



Preverisk
Group



Catalonia survey report

November 2021

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1. Introduction and objectives

WAT'SAVEREUSE is a European project funded by The LIFE Programme and created under the coordination of the Euroregion Pyrenees Mediterranean (EPM) with the aim of raising awareness regarding water management in the tourism sector.

Wat'Savereuse's main objective is to highlight the benefits of reusing and saving water, as well as the potential opportunities for the tourism sector and the implementation of initiatives that promote a circular economy approach, based on the reduction of water consumption.

For this, the following actions have been planned:

- Carrying out awareness campaigns to reduce and save the overall water consumption of tourists during their hotel stay.
- To raise awareness within the tourism industry regarding the reuse of water and to encourage it to implement at least five solutions to make this possible.
- Strengthen collaboration between public administrations, valued chain operators and stakeholders to reduce global freshwater consumption.

With this objective, Preverisk Group has collaborated on this project by conducting surveys of tourists and hoteliers in Catalonia. These surveys aim to obtain a first assessment of the perception and practices of both tourists and tourist's accommodation with regards to the consumption, saving and reuse of water.

This report contains the results of the Catalonia region's surveys.

2. Methodology applied

For this project, two surveys were carried out: One for tourists and one for tourist's accommodation. These surveys aim to help the WAT'SAVEREUSE project's partners to evaluate the knowledge, practices and perception of different objectives in terms of water consumption, saving and reuse.

The average duration of the surveys was 8 minutes per person for tourists and 20 minutes per person for tourist's accommodation. The tourist surveys were carried out face to face between the 2nd and 30th September 2021, whilst the tourist's accommodation interviews were conducted by telephone in October 2021.

Tourist surveys were made up of four blocks:

1. Block I: Socio-demographic information.
2. Block II: Sustainable behaviour with regards to water consumption both at home and on holiday.
3. Block III: Awareness regarding water shortage and drought.
4. Block IV: Survey respondents' understanding of recycled water.

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Tourist's accommodation surveys were made up of four blocks:

1. Block I: Accommodation features.
2. Block II: Awareness regarding water shortage and drought.
3. Block III: Consumption and technology for saving and reusing water.
4. Block IV: Recycled water.

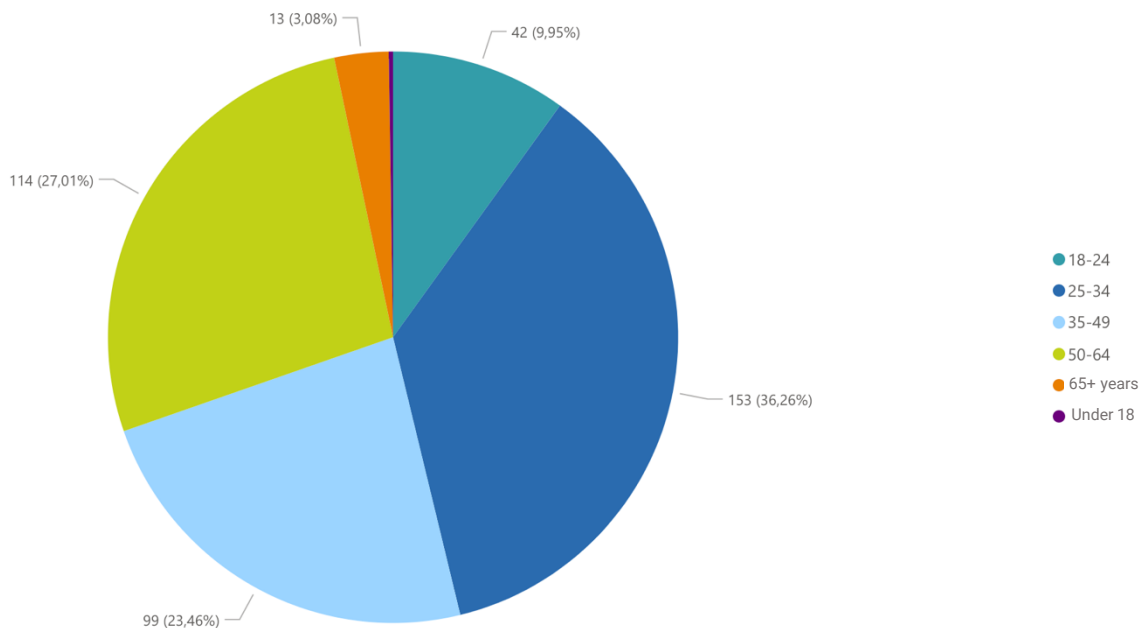
400 surveys in total were carried out with tourists and 100 surveys with tourist's accommodation. The surveys, of both tourists and tourist's accommodation, were carried out in the following Catalonian tourist destinations:

- Barcelona
- Lloret de Mar
- Sitges
- Salou
- Tossa de Mar
- L'Ametlla de Mar / Port de la Selva

2.1. Characteristics of the tourist sample

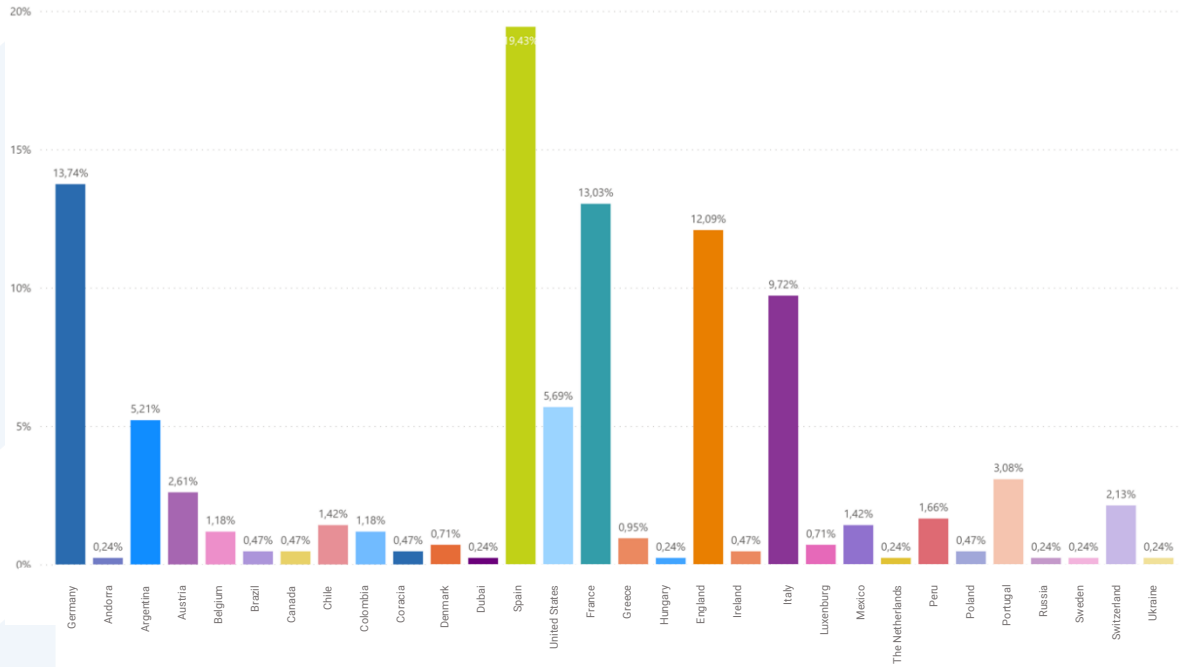
The socio-demographics of the tourists interviewed were as follows:

- 50.24% were women and 49.76% were men.
- These were the age groups of those interviewed:

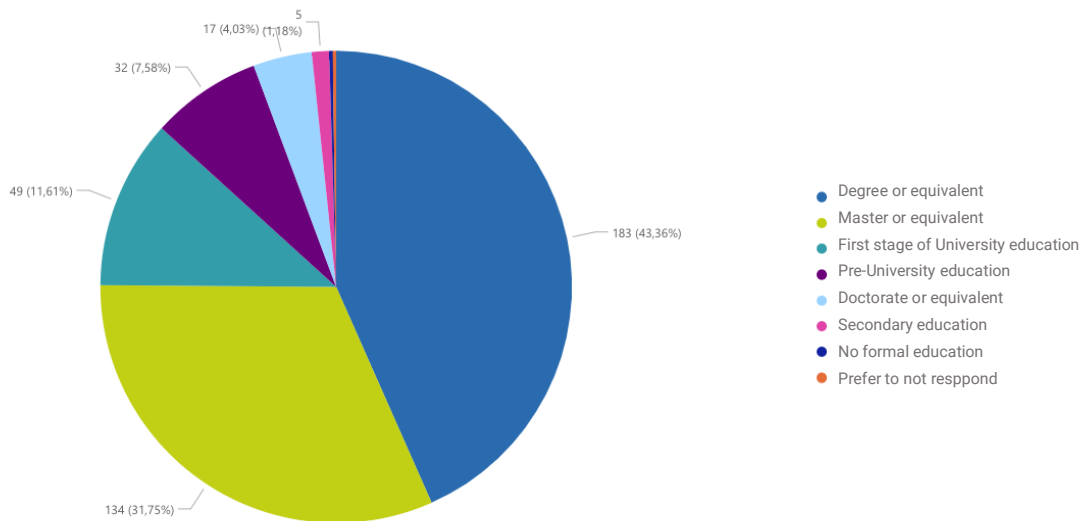


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- The countries of origin of the survey respondents were mainly Spain, France, Germany and England.

