



**15 ANNI DELLA FONDAZIONE DELLA  
ASSOCIAZIONE EUROPEA VIE FRANCIGENE  
(2001/2016)**

**28-30 APRILE 2016  
FIDENZA/PIACENZA  
VIA FRANCIGENA, VIA DI PACE**

**THE EUROPEAN  
PILGRIMAGE ROUTES AS  
ECONOMIC DRIVER.  
THE IMPACT OF THE  
FRANCIGENA IN TUSCANY.**

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## ***THE WORK AIMS TO ESTIMATE THE ECONOMIC EFFECT RELATED TO THE RESTORATION AND PROMOTION OF THE FRANCIGENA IN TUSCANY,***

considering that:

- the promotion of cultural heritage is particularly promising for Tuscany, because of the quality of its smaller cities and rural landscape;
- the experiential tourism, that is cultural tourism in the broadest sense, represents an important growing market at international level;
- the development of the experiential tourism promises to reconcile development objectives with those of sustainability, as it acts on less developed areas (smaller cities, rural areas) in a low-impact way (walking and cycling tourism, small traditional accommodations, promotion of local culture);
- the restoration and promotion of the route implies important public investments.

### ***THREE DIFFERENT METHODS OF ECONOMIC IMPACT EVALUATION ARE PROPOSED, ALL BASED ON EXISTING DATA, ACCURATELY PROCESSED CONSIDERING TERRITORIAL CHARACTERISTICS.***

The main research steps are the following:

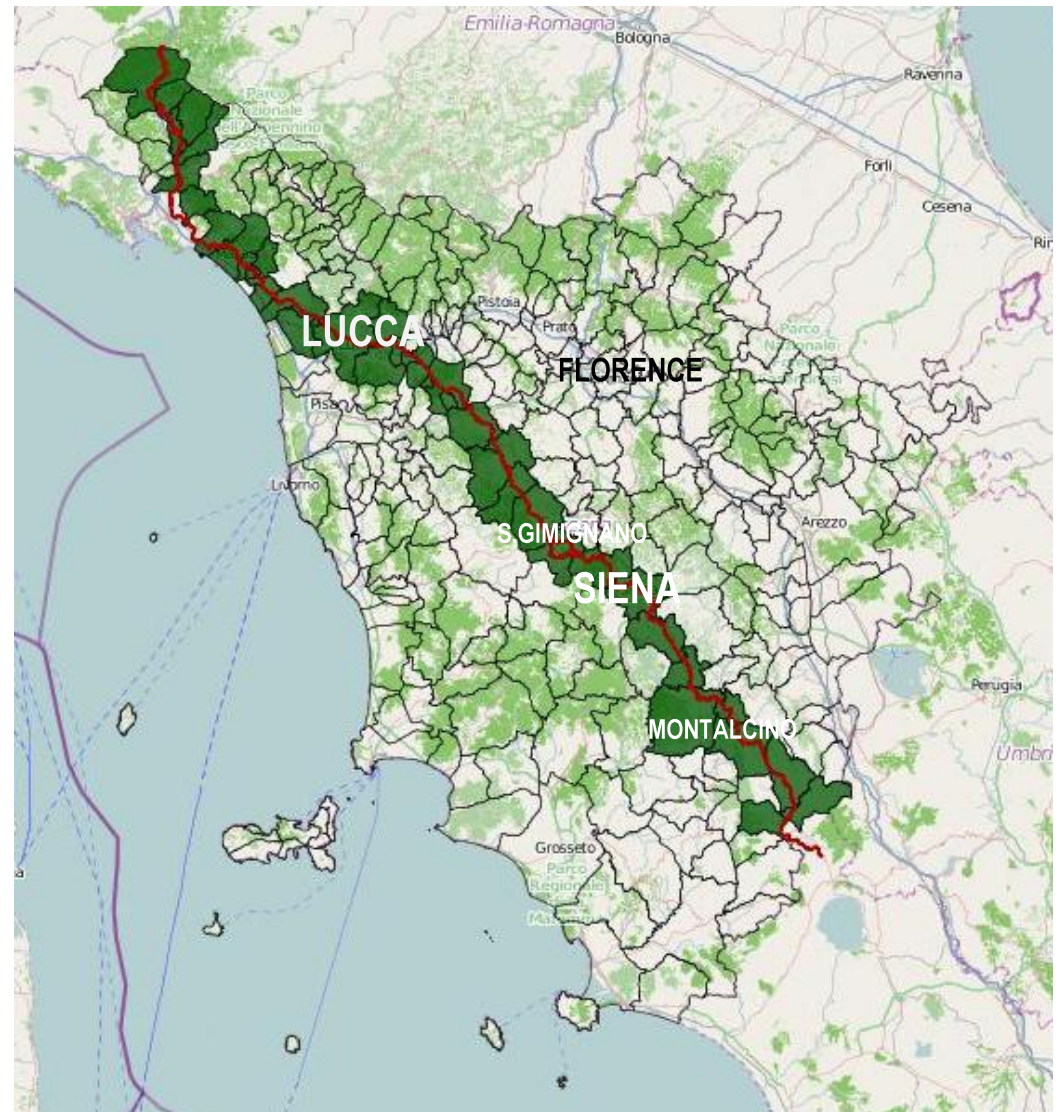
- socio-economic analysis of the areas crossed by the Francigena and georeferencing of tourism supply and demand;
- reconstruction, by regional administrative sources, of the amount and the timescale of public funding allocated for the development of the route;
- evaluation of the impact in terms of tourists' dynamic 1994-2012 by a counterfactual approach;
- evaluation of the economic effect in terms of GDP and FTE in 2012 by an input-output model applied on public investments and georeferenced tourist spending;
- Evaluation of long-term tourists dynamic (to 2022) by forecasting scenarios based on benchmark territories.

