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> Tourism in Barcelona

Tourism, in its different guises, has become one of the fastest-growing social and economic phenomena which had major repercussions in Barcelona during the last few decades of the 20th century. On the one hand, tourism has become one of the main channels for raising the profile of the city and the region throughout the world, and on the other, visitor and tourist levels have increased sharply in Barcelona over the past 15 years, a fact that certainly proves the city's importance and vitality.

Since Barcelona hosted the Olympic Games in 1992, **the city has experienced steady growth in tourist numbers**, while continuing to specialise and diversify its supply and demand. The Olympic context certainly helped Barcelona raise its profile worldwide as a renewed city with new values and proposals adapted to emerging markets. The **Turisme de Barcelona Consortium** was created in this context as the result of an agreement between the city's public and private sectors. Since then it has worked to lend continuity to the impetus given by the Olympic Games, making it possible for the city's wide range of hotels, services and new infrastructures to become more cost-effective and to improve over time.

Turisme de Barcelona was set up as the result of an agreement and the close relationship between **Barcelona City Council** and the **Barcelona Chamber of Commerce**, which took advantage of the 1992 Olympic Games to establish the guidelines and operational organisation for Barcelona's growth as a tourist destination. Since then, Turisme de Barcelona has developed and identified a number of programmes and actions to promote the city as a tourist destination, making Barcelona the European city that has experienced the greatest proportional growth in terms of the tourism sector. Today, Barcelona is among the world's main urban tourism destinations.

It is important to take on board the fact that tourism has become an element that can make a clear contribution to structuring the city, as **its activity has a cross-cutting impact on society as a whole and affects the many facets of its economic, social, cultural and territorial life**. Indeed, it would be hard to imagine Barcelona without tourism, and the same is true of the large or medium-sized urban centres around the world which are inextricably linked to tourist activity, whose flows are combined with the arrival of all kinds of visitors who use and experience the city and its environs for increasingly disparate reasons. Tourism is enjoying an upturn around the world and urban tourism is one of the areas that is experiencing the strongest growth, while being an undeniable part of the tertiarisation processes currently experienced by most cities and countries around the world. This means that tourism is one of the most important economic cornerstones of these territories, together with other forms of economy, such as business services and the knowledge economy.

The high profile and recognition of the image of the city around the world, its dynamism as a financial and business centre, the creation of employment opportunities, the growth and diversification of jobs, the revitalisation of cultural, recreational and leisure sectors and the expansion of infrastructures regarding receptive, transport, hotel and service infrastructures, are among the key foundations and effects resulting from tourism in Barcelona.

Nowadays, Barcelona is an internationally established and recognised tourist destination, which receives large numbers of visitors who come to the city for a variety of reasons (recreation, business, training, medical matters, sporting events, etc.). Its status as a **tourist city** has led to a series of functional and social adaptations, which have meant that, over a relatively short space of time, its inhabitants have had to learn to live with the new **"temporary citizens"** who choose Barcelona to do business, experience culture, undergo training and enjoy themselves. These

aspects are part of a process in which institutions, sectors, the community and visitors have had to learn to reconcile their mutual coexistence, in order to gain a better quality of life, better experiences and better performance.

Tourism certainly has complex effects on society, and there's no doubt that a **global view of the positive and negative impacts** of this activity can help us to better understand the processes of tourism and the city as a whole. However, some of the effects of tourism are often a nuisance and inconvenience to the local community, making it difficult for the tourist phenomenon to be understood and viewed in a positive way.

The inconvenience experienced by some local residents, which creates a feeling of unease and anti-tourist sentiments, ends up converging on and having feedback in certain discourses and public (and/or published) opinions by journalists, intellectuals and professionals who can make their opinions heard, thereby constructing a social discourse which is sceptical about or against tourism.

Today, Barcelona is setting itself new challenges and initiatives that require a deep reflection process which involves adopting a new approach to some key questions, such as, for instance, the type of growth and tourism management model, the territorial boundaries of the destination, the extent and consequences of the impact and effect of tourism and the modes of coexistence between local residents and visitors.

> Beginnings, objectives and working process of the Strategic Plan

Municipal Action Programme

Aware of the new situation, Barcelona City Council included the following objectives and lines of action in its Municipal Action Programme (MAP) drawn up for the period 2008-2011 and approved on 31st October 2008:

Line of action 3.8

Tourism

Mission

To strengthen Barcelona's appeal as a tourist destination and to reinforce its position worldwide, highlighting the aspects that make the city different and boosting quality tourism, while improving the mechanisms for managing the effects of tourism on the city in association with the local community and by conveying its positive factors.

