

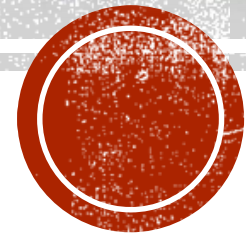
ACTIVE TOURISM IN NATURAL PROTECTED AREAS OF THE VALENCIAN REGION (SPAIN)



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Proyecto financiado por:



'THE OUTDOORS' CONCEPT

- 'The outdoors' is a location for a recreational activity related largely to a natural environment, usually outside.
- Furthermore, the term 'outdoors' relates to the interaction between people and the outdoor environment and the related tools or specialist equipment for specific single or multiple purposes.
- The 'Outdoors Industry' is a multi-dimensional sector recognised by law in U.S.A. in the past year 2016: *'The Outdoor Recreation Jobs and Economic Impact Act of 2016 (REC Act)'*, approved in a unanimous bipartisan vote (Republicans and Democrats) in the 114th Congress (Public Law 114-249 DEC.8, 2016). The REC Act quantifies the outdoor industry's economic contribution to the U.S. Gross Domestic Product (GDP).



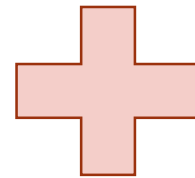
OUTDOORS RECREATION SECTOR

RECREATIONAL ACTIVITY

Natural resources
(Attractions, Natural
Protected Areas, etc.)



Facilities
(trails, signage systems,
etc.)



RECREATION INDUSTRY

**Gear, vehicles and
accessories
purchases**



**Tourism and Travel
Services**



The cornerstone of the sector



RECREATIONAL ACTIVITIES

Attractions and facilities, make up a Recreational Activity

Ludic or Entertainment



Sports & Adventure



- They are physically demanding activities and non-competitive sports characterised by the level of fitness or skills, experimentation, and even some risk.
- Specific sports and adventure activities can be found in a place according to the attractions and existing resources.

Educational & Interpretative



OUTDOOR RECREATION SECTOR

SPECIALIZED PURCHASES

- **PURCHASE OF GEAR** (outdoor apparel and footwear, bicycles, skis, fishing equipment, horse riding equipment, tents, climbing equipment, backpacks, etc.)
- **PURCHASE OF VEHICLES AND ACCESSORIES** used only for outdoor recreation (boats, motorcycles, horses, horse vans, 4x4 vehicles, etc.)