## **IN SHORT:**

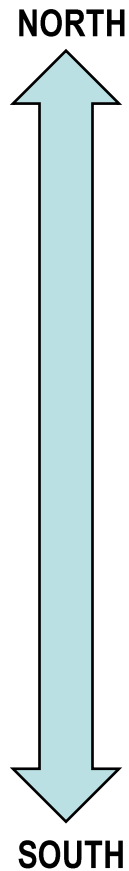
- since 1994, when the Council of Europe first proposed the project of Francigena, till 2012, rural areas crossed by the route experienced a positive gap in the tourists' number of nights spent in comparison to other rural areas: in 2012 they obtained 34% more tourists;
- total public investments planned since 2009 on the Francigena in Tuscany amount to 24 million Euros, of which 8.8 already implemented in 2012. In differential terms, the regional investments produced 64,200 additional tourists nights spent, and enabled a total GDP of 10.8 million Euros and 200 Full Time Equivalents Employees (FTE);
- in stock terms, the expenditure of the all 690,000 nights spent by tourist related to the route activated a GDP of 49.1 million Euros and 881 FTE (0.04% of the regional GDP and 0.05% of the regional FTE);
- The forecasting scenarios to 2022 produce a large range of future trends, in any case increasing. The growth interval goes from + 40% to four times the current 690,000 tourists nights, in other words the tourists related to the Francigena expected in 2022 range from 1 million to 2.7.

## The Francigena route in Tuscany

- Tuscany hosts 375 km out of the 945 of the Francigena way from the Alps to Rome (40%)
- The route crosses mainly hilly and mountainous areas, which traditionally have remained on the margins of the industrial development and have experienced strong processes of depopulation and weakening of the productive structure, but there are exceptions too, represented by internationally known art cities like Lucca, San Gimignano and Siena, but also by densely populated urban and industrial areas.



## The Francigena route in Tuscany



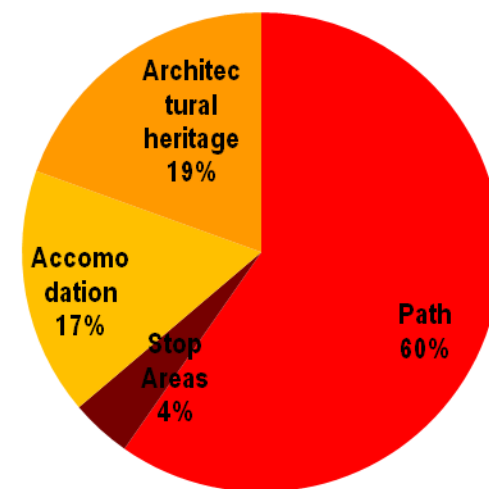
	% OF ROUTE LENGHT	POP. PER KM2	% CHANGE OF POP. 1971-11	% TOURIST WORKERS ON TOTAL	HOUSE PRICE LEVEL	MAIN FEATURE OF THE AREA
Lunigiana	17	36	-94	126	54	<b>Rural</b>
Massa-Carrara	6	378	69	109	99	Tourist
Versilia	7	187	125	122	132	Tourist
Lucca	10	192	102	82	91	Tourist
Low Valdarno	5	155	404	43	70	Residential
Empoli	4	167	317	45	81	Residential
Low Valdelsa	5	49	111	95	82	Residential
High Valdelsa	11	60	499	129	98	Tourist
Siena	11	136	-221	122	154	Tourist
Crete Senesi	7	33	929	133	80	<b>Rural</b>
Val di Chiana	1	8	-583	182	64	<b>Rural</b>
Amiata - Orcia	17	12	-267	220	72	<b>Rural</b>