3.8.1 Objective 1. **To promote a tourism model which will strengthen the balance between local residents and tourists, while preserving the identity values of the city.**

3.8.1.1. We will draw up a **Tourism Strategic Plan** in association with the sectors involved which will address the need to plan our capacity for hosting tourists and guarantee the quality and sustainability of the city's business sector.

3.8.1.2. We will analyse the city's capacity for hosting tourists in accordance with the characteristics of the public space in each neighbourhood and with regard to the impact of tourism.

3.8.1.3. We will promote cultural tourism based on the city's identifying elements such as the Catalan language, its status as regional capital, unique architectural heritage and Catalan cuisine.

3.8.1.4. We will promote tourism that includes civic-minded attitudes as a value for coexistence.

Barcelona City Council commissioned the **Strategic Plan to Turisme de Barcelona**, in view of its long-standing and valuable experience in promoting the city as a tourist destination. The Turisme de Barcelona Consortium places its activities within the framework of economic and social development and quality of life in Barcelona and works with criteria which will give impetus to and improve the current situation of the entire tourism sector.

The current situation and the experience of Turisme de Barcelona form the basis of the Strategic Plan, which provides the starting point for a **reflection process on the city's tourism model** which will be used to define the future strategies for action necessary to maintain and increase the interest of the community, economic sectors, institutions and visitors to the city. At the same time, the **Plan wants to successfully involve the community in Barcelona's tourist plan, insofar as it seeks to lay the foundations for tourism model that will strengthen the balance between residents and visitors, preserving the city's values of identity and coexistence.** The Strategic Plan will establish the actions to be taken by the different public and private agents that have an impact on the city's tourism sector in order to guarantee sustainable and continued success in the future.

The Strategic Plan was launched in the middle of 2008, and will remain in force until summer 2010.

Management bodies for the Plan

In order to carry out the reflection process on tourism and the city, Turisme de Barcelona, in association with the City Council, decided to set up an ad hoc Strategic Plan Office, manned by a coordinator and a team of managers who are responsible for developing the reflection process on tourism and the city throughout the two-year period of 2008-2010.

Enric Truñó, who has long-standing experience in the world of tourism and municipal politics, has been appointed coordinator of the Strategic Plan.

The Office is staffed by a team of multidisciplinary managers: Joan Serra, content manager; Xavier Suñol, operations manager; Jordi Moll and Saida Palou, managerial team. The Office also has a head of administration, Miriam Antequera.

The managerial structure of the Plan is organised around three main bodies: **Technical Committee**, **Advisory Committee** and **Board of Directors**, who guarantee the development of the Plan.

The permanent **Technical Committee**, comprises the general manager of Turisme de Barcelona, Pere Duran, the assistant manager, Joana Homs, the director of territorial promotion and tourism from the Economic Promotion Department at Barcelona City Council, Joan Torrella, and the coordinator and members of the Strategic Plan Office. The Technical Committee is responsible for guaranteeing the dynamics of the process of the Plan.

The Office receives backup from tourism experts who sit on the **Advisory Committee** and contribute their views and review the process and work of the Strategic Plan. Josep Ros, Francesc López Palomeque, Josep Chias and Ángel Díaz are advisory members of the Plan.

The Executive Council of the Turisme de Barcelona Consortium acts as the **Board of Directors of the Plan**. The council comprises representatives from local institutions, the City Council and Chamber of Commerce, as well as representatives from the world of tourism and the city. This year the board has expanded to include several municipal groups.

Principles of the City of Barcelona Strategic Tourism Plan

In order to proceed with and give impetus to the reflection process on tourism and the city, the Strategic Plan has taken on board a raft of principles that have inspired and justified it from the very outset. The inspirational principles can be summarised in the points below:

- > **The city's identity**
- > **Economic, social and environmental sustainability**
- > **Cooperation and participation**
- > **Territorial balance**
- > **Quality, innovation and high-quality added value**
- > **Gearing demand to the client**

Working criteria and objectives

A series of core ideas and convictions regarding tourism and the city have been included in the work and modus operandi of the Strategic Plan from the very outset. In one way or another, this set of ideological approaches has defined the lines of action of the Plan, while proving its degree of commitment:

- > First of all, the unitary concept of the terms **tourism and city** is key, based on the acceptance that one reality cannot be conceived without the other, but that both are constructed mutually.
- > In the same vein, tourism should not just be understood as a mere economic sector, which is closed and independent, but as a **cross-cutting reality** which is embedded in the different economic, territorial, social and cultural facets of the city.
- > The **territorial vision** of the tourism phenomenon becomes a basic conceptual premise which is essential when it comes to understanding and taking action, as the territorial implications (from an administrative, geographical or conceptual representation viewpoint) have a great impact on the tourism management and action model.
- > It is essential to accept that **the community plays an important role** in the development of tourism in the city: the people of Barcelona are not actors on a simple static stage, but the active participants and creators of the city and, as a consequence, tourism. The health of the city's tourist activity stems from the well-being of its population, which must be the cause and effect of the successful development of Barcelona as a tourist destination.
- > Finally, and bearing in mind the economic and socio-cultural framework of major western cities in the 21st century and the global dynamics they are immersed in, it seems logical to understand that the visitors who are welcomed to great urban centres such as Barcelona do not fit in with the classic concept of the tourist. Nowadays, the appeal of urban centres lies in recreation, business, healthcare, training, work and culture, among many other facets. This is why the visitor profile does not fit in with the stereotypical tourist. **Visitors to Barcelona are now the temporary visitors to the city**, who use and consume it specifically according to their interests and length of stay.

Based on the inspirational principles, different criteria and starting points, the Strategic Plan is geared to **two core working objectives**, which focus on:

- > **Fostering improvements to tourist activity in Barcelona.**
- > **Ensuring that tourism fits in better with the needs of the city.**

In order to achieve its set objectives, the Plan focuses on **four major proposals**:

- > **To determine the impact and effects generated by tourism activity in the city itself, taking into account its different manifestations, in qualitative and quantitative terms.**
- > **To reflect on the model of tourism in the city.**
- > **To set the tourism development of Barcelona within a framework of sustainable growth.**
- > **To foster the positive involvement of the community in the city's tourism project.**

The objectives of any planning process must be measurable in time and, for this reason, must have a start and end point. This is why we propose that the Plan should establish future objectives and actions for the **Horizon 2015**, leaving open a **permanent space for assessment and reflection** on the evolution of Barcelona's tourism activity.

Benchmark plans, bodies and various institutions

Barcelona has long-standing experience in drawing up strategic plans, which make it possible to find out about and plan aspects of the current situation in an organised, consensual way.

From the very outset, the City of Barcelona Strategic Tourism Plan has used the **Barcelona Metropolitan Strategic Plan** as its benchmark. The Metropolitan Plan has recognised know-how and experience in the analysis and diagnosis of the current situation of Barcelona and its

metropolitan area. The Tourism Plan also draws on the experiences of the **Barcelona Metropolitan Territorial Plan**, which analyses and identifies the dynamics concerning the occupation of the territory and the economic activities of the Barcelona metropolitan area, by setting challenges and possible scenarios for future evolution, from a socio-demographic and economic viewpoint.

Recently, the Catalan Government also defined its first **Catalonia Tourism Strategic Plan**, for the period 2005-2010 which seeks to boost and make more cost-effective the tourism resources of Catalonia as a destination. In 2007, the Spanish Government's Ministry of Tourism approved the **Spanish Tourism Plan – Horizon 2020**.

In addition to drawing on the know-how and experience of other strategic plans which are important to tourism in Barcelona, the Plan is also part of the dynamics and processes of the institutions and organisations in Barcelona that count tourism and the city among their spheres of interest. In this way, the **City Advisory Board** and the **Barcelona Economic and Social Council** are involved in the reflection process and work of the Strategic Plan, in the same way that these institutions incorporate the lines of thought and strategies of the Plan.

The **City Advisory Board** has set up a **specific Working Commission** to contribute its thoughts and discuss the diagnosis and strategic proposals of the Plan. This commission will issue its findings which will be presented at the plenary meeting of the City Advisory Board. Together with the Strategic Plan, the **Barcelona Economic and Social Council** has convened a working group to look in depth at aspects of professionalism and quality.

Permanent liaison mechanisms with other institutions and bodies from the city and the country will be established during the process of the Plan, in order to share and line up the strategic objectives to ensure that tourism fits in with the needs of the city. The series of institutional links defined during the process of the Plan, will provide a way of sharing and nurturing the objectives and lines of work, and from this, we understand that forging these links is a fundamental part of the reflection process on tourism and the city.

