



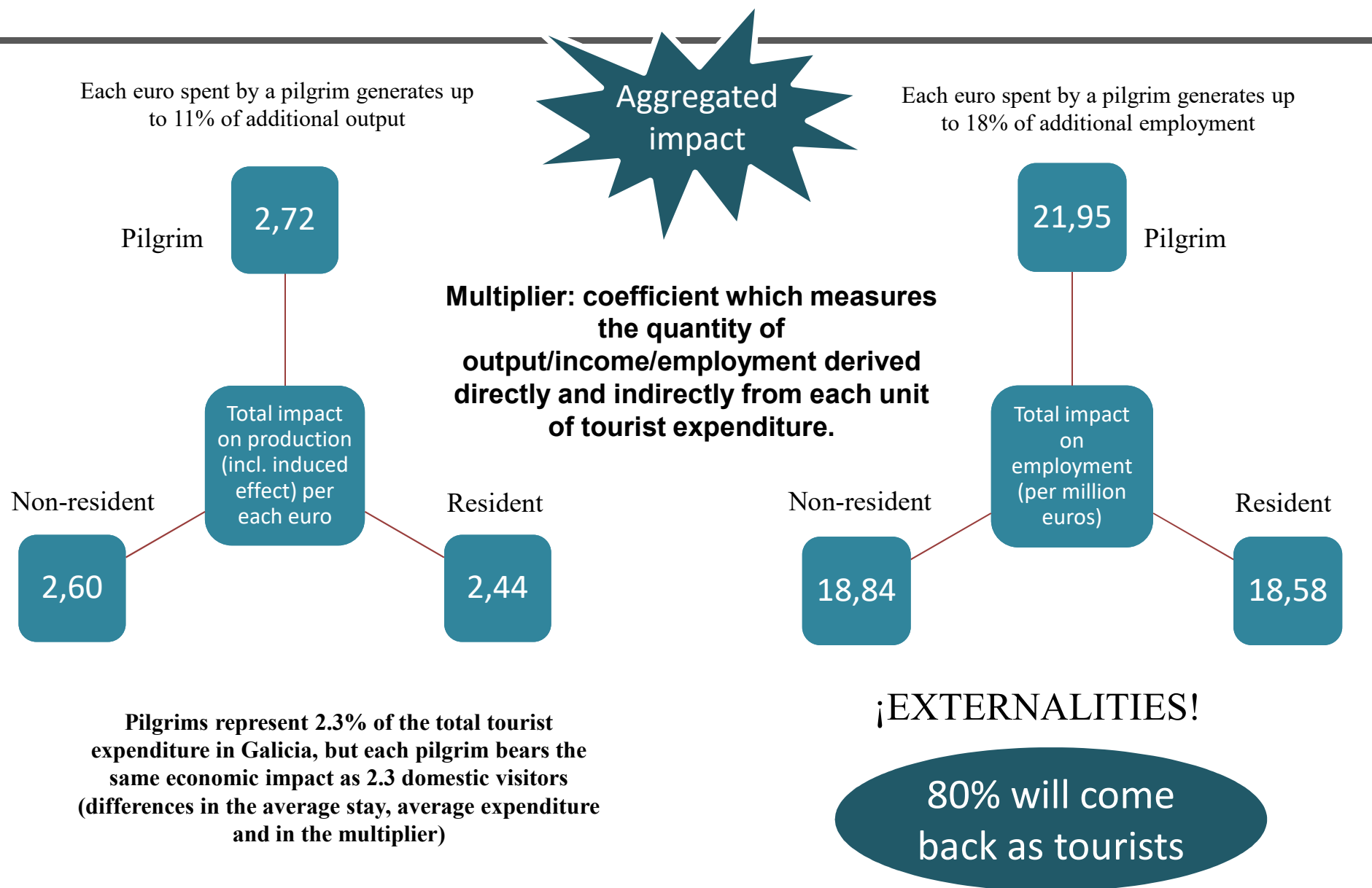
ANALYSIS OF THE SOCIOECONOMIC IMPACT OF THE *CAMINO DE SANTIAGO*

PRELIMINARY RESULTS

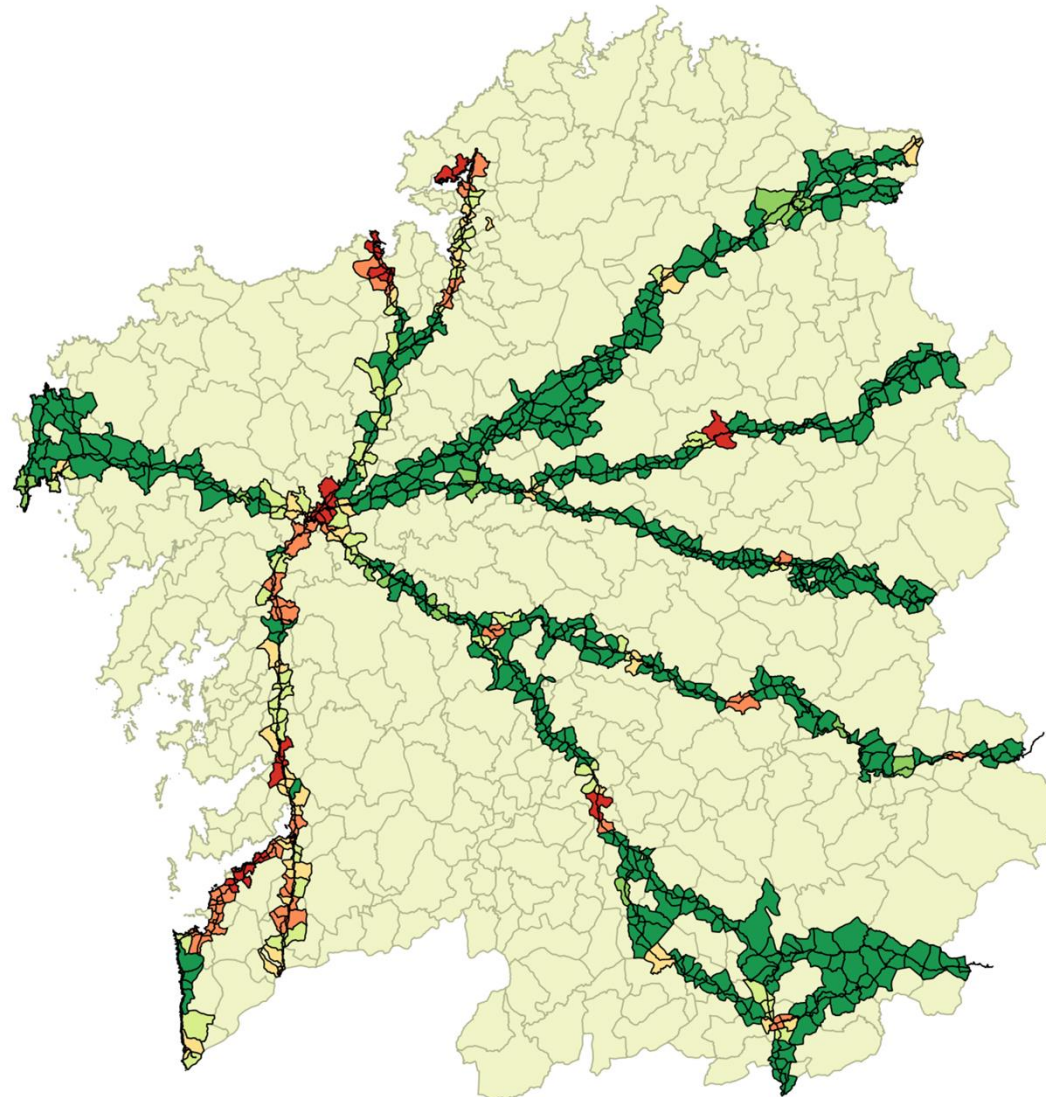


RESULTS PREVIEW





SOCIOECONOMIC IMPACT AT THE LOCAL LEVEL



Lenda

Parroquia segundo grao de urbanización

- ZDP
- ZIP alta
- ZIP baixa
- ZPP alta
- ZPP baixa
- ZPP media

Very high
heterogeneity

USC
UNIVERSIDADE DE SANTIAGO DE COMPOSTELA
INSTITUTO DE ESTUDOS
E DESENVOLVEMENTO DE GALICIA
(IDEGA)

GAME
GRUPO DE ANÁLISE E MODELIZACIÓN ECONÓMICA

WHAT IS THE OPINION OF THE RESIDENTS?