## Public investments on the Francigena in Tuscany

In 2004 the Council of Europe promoted the Francigena to Major Cultural Route (the first idea dates back to 1994), in 2006 Tuscany was the leader of a transregional project for the reconstruction and development of the path, while in 2009 it launched a multi-year investment plan and in June 2014 the Tuscan section was officially opened.

FINANCIAL INSTRUMENT	REGIONAL CONTRIBUTION (million euro)	TOTAL INVESTMENT (million euro)
MASTERPLAN 2009 (Dec. 2012)	5.4	8.8
OPERATIONAL PLAN 2011	12.9	15.2
Phase I and II (Febr. 2014)	8.6	9.6
Phase III (in progress)	3.5	4.7
<b>TOTAL</b>	<b>18.3</b>	<b>24.0</b>

INVESTMENTS BY TYPE (%)



There are different techniques to quantify the economic impact of public investments on cultural heritage and to distinguish them by categories (tourists, employments, incomes, house prices, tax revenues, demographic dynamics, etc.), as well as to separate the positive effects (increased employment and income) from the negative ones (congestion, waste production, consumption of scarce resources, rising prices, etc.). Often specific surveys are necessary to obtain data on the number of tourists directly related to the asset and their spending profile (Martini and Sisti, 2009).

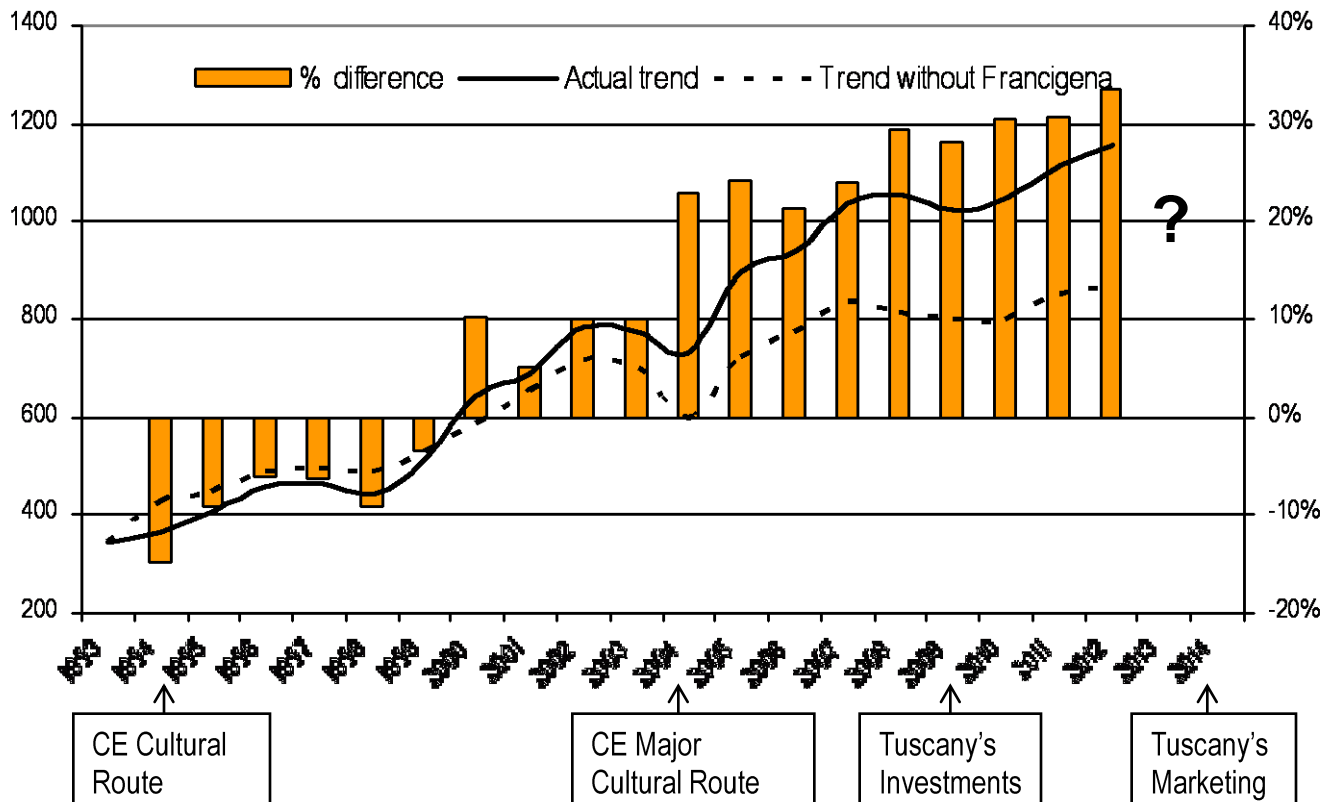
In the present work, for reasons of time and cost, but also because investments are still ongoing and a real promotional campaign of the route is now beginning, the survey has been excluded. It was decided, instead, to introduce **a geographic method, in order to use in a robust way the existing data**. The geographic approach is used in three different ways:

- 1. a counterfactual approach on tourists' dynamic in rural areas in 1994-2012;**
- 2. an input-output approach on public investments and georeferenced tourist spending in 2012;**
- 3. forecasting scenarios to 2022 on tourists' dynamic based on benchmark territories.**



## The counterfactual approach on tourist' dynamic 1994-2012

As shown before, territories crossed by the Francigena are very heterogeneous: some are very well known art cities, while other are rural areas. In order to point out the “Francigena net effect”, the work compares the tourists' dynamic in rural areas crossed by the route (27 municipalities out of 37) to other rural areas. The analysed period is since 1994, when the CE made the first proposal of the route, until nowadays.



**RESULT:**  
**UNTIL 2000** THE TREATMENT GROUP HAS EXPERIENCED A DYNAMIC LOWER THAN THAT OF THE BENCHMARK AREAS, BUT SINCE **2000** THE GAP IS POSITIVE AND INCREASING. IN **2012** THE PRESENCE OF THE FRANCIGENA ALLOWS AN INCREASE OF **34%** OF TOURISTS (290THOUSAND OF NIGHTS SPENT) IN COMPARISON TO THE CONTROL GROUP.

## *The input-output approach on regional investments and tourist spending* <sub>1</sub>

The purpose of this second approach is to estimate the economic impact of the Francigena in 2012. In that year, the impact depends on two factors: the investments made by Tuscany and the tourist spending related to the route. **Between 2009 and 2012**, Tuscany invested **8.8 million Euros** to empower the route

Tourist spending can be conceived in two different ways:

1 **2009-2012 additional tourists** nights spent related to Francigena are estimated in **64,200 units**, comparing crossed municipalities and benchmark ones. This difference can be considered the effect of the regional investments made in the three-years period.

2 The total nights spent by tourist related to the Francigena using a geographic method to compute those **strictly related to the Francigena**.

$$FT = T \leq 1Km_{NTA} + \frac{T \leq 1Km_{NTA}}{FKm_{NTA}} * FKm_{TA}$$

WHERE

FT= Francigena tourists

T = Tourists

NTA = Non tourist areas

TA = Tourist areas

FKm = Km of Francigena

Given that Francigena is a tourist route preferably dedicated to slow mobility (walking and cycling), and that it crosses very heterogeneous areas in terms of tourist maturity, the work considers as directly related to the route those tourists who stay in accommodations within 1 Km from the path in rural areas (27 municipalities out of 37 crossed by the route). The ratio tourist per Km of the route obtained for the rural areas is then multiplied for the length of the route in very tourist areas (10 municipalities).

According to the described method, **overall tourists nights spent related to the Francigena in 2012 amounted to 689,212 units**, that is the 12.1% of the total tourists in areas crossed by the route and the 1.6% of the total tourists in Tuscany.