Methodological process

The Strategic Plan was drawn up according to the basic premise of applying a flexibility-based methodological style. In order to develop a **reflection process on tourism and the city**, the Plan based on the criteria, instruments and systems inherent to the strategic approach which have been rigorously adapted to the dimensions and realities of Barcelona, while following the style of work attained in drawing up several of the city's strategic plans.

In order to foster participation and involvement, the Plan has set in train a very diverse set of actions which have made it possible to trace a route which has deliberately set out to place special emphasis on the **creation of dialogue, opening up debates and contrasting different views of tourism** in Barcelona. The entire process helps to make headway in and achieve the objectives of improving tourist activity and ensuring that tourism fits in with the needs of the city, making the process a basic asset in order to achieve improvements.

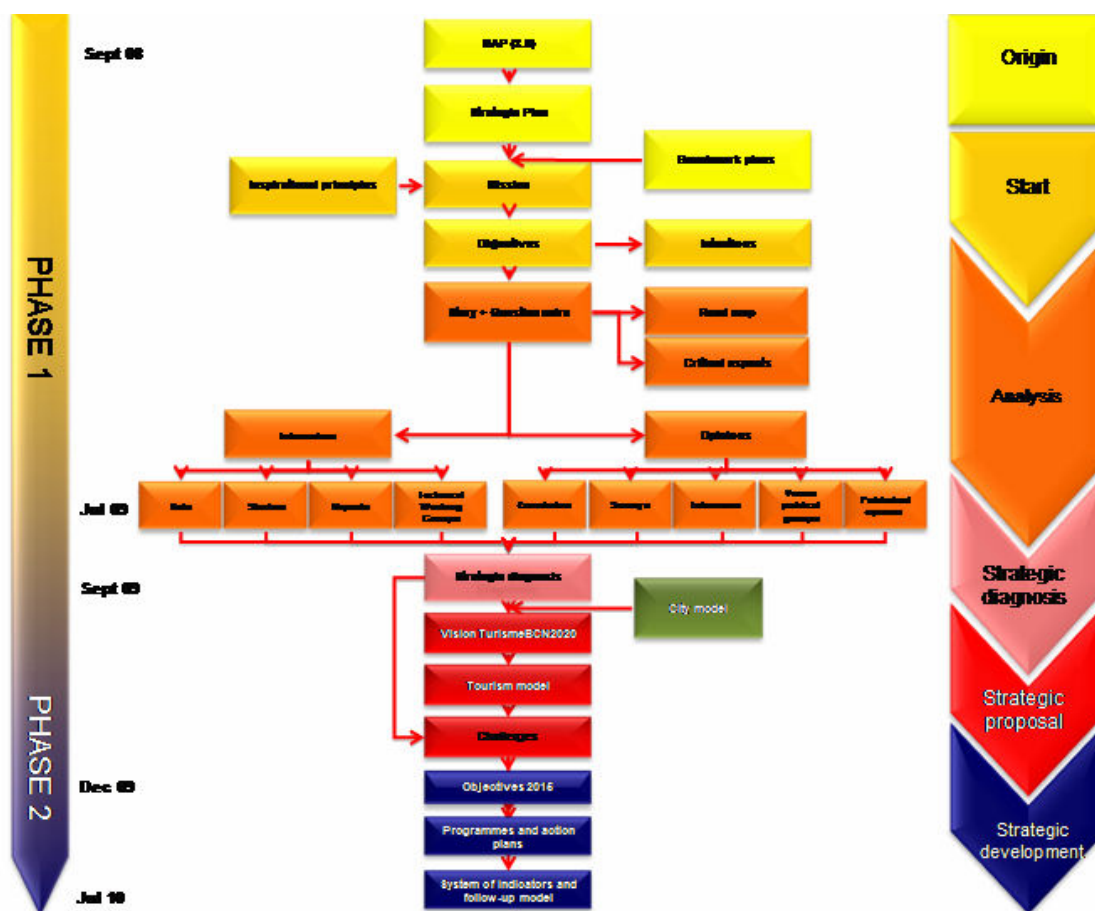
The importance of the **action-reflection process** has become key throughout the Plan, precisely because active participation, the generation of opinions, the comparison of discourses and criteria, and the shared knowledge of the current situation have become the means to achieving the aims of the Strategic Plan. Indeed, the slogan of the Strategic Plan – a reflection process on tourism and the city – becomes the objective and method of the plan at the same time.