Melide and
Pedrafita do
Cebreiro

Youngest and oldest
municipalities in the
French way

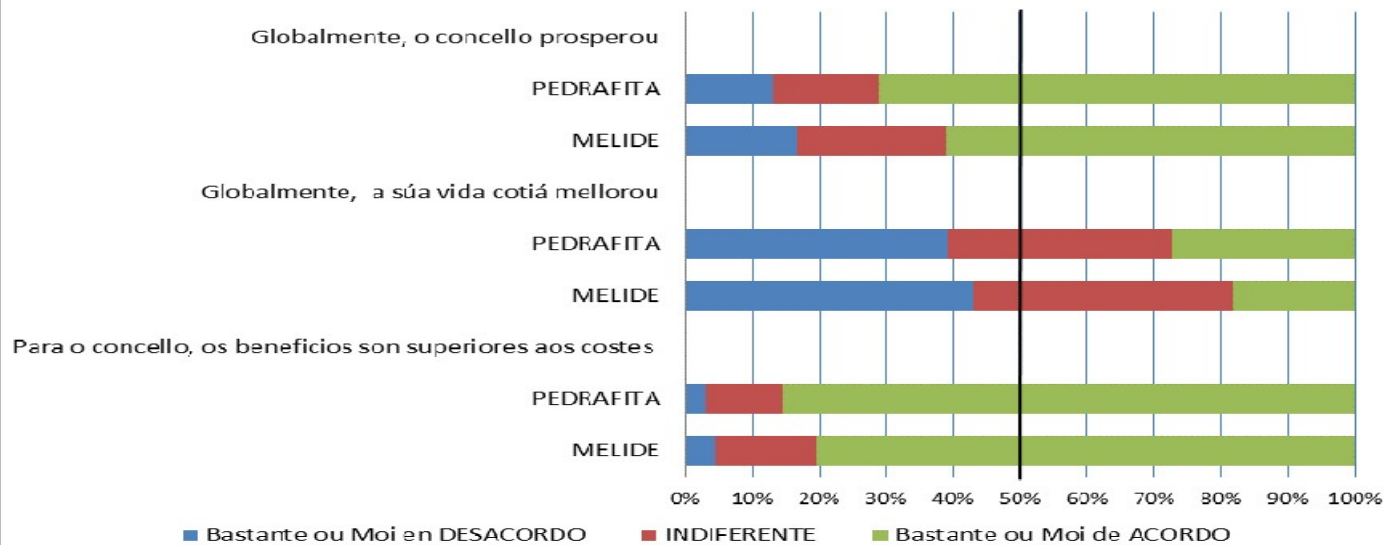
Most and least
densely populated

Leyenda

— Trazado complementario
— Trazado principal



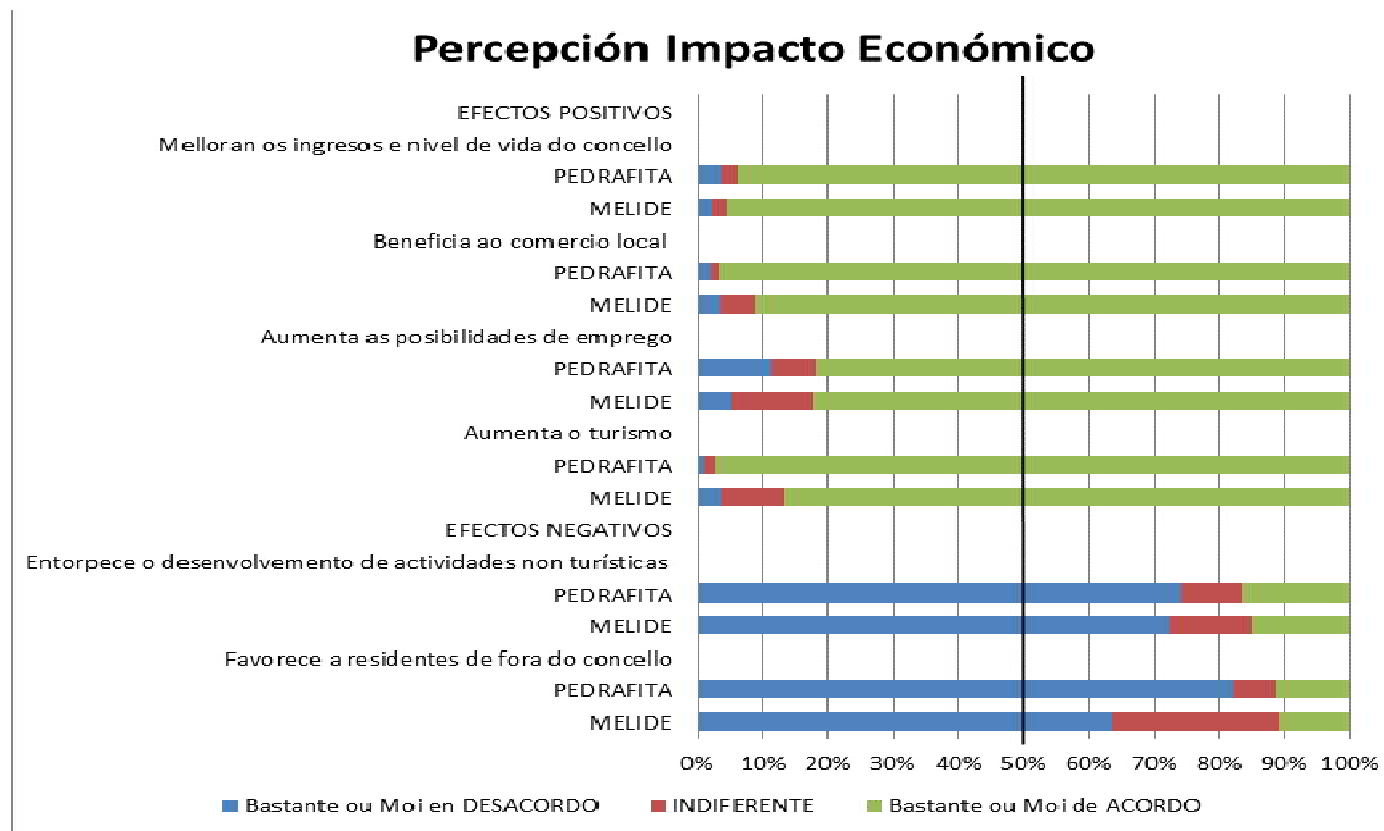
Percepción Impacto Global



Very positive overall
assessment, with a better
evaluation for the
population as a whole
than for each individual

PERCEIVED ECONOMIC IMPACT

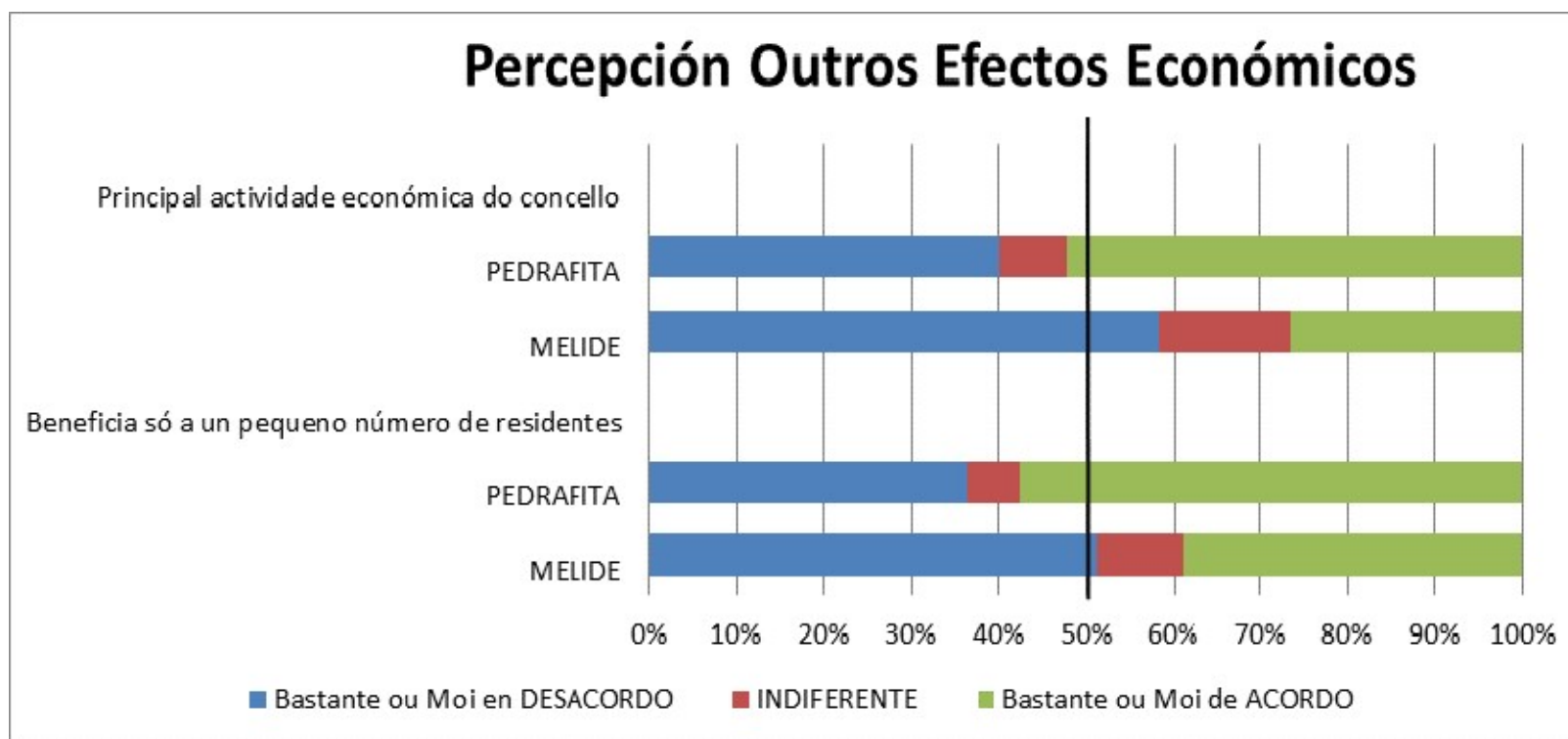
