

THE SPANISH RURAL AREAS: TERRITORIES WHERE TOURISM IS PRODUCED AND CONSUMED OR SUSTAINABLE TOURISM DESTINATION IN A COMPETITIVE ENVIRONMENT? THE CASE OF NORTHEAST OF SEGOVIA *

Fernando Martín Gil

Departamento de Geografía. Universidad Autónoma de Madrid
f.martin@uam.es

Iris Martín Hernanz

Universidad Estatal Amazónica de Ecuador
irs20@hotmail.com

This paper addresses the different scenarios posed to Spanish rural areas regarding the need to evolve from areas in which tourism is simply produced and consumed into becoming highly specialized tourism destinations that offer a product boasting significant added value; in other words, a transformation into highly articulated and competitive tourist destinations. By studying the case of the northeast of Segovia, conclusions can be drawn that can be extrapolated to Spain's rural geography as a whole.

INTRODUCTION

Over the last twenty years, tourism has extended into all corners of rural Spain. Over this period, a number of tourist accommodation infrastructures have been created, adding significant value to Spain's rural heritage, furthermore diversifying its tourism services. Today, all over the country, there is an abundance of territories offering a generic model of rural tourism which is themed on such on-trend social values as the absence of environmental stress, well-preserved landscapes and traditional rural culture. However, the growth in supply, territorial diffusion and global changes in a post-Fordist market has led to increasing competition in the market, which questions the sustainability of such activity in rural areas. The evolution from conventional tourist to another with far more experience and with a whole new set of motiva-

* Translation: Mark Crumpton (markcrumpton@virtuamc.com)

tions has encouraged travel businesses and tourist destinations alike to invest in products and services where quality and market orientation are key to maximizing their competitiveness. It also means however that businesses and destinations need to design more innovative products in order to capture new markets (Ioannides, 1997) and promote the proliferation of more highly-specialized approaches that are targeted at niche markets.

I. THE SPANISH RURAL TOURISM: AN ACTIVITY MATURE SUBJECT TO GROWING COMPETITION

The post-modern, hyper-mobile tourist (Urry, 2002), who permanently aspires to consuming “authentic and unique experiences” is encouraging travel businesses and tourist destinations to invest ever more resources in ongoing efforts, and designing new products which are complex in both their planning and management, and to develop costly promotional campaigns. In rural areas, where dominating micro-operators have limited financial capacity, these efforts, which define competitive tourist destinations, regardless of their nature (Brito, 2009), can only be accomplished by coordinating efforts among local agents, promoting networking and the widespread use of new information technology; issues that are not currently addressed or resolved in the majority of Spanish rural areas. Twenty five years ago there was hardly any evidence of rural tourism in Spain. In this context, territories that proposed generic models of rural tourism could operate with relative success because they worked in an emerging sector with little competitive or no pressure. Today, territories operate in highly competitive environments, as evidenced by official statistics published. Last century, by the close of the 1980s, in Spain there were several hundred rural accommodations. By 2011 the figure was closer to 15,000. In this period the number of accommodation users grew very significantly, however the supply growth curve grew even steeper. Consequently, the average occupancy per room and per accommodation unit decreased, showing a considerable decline in the period from 2000-2011. At this time the number of users increased by 124.1%, whilst occupancy units grew 220.85% and accommodation units grew 173.59%. This resulted in a decrease in the average number of users per accommodation from 220.3 to 180.5, and the number of users per occupancy unit (28.2 and 19.7 respectively), figures that indicate a clear decline in profitability per tourism enterprise. This problem is compounded by the derivative of high dependence on domestic tourism and a very limited ability to capture international markets, meaning that, in times of market crisis, the fall in hotel occupancy is not compensated by the arrival of foreign tourists. The combination of these factors (greater growth in supply versus demand and excessive dependence on the domestic market) raises real profitability issues for the sector and seriously questions the sustainability of enterprises and regions that do not adapt to the current situation. As Butler notes in its approach to the life cycle of tourist destinations, the current scenario requires territories to ultimately make decisions, innovate and avoid stagnation and decline.