TOURISM

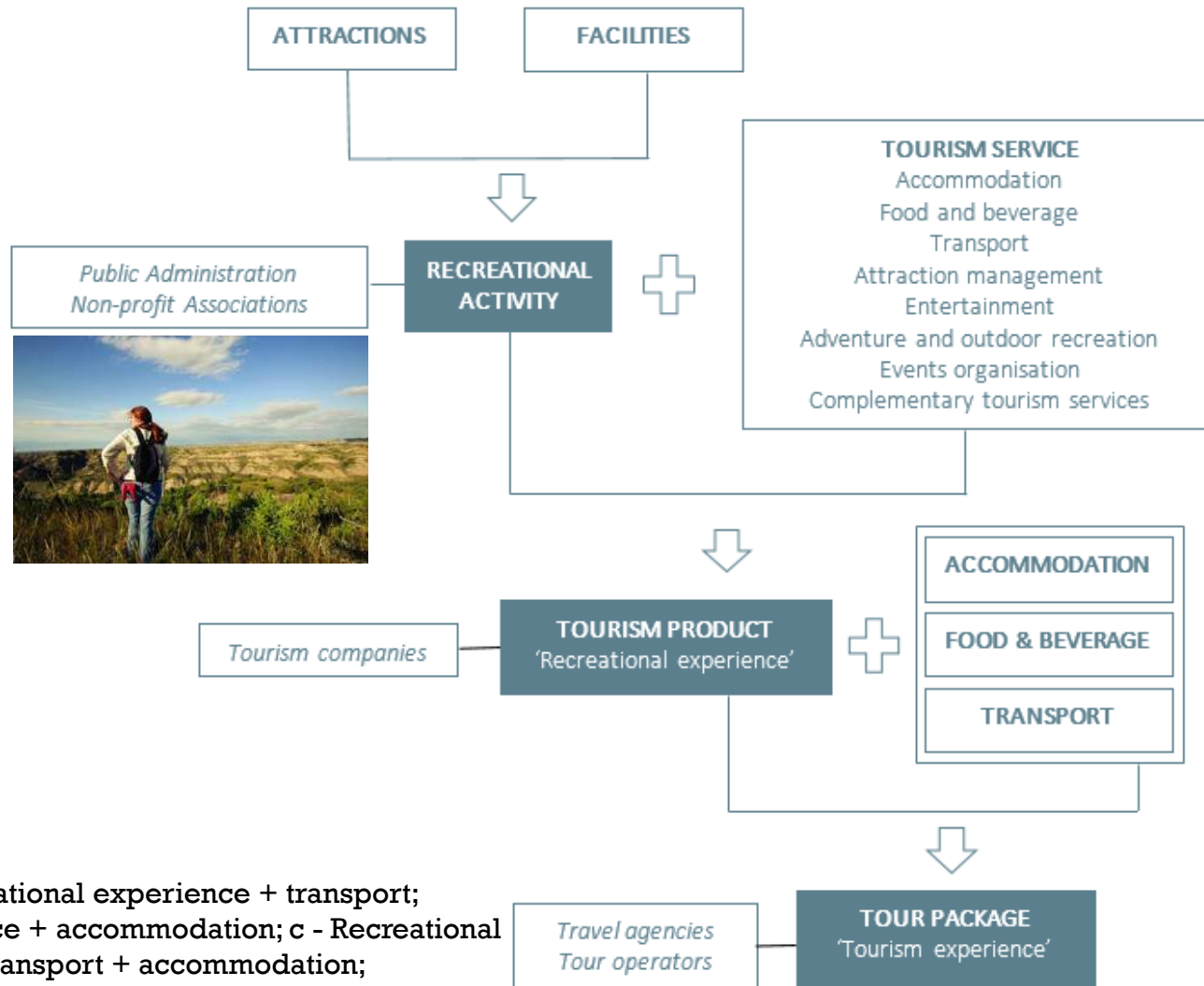
- **TOURISM AND TRAVEL SERVICES** (guides, instructors, interpreters, entrances fees, sport lessons, attractions tickets, guided tour, travel tickets and transport, rental cars, lodging and overnight stays, restaurants and supplying food, organising activities and logistics, renting equipment or infrastructures, etc.)



SPECIALIZED OUTDOOR PURCHASES



RECREATIONAL ACTIVITY VS. TOURIST PRODUCT

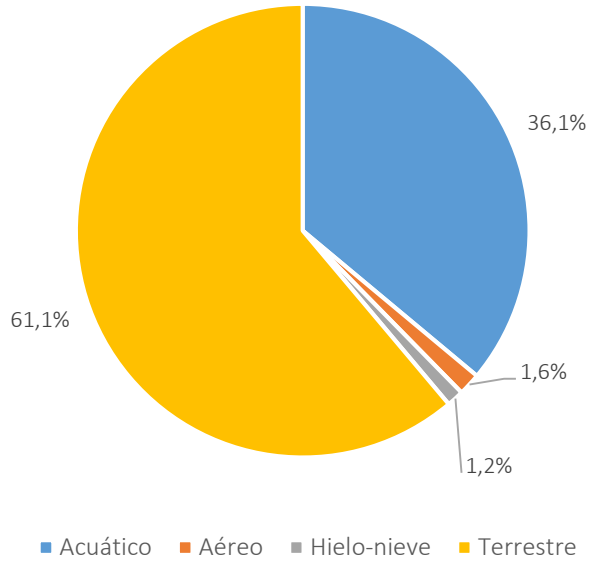


≥ 2 components: a - Recreational experience + transport;
 b - Recreational experience + accommodation;
 c - Recreational experience + meals;
 d - Transport + accommodation;
 e - Full-Board (accommodation and meals);
 f - Transport + accommodation + meals;
 g - All inclusive;
 h - Others