Positive economic impact: mainly, the residents in both municipalities see the **positive economic impacts of the *Camino*** (in terms of income, local business, employment and tourism), but they are not aware of any **negative economic impacts** (The *Camino* does not harm other activities and its benefits go to the residents of the municipality)



OTHER PERCEIVED ECONOMIC EFFECTS

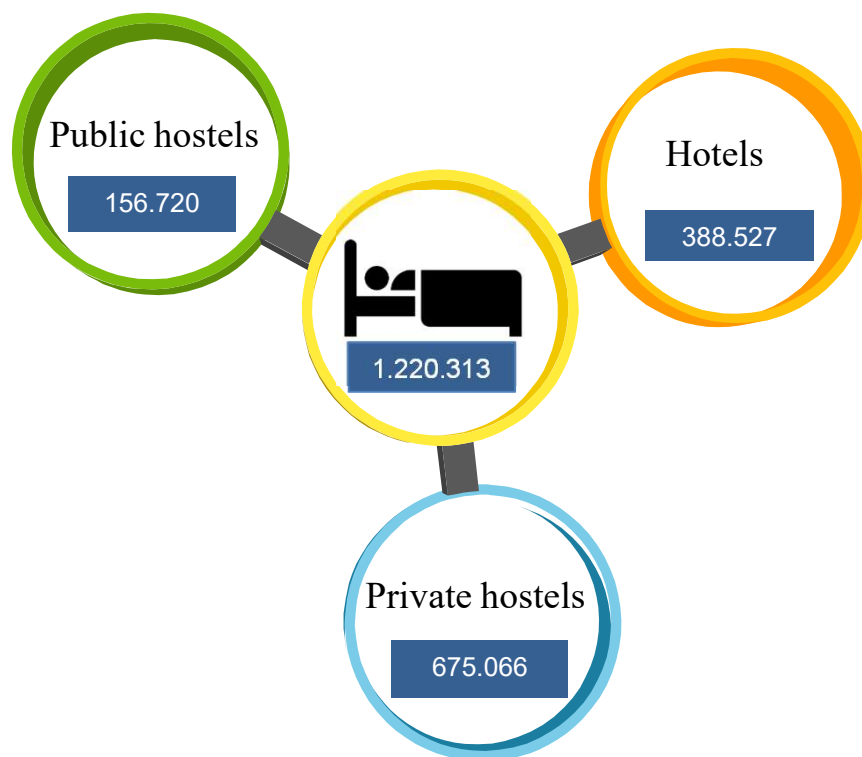
In **Pedrafita**, the widespread opinion is that *The Camino* represents the main economic activity of the municipality, but that **activity benefits only a few residents**.