Today, rural tourism in Spain is a mature market which depends increasingly upon the ability of territories to attract and retain visitors and to draw on their know-how to develop specialized and differentiated products that integrate different resources and provide high added value that the market can identify with. Spanish rural tourism there needs to depend on

the effectiveness of public and private agents to act in a coordinated manner and to develop proposals that are capable of transforming territories into articulated tourist destinations with a highly recognizable brand image. Having said that, rural Spain lacks the experiences of mutually agreed tourist developments carried out by local agents which are planned properly and whose primary objective is the construction of destinations over and above the creation of supply. Also lacking are institutions with the capacity to address basic problems for the sustainability and competitiveness of tourist destinations such as the assessment of the evolution of the tourism phenomenon, the correction of negative impacts, and assessment of service quality, determining the degree of satisfaction of the tourist experience and the effective investment in promotion, sales and marketing. This is the case in the Segovia Northeast, a region where there has been some progress in tourism development but which today still presents a number of deficiencies in its role as an articulated tourist destination that is ready and prepared to compete over the long term.

II. NORTHEAST OF SEGOVIA: TOURIST DESTINATION OR TERRITORY WHERE TOURISM IS PRODUCED AND CONSUMED?

The case study is conducted in an area located in the center of Spain, in the north-eastern sector of the province of Segovia, 130 km from the state capital. Her 1829.85 Km² include 57 municipalities populated by 12,000 residents spread over 118 small settlements. It is a rural area with little human occupation (6.6 per km²) and a high degree of aging population. The sparse population generates both positive and negative impacts on the development of tourism in the area. On the one hand, there is the outstanding guarantee of the absence of environmental stress, a benefit which is highly valued and appreciated by today's urban tourist. On the other hand, and as a result, the area has experienced moderate urban growth in recent years which has taken great pains to preserve agricultural landscapes, wildlife habitats, traditional settlements and vernacular architecture. The main negative impacts include the deficit on two essential resources for development: social and human capital.

The number of visitors, the supply of accommodation, restaurants and other tourist services have grown sharply in recent years and tourism has become one of the core activities contributing to the local economy. However, although a small number of municipalities have managed to specialize and generate tourism through marketing their image as a venue in which to enjoy gastronomy, mother nature or outdoor/extreme sports, the regional tourism model can only be defined as "generic rural tourism", with a tangible lack of specialization which is barely distinguishable from that of other many Spanish rural areas. The central attraction of this model, dominated by weekend hikers and vacationers visiting their second homes, is its proximity to Madrid (80 minute road trip to a potential market of 6 million consumers), and its natural heritage which is well conserved, with its monumental architecture and popular and traditional gastronomy.

That said, although heritage is a valuable factor for tourism, this is not enough to justify sustainable and lasting tourism development over time. The transformation of heritage tourism into a resource, the step prior to creating marketable products, requires a complex process of changing cultural values in society and a series of actions designed to preserve, transform and enhance its value in economic terms (Ortega, 1989). But (and with a few

exceptions) much of the Segovia Northeast territorial heritage has barely been incorporated into the value chain or is painfully underutilized.

The growth of tourism has been possible thanks to the tourism market-breaking effect of a handful of pioneers, the financial support of rural development policies, the favorable market framework generated by Spanish economic growth between 1995 and 2007 and an excellent geographic location: its proximity to the Madrid metropolis. The region is in close proximity to a huge Madrid market which is its primary tourism resource. Madrid produces a powerful “inertia” that guarantees a steady flow of visitors, regardless of the quality, diversity, uniqueness and degree of articulation of tourism services. This proximity benefit generates comparative advantages over other territories, although much of its potential is wasted. The proximity to Madrid could enhance organizational processes which could favor its articulation as a tourist destination (Becattini, 1974). Also it could favor more positive reactions from individual companies or conglomerates, encouraging the creation of institutions focused on managing issues affecting the global nature of the agents and the tourist destination (Aurioles et al., 2008). It could also encourage the accumulation of investment capital, increased cooperation between public and private agents and synergies that improve the efficiency of public policy, quality and global competitiveness of the destination. But this hardly occurs, since most of the agents perceive that, whatever the articulation of the territory as a tourist destination, the uniqueness and quality of the offer runs completely independent to tourists’ satisfaction levels concerning the services consumed, since Madrid guarantees a high influx of visitors, whatever. Consequently, their proximity to the capital is experienced as a kind of financial insurance policy which discourages any interest in working together and dilutes part of the comparative advantages associated with the region.