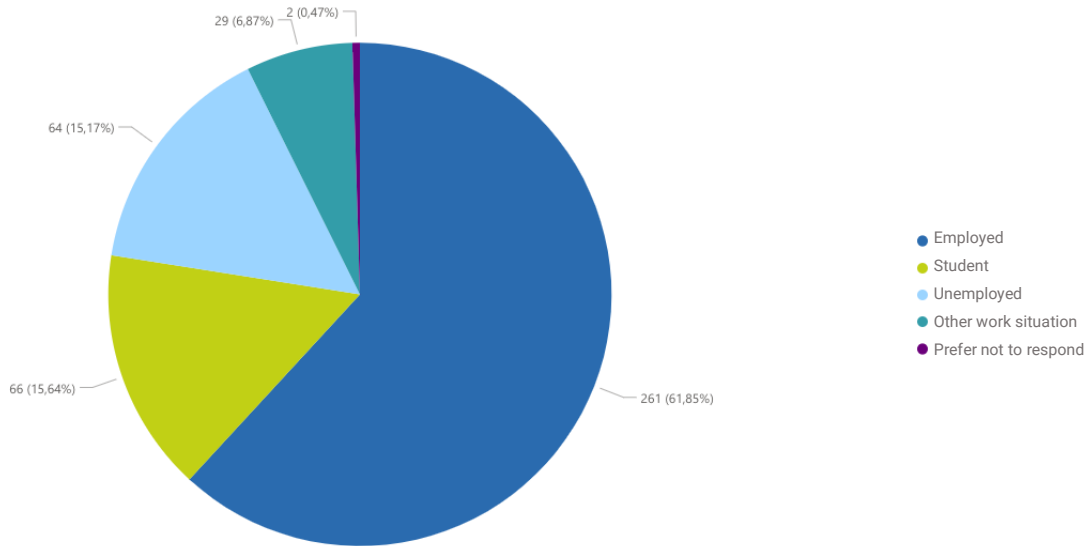


- The majority of the survey respondents (>70%) had achieved a level of education to degree level, or higher (master's degree).



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- 62% of respondents were employed, whilst 15% were unemployed.



- The main types of accommodation in which they were staying were hotels, hostels/guesthouses, or in the homes of friends/family.

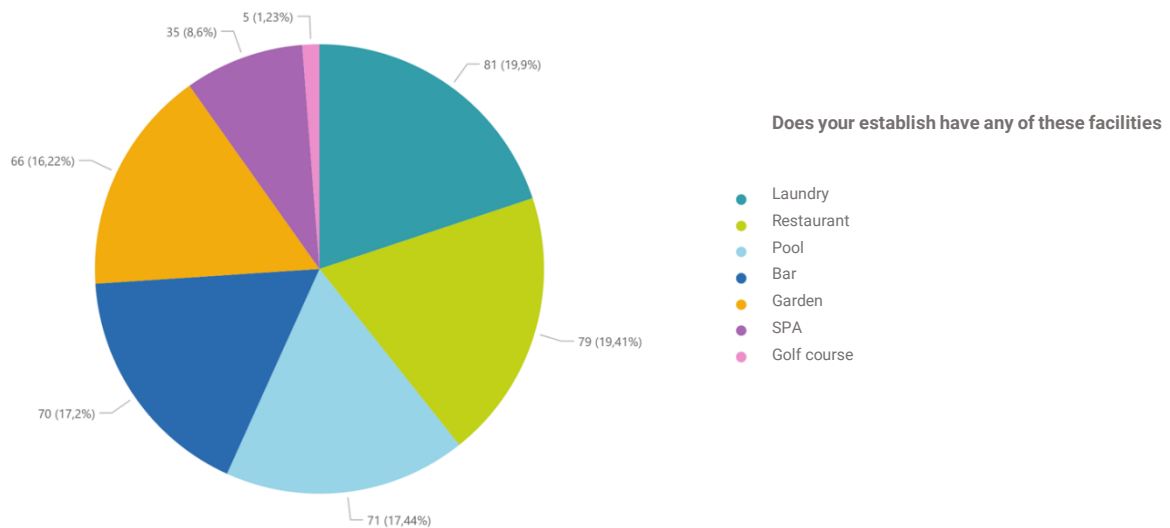
Low-end rural tourist accommodation	0,2%
Mid-range rural tourist accommodation	0,5%
Friends/family	14,7%
High-end apartment	5,9%
Low-end apartment	0,2%
Mid-range apartment	4,3%
High-end camping	0,5%
Mid-range camping	3,8%
Hostel/Guesthouse	18,2%
3/2 star hotel	19,2%
5/4 star hotel	31,8%
None of the above	0,7%

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2.2. Characteristics of the tourist accommodation sample

The features of the accommodation of those interviewed were as follows;

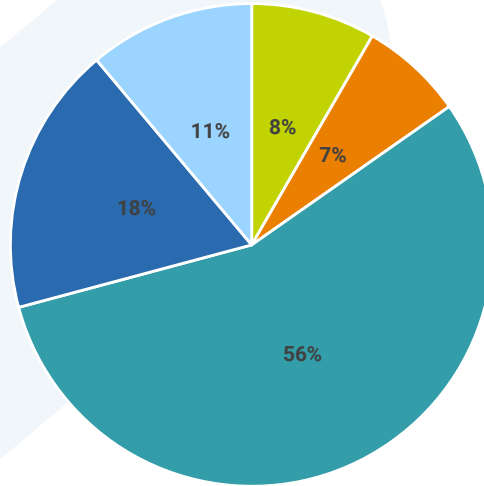
- Amongst the 100 interviewees, **29 were large chains** (>40 establishments), **19 were medium sized chains** (between 10 and 39 establishments) and **52 were small chains** (less than 9 establishments).
- The annual average of open/available rooms amongst the accommodations interviewed was 77%, whilst **the average occupancy was above 70%**.
- **64% of respondents remain open between 10 and 12 months** whilst 23% are open between 7 and 9 months. Only 13% open for under 6 months.
- The establishments interviewed had the following services and facilities:



- **91%** of respondents offered the **"all-inclusive"** approach.
- 75% of respondents knew of the existence of quality/environmental certificates applicable to their business, whilst **69% had a quality and/or environmental certificate**. These were the main reasons why they got it:

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- Growing customer loyalty
- Improved company image
- Improved service quality
- All three
- Others



- **64% of the interviewees had a department which manages environmental issues.**

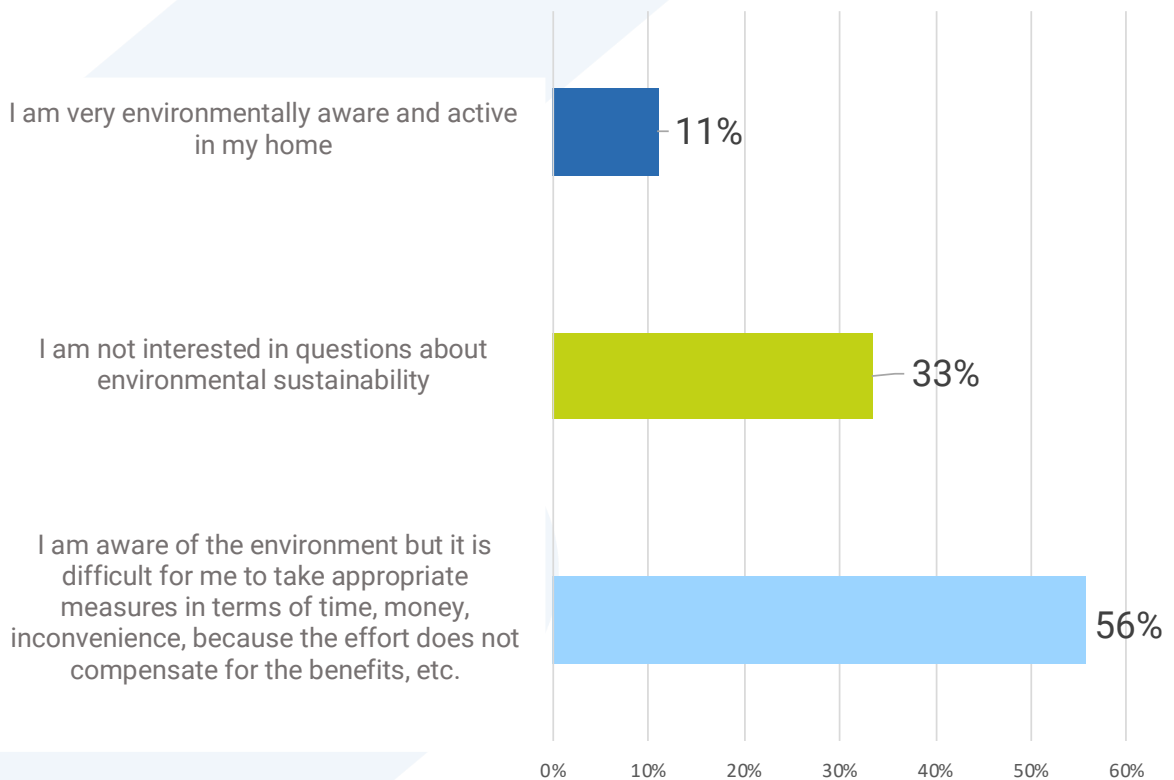
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3. Results

3.1. Tourist surveys

Block II: Sustainable behaviour with regards to water consumption both at home and on holiday.