The residents of **Melide** do not think that *The Camino* is the main economic activity of the municipality, nor that the benefits from that activity go to a small number of residents.



IMPACT AT THE LOCAL SCALE

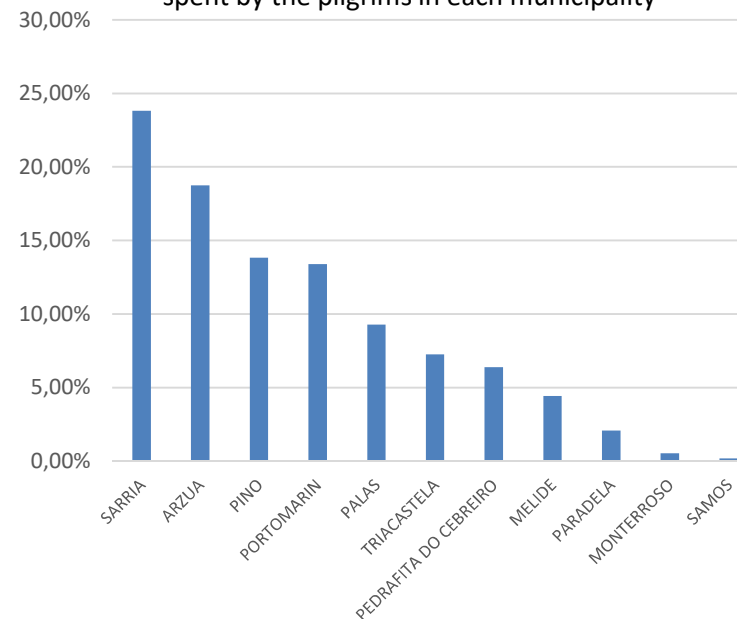
From the estimation of the number of NIGHTS that pilgrims spent in Galicia, in each of the municipalities concerned.



At the local level, most of the indirect and the induced impacts are generated outside the municipality

Focus on the Direct Impact

Estimates of the distribution of the nights spent by the pilgrims in each municipality

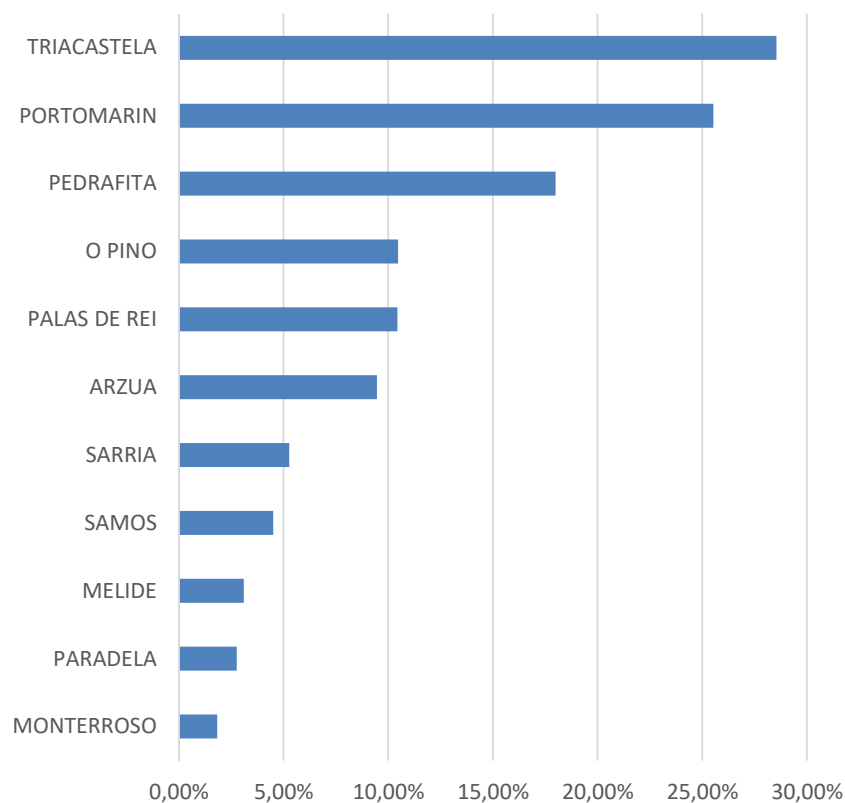


SOME RESULTS...

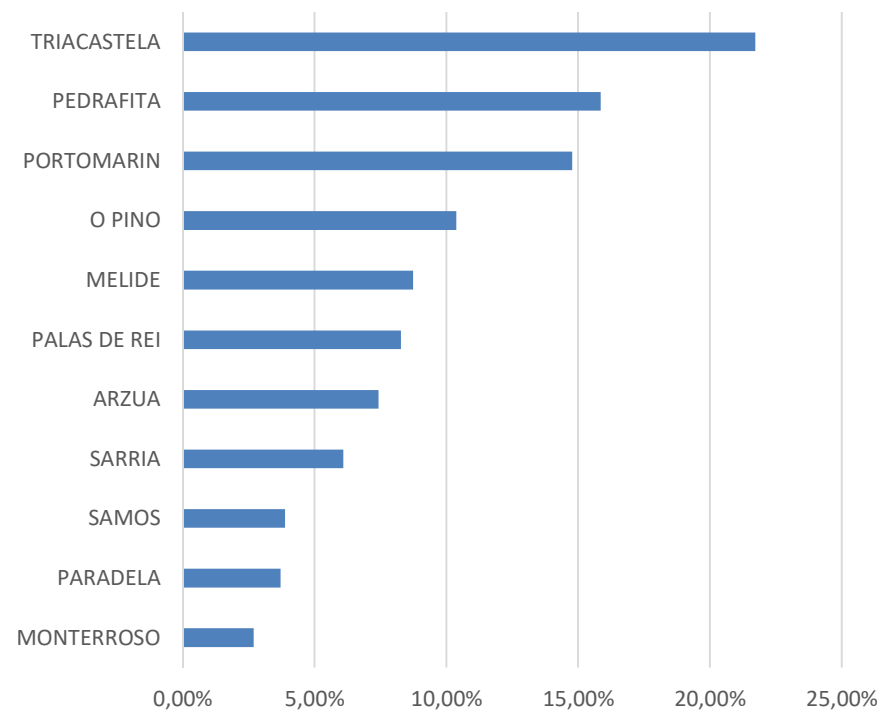
One pilgrim that spends one night in the municipality is equivalent to 1/365 of a permanent resident