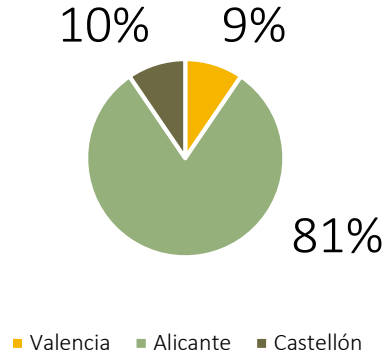


VALENCIAN OUTDOORS COMPANIES

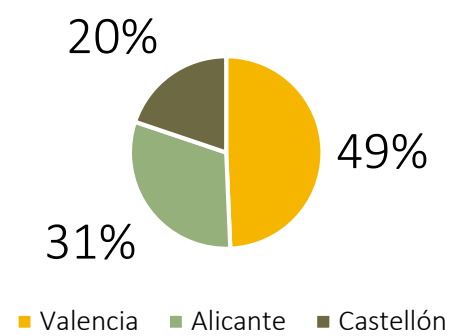
% COMPANIES OFFERING DIFFERENT TYPES OF RECREATIONAL ACTIVITIES IN THE VALENCIAN REGION



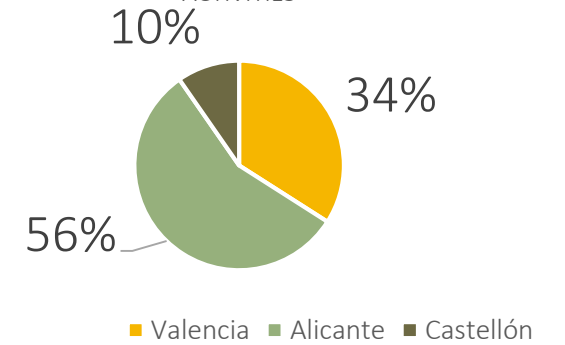
% COMPANIES OFFERING AIR ACTIVITIES



% COMPANIES OFFERING TERRESTRIAL ACTIVITIES



% COMPANIES OFFERING AQUATIC ACTIVITIES



VALENCIAN ACTIVE TOURISM ENTERPRISES

- Recreational experiences are offered by Tourism Service Companies.
 - These are framed in the Tourism Adventure & Outdoor Recreation Sector (active tourism enterprises, eco-tourism enterprises, guiding groups companies, etc.)
 - There are **332** companies (almost double than two years ago): 193 in Alicante, 85 in Valencia, and 64 in Castellón.
 - Terrestrial activities are dominant in the products portfolio (61%). In Alicante, aquatic activities are the most popular.
 - Many of these companies are small or medium-sized enterprises (SME's). This means that marketing, sales, finance, logistics, administrative, executive and other functions are the responsibility of the manager and co-workers or employees.
 - They market their products through direct sales (counter sales, telephone, email, call center, instant messaging –whatsApp,- etc.), own website (with reservation system, payment platform, etc.), traditional and online travel agencies, and by a reservation centre.
- Active and Adventure Tourism Trips and Travels are offered by specialized Outdoors Inbound Travel Agencies existing in the destination.
 - They are also SME's offering: transport and overnight stays, supplying food, organising activities and logistics, guiding/educating participants, renting equipment or infrastructure, etc.
- The number of companies of this type in the interior territory and small town of the Valencian Region is very scarce.