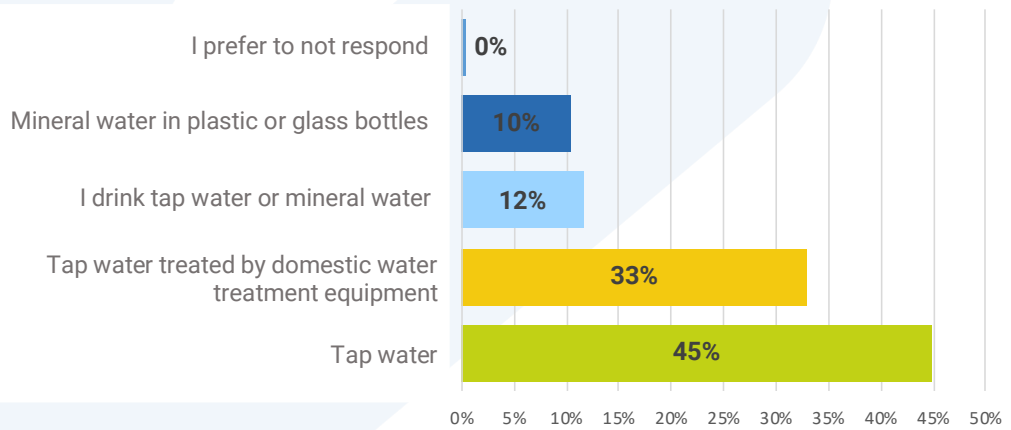
- 56% of respondents reported that they were **aware but acknowledged that they did not habitually adopt sustainable habits for different reasons and only 11% reported being very aware**



- Amongst those who reported being aware (albeit with difficulty adopting the necessary habits), 66.01% were aged 25-34, whereas only 7.7% were aged 65+.
- If we compare respondents with university or higher education levels versus pre-university, secondary or non-school education levels, 58% reported being aware compared to 31%.
- Amongst the various sustainable practices which they said they took at home, **the most popular option was to recycle (50.51%)**, the second was to install energy-saving bulbs (34.84%), the third was to turn off the tap whilst brushing teeth (29.29%) and the fourth was to buy organic food (21.35%).

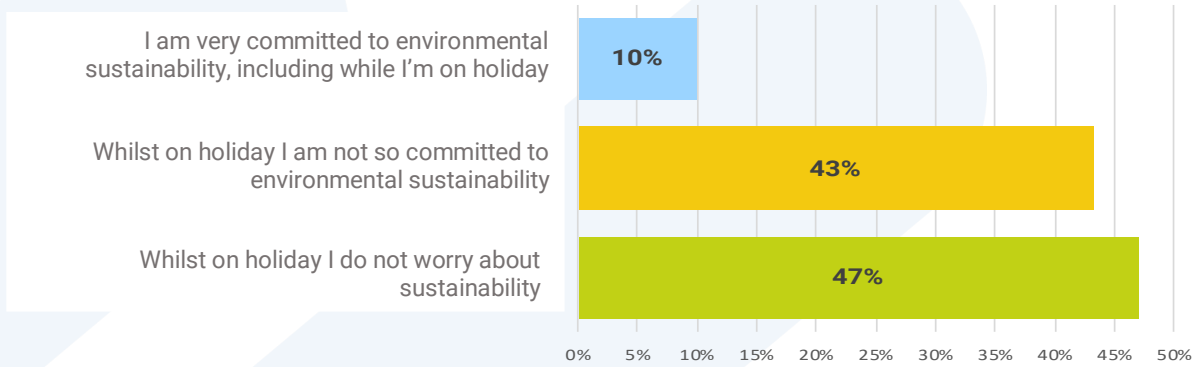
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- Regarding water consumption at home, **44.79% of respondents said that at home they drank tap water**, whilst only 10.43% drank water from plastic bottles. No relevant differences were identified according to gender, age, work situation or level of study.

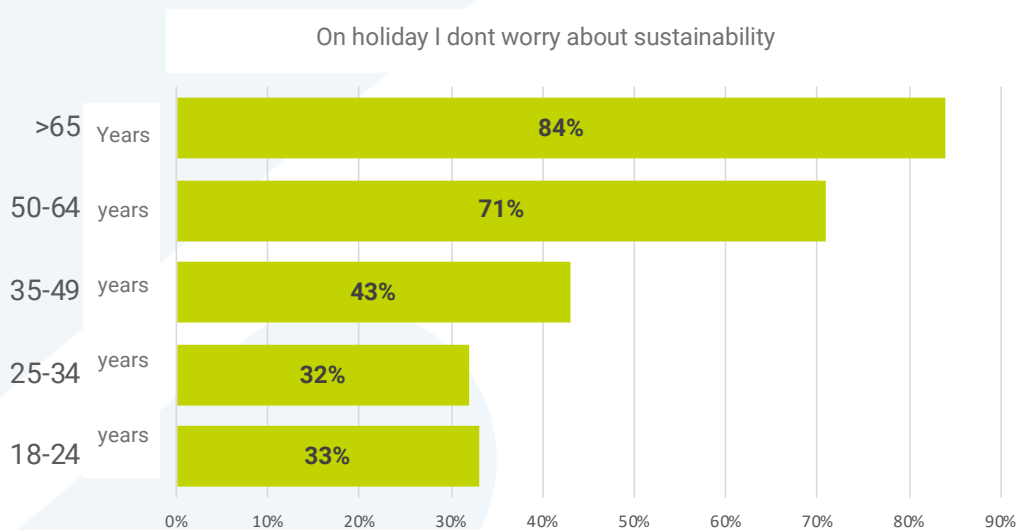


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- Environmental awareness whilst on holiday was less than their awareness whilst at home. In this case, only 10% reported being very committed even whilst on holiday.



- If we compare, by age range, those who said that they did not worry about sustainability whilst on holiday, the % increases substantially with age.



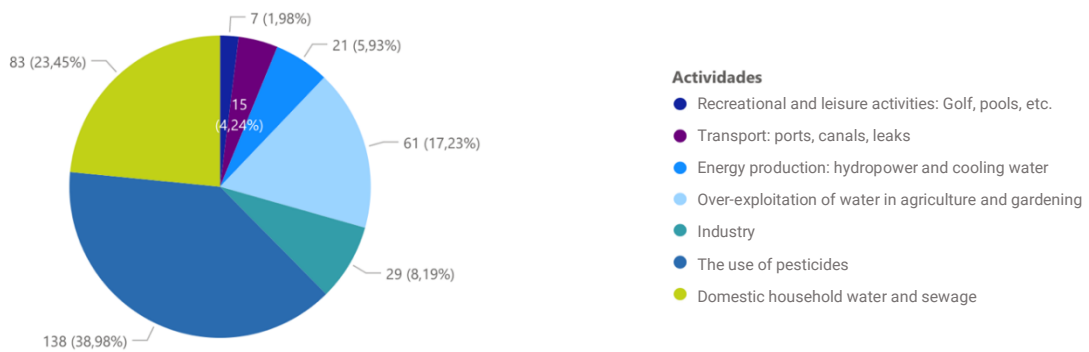
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Block III: Awareness regarding water shortage and drought.

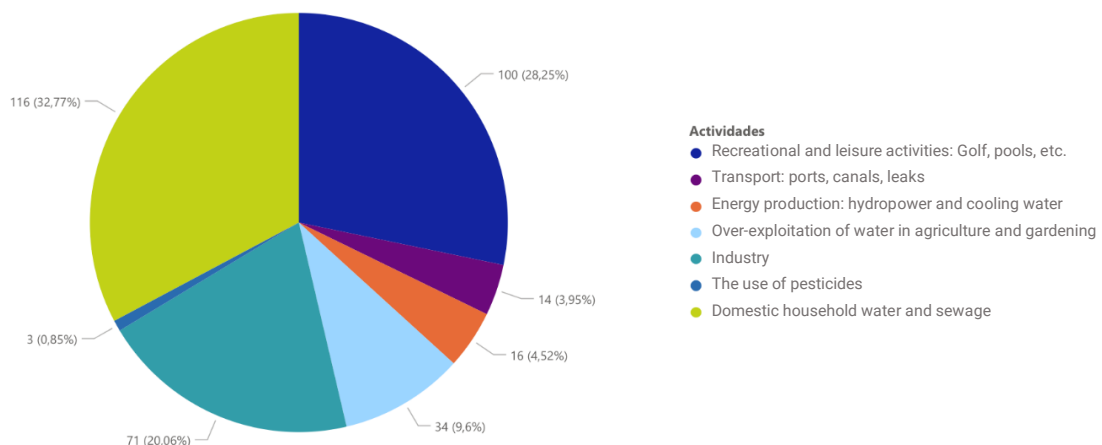
In block III, respondents were asked to place in order (from less to more) the following seven activities for the amount of water they waste in Catalonia:

- Recreational and leisure activities: Golf, pools, etc.
- Transport: ports, canals, leaks
- Energy production: hydropower and cooling water
- Over-exploitation of water in agriculture and gardening
- Industry
- The use of pesticides
- Domestic household water and sewage

- As a first option (the one identified as the least waste), almost **40% of respondents reported that the least waste of water came from the use of pesticides and fertilizers.**



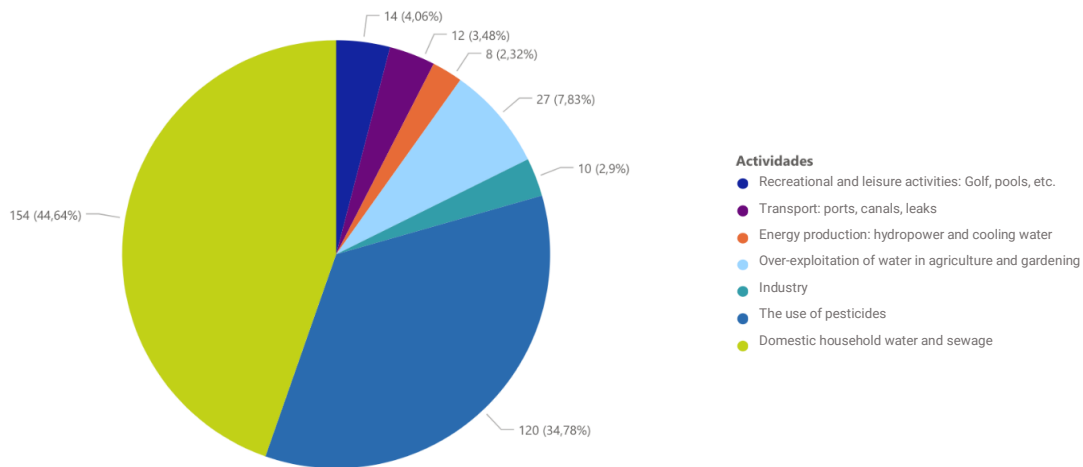
- On the other hand, the seventh option, **identified mostly as the greatest waste, was recreational and leisure activities (28.25%) followed by domestic water and wastewater consumption (32.77%).**



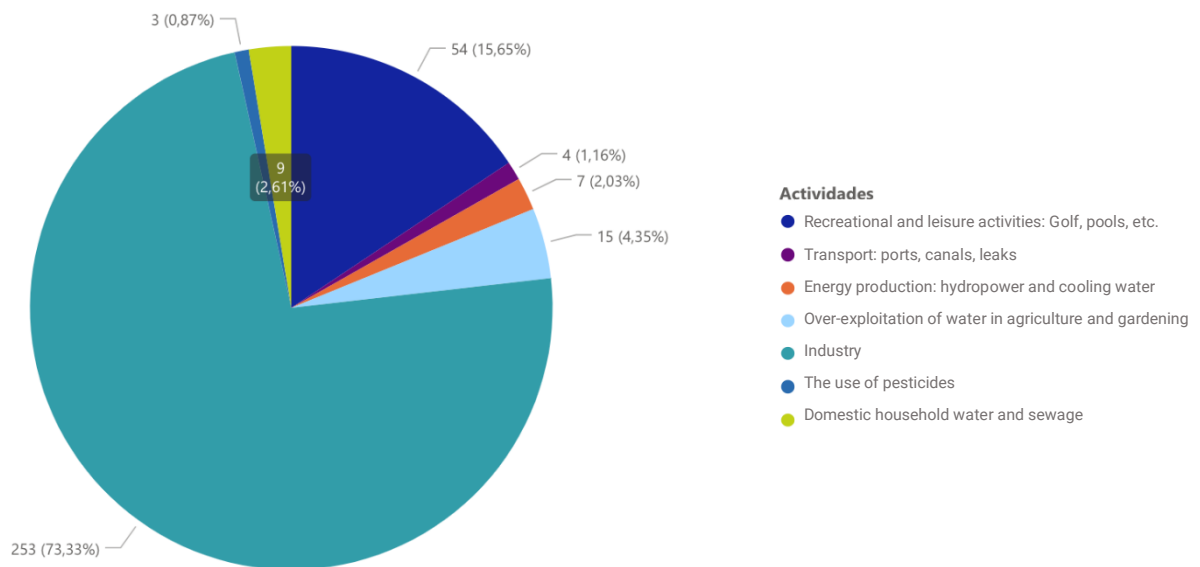
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In the same block, they were also asked about damage caused to the quality of the water in Catalonia by the same activities. They were also asked to place them in order, from least to greatest damage caused.

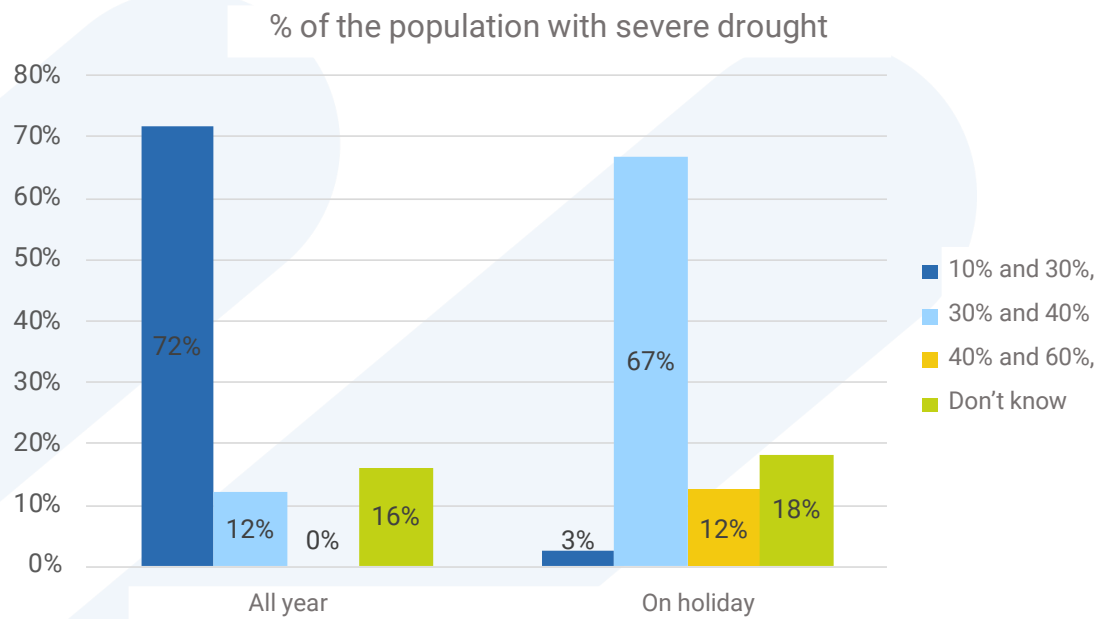
- The option selected as **least associated with the deterioration of water quality** (44.64%) was **water and wastewater consumption**, followed by the use of pesticides and fertilizers in agriculture.



- As the seventh option, the one associated with the **greatest deterioration of water quality** was **industry** (73.33%), followed by recreational activities (15.65%).



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Finally, regarding the shortage of water, they were asked to report which of the following options most affected the lack of water in Catalonia. The most selected options were:

Don't know	36,49%
Laundry and the cleaning of rooms / pax	20,62%
Golf courses, pitch & put	13,51%
Wellness activities	10,19%
Personal hygiene	9,48%
Pool activities, aquapark and others	5,21%
Hotel communal gardens, camping sites, etc	2,61%
Food and drink	0,71%
Green areas of the town in which they are located	0,47%
River navigation activities	0,24%
River fishing activities	0,24%
The use of fossil fuels	0,24%

Block IV: Survey respondents' understanding of recycled water..

The last block analysed perception regarding recycled water.