Assuming a daily EXPENDITURE of 50 EUROS
(61,015,633 euros in total)

EQUIVALENT ASSOCIATED POPULATION



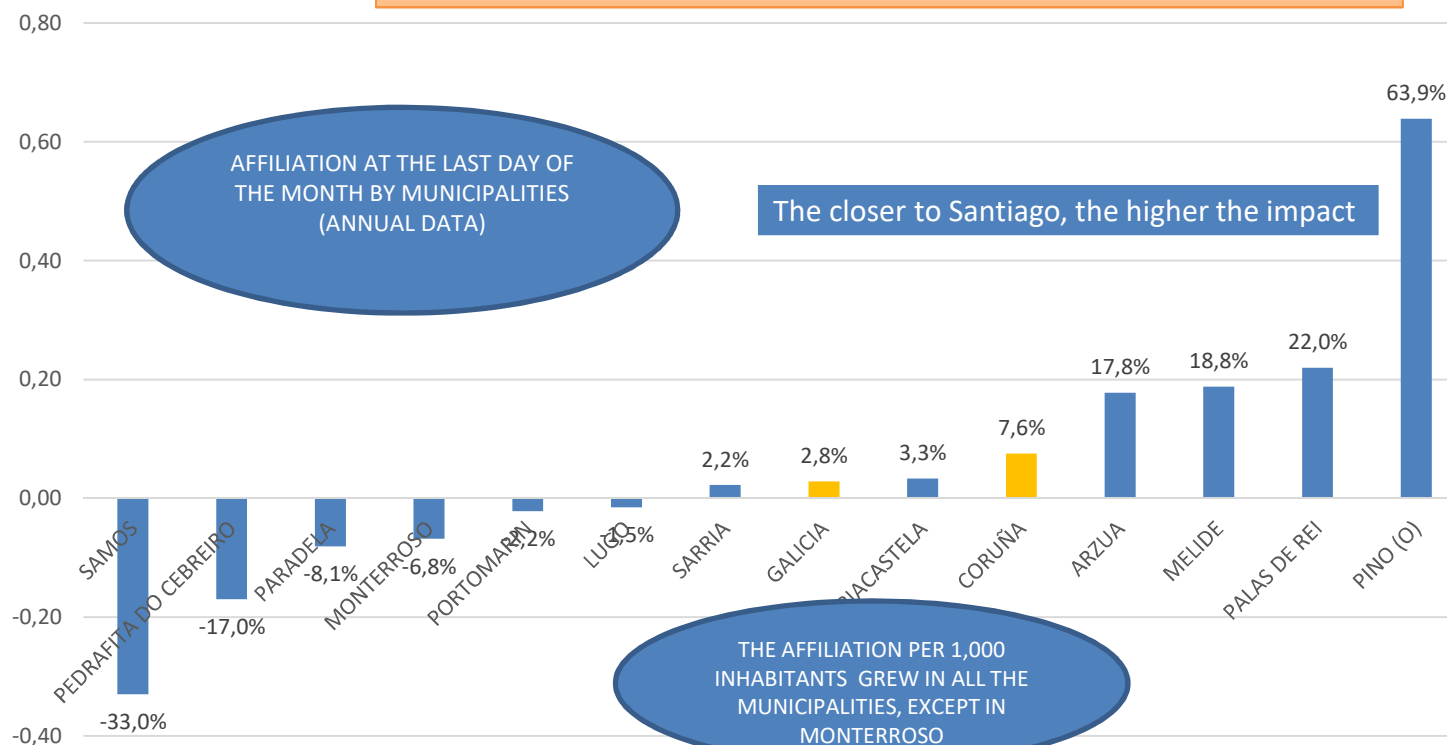
RATIO BETWEEN THE DIRECT EXPENDITURE OF THE PILGRIMS AND THE GDP OF THE MUNICIPALITY IN 2014



EMPLOYMENT IMPACT

The oficial data confirms the importance of the economic activity generated in the municipalities along the *French way*.

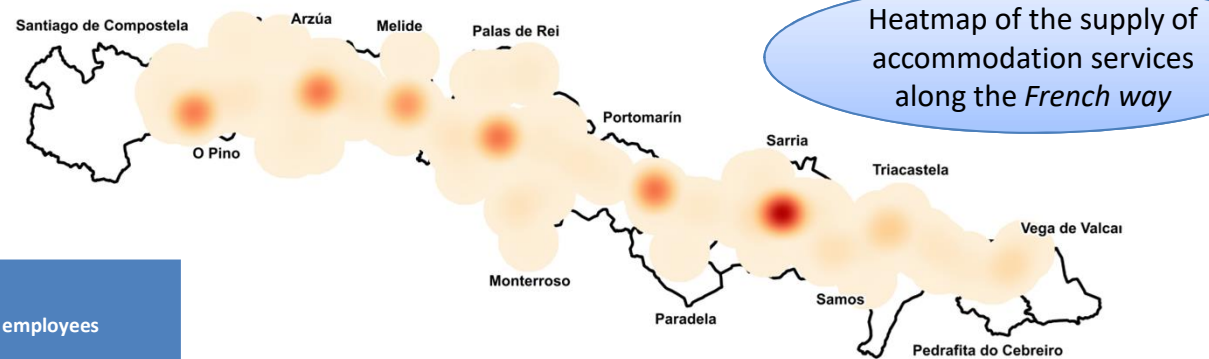
EMPLOYMENT IMPACT DATA ON AFFILIATION TO THE SOCIAL SECURITY. RELATIVE CHANGE 2017/2003



SOME FIGURES...