Working phases

The Strategic Plan is structured into two basic working phases:

- > Strategic diagnosis phase
- > Strategic proposal and action development phase

The initial phase spanned the period from September 2008 to October 2009, and developed the aspects related to the **analysis** and **diagnosis** of tourism in the city. The proposed actions phase consisted of two main parts: the first, the strategic proposal (from November 2009 to January 2010), defined the **vision**, the **tourism model** and the **challenges facing tourism in Barcelona**; the second part, however, was dedicated to the **development of lines of action** and the definition of **proposals**, that will last until summer 2010.



Main actions carried out in the analysis and diagnosis phase

The initial working phase, which took place from September 2008 to October 2009, performed an in-depth analysis and diagnosis of the situation of tourism in Barcelona, paying special attention to its territorial, sectorial, economic, social and cultural aspects, and always takes an integral view of the tourist phenomenon itself. It is also important to mention an aspect that has been fundamental throughout this task and which has marked out the path and the modus operandi of the Plan throughout the analysis and diagnosis process: **the participation and involvement of society in the reflection on tourism and the city.**

In this way, the analysis and resulting diagnosis of tourism in Barcelona have been performed according to a **process of reflection and action** which has deliberately sought the wide-ranging and constant involvement of the local community, and made this aspect both the method and final result. At the same time, a great effort was made to gather data and objective information, in order to find out about the current situation of tourism in Barcelona with greater rigour and precision.

Road map: the focus groups and the questionnaire “Senate Tourism and City”

In order to embark on the reflection process on tourism and the city, and having defined the objectives, intentions and basic methodological foundations for its development, two actions were carried out that defined the Strategic Plan road map: six focus group workshops and the drawing up, issuing and analysis of a wide-ranging, in-depth questionnaire about tourism and the city to a large group of people associated with tourism and Barcelona.

The purpose of the focus groups was twofold: to bring up and reveal the main critical issues and key aspects of tourism in Barcelona and to mark the **true starting point of the Plan.**

Six working sessions were held with 100 people from a wide variety of backgrounds taking part. As a whole, the contributions of the focus group members brought to the table a series of questions concerning the following aspects:

- > **Relationship between tourism and the community**
- > **Territorial rebalancing and diversification**
- > **Infrastructures and internal mobility**
- > **Tourism image**
- > **Professionalisation**
- > **Tourism management and model**

Bearing these considerations in mind, and thanks to the quality and quantity of the contributions from all the participants, the focus groups have become the true starting point and beginning of the reflection on tourism and the city.

The Strategic Plan Office then drew up a questionnaire drawing on the contributions of the focus groups, which had as its aim **the calculation, exploration and analysis of critical themes and key aspects of tourism in Barcelona.**

The questionnaire featured some 200 questions and was sent out in early November 2008 to the focus group members and greater numbers of people who were also linked to tourism and the city. In total, 300 people received the questionnaire with more than 50% submitting their replies. By analysing the questionnaire, some particularly important themes emerged which indicated the main critical points and key aspects of tourism in Barcelona.

From a methodological point of view, the experience of the focus groups and the questionnaire gave the Strategic Plan a very clear idea of the areas that needed to be addressed in order to analyse tourism in the city, while confirming the importance of social involvement and participation.

Information and opinions: a dual line of work

In order to carry out the analysis of tourism and the city, the Strategic Plan has worked on a dual line of research:

- > to gather and generate information and objective data
- > to generate and gather opinions and perceptions

Both lines of work are complementary and were carried out simultaneously, and fit into the areas of “**Knowledge generation**” (which is interested in gathering and constructing objective data and information) and “**Spaces of participation**” (which takes as its basis a variety of actions in order to promote social participation and the creation of opinions and perceptions about tourism in the city).

Studies and reports

The Strategic Plan Office has commissioned to and coordinated a series of major studies with university research groups and businesses specialising in tourism analysis. They all made an important contribution to knowledge of tourist activity in Barcelona and the understanding of the relationship between tourism and the city.

> Delphi study on urban tourism trends and their links to Barcelona

ESADE carried out a Delphi study on urban tourism trends and their links to Barcelona, based on the participation of some 60 experts from Spain and abroad.

> Economic impact of tourism on Barcelona 2007 and 2009

The study *Economic impact of tourism on Barcelona* was commissioned to the research group AQR at Barcelona University. It was carried out in two phases: the first corresponding to the analysis of 2007, and the second focusing on 2009.