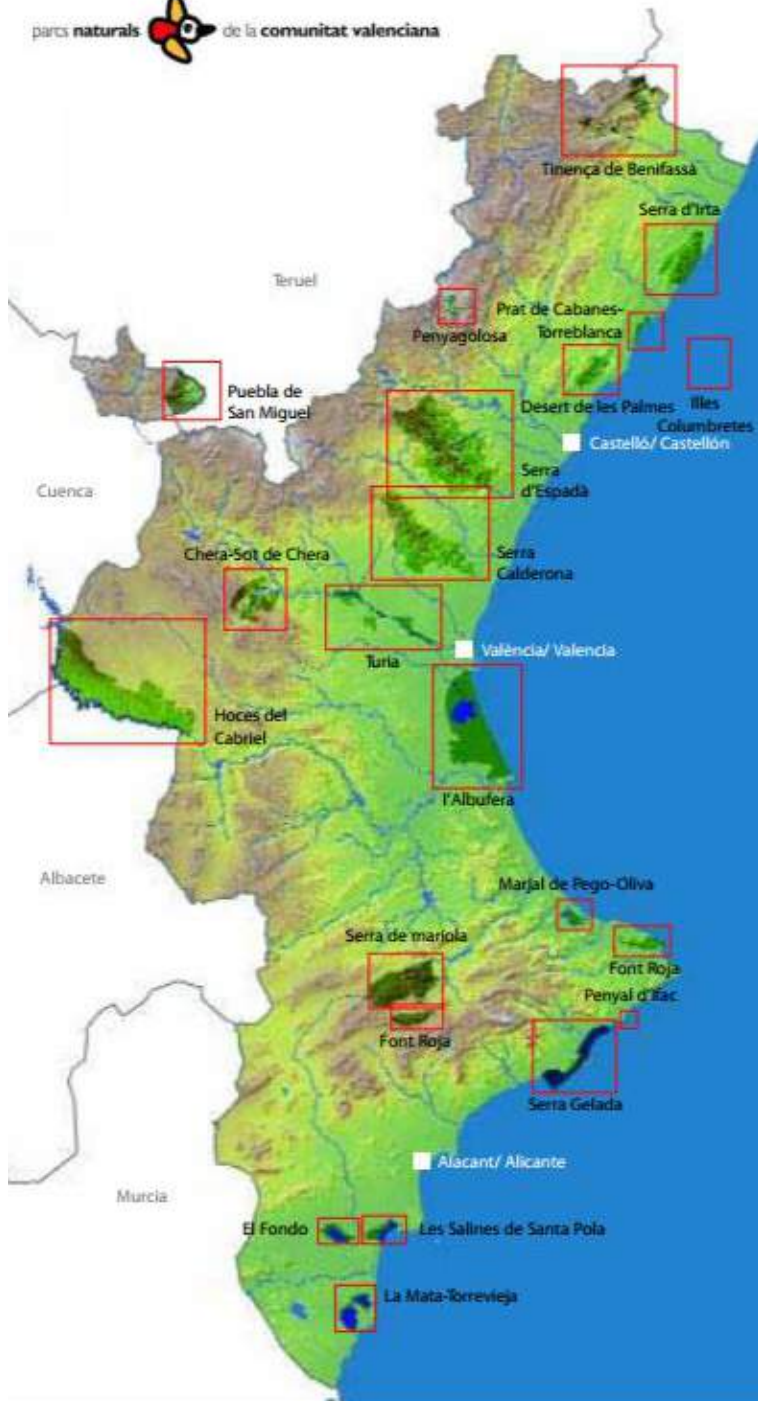


ECONOMIC INCOMES BY EQUESTRIAN ACTIVITIES



- Turia Natural Park: 150.000 people aprox. living in neighbouring villages
- 25 Equestrian Centres + Individual local owners: ±1.289 horses (481 for recreational purposes)
- Yearly direct expenditures per 1 horse: 4.350 € year (horse boarding service, vets, farrier, equipment, horse riding apparel, food supplements for horses, horse vans, etc.). Total amount: 2.092.350 €
- Yearly indirect expenditures (federation licences, insurance contracts, food services, transport, maintenance supplies, training, horse sales, magazines and journals, etc.)= 992.300 €
- **Yearly Total = at least 3.084.650 € (9.000€ at day)**





NATURAL PROTECTED AREAS IN THE VALENCIAN REGION

The Valencian Region presents:

- A good Mediterranean climate
- Excellent territorial and marine conditions for the development of many Active and Adventure Tourism activities
- The heritage values of the natural resources has led to the designation of 22 natural protected areas on land and at sea (39,47% of the total territory), as:
 - Natural Parks, Nature Reserves, Protected Landscapes, Local Natural Sites.

Some of them are included in Natura 2000 Network (Special Protection Areas, Sites of Community Importance, and Special Areas of Conservation).