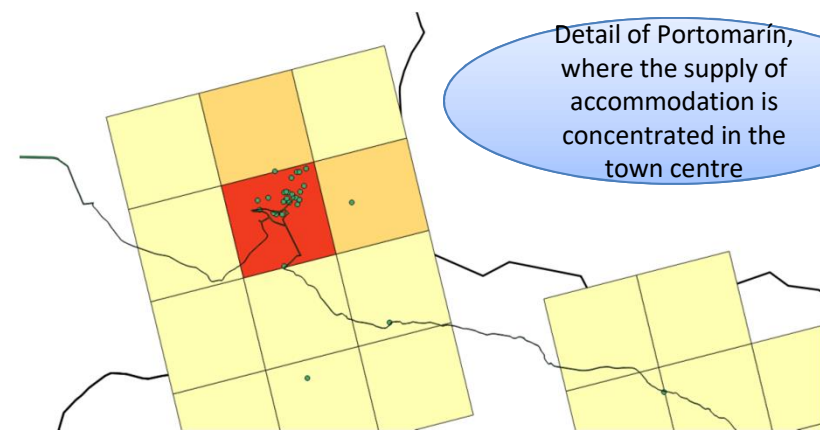
In 2009 the *French way* accounted for 4.26% of the total hotel beds in Galicia, in 2017 was the 8.71%. Among the 5,036 new hotel beds created in Galicia between 2009 and 2017, 30% were established along the *French way*.

The population of the municipalities in the *French way* represents 1.68% of the total population in Galicia.



| Contribution of the Hospitality sector in terms of employees | | | | |
|--|------|------|------|---------|
| | 2008 | 2010 | 2016 | Share % |
| ARZUA | 7 | 5 | 3 | 11,1% |
| MELIDE | 5 | 4 | 2 | 20,1% |
| O PINO | 4 | 2 | 1 | 17,8% |
| MONTERROSO | 6 | 5 | 5 | 7,7% |
| PALAS | 6 | 5 | 1 | 16,4% |
| PARADELA | 7 | 4 | 2 | 16,9% |
| PEDRAFITA | 3 | 3 | 2 | 30,5% |
| PORTOMARIN | 3 | 1 | 1 | 31,6% |
| SAMOS | 4 | 3 | 3 | 14,5% |
| SARRIA | 7 | 6 | 5 | 10,5% |
| TRIACASTELA | 5 | 3 | 1 | 33,0% |
| GALICIA | 8 | 7 | 6 | 6,8% |

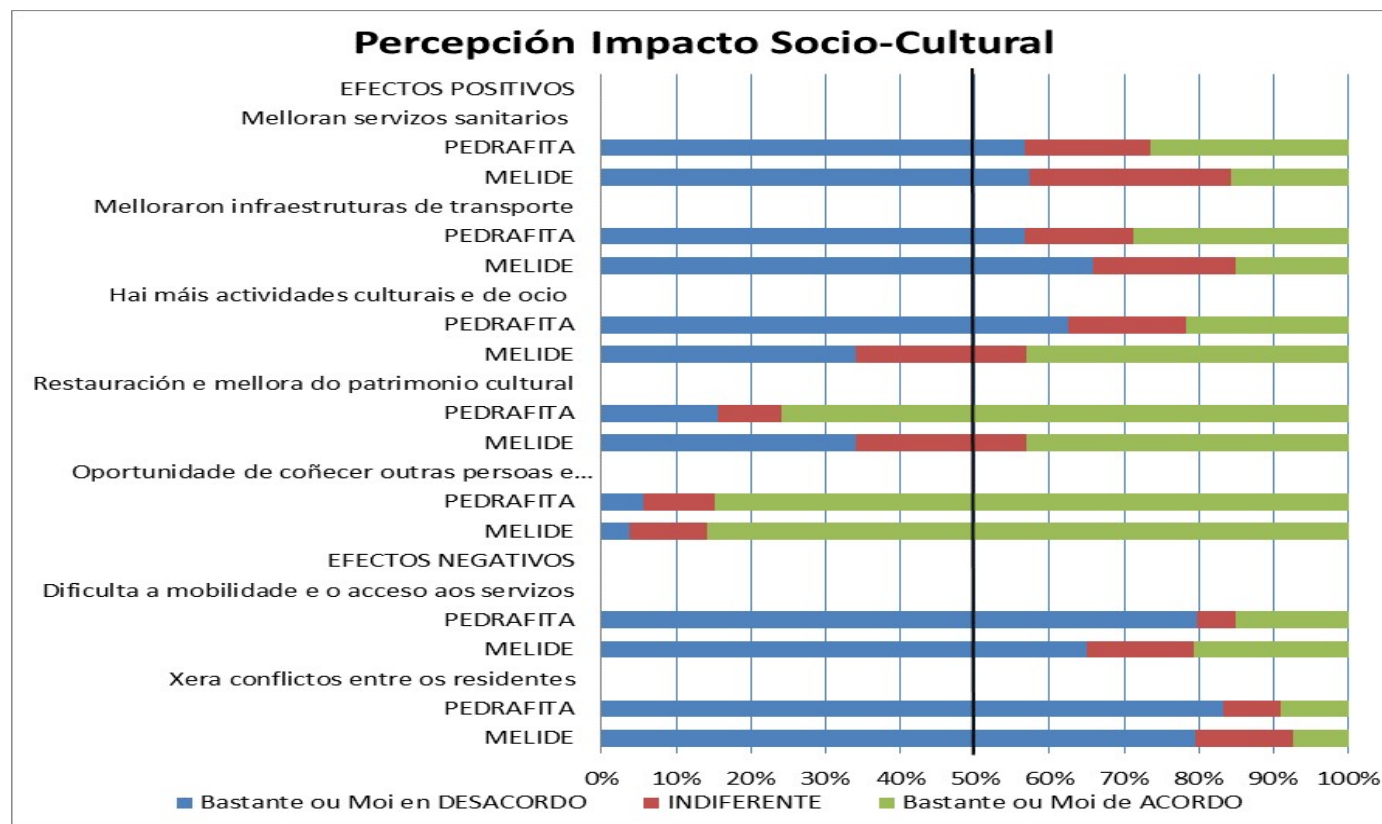
Source: Instituto Galego das Cualificacións



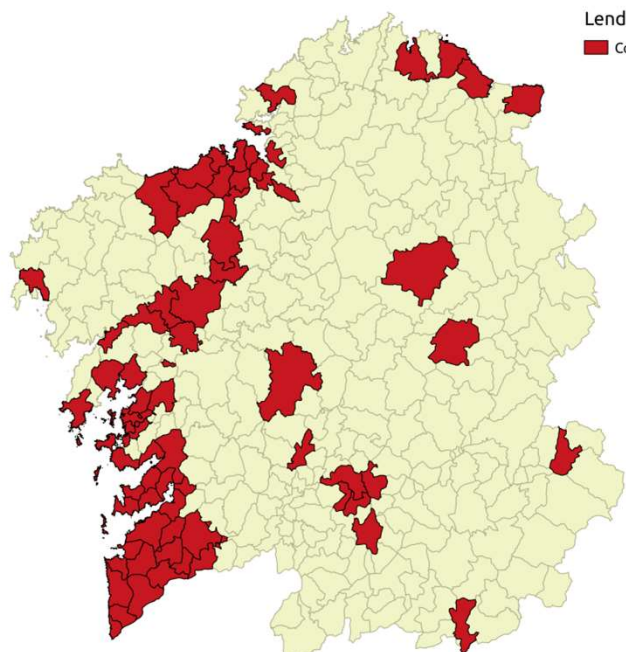
SOCIOCULTURAL AND DEMOGRAPHIC IMPACT

Social impact: neutral, without negative impacts

Cultural impact: positive, especially regarding the preservation and restoration of the cultural heritage, perceiving the *Camino de Santiago* as an opportunity to meet new cultures