> Benchmarking Barcelona

The Plan also carried out a benchmarking analysis which used objective criteria in order to compare Barcelona with 17 cities around the world, competitors and/or benchmark cities.

> Image of Barcelona on incoming markets

The inhabitants from eight of the main incoming countries were polled about their image of Barcelona for the study *Image of Barcelona on incoming markets*.

> Image and position of Barcelona as a tourist destination on social networking sites

The importance of the internet in the decision-making processes of a tourist destination was the reason for the study on the image and position of Barcelona as a tourist destination on social networking sites.

> Quantifying the number of visitors to Barcelona in 2009

The aim of this study was to record the different types of visitors to Barcelona throughout 2009, either those staying in hotels, guesthouses, youth hostels or with friends and relatives, as well as those visiting from other places who did not stay overnight.

> Good practices in the international sphere

The Plan are also carrying out an analysis of good practices in the international sphere to identify those possible actions geared to the competitive improvement in specific aspects which have a particular impact on the proposals featured in the Plan.

Technical Working Groups

In order to reinforce the participative processes, the Strategic Plan has made it possible to bring together five working groups known as Technical Working Groups which have as their aim to analyse, identify and garner knowledge of some of the specific aspects of tourism in Barcelona. They featured the contributions of experts, professionals and those in charge of each theme, as well as the direct involvement of institutions such as the Barcelona Economic and Social Council and the Mobility Pact.

- > **Barcelona Web 2.0 Technical Working Group**
- > **Technical Working Group for Professionalism and Quality**
- > **Technical Working Group for Safety**
- > **Technical Working Group for Mobility**
- > **Technical Working Group for Tourism and Retail Opening Hours**

Interviews

Throughout the process of the Plan, the Strategic Plan Office took into account the opinions of significant people who have been interviewed, along with those of other people who are representative of the city and, due to their links to, or knowledge of Barcelona, brought the Office their views and opinions about tourism in Barcelona. The Office also interviewed representatives of the different municipal groups.

Working Commissions

The Working Commissions met in April and May 2009, and concentrated mainly on the efforts of the Strategic Plan during its analysis phase.

As a whole, the commissions have activated **high and diverse levels of participation from people associated with the city and tourism in Barcelona and the country**. This is why the Strategic Plan Office has obtained a valuable amount of information and opinions which will contribute towards the diagnosis of tourism in Barcelona. **More than 250 people from Barcelona and Catalonia** took part in the 20 working sessions.

- > **Territorial sphere**
 - . **Tourist areas and icons**
 - . **Barcelona districts**
 - . **Metropolitan environment**
 - . **Barcelona, capital of Catalonia**

- > **Sectoral sphere**
 - . **Commerce**
 - . **Accommodation**
 - . **Restaurants and bars**
 - . **Intermediation**

- > **Product sphere**
 - . **Tourism and culture**
 - . **Tourism and business**

The Working Commissions were set up with a very clear objective: **to create a dialogue and shared analysis about the way tourism fits in with the needs of the city.**

The purpose of the commissions is to bring together relatively small groups of people from different backgrounds and opinions in a dialogue about a specific theme, in order to perform a SWOT-type (Strengths, Weaknesses, Opportunities and Threats) diagnosis about every aspect

under discussion. The intentions have certainly been ambitious, in terms of the people convened and their involvement, as well as the level and intensity of discussion aimed for.

Communicating the Plan

Numerous presentations of the Plan have been made in different settings and venues, inside and outside the city: departments and head offices of the City Council, Barcelona Provincial Council and the Catalan Government, as well as at the city's cultural, economic, social and neighbourhood institutions and organisations and professional associations; presentations have also been made to trade unions and management, and representatives from the main sectors and businesses associated with tourist activity. The Plan has also been presented at workshops, symposiums, congresses and conventions, and to a broadly based public. A total of 120 presentations have been made since the Plan was launched.

There is also a website (www.turismebcn2015.cat), which provides a channel for the dissemination of the Strategic Plan.

Tourism and City Municipal Technical Committee

At the request of the Strategic Plan, and by mayoral decree, the **Tourism and City Technical Committee** was set up in June 2009. It is convened by Barcelona City Council, to provide an instrument for cross-cutting coordination, which is authorised to request commissions for the municipal organisation and is associated with the governing bodies of the executive municipal administration. The Tourism and City Municipal Technical Committee is chaired by the municipal manager, and coordinated by the Economic Promotion Department. Its members include representatives from the different municipal departments: Municipal Management; Economic Promotion, Environment; Prevention, Mobility and Safety; General Services and Territorial Coordination; Urban Planning and Infrastructures; Education, Culture and Welfare; Ciutat Vella District Council.

