



Generalitat de Catalunya
**Departament d'Innovació,
Universitats i Empresa**

SUSTAINABLE TOURISM NEW REQUIREMENTS TO FACE NEW THREATS

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SVILUPPO DEL TURISMO SOSTENIBILE
“TOWARDS A EUROPEAN NETWORK FOR A SUSTAINABLE AND COMPETITIVE TOURISM”**

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Introduction

Tourism brands and main figures



- 6,8 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=57%
- Industry=23%

Data from IDESCAT 2004



Introduction

580 kms of coast, from Cap de Creus to Terres de l'Ebre; important rural areas, which are experiencing a process of degradation and abandonment, as well as protected natural spaces; the Pyrenees; and urban centres.

Catalonia is promoting a global and integrated policy of development, according to sustainability principles under a wide scope, including an especific treatment of tourism:

- as a transversal and multisectoral activity**
- providing by 11% of Catalonia GDP**

At a local level, by 25% of municipalities of Catalonia have already aproved or are currently ellaborating the Local Agenda 21.

BUT...



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Introduction

BUT...

- **More than 50% population concentrates in BCN metropolitan area**
- **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.



Tourism in Catalonia

Main Tourist Figures (2005)

- More than 25 million tourists (second residences not included!!!)
- More than 165 million overnights
- Importance of international visitors

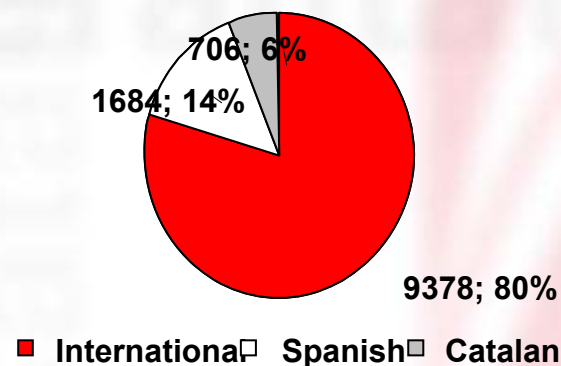
15 million tourists (Δ 9%) France-UK-Germany-Italy

115 millions overnights (Δ 3%)

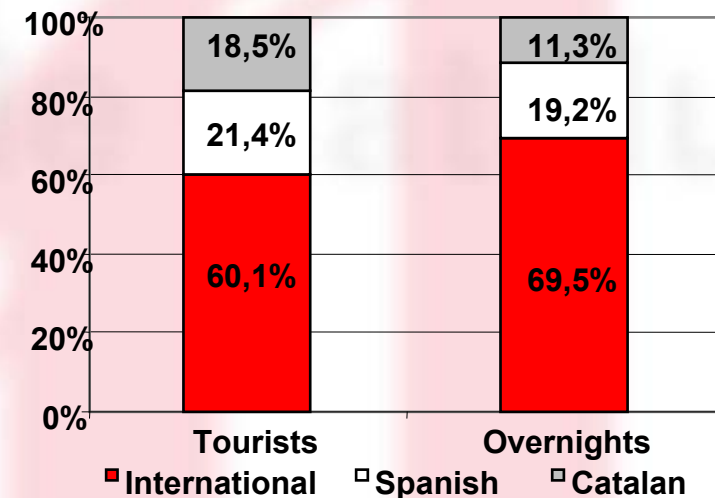
International arrivals: 25% Spain; 1,8% World; 3% Europe

Total income: 9.400 million € (Δ 7%)

- Total tourism income: 11.768 million €



Tourists and overnights in Catalonia 2005





Tourism in Catalonia

Almost 80% tourism activity concentrates in the coast.

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, so did in Catalonia.

Some implications of traditional Mediterranean Tourism model:

- congestion in the coastal areas-seasonality (time-space)**
- crowding out effects on local activities, culture and population**
- generation of residues, pollution, and environmental degradation**
- dramatic transformations on landscape (urbanisation)**
- low qualified and precarious labour market**
- lack of sensitivity regarding natural and cultural heritage**
- absence of synergies between tourism and other activities and industries**



Tourism in Catalonia

The maturation process of tourist destinations plus new challenges are demanding new global policies facing PRESENT behavioural patterns, changes concerning the decision making process and the suppliers chain, IT/e-business, more and new destinations and outgoing markets,...