'VALENCIAN NATURAL PARK' BRAND



- The Environmental Administration have developed the brand 'Valencian Natural Park' that certify local products and / or tourism services in the protected areas.
- Only 22 companies have joined the 'Valencian Natural Park' brand (50% in Valencia). Probably because the benefits of being associated with the brand are not clearly visible, since the Environmental Administration is not very pro-active in promoting the brand. In addition to this, companies have to pay a fee to joint the brand.
- There is no information about the location and practices that are developed during the course of recreational activities.



TOURISM VS. ENVIRONMENTAL ADMINISTRATION

TOURISM ADMINISTRATION

Continued trend towards the driving of Active Tourism

Tourism Administration tries to organize the offer for better communicating the tourism products and easily getting the customers

Recreational facilities have been developed, specially signage systems.

Valencian Regional Decree 22/2012, JAN. 27, 2012. *Regulation of the Active Tourism in the Valencian Region*

ENVIRONMENTAL ADMINISTRATION

Changing and uncertain position regarding the enhancement of Active Tourism in Natural Protected Areas

This administration offers the possibility to companies that operate in Protected Areas to join the brand 'Valencian Natural Parks'

Not too many new recreational facilities and installations have been developed. There has been minimal maintenance of the existing ones.

Public Use Plans only for two parks (Desert de les Palmes, Sierra Calderona)



MASTER PLAN FOR ACTIVE TOURISM IN THE VALENCIAN REGION

PART I: DIAGNOSIS ABOUT THE ACTIVE TOURISM IN THE VALENCIAN REGION

1. INTRODUCTION
 - 1.1. Conceptual framework
 - 1.2. Justification for developing Active Tourism Master Plans
2. BACKGROUND
3. TOURISM MASTER PLANS
 - 3.1. Definition
 - 3.2. Objectives
4. DIAGNOSTIC ASSESSMENT
 - 4.1. Legal issues
 - 4.2. Tourism Offering
 - 4.3. Demand
 - 4.4. Facilities
 - 4.5. Territorial analysis
 - 4.6. Business issues
5. TOURIST POTENTIAL ASSESSMENT OF THE RECREATIONAL ACTIVITIES

PART II: METHODOLOGY FOR DESIGNING AND DEVELOPING ACTIVE TOURISM MASTER PLANS

1. INTRODUCTION TO METHODOLOGICAL ISSUES
2. KEY CONTENTS
 - 2.1. Introduction to the conceptual framework of the analysed Active Tourism activity and legal framework
 - 2.2. Recreational activity description
 - 2.3. Potentially marketable Products
 - 2.4. Territorial needs, infrastructures y facilities
 - 2.5. Current analysis about the activity (offer, demand, entrepreneurial structure, etc.)
 - 2.6. Benchmarking
 - 2.7. Vision, Strategy and y Objectives
 - 2.8. Guiding principles
 - 2.9. Developing the Operational Plan Actions and Sub-actions
 - 2.10. Evaluation Plan. Indicator System
 - 2.11. Best practices in Active Tourism
 - 2.12. Communicating the Master Plan



SOME GENERAL REFLECTIONS

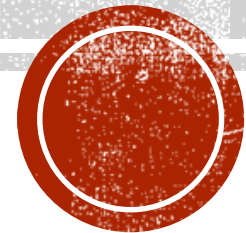
- Outdoor recreation is a growing and diverse economic multi-dimensional sector providing livelihoods to many people.
- Because recreation-related business is an important factor in the Valencian economy, it will be important to estimate that the outdoor recreation sector alone contributes annually to the regional economy, and then to provide a stronger institutional support to the Valencian outdoor recreation sector.
- The outdoor recreation economy can improve and increase the growth of jobs and an economic powerhouse if Environmental Administration plan and manage adequately the Public Use, and invest in Natural Protected Areas.
- Outdoors sector has strong links with Public Administration because it is based on attractions and natural and / or cultural resources that are, in many cases, publicly owned. For this reason, when a recreational activity is part of a tourist product and the private sector gets involved, the Public Administration has to ensure compliance with the rules established for the wise use and conservation of public heritage and properties.
- Recreational activities generate significant income in the specialized outdoor purchasing sector, but not all of them are linked to the tourism sector; indeed, some of them may never become tourist products. However, those that result in a tourism product will contribute most to the local development. For this reason is important to develop a Master Plan for Valencian Active Tourism (even if not appointed in the Valencian Active Tourism Decree).