> Strategic diagnosis

The analysis phase of the Plan got underway with the drawing up of a specific road map, based on the set of critical points and key aspects relating to tourism which became clear within the framework of the Focus Groups and the questionnaire. From these questions the Office proceeded to carry out an in-depth analysis of tourism in Barcelona, while setting in train a process of shared participation and reflection. We explored and collated objective data and information during this process, and listened to the opinions of a broad sector of the community, including groups. The actions carried out were diverse and participative: the Working Commissions, the Technical Working Groups, opinion studies and the different projects carried out in association with bodies and organisations, among others.

The strategic diagnosis phase of the Plan concluded in autumn 2009, with the presentation of the document ***Strategic diagnosis of tourism in Barcelona***.

Strategic diagnosis document

The **Strategic diagnosis** document was presented in mid-October and set out a rigorous analysis which was very aware of the diverse realities that comprise tourism in Barcelona.

The **Strategic diagnosis** document is divided into different chapters: the first, the introductory chapter, sets out the origins, objectives, intentions and working methodology that have steered the Plan, highlighting its linking threads: management bodies, inspirational principles, objectives and horizon, working criteria, actions and methods, and the main areas of work...

The second chapter presents a strategic analysis of tourism in Barcelona: it features a brief explanatory framework about the relationships between tourism and the city and the main trends and challenges facing tourism on a global scale. It also places these aspects in context to make it easier to understand the tourism system, from a global and local viewpoint and taking into account the economic, territorial, socio-demographic and environmental variables. This chapter also performs an analysis of Barcelona's current tourist situation, highlighting the milestones that have marked its recent development; it also looks at current and previous benchmark strategic plans, and makes an analysis of the main aspects that shape tourism supply and demand in the city, paying particular attention to the case of the old town, Ciutat Vella, and, finally, reflecting on the external image of the city, its competitiveness with other tourist destinations, and opinions and internal discourses.

The third chapter includes the strategic diagnosis, the core of the document featuring a **list of 150 issues** which, by way of conclusion, brings together the aspects the Office deems to be the most important facets of the complex reality of tourism and the city in Barcelona: the key aspects to be taken into account. The chapter concludes with a summary of these.

The 150 points are set out under the following headings:

- > **Supply and demand: *the position of the city as a tourist destination around the world***
- > **Policies, management and promotion: *governance of the activity***
- > **Economic and sectoral aspects: *the economic and business dimension***
- > **Social and cultural aspects: *the citizen's gaze***
- > **Ciutat Vella: *the challenge***

Finally, the document includes an appendix which, like a participative report, lists the participants in the different areas of debate and participation of the Plan, the main activities, the documents consulted...

The *strategic diagnosis* was presented to the **Board of Directors of the Plan** in October 2009 and the **Municipal Commission for Economic Promotion, Employment and Knowledge**, as well as the **City Advisory Board Tourism Commission**.

Strategic synthesis

The strategic synthesis that concludes the **Strategic diagnosis** document presents a compendium of the most relevant data and information collated from the analysis and diagnosis of tourism in Barcelona, from an economic, social, cultural and territorial viewpoint.

For a number of years now, the growth in tourist activity in Barcelona has made the city a world-class tourist destination. **Today, Barcelona is a successful tourist city**, and enjoys worldwide recognition and acclaim and is a desirable destination for many types of people. Barcelona's appeal certainly has to do with a multiplicity of elements that make it interesting to a wide range of demand segments, beyond the classic tourist who visits for recreational purposes or on holiday.

Visitors with a very varied profile, with diverse origins and motivations come to Barcelona. Training, business, healthcare, sport and research are some of the reasons that attract visitors to the city.

Barcelona as an urban tourism destination owes its success to its ability to combine all its potentialities and strengths as a city with other activities. Indeed, **urban tourism exploits the multi-activity of the city, urban multiculturalism and the multi-motivations of the community and visitors**.

The majority of international analyses and studies always place **Barcelona near the top of their rankings**, highlighting its values and qualities in areas as diverse as the quality of life and lifestyle, the cultural and recreational offering, the architectural and monumental legacy, the hotel infrastructure, retail offering, restaurants and bars and its wide range of facilities and amenities for tourism associated with trade fairs, congresses and conventions. Visitor satisfaction is usually very positive with regard to most aspects of the city, and this factor gives impetus and stimulus to the success of the destination. In addition to being valued as a city that must be visited, **Barcelona is appreciated because of its quality of life and lifestyle** in general, and the image associated with the city incorporates values such as **creativity, cosmopolitanism and innovation**, which also make it a desirable place to live and work.