BUT MAINLY

... to developed a sustainable and competitive tourism strategy, enhancing synergies, searching for local equilibrium concerning nature, culture, society and economic activities.

TOURISM IS AN INCREASING ACTIVITY IN ALL EUROPE WITH IMPORTANT OPPORTUNITIES, PROMOTING OTHER SOCIOECONOMIC ACTIVITIES, AS WELL AS AN INSTRUMENT FOR TERRITORIAL EQUILIBRIUM AND CULTURAL AND ENVIRONMENTAL PRESERVATION



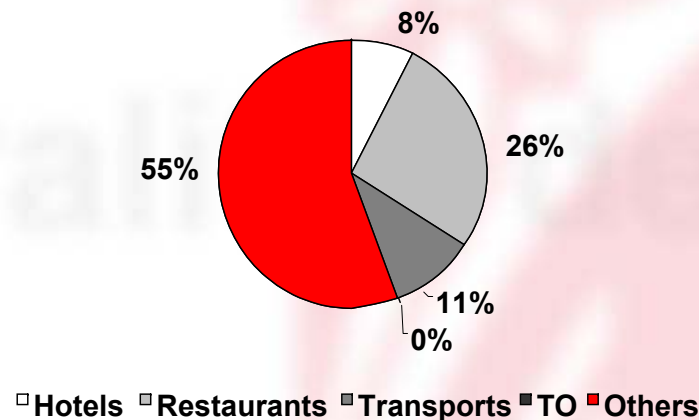
Tourism in Catalonia

'The economic impact of tourism expenditure; sectoral analysis'

Intersectoral relationships represent added effects corresponding to 48,5% of the originally ones directly generated by tourists expenditure (very important multiplier effect).

Traditionally considered "tourism sectors" (hotels, restaurants, travel agencies and transports) only concentrate by 44,5%.

Sectoral distribution of total tourism expenditure impact



So there are important effects upon a large range of industries, some of them linked to the seas and life on the coast.



A new approach

“Sun and beach” remains the most important motivation to visit Catalonia, but changing into a more diverse and integrated model.

Current and future most competitive and performing tourist destinations will be those that are capable to adapt into a sustainable and responsible framework, including tourism within a global territorial and sector planning.

This is intimately linked to the necessity, opportunity and principles of the criteria included in the Communication from the EC “Agenda for a Sustainable and Competitive European Tourism”,...

... And it means building partnership, collaborative and network-based models



A new approach

The new approach must take into consideration:

- **Environmental preservation and reducing negative impacts of tourism activities; sustainable tourism as an opportunity to regenerate infrastructures, landscape, implementing renewable energies, mitigation and action plan to face climate change**
- **Economic viability for tourism activities, but considering and promoting positive externalities on the rest of economic sectors, activities and industries in the territory (synergies)**
- **Social cohesion, improving labour conditions, quality of life and cultural (material plus immaterial heritage) preservation; identity and singularity becomes specially relevant in a global world: “finding the difference is attractive for the visitor”**



A new approach

The role of tourism in economic and social terms is being revised in order to promote new activities but mainly a new sensitivity and culture.

The particular case of Catalonia, where climate and sea have been the main assets, now is changing into a new model promoting the understanding of history, culture, heritage, gastronomy, society,...

We are learning from experiences, but our experience may also be exportable to other destinations in Europe

In order to face challenges and to implement this new approach:

CATALONIA TOURISM STRATEGIC PLAN 2005-2010

<http://www.gencat.net/ctc/turisme>



Catalonia Tourism Strategic Plan 2005-2010

Criteria/Inspiring Principles

1. Sustainability
2. Cultural Identity
3. Quality
4. Innovation
5. Demand Oriented
6. Competitiveness
7. Citizen's service
8. Territorial distribution/equilibrium
9. Unseasonality
10. Collaboration, cooperation and coordination (PPP)

In fact all them can be summarised into sustainability, competitiveness and social responsibility.



Catalonia Tourism Strategic Plan 2005-2010

All stakeholders were involved: Government (coordinated and global action from different areas); local administration, private sector (mainly SME, most micro-e), NGO's, civil society.

It includes a territorial vision which is combined with the sector one. This is the first time that tourism is considered under a wide scope, being the territory and society the priority of the CTSP.