**THANK YOU FOR YOUR ATTENTION...
AND ENJOY NATURE !!!**

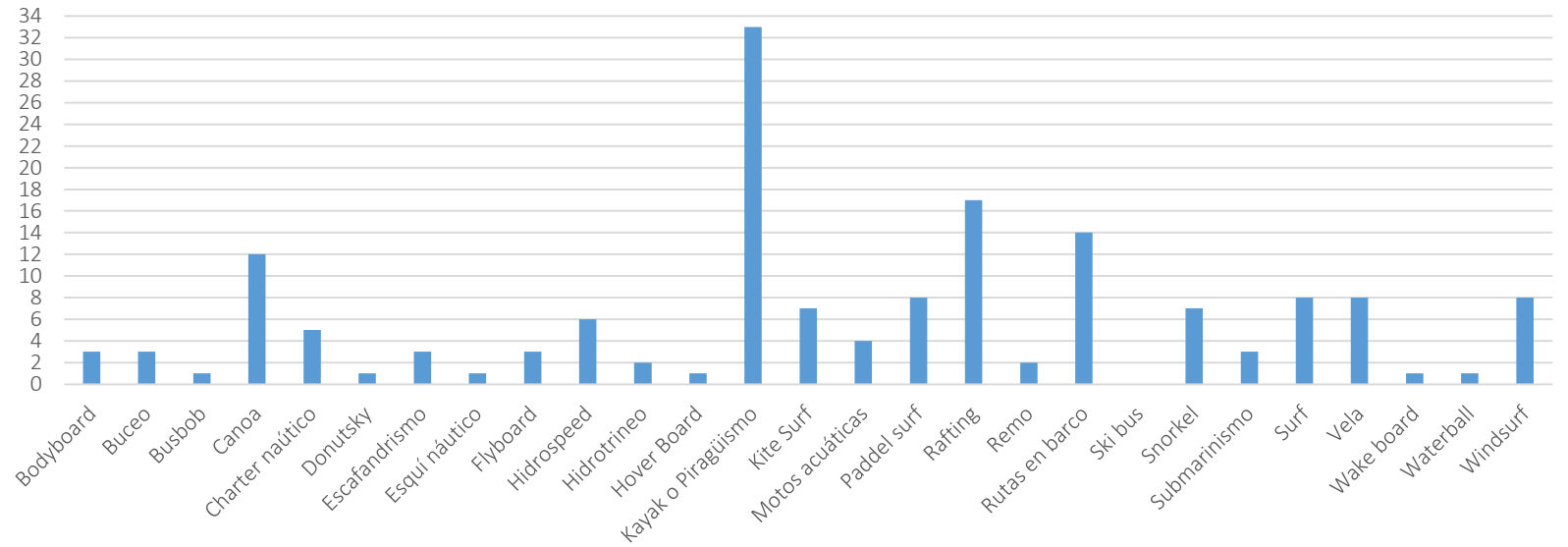


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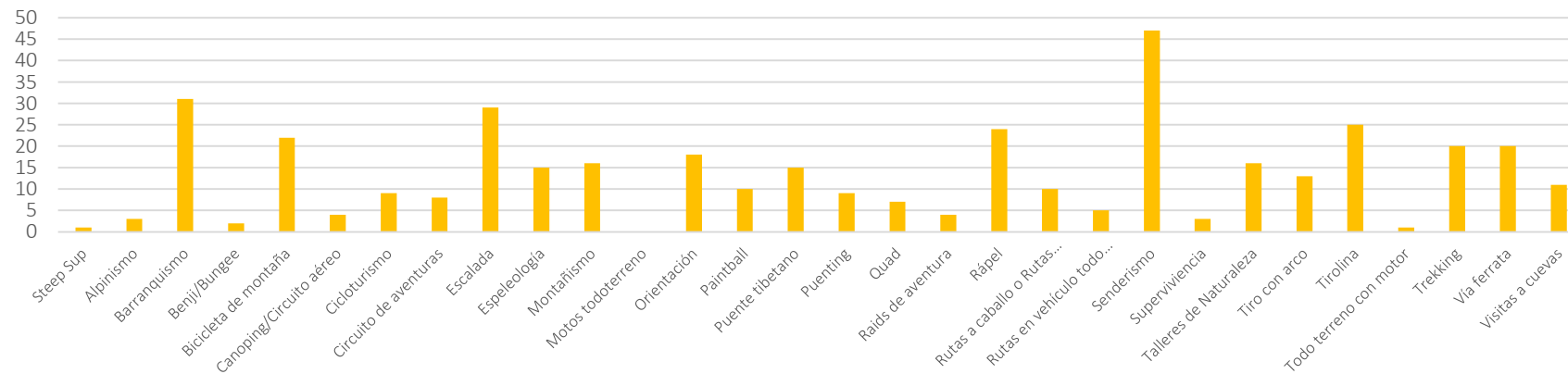