The geological heritage, protected areas, forests, hydrological network, agricultural landscapes and architectural heritage show a significant potential for tourism which is, to a large extent, not being taken advantage of. With regard to the area’s geological heritage, milestones of scientific, educational and aesthetic interest stand out such as the Duratón and Riaza river canyons, karst formations, fossil sites and multiple traces of ancient geomorphologic processes. This wealth is translated into fourteen Points of Geological Interest catalogued in the Spanish Geological and Mining Inventory (50% of those in the province of Segovia). The forty thousand hectares of forest and hydrographic networks of the Riaza and Duratón rivers contribute to the Natura 2000 network a total of 40,212 hectares, including three protected natural parks. The 115 hunting grounds of the region also show clear potential for hunting and the same happens with mushroom collecting. However, despite their obvious potential, most of the natural heritage has not yet been incorporated into the tourism value chain or its value is incomplete. There is no single path, infrastructure, or themed product on geology and / or geomorphology and the enhancement of other natural heritage matters; in fact numerous deficits are registered. Among them, an insufficient provision of infrastructure for public use, a marked deterioration in others and a very limited supply of specialized nature tourism. As for hunting, despite it being an activity that is practiced by local people and popular with hunting parties coming in from other provinces, the region has failed to develop a specialized segment of hunting tourism for this target audience.

The same applies to the mycological heritage. Although a number of lucrative submerged harvests, recreational activities and a timid emergence of mycological tourism have been

developed, it still appears to be an emerging activity on which a solid and specialized tourism offer has yet to be articulated. Finally, the practice of canoeing is the only activity based on the use of the natural heritage that has generated significant specific demand and helped to enhance territorial branding, although only in a small and confined area: running through the middle stretch of the Duratón River.

Another major argument in favor of tourism in Segovia's northeast is its architectural heritage and in this case much of it is underutilized. At the Duratón Nature Reserve can be found one of the largest concentrations of rock art in the mainland of the peninsula, whilst distributed along the rest of the territory is an important medieval monumental heritage, pre-Roman, Romans and Visigoths archaeological sites. Twenty assets have been declared of Cultural Interest: four Monumental Historic sites (50% of those in the province), twenty civil and religious monuments (14.6% of the provincial total) and the only archaeological area of interest catalogued in Segovia. Noteworthy for its walled sites and historical-artistic interest are the nuclei of Ayllon, Maderuelo and Sepulveda and a number of Romanic churches and chapels. Added to this popular architectural heritage are examples of four of the thirteen traditional settlement patterns catalogued in Castilla y León (Benito, 1998), sources, sinks, stone fences, forges, mills, lofts, wine cellars and other agricultural buildings. Most of this heritage has not been leveraged and exploited for use beyond standard promotional brochures, guides or web pages. In other cases its use is partial, incomplete or shows multiple deficiencies with very restricted visiting hours and difficulties for physical access. Specific products such as themed routes have not been developed either, and there is a clear lack of signage and information panels to guide tourists in popular buildings of architectural interest, in stark contrast to the region's monumental architecture. The inadequate treatment of this heritage in municipal planning instruments, the disinterest of the owners and their financial inability to finance the entitlement to visits, maintain surveillance systems and enable physical guides provide some of the explanation behind these problems. These issues do not help to resolve public policy on rural development since hiring staff eligible for providing such services is considered unworthy of public funding.

Despite all this, tourism in the region has grown sharply in recent years, especially with regard to basic accommodation infrastructures. The late eighties, as was happening in the rest of the country, saw the start of an accelerated infrastructure building program which was promoted by European structural funds earmarked for rural development. By the year 2000 there were 46 fully functioning accommodations with 976 units. Just seven years on and accommodations had reached 105 (128% growth) with 2,498 units (155.9%). In the next three years, in full economic recession, the number of accommodations increased by 8.5% and units by 13.8%. In parallel, the offer spread throughout the territory like wildfire: Taking into account that in the year 2000 there were 18 municipalities boasting tourist accommodation; by 2010 the number had reached 32. Similar trends were registered in the hotel and restaurant business, the tourist activity with the longest history, and which boasts the largest number of establishments and the most widespread throughout the region. In 2000 there were 64 restaurants, 4,852 place settings and 24 municipalities with a relevant offer. In 2007 these figures had risen to 99 (a 54.7% hike), 7,556 (58.8%) and 25 respectively. Between 2008 and 2010, despite the economic crisis and recession facing the region, the increases were 7.07% and 2.8% respectively, with 27 municipalities boasting such services. Two main factors