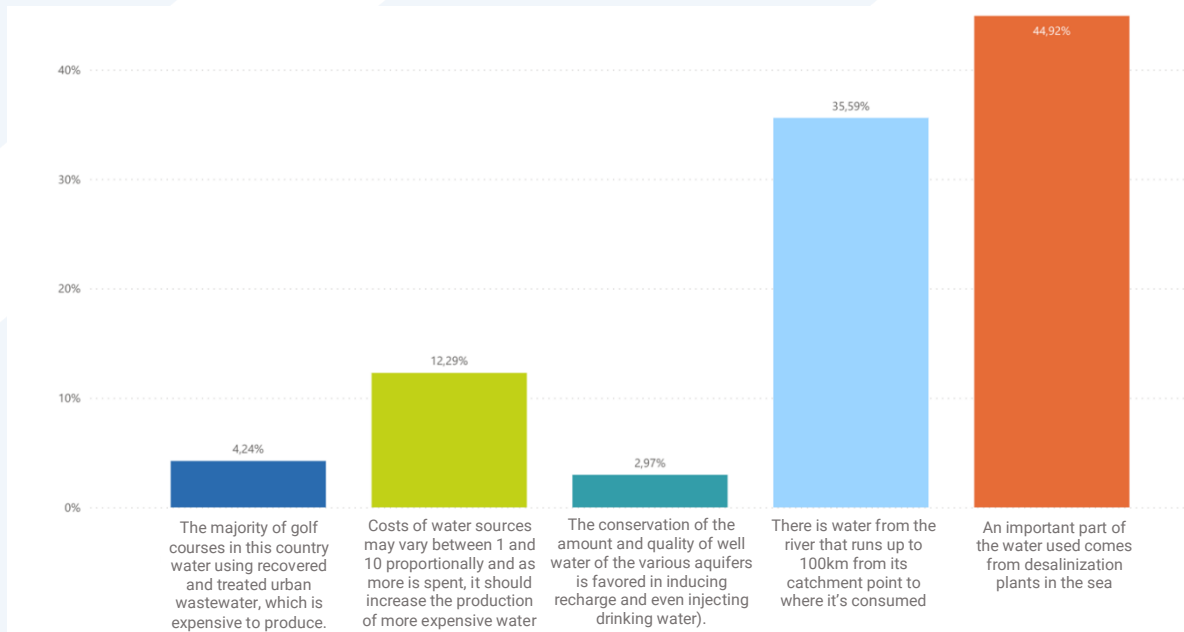
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One of the questions asked which **activities they believed could use recycled water**.

- The most popular options were: **Street cleaning (94%)**, followed by vehicle cleaning (80%), pool filter cleaning (69%) and lastly toilet water supply (67%).

Respondents were asked to indicate which of the following statements they were aware of;

-
- The most popular option, (selected by **45% of the interviewees**), was that **an important amount of the water used, came from seawater desalination plants**.



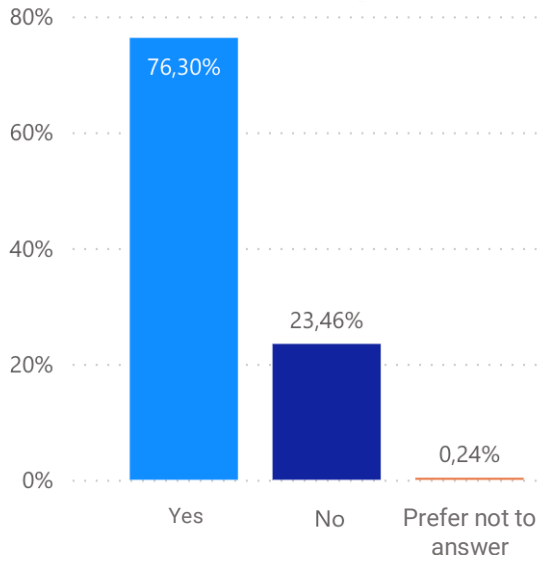
The interviewees were asked to indicate what strategies could help to limit the amount of water used and identify at least 3 measures. The most popular were the following:

- Be more aware and limit showers/baths during my stay (71%).
- For my stay give preference to tourist establishments with a sustainable tourism label and/or implement means to reduce/optimize water consumption (53.24%).
- Use the information (meteorological information, drought) provided and implement the publicised recommendations (42.72%).

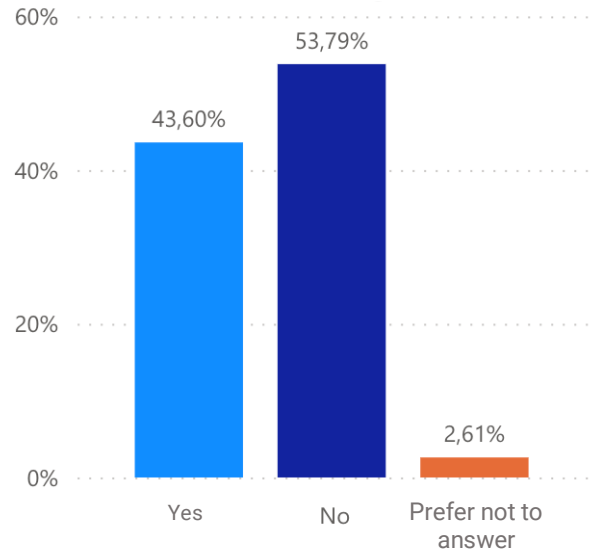
Lastly, the following questions were asked:

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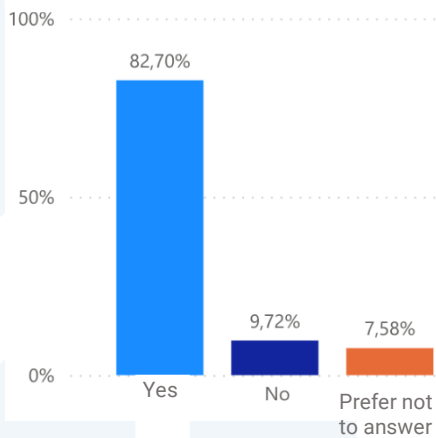
Do you know how much your bill is for water each month?



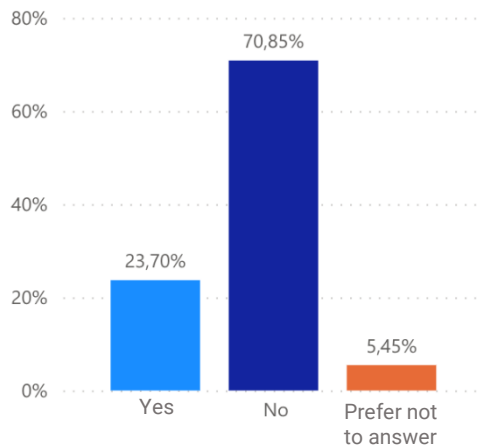
Do you know if you are penalized for using too much water?



Various factors contribute to a rise in the consumption of water, related to tourism

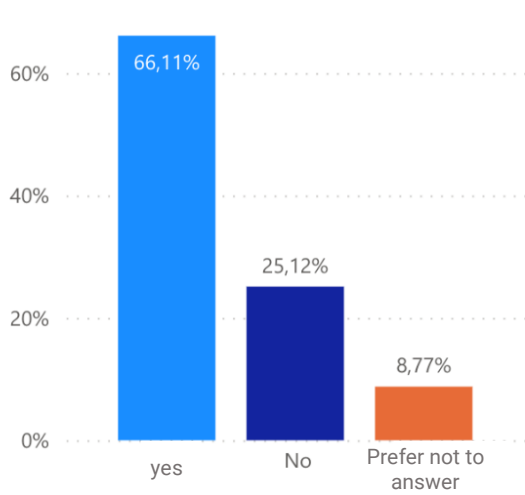


Have you been informed during your stay in your holiday destination of environmental questions related to water consumption?

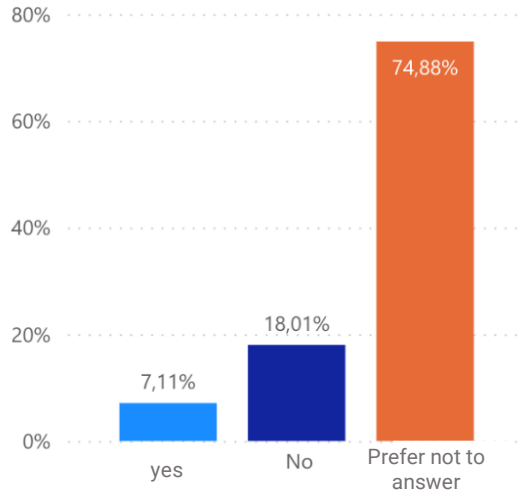


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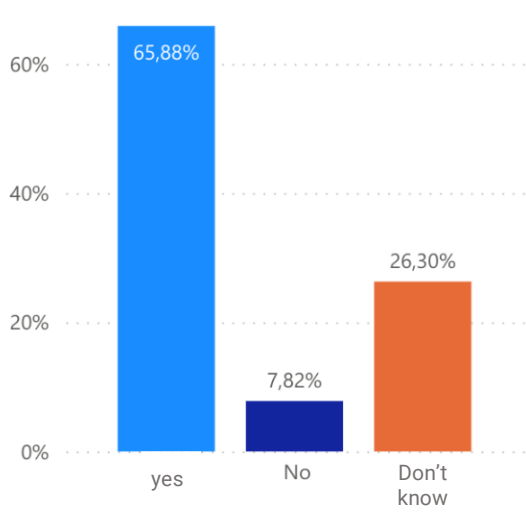
Are there similar problems regarding drought in your own country/region?



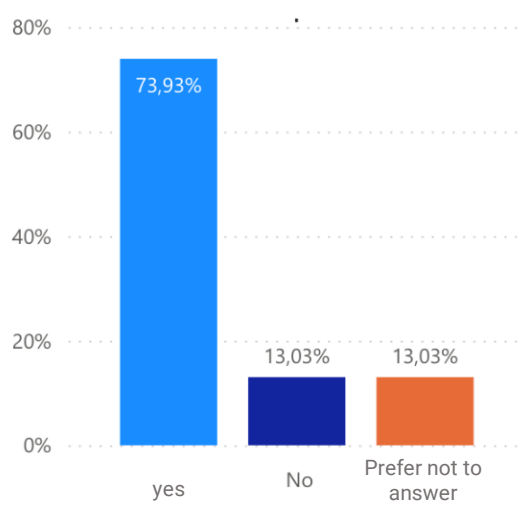
Does your holiday accommodation use recycled or reused water for any of the aforementioned activities?