VALENCIA

NÚMERO DE EMPRESAS DE VALENCIA SEGÚN ACTIVIDAD ACUÁTICA OFERTADA

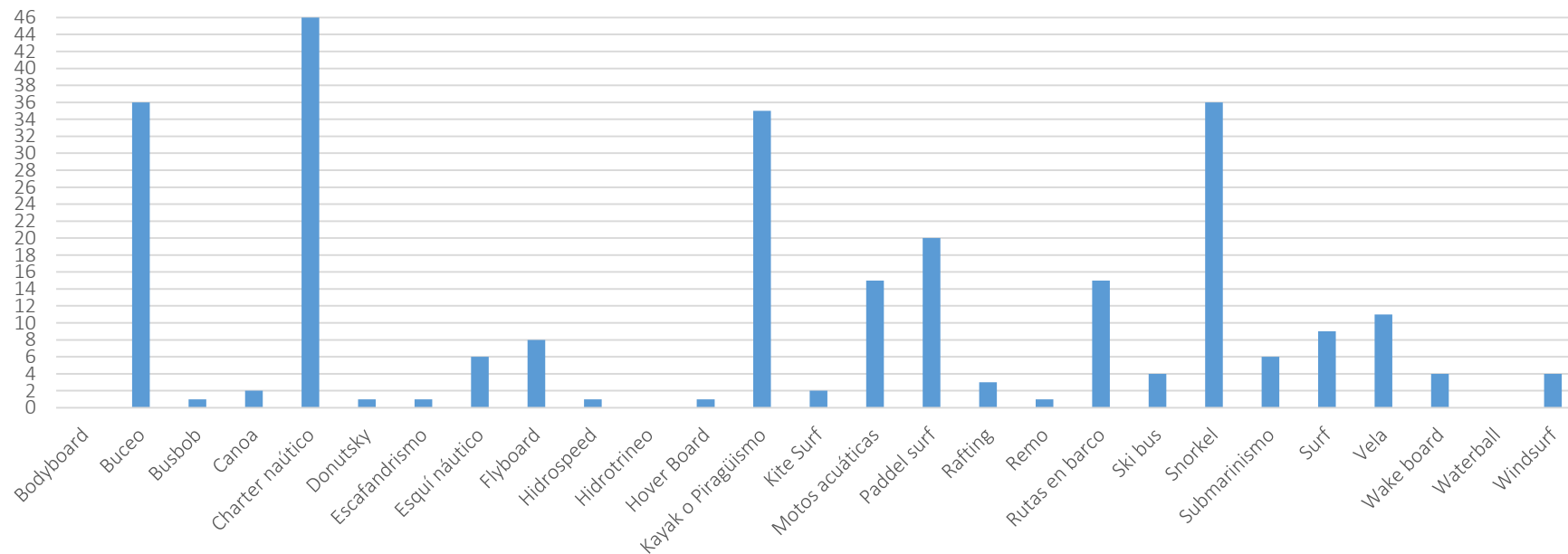


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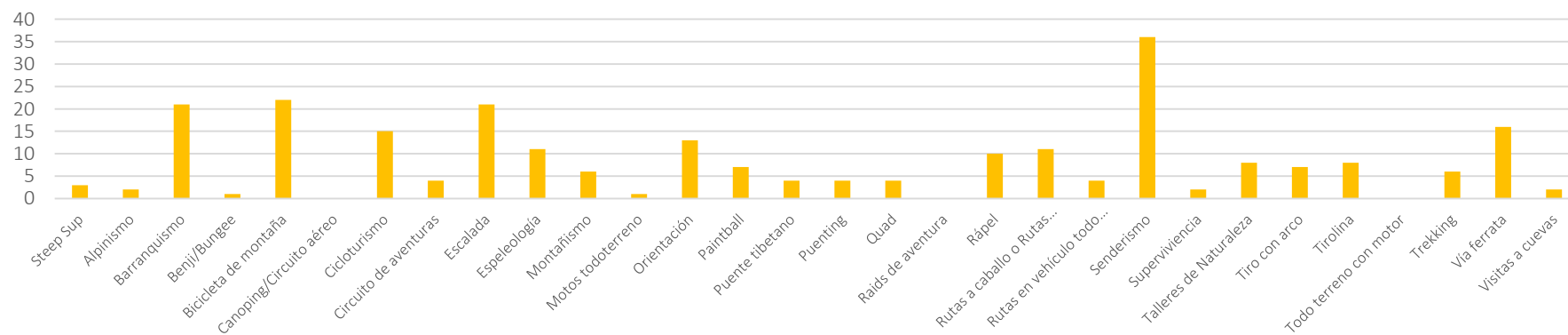


ALICANTE

NÚMERO DE EMPRESAS DE ALICANTE SEGÚN ACTIVIDAD ACUÁTICA OFERTADA

