourist products
- 3.- Identifying and promoting singularity of Catalan tourist supply
- 4.- Marketing and promotion
- 5.- Modernising and improving the systems to provide tourist information
- 6.- Quality
- 7.- Training and human resources in tourism
- 8.- Research, technology and innovation
- 9.- Building a stronger institutional, sectoral and legal framework
- 10.- Communication and promoting sensitivity

SOME STRATEGIC PLAN ACTION POLICIES

Territorial Planning on Golf, Coastal, and Natural Parcs

Diversifying the tourist use of the different territories

There are new tourisms and new tourists by the sea, which become new opportunities to increase synergies:

- cultural tourism
- gastronomy tourism
- nautical tourism
- wellness and thalassotherapy tourism
- family tourism
- active tourism , others

There are also new territories next to the sea front to spread the benefits of tourism, diminishing therefore the pressure on carrying capacity in these areas.



Pla Estratègic de Turisme 2005-2010: A basic tool

SOME STRATEGIC PLAN ACTION POLICIES

- New products and new destinations are being promoted to fight against seasonality, generating more stable economic activity (labour market), and once more bringing equilibrium for carrying capacity (social, environmental and economic) and improving quality of life in coastal areas.
- There are also traditional activities to be preserved and promoted under the new Creative Tourism:
 - Artisan activities are more and more valued by tourists, bringing the opportunity to discover host culture, and bringing the possibility for “not traditionally considered tourist sectors” (and local society as a whole) to benefit from visitors.
 - The same happens with fishery, agriculture, gastronomy, enology and so.



Pla Estratègic de Turisme 2005-2010: A basic tool

SOME STRATEGIC PLAN ACTION POLICIES

- New branding and new marketing, searching for demand micro-segments and diversification, based on quality, identity, responsibility and sustainability (seniors, accessible, independent professionals, employers)
- Creation of Destination Labels to catch unseasonality segments: Sport Destination, Family Destination,...
- Integral Quality Campaigns for Tourist Destinations
- Sensitivity and communication for tourists, industry and host society (conduct code)
- New products and territories to avoid seasonality (golf, heritage, cultural, wellness, rural, routes, summer mountain stations, leisure and health)



Achieved Results

TOWARDS A BETTER ANNUAL TOURISM ACTIVITY DISTRIBUTION

	2002	2004	2006
Gener-maig	29,9%	32,6%	34,1%
Juny-agost	43,9%	38,6%	37,5%
Setembre-desembre	26,1%	28,8%	28,4%
Total	100,0%	100,0%	100,0%