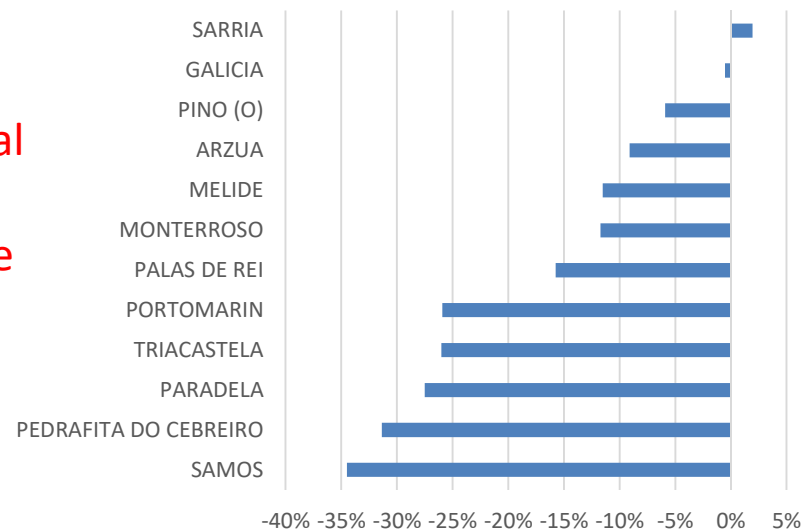


SOCIOCULTURAL AND DEMOGRAPHIC IMPACT



Data from the oficial statistics shows a very clear regressive dynamic

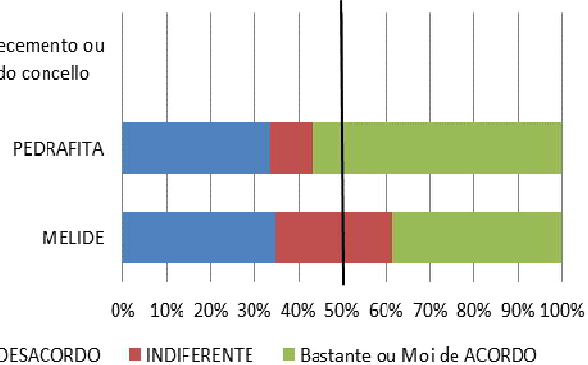
RELATIVE CHANGE OF THE POPULATION BETWEEN 2001-2016 (MUNICIPAL REGISTER)



The general perception is positive

Percepción de impacto demográfico

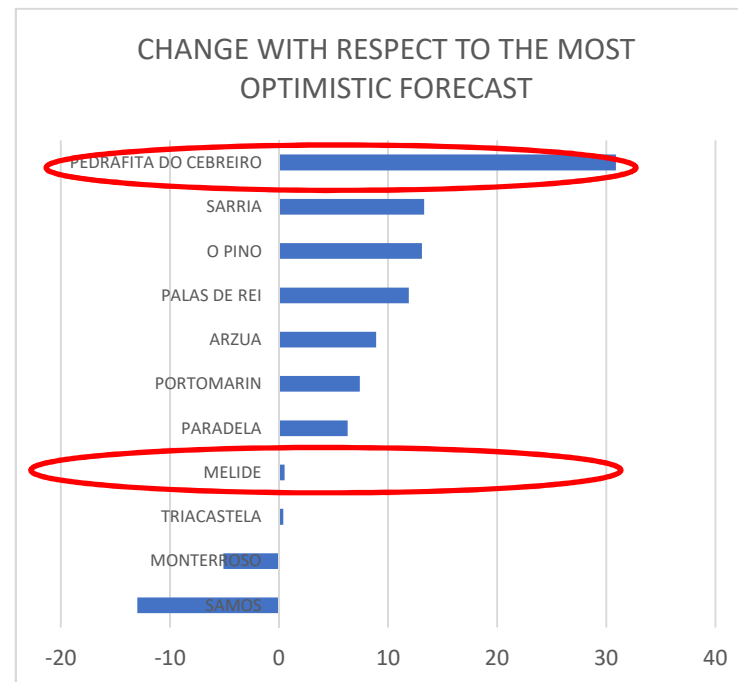
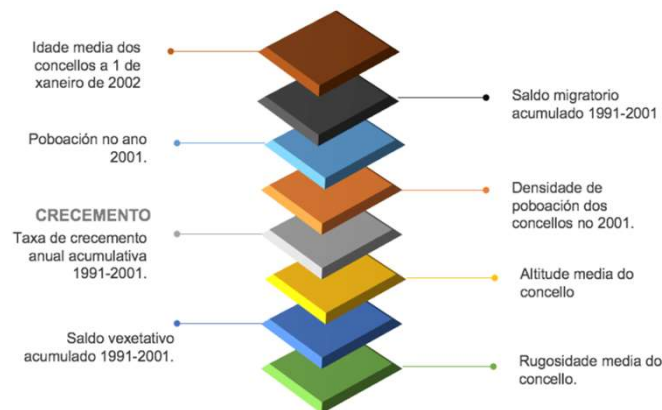
O Camiño contribúe ao establecemento ou mantemento de poboación do concello



SOCIOCULTURAL AND DEMOGRAPHIC IMPACT

An alternative analysis: estimation of the population of the municipalities along the *French way* using the information of the municipalities that belong to the inner part of Galicia not affected by the *Camino de Santiago* as a benchmark.

The closest neighbouring municipalities are the ones that show a greater similarity with respect to the reference municipality during the period 1991-2001.