Would you accept recycled water for any of the aforementioned activities?



After reading this questionnaire and the information contained in it, are you more conscious of the theme



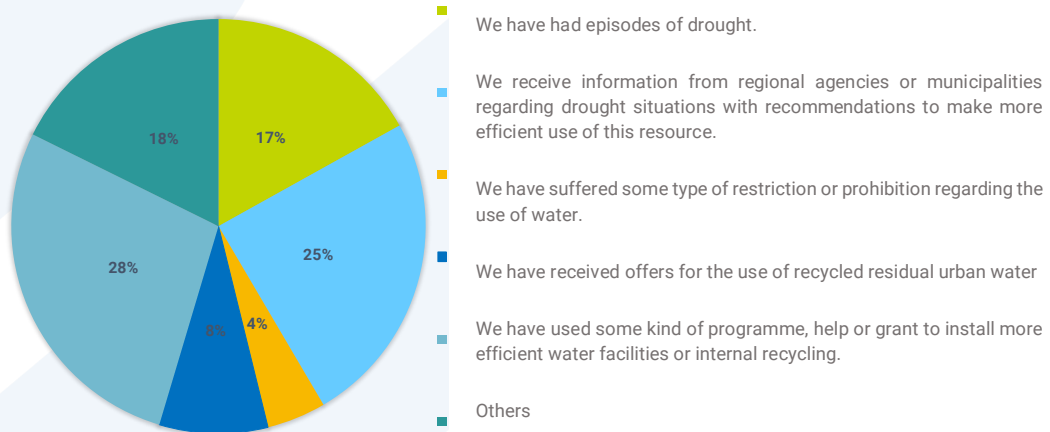
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3.2. Tourist accommodation surveys

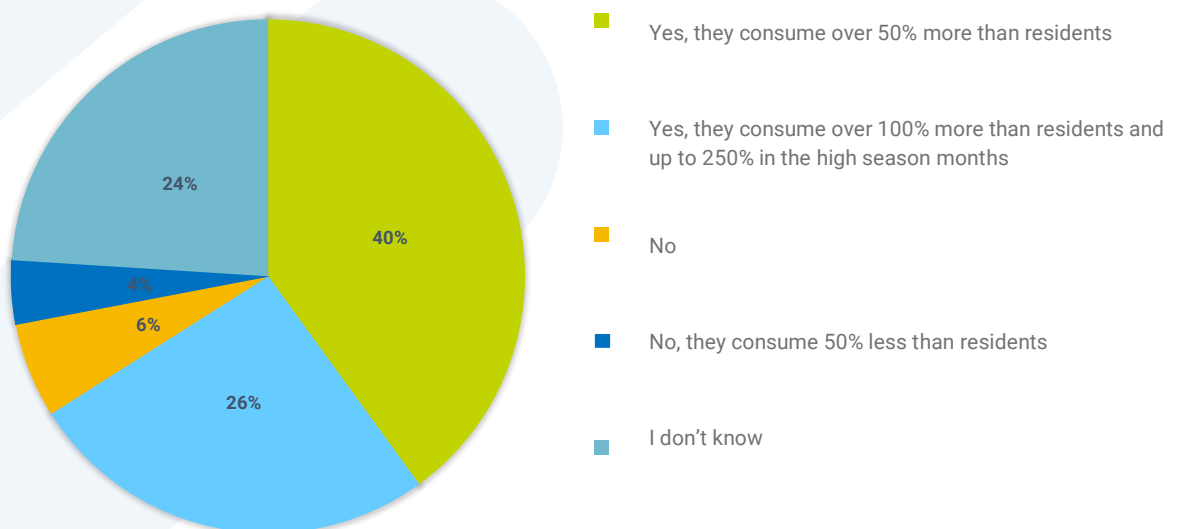
Block II: Awareness regarding water shortage and drought.

In block II, the interviewees were asked the following questions:

- Which of these statements have affected your business at any point in history?



- Do you think that tourists visiting the Mediterranean sea, consume more than residents?

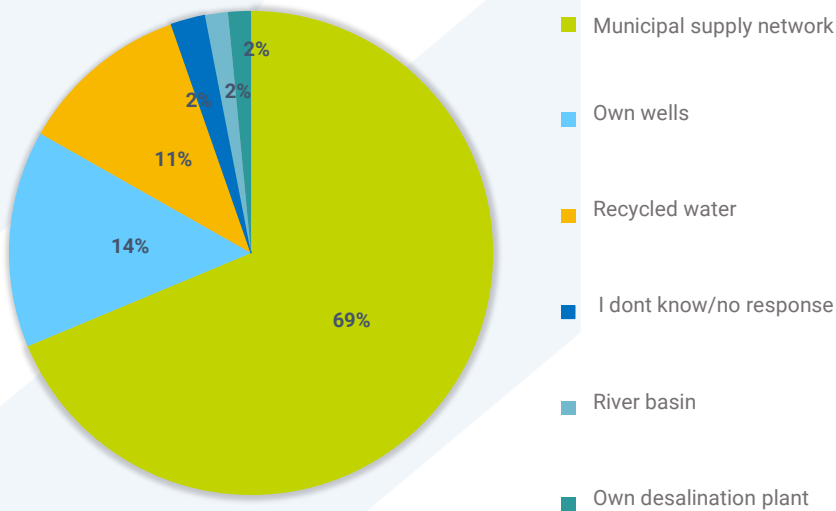


66% of the accommodations surveyed stated that they believed that tourists consumed more water than residents. While only 10% claimed the opposite.

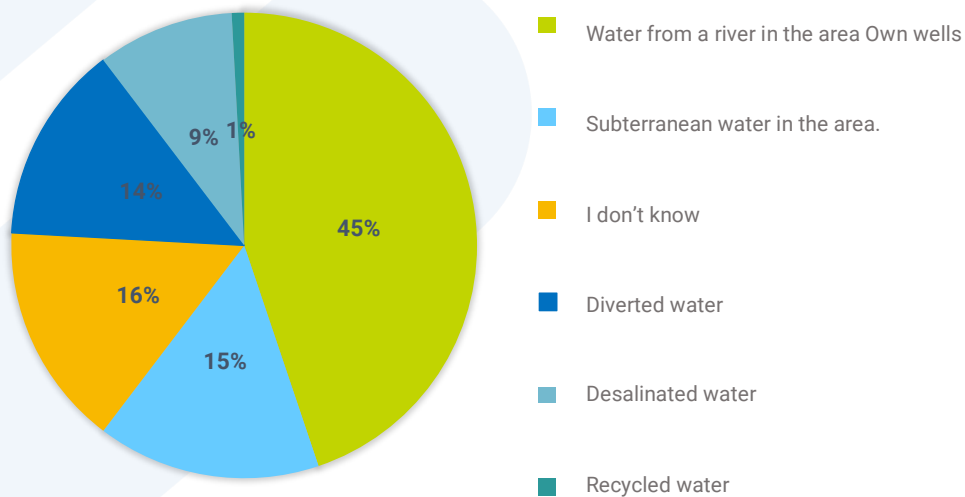
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The following questions were related to the establishment's water source. 69% of survey respondents indicated that it came from the municipal supply network. Of these, 45% said the source was water from a river in the area.

- Do you know where your establishment's water comes from?



- If it comes from the municipal supply network, do you know the origin?



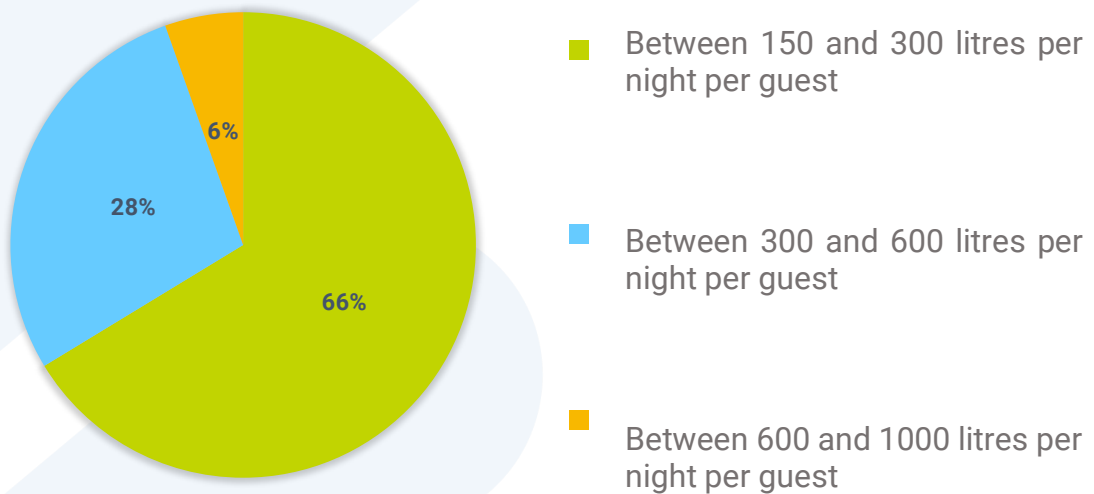
83% of respondents said that their establishment was monitoring and benchmarking water consumption. 9% reported that they didn't, and 8% reported that they didn't know. Of those who answered this statement;

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- 60% said that annual water consumption was logged and that they compared it to the number of pax to get a comparative assessment of similar hospitality facilities and identify possible efficiency improvements.
- 18% indicated that they compartmentalised the various areas, such as the kitchen, pool, SPA and other areas, in order to make a comparative assessment of water consumption per functional unit for specific water utilisation. The various areas can be connected to an automatic central logging system or a building management system (BMS).
- The remaining 22% indicated other options without specifying.