Besides, from the marketing point of view, competitiveness and sustainability are completely linked. Being sustainable is a guarantee for competitiveness; most of the assets to build tourism competitive destinations in the XXI century are emerging from the sustainability principles.



Catalonia Tourism Strategic Plan 2005-2010

MASTER PROGRAMMES (48 actions)

- 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, sector and legal framework**
- 10.- Communication and promoting sensitivity for the new approach**



Catalonia Tourism Strategic Plan 2005-2010

Emerging from the CTSP new tourisms and new tourists can be identified, which become important opportunities to increase synergies between stakeholders, territories, activities and industries:

- cultural tourism**
- gastronomy tourism**
- nautical tourism**
- active tourism**
- wellness and thalassotherapy tourism**
- family tourism**
- business tourism**
- literature tourism**
- historic tourism**
- experiential tourism**

There are also new territories to spread the benefits of tourism, diminishing the pressure on carrying capacity in traditional areas.



Catalonia Tourism Strategic Plan 2005-2010

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.

There are also traditional activities to be preserved and promoted under the new tourism paradigm:

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.

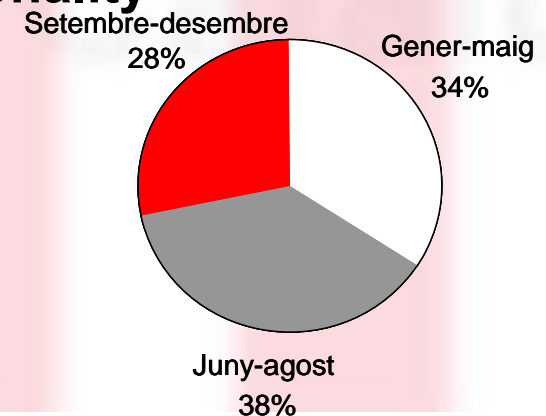
The same happens with fishery, agriculture, gastronomy, enology and so.



Some examples of Catalan actions linked to SCET

- New branding and new marketing, searching for demand micro-segments and diversification, based on quality, identity, responsibility and sustainability
- Creation and promotion of Destination Labels
- Integral Quality Campaigns for Tourist Destinations (environmental, social and tourist)
- Sensitivity and communication for tourists, industry and host society (conduct code, Tourlink project-sust. Through value chain)
- New products and territories to avoid seasonality

	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%





Some examples of Catalan actions linked to SCET

- **General Master Plan for Coastal Area (2006):**
 - **preservation of not urbanised areas**
 - **urbanisation limited: free 500 m. from the sea line**
 - **free areas protected for public use**
 - **new preserved and protected natural areas in the coast**
- **General Master Plan for Mountain Resorts**
- **Specific Territorial Plans with a broad intersectoral scope, including especially coastal areas:**
 - **limit for building second residences**
 - **promotion of economic diversification-enhancing synergies**
 - **coordination under a supramunicipality point of view**
- **Adapting regulation for SME competitiveness**
 - **quality and modernisation**
 - **creation of new complementary supply/activities**
 - **reevaluation of natural plus cultural heritage: entrepreneurship**



Some examples of Catalan actions linked to SCET

- **Promoting more preserved areas and European Charts for sustainable tourism**
- **New activities by the sea: diving (Illes Medes-L'Estartit); understanding (Museum of Fishery-Palamós: "Tourism and sea; maritime heritage and new tourists"),...**
- **Specific product: Urban-coastal-cultural destination: Barcelona, more than 4kms of beaches and one of the main cruises destinations**
- **Creation of a new Agency to promote Catalunya based on PPP**
- **Research: through the Observatory of Tourism, to promote innovation, knowledge and sharing good practices at regional and international level, involving industry plus universities. Collecting and harmonising statistics and monitoring indicators.**

So transversality and search for a global planning and synergies inspire the renewed tourism in Catalonia.



Conclusions

Catalonia is one of the main coastal destinations of the Mediterranean and Europe. We all are facing important challenges; but they can easily become opportunities by applying a proper planning and action, requiring the implication of all stakeholders under a broad scope, where tourism must be included in a global strategy.

The role of the European Regions and promoting cooperation becomes a key asset for the construction of a sustainable and competitive tourism, for each region, but also for Europe as a global destination. Tourism needs for an integrated planning but requires local and regional actions to succeed.



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THANKS FOR YOUR ATTENTION!

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