## The input-output approach on regional investments and tourist spending <sub>2</sub>

	REGIONAL INVESTMENTS 2009-2012	TOURIST SPENDING* DUE TO REGIONAL INVESTMENTS 2009-2012	OVERALL TOURIST SPENDING* RELATED TO FRANCIGENA IN 2012
<b>GDP (million euro)</b>	<b>6.25</b>	<b>4.58</b>	<b>49.12</b>
National Import	3.52	2.44	26.19
Foreign import	1.59	1.05	11.23
Total Resources	11.36	8.06	86.54
Induced consumptions	2.55	1.70	18.24
Household and tourism consumption	0.00	6.36	68.30
Public expenditures	0.00	0.00	0.00
Fixed investments	8.81	0.00	0.00
Stocks change	0.00	0.00	0.00
Regional Export	0.00	0.00	0.00
Foreign Export	0.00	0.00	0.00
Total Uses	11.36	8.06	86.54
<b>Full Time Equivalent (FTE)</b>	<b>118</b>	<b>82</b>	<b>881</b>

\*Tourist spending per capita is based on a previous IRPET survey (Conti, 2010)

### RESULT:

- THE REGIONAL INVESTMENTS ENABLED A GDP OF 6.2 MILLION EUROS AND EMPLOYMENT OF 118 FULL TIME EQUIVALENTS EMPLOYEES (FTE);
- THE EXPENDITURES OF THE ADDITIONAL 64,200 TOURISTS, INCREASED IN THE AREA THANKS TO 2009-2012 INVESTMENTS, ACTIVATED A GDP OF 4.6 MILLION EUROS AND AN EMPLOYMENT OF 82 FTE;
- THE EXPENDITURE OF THE ALL 690,000 TOURIST'S NIGHTS SPENT RELATED TO THE ROUTE ACTIVATED A GDP OF 49.1 MILLION EUROS AND 881 FTE (0.04% OF THE REGIONAL GDP AND 0.05% OF THE REGIONAL FTE)

# What happened between 2012 and 2014

## Variation of nights spent by tourists in official accommodations

	27 rural municipalities crossed by Francigena	Benchmark Municipalities	Tuscany	% differential Francigena-Benchmark
2009-2012	13%	9%	4%	4.5%
2012-2014	4%	-7%	1%	11.0%
2009-2014	18%	1%	6%	16.7%

## Nights spent by tourists tributable to empowerment of Francigena

	27 rural municipalities	10 touristic municipalities	Total Francigena
2009-2012	46,000	18,195	64,195
2009-2014	170,799	67,559	238,358

## *Forecasting scenarios to 2022 based on benchmark territories <sub>1</sub>*

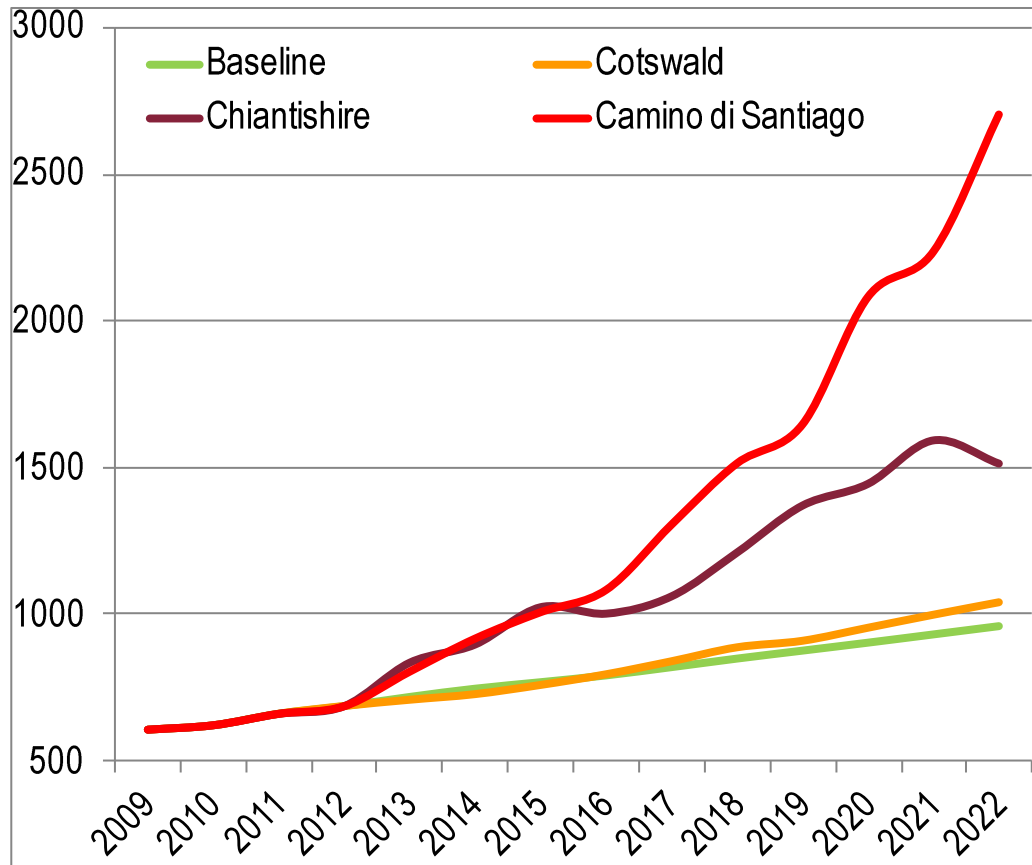
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This third method is a typical "what if" scenarios. In particular, it estimates the number of tourists related to the Francigena Tuscany will host in 2022, simulating 4 different performances:

- **a baseline scenario**, which assumes as invariant the weight of the Francigena tourism on the regional total (number of tourists) in 2012 and applies to the last one a forecasting scenario outlined by IRPET on the base of WTO foresight 2012-2022 (Conti, 2012);
- **a second scenario**, based on the tourists' trend experienced in the period 2001-2011 in the English region of **Cotswold**, which is similar to rural Tuscany in many aspects (world famous valuable country, rich in cultural heritage, relatively close to urbanised areas), but which is nowadays in its stage of maturity;
- **a third scenario**, based on the tourists' trend recorded in the period 1999-2009 on the **Camino de Santiago**, which is similar to the Tuscan case both for the type of tourist asset (international cultural route, based on the rediscovery of an ancient pilgrimage way) and for the characteristics of the territorial context (rural areas); it represents a case of international success, passed from about 3 thousand tourists in 1987 (when the Council of Europe proposed the route) to more than 190 thousand in 2012;
- **a fourth scenario**, based finally on the tourists' trend recorded in the period 1993-2003 in the **Chiantishire**, which is a rural part of Tuscany, rich in valuable landscape, which experienced its successful phase in the 90's.

*All the scenarios are expressed as local dynamic compared to the regional one.*

## Forecasting scenarios to 2022 based on benchmark territories <sub>2</sub>



### RESULT:

THE FOUR SCENARIOS BELONG TO THREE ORDERS OF MAGNITUDE. AT LOWER LEVEL, AS LOW GROWTH TREND, WE HAVE THE BASELINE HYPOTHESIS AND THE COTSWOLD LIKE DYNAMIC, BOTH GIVING AN INCREASE BETWEEN 40% AND 50% COMPARED TO CURRENT 690,000 PRESENCES (2012). THEN THERE IS AN INTERMEDIATE SCENARIO, REPRESENTED BY AN EVOLUTION ON THE CHIANTISHIRE MODEL DURING THE '90s, IN THIS CASE THE EXPECTED TOURISTS IN 2022 ARE MORE THAN DOUBLE THOSE OF TODAY. FINALLY, THERE IS THE SCENARIO THAT CORRESPONDS TO THE THEORETICAL MAXIMUM INCREASE IN THE TOURISTS' PRESENCE, FOLLOWING THE STRIKING EVOLUTION OF THE SANTIAGO ROUTE. IN THIS CASE, TOURISTS QUADRUPLE FROM ABOUT 690,000 TO 2.7 MILLION IN 2022.

# Conclusions

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1. There are many expectations on the ability of **cultural and experiential tourism** to act as an important **driver of economic growth**, especially **for rural areas and smaller towns with cultural heritage**, remained on the margins of traditional industrial development. The **interesting aspects** of the specific driver are two: the **kind of areas potentially affected by growth** (those until now less developed) and the way in which development can take place, more **sustainable** because less intensive and impactful in comparison to traditional mass tourism or to many manufacturing activities;
2. The **Francigena route**, in the wake of the previous success of the **Camino de Santiago**, is therefore an interesting case for both scholars and local and national policy makers. Furthermore, it is particularly interesting for a region like **Tuscany**, worldwide **famous for its cultural heritage and landscape**, in rural areas too;
3. The **knowledge of the territorial assets**, combined with some hypotheses about catchment areas and the **georeferencing** of accommodation facilities, besides a **multiregional input-output** model made it possible to measure the impact in three different ways, avoiding a direct survey: a) by a **counterfactual approach** on the less developed areas, b) by a **georeferenced tourist spending and an input-output model**, and finally c) by **long-term scenarios** based on the development trend experienced by benchmarks areas;
4. The three methods give obviously different results, but complementary and in any case positive, **confirming the expectations about the leverage effect exerted by the cultural and landscape heritage on the local economic development.**



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