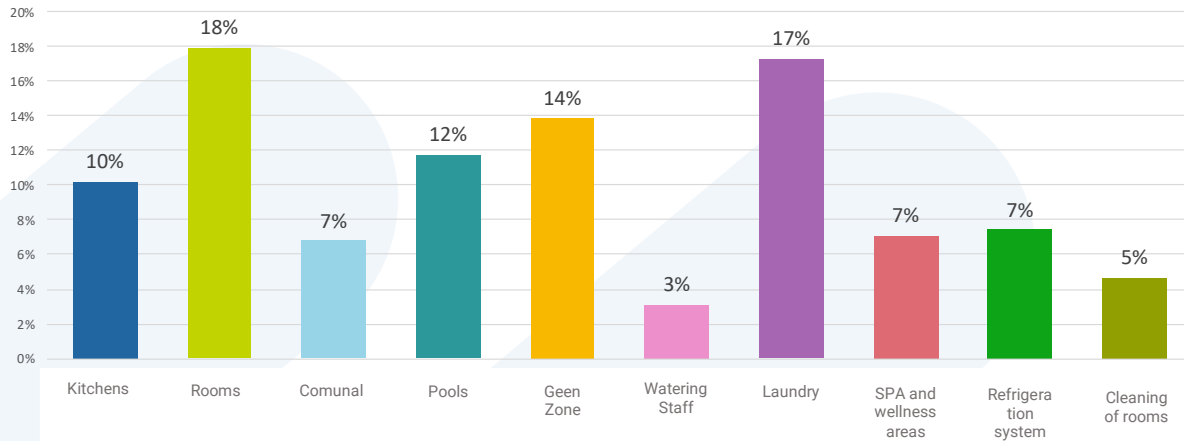
Block III: Consumption and technology for saving and reusing water

Regarding water consumption, here are the responses regarding the number of litres of water, per night, per guest:

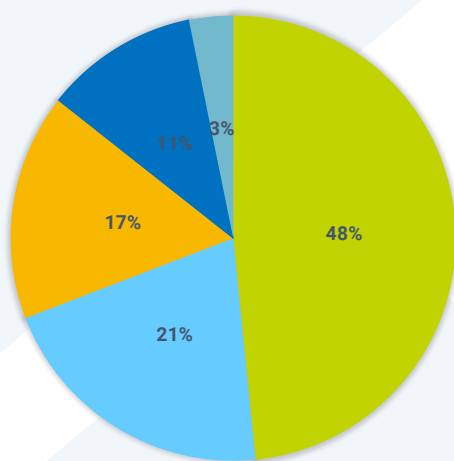


- The establishments' areas with the highest consumption were:

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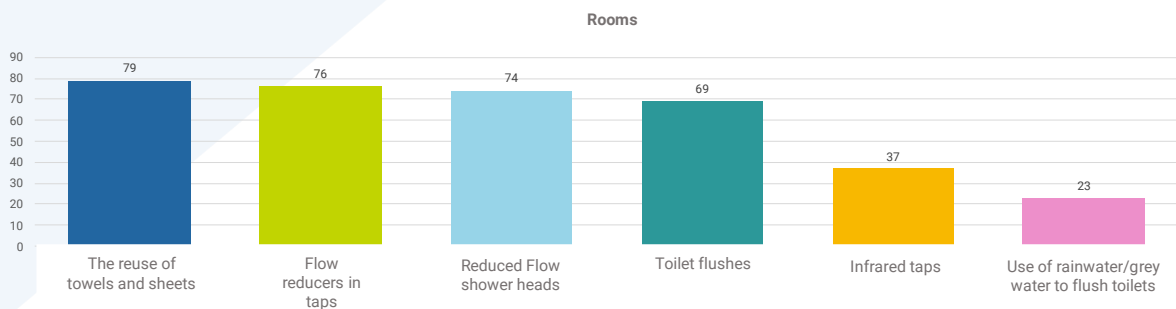


- They were asked to indicate what kind of information they provided to their clients regarding water efficiency and saving water. Almost half said they shared recommendations for using water and laundry during their stay.



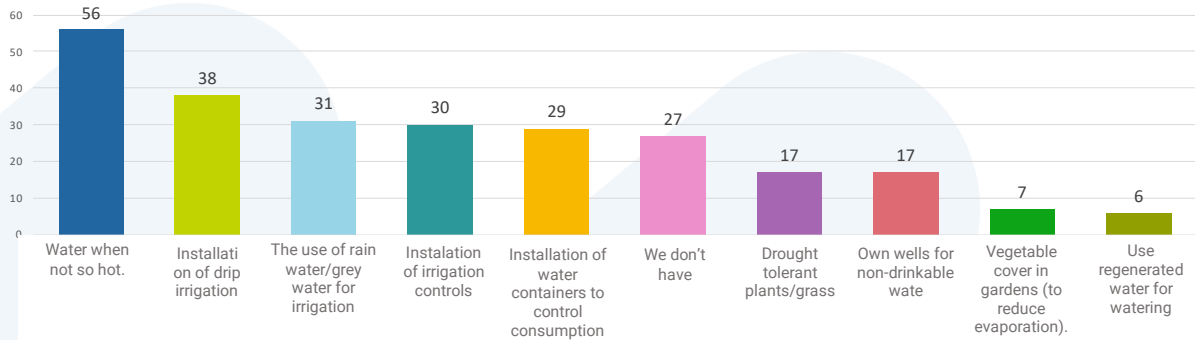
- Recommendations for the use of water. Laundry, etc. During your stay.
- Information regarding policies, specific facilities or investments made by the establishment in water efficiency materials.
- Other aspects such as the water's origin, specific certification or accreditation, etc.
- Contextual regional information specific to the nature of the mediterranean and the shortage of water resources.
- Up to date information regarding the region's hydrological state.

Finally, in block III, they were asked to indicate the different savings measures they had adopted, by area (they could indicate as many as required):

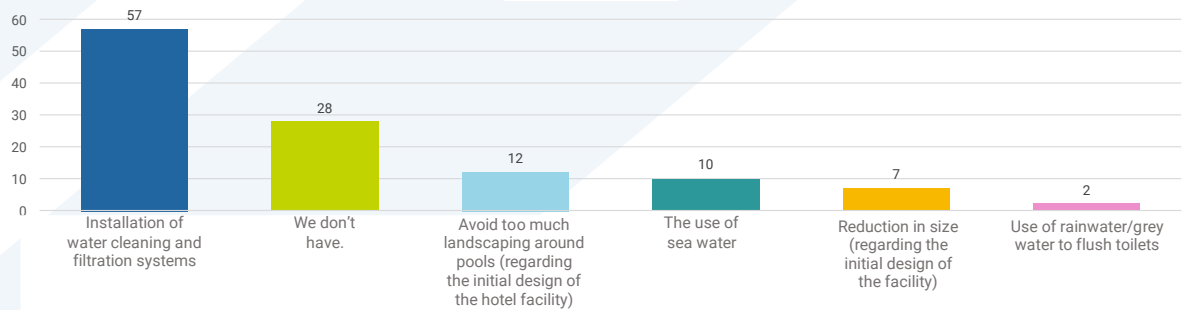


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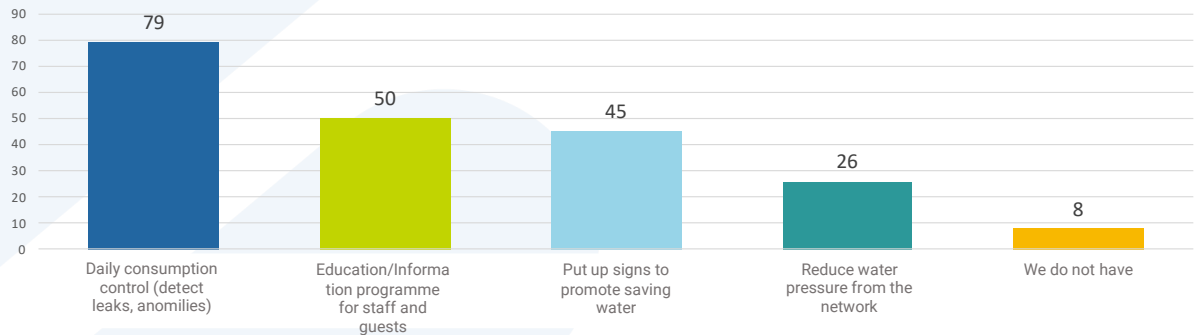
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Pools