explain these trends. The first is the role as a shelter activity within the sector, with frequent cases of entrepreneurs who started out with the notion of building accommodation projects or other tourist services, and eventually expanding their businesses with the inclusions of restaurants. The second, and more important, is the tremendous appeal of a tradition that has been documented all the way back to at least the mid-nineteenth century: succulent roast lamb whose reputation is grounded on the quality of local livestock, the valuable intangible cultural heritage and the culinary know-how of its chefs. Another pillar of regional tourism is its potential for outdoor sporting activities, namely the practice of flat-water canoeing. This is a highly specialized tourism offer that can only be found in a small number of municipalities. In 2008 there were 42 active tourism companies operating throughout the Castilian-Leon region with 10 of them (24% of total) operating in the Northeast of Segovia. This data shows a clear spatial concentration of regional activity in the territory, although in effect it only takes place across four municipalities affected by the Duratón Natural Park (Sebúlcor, Carrascal del Rio, San Miguel de Bernuy and Sepulveda) and two located a short distance away (Grajera and Fuente del Fresno). In stark contrast to the development of gastronomy and sports tourism, and despite the existence of a high potential demand for cultural activities such as exhibitions, music concerts or theatre production stage performances Segovia's Northeastern region does not appear to have a minimum or permanent range of cultural tourism services on offer, neither does it have any specialized companies operating in the sector. It also seems to have an undeveloped range of nature tourism services over and beyond the few provided by the Natural Parks Interpretation Centers and a scattering of sports tourism companies that include it almost as an afterthought in their product offers. Both deficits represent a clear weakness in the process of consolidation of the territory as a competitive and sustainable tourism destination.

CONCLUSIONS

The conclusions of the research reveal that in the Segovia Northeast similar processes to those recorded in other Spanish rural areas have occurred over the last twenty years: namely a significant expansion of activity throughout the territory as a whole and strong growth in the offering of basic tourism infrastructures and the ability to accommodate tourists. However, despite some municipalities offering a long tradition of culinary tourism and a few others providing a highly specialized service in sports tourism, and taking into account other advances in the enhancement of the local heritage's value via the generation of relevant products and services, the conclusions furthermore show that the region cannot be considered a consolidated destination that is ready to compete in the long term. Despite some exceptions, it appears to have failed to create recognizable tourist arguments that distinguish it from other regions in Spain and shows a clear inability to articulate itself as a differentiated tourist destination that could allow it to overcome its current "generic rural tourism" service perception. After more than twenty years of tourism development a significant part of the territory's heritage has not seen its value tangibly enhanced, other developments are underutilized and there is a clear deficit in the development of nature and cultural tourism services. Neither has it managed to produce complex products composed of different resources which are themed, with high added value and targeted at a specialized and niche target audience. Finally the

region appears not to have a tourism development strategic plan in place which, considering the general trends and endogenous potential, offers a shared objectives approach, enjoys the commitment of local agents, defines a coherent and comprehensive set of proposals for specialization, promotion and marketing, identifying the measures needed to generate a territorial brand image which is highly impactful and recognizable by the market.

Many of the problems identified are due to the inability of public institutions and private agents to work together. Tourism in this area is plagued by a myriad of public agents that work together with little or no coordination, that lack human capital, have limited technical and financial resources. With very few exceptions, there is little evidence of cooperative relations between public and / or private agents. Nor does there seem to be space for reflection on the problems of tourism development, where distrust of “the other side” is widespread. This environment gives rise to frequent problems of coordination and the juxtaposition of actions executed by different agents, the duplication of investments under the same commercial objectives as well as other inefficiencies in the implementation of public policies. All this, together with the absence of a recognized leadership, reflects on a deeply engrained deficit in social capital, another major problem in the overall development of tourism in many of Spain’s rural areas as a whole. This deficit is, in most probability, the principle obstacle to be addressed in order for Segovia’s northeast to become a sustainable and competitive tourism destination.

In conclusion, over and above its status as a geographical area where tourism is produced and consumed, the Segovia Northeast cannot at present be regarded as a well-rounded and holistic tourist destination, a matter which compromises the economic sustainability of this activity in the region in an increasingly competitive environment. The scenario of increased competition in Spanish rural tourism, budget constraints of national policies and the depletion of European resources is driving this territory, along with the rest of Spain’s rural areas, to commit to the design of more innovative ways of working and formulas for moving forward. These should include, based on the enhancement of endogenous resources and environmental and socioeconomic sustainability criteria, projects that are more highly specialized, themed, differentiated and capable of attracting international markets, applying criteria that maximizes the efficiency of public investments, new funding formulas that include higher levels of self-financing and more active involvement from local agents. This requires an action plan featuring tourism development strategies that are well planned, have the shared consensus of agents, set hierarchical objectives, and involve actions that are targeted at generating high value-added products that combine different local resources, mechanisms, control systems and monitoring of tourism development, as well as instruments to strengthen and spread the destination’s brand image. These are questions that require the need to work together in unison, with full collaboration, active engagement and trust between agents and the political and institutional leadership.