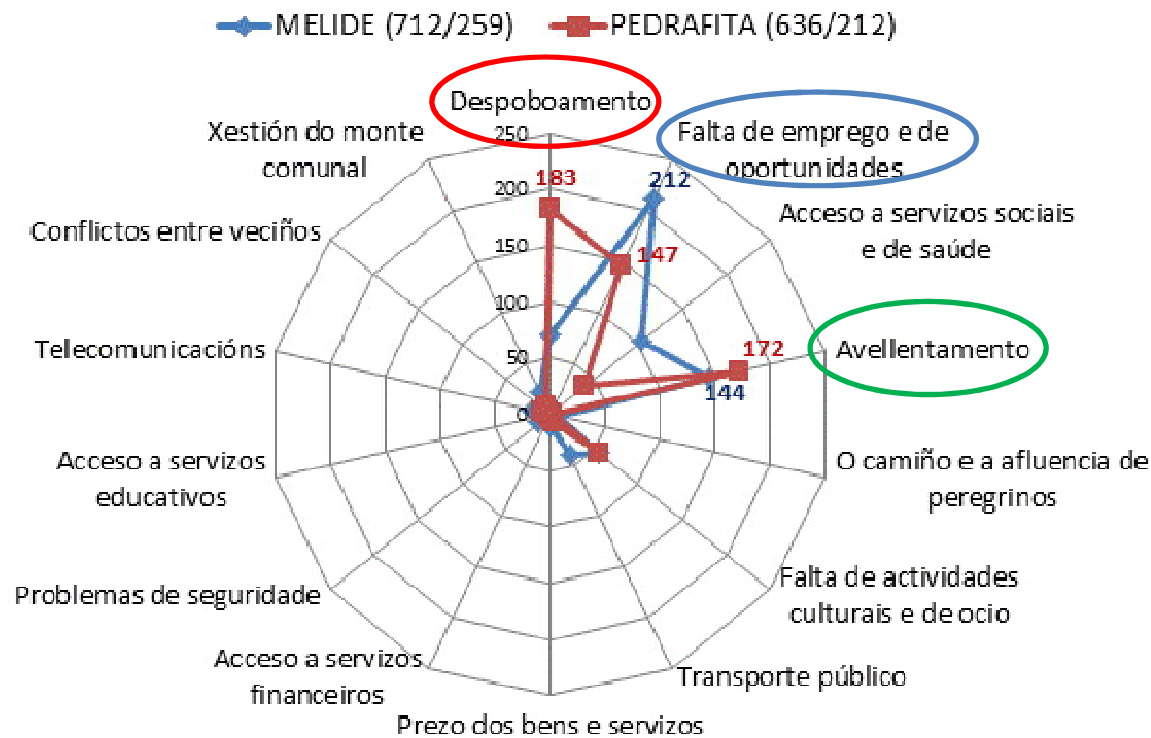
Therefore, the demographic impact is also very relevant

Moreover, despite the fact that the population in the administrative register is decreasing, the **associated population and the estimations of the equivalent population**, which includes the pilgrims weight, (one pilgrim is equivalent to 1/365 of an annual resident in the municipality) **show a positive trend for most of the municipalities**

The main problems observed by the residents are related to the **demography** and the **economy** of the municipality.

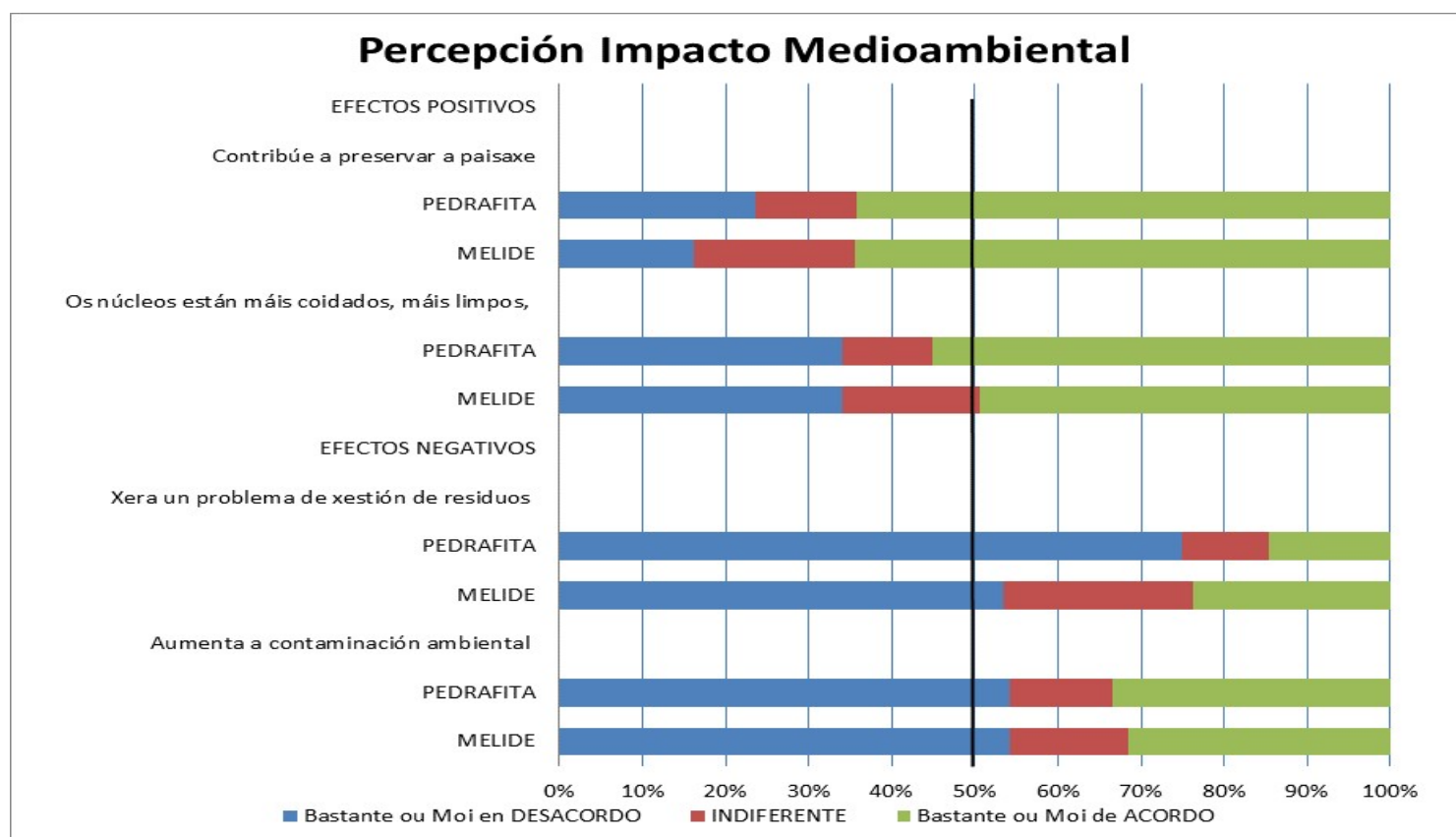
The *Camino de Santiago* and the flow of pilgrims is not considered as a problem at all. In fact, taking a look to the results, the *Camino de Santiago* is perceived as part of the solution, especially in the Pedrafita case.

Main problems in the Municipality



ENVIRONMENTAL IMPACT

Positive environmental impact in both municipalities: in general, residents do not see any negative effects, but they observe positive impacts, especially in the case of the landscape care and, to a lesser extent, of the town centre care.





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