Management

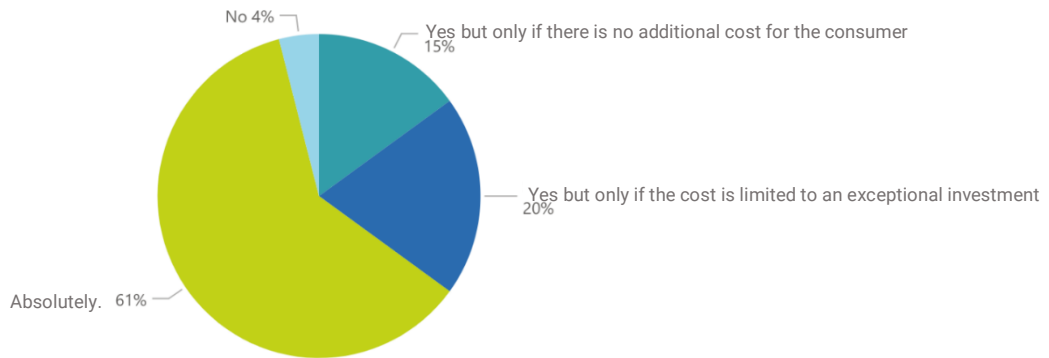


Block IV: Recycled water

The last block concerned the reuse of non-drinkable/recycled water. The following data is the most notable:

- 61% strongly believe in the reuse of non-drinkable/recycled water

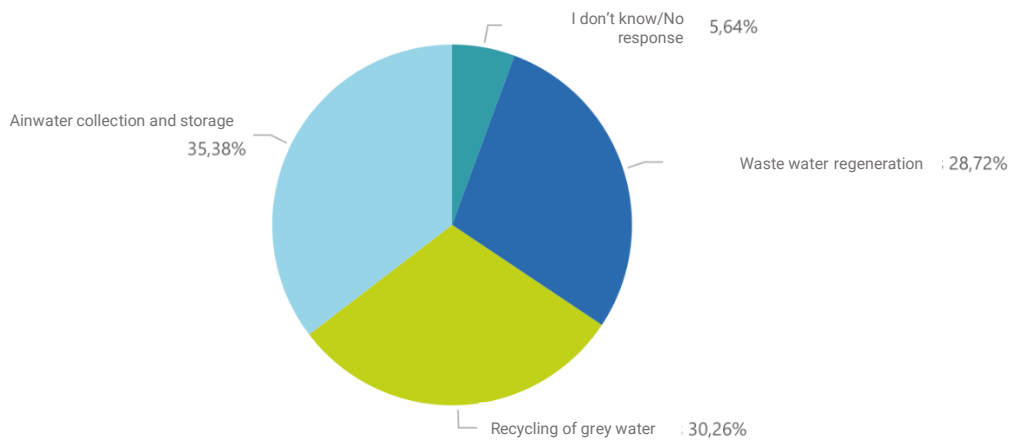
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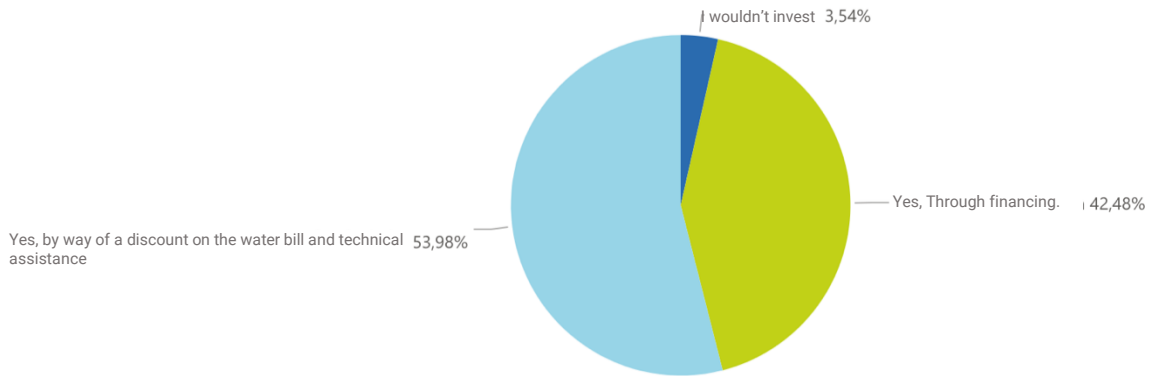
Do you think that the reuse of non-drinkable/recycled water should become widespread?

- The option which they thought most viable to improve water efficiency by way of water recycling, was the collection and storage of rainwater (35%)

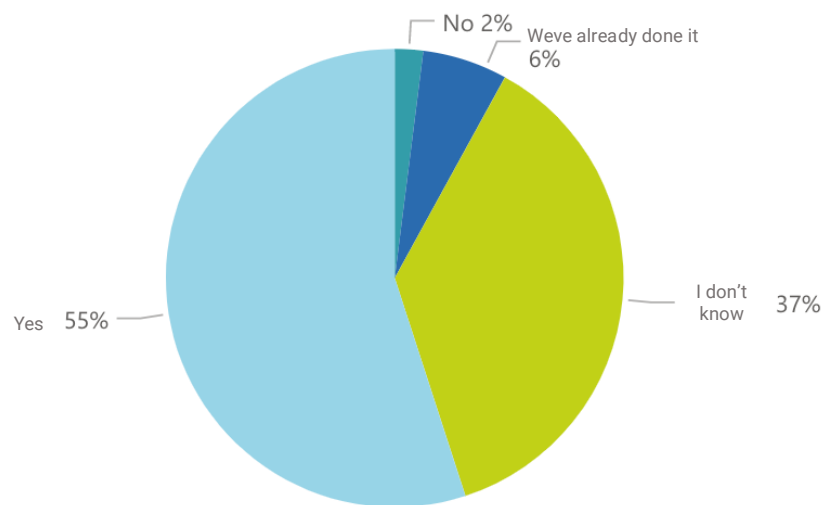
If your establishment had the potential to improve water efficiency by recycling water, what choices do you think you would make?



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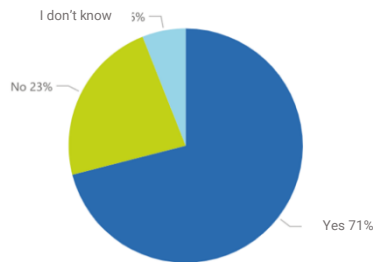
- The vast majority (>95%) would be willing to invest in water-saving technology, as long as there was financing or a discount on the water bill and technical support.
- 54% stated that they would be interested in making the substitution and installing internal water separation installations. 6% had already done so.



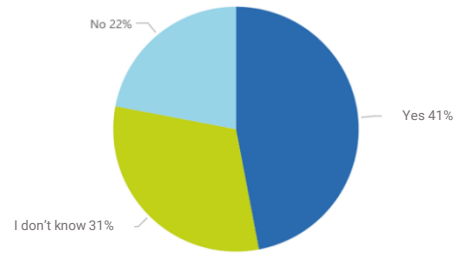
- 71% said that they had been informed about water-saving technology for tourist accommodation and 47% indicated that it was easy to get information about it.

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Have you been informed regarding water saving technology for touristic accommodation?

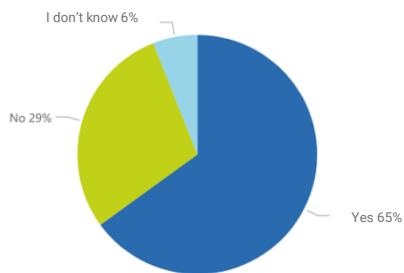


Do you think its easy to find relevant information?

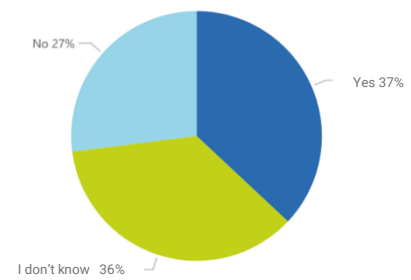


- Finally, 65% have been told about water regeneration technology for tourist accommodation, with 37% reporting that it was easy to find the relevant information.

Have you been informed regarding water saving technology for touristic accommodation?



Do you think its easy to find relevant information?



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4. Final thoughts and conclusions

Take into consideration the surveyed sample group when comparing these results, according to the socio-demographic features of tourists and tourist accommodation.

The aim is that once awareness campaigns have been completed in 2022, this first analysis will be used for comparison with the second round of interviews, with the same segment, which will be carried out in 2023.

There is some awareness, amongst the tourists questioned, regarding water consumption, although most reported that they did not actively participate in sustainable practices. Awareness decreases the older people are and awareness is higher in women. In contrast, all groups recognise that when travelling, they are less committed than when in their home countries.

Most of the tourists questioned, reported that during their holiday, they had not been informed regarding water consumption environmental issues and acknowledged that following the interview they were more aware of the topic.

Regarding tourist accommodation, over 60% of the respondents were hotels or hostels. Most of them were aware of the shortage of water and recognised that tourists consumed more than residents. Virtually all of them indicated savings measures in their establishments and believed in the reuse of non-drinkable water. However, for the implementation of water saving technology, they felt they would require support by way of financing or discounts.