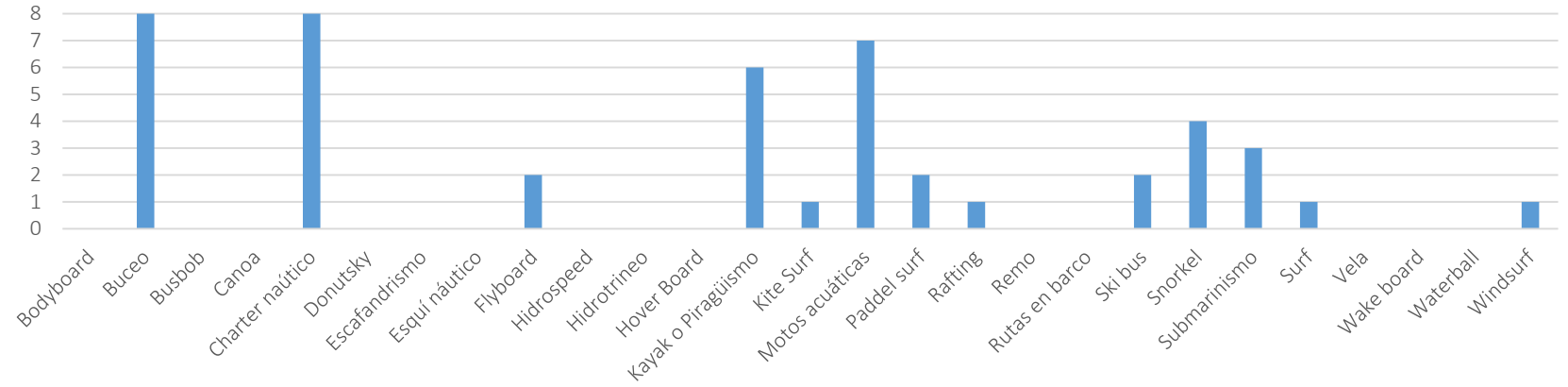


NÚMERO DE EMPRESAS DE ALICANTE SEGÚN ACTIVIDAD TERRESTRE OFERTADA



CASTELLÓN

NÚMERO DE EMPRESAS DE CASTELLÓN SEGÚN ACTIVIDAD ACUÁTICA OFERTADA



NÚMERO DE EMPRESAS DE CASTELLÓN SEGÚN ACTIVIDAD TERRESTRE OFERTADA