Barcelona has **traditional and established iconic landmarks** which are widely recognised around the world, such as La Rambla, the Park Güell, works by Gaudí and the city's old quarter. It also **offers a great many possibilities and potential resources** which can further increase the city's appeal, while favouring the dispersal of tourist attractions and, in this way, taking tourism to more of the city's neighbourhoods and districts.

Barcelona's **hotel infrastructure** has expanded markedly over the past two decades. In the last five years alone, this sector has experienced growth levels of 40%, taking the number of beds from 39,000 to 56,000. The **concentration** of hotels in the Ciutat Vella and Eixample districts, although high, has decreased while a slow but gradual **dispersal** of this activity to other areas of the city has taken place.

Barcelona is a competitive tourist city, and is often compared to long-established tourist destinations such as Paris, Rome, Madrid and London, all of them state capitals. In fact, Barcelona is one of the European cities that have experienced the greatest growth in relative terms with regard to tourism.

The economic and sociocultural environment of recent years has helped raise the city's profile around the world. In addition to this, the development of transport infrastructures, such as the airport, port and high-speed train (AVE) have benefited the major growth in tourism

demand for Barcelona. The low-cost transport boom throughout Europe, the increase in the number of trips from around the world and the popularisation of weekend breaks in urban centres have favoured the city's success as a tourist destination.

Barcelona has done things properly as far as tourism promotion is concerned: for more than 15 years, Turisme de Barcelona – a public-private consortium comprising the Chamber of Commerce and the City Council – has made great efforts to promote and disseminate the image of the city, attract specific demand segments and make Barcelona's offering cost-effective. All this has been achieved following an ongoing strategy of creating, managing and marketing products which have made the consortium practically self-sufficient in financial terms, meaning that it generates more than 90% of its budget which, in 2008, was in excess of 30 million euros. The Turisme de Barcelona model is widely admired, and an example of promotion that many other destinations seek to imitate. However, in order to face the future with guarantees, it may be necessary to rethink its **definition, role and sources of funding** based on the experience of the success accumulated over these years.

Beyond the promotional strategy implemented, it is important to remember that the legacy of the image of the **92 Olympics**, the urban renewal and the **general appeal of the city have contributed to the growth in tourism in Barcelona.**

It is estimated that **more than 10 million visitors** stayed overnight in Barcelona in 2008. The city is a leader in segments including congresses, cruises and city breaks. These visitor volumes represent around **25 million overnights** in all kinds of accommodations, including those categorised as "relatives' and friends' houses". These do not take into account the large numbers of day visitors or "trippers" who travel to the city throughout the year.

The magnitude of these figures is also associated with another important piece of data: in 2007, tourism activity in Barcelona had an economic impact close to **20 million euros a day** – in sectors as diverse as accommodation, the retail trade, restaurants and bars, transport and cultural and recreational facilities, among others – and created more direct employment than the chemical, financial, property and car industries in Catalonia, thus proving its importance. It is also important to highlight the multiplying effect of tourism on the city's economy, where **more than 25% of its impact is distributed by sectors that are not directly considered to be associated with tourism**, as well as its important effects on the rest of the country.

Beyond understanding tourism as a source of income for the city, the community also values this activity insofar as it is an **element for social and cultural progress** and a **stimulus for urban development**, which fosters the dynamism of a **plural, cosmopolitan city which is open to the world.**

In recent years, the large and medium-sized metropolises in western society have shown a commitment to the **tourist industry as one of the engines for economic development and an element for revitalising the territory.** Increasingly, tourism is taking on a predominant role in contemporary cities, and it is within the framework of this dynamic that Barcelona has fully established itself as a tourist destination.

Barcelona's new transport infrastructures have brought about a true change in scale. The continuous improvements being made to the airport and the port, and the arrival of the high-speed train (AVE) are changing the true dimensions of the city, connecting it with the world's main incoming markets and expanding its potential market. An example is the current leadership of the port in the cruise market. Barcelona is the leading cruise port in Europe and the Mediterranean and ranks fifth in the world.

The territorial and symbolic boundaries of **destination Barcelona** have extended beyond the purely administrative demarcations of the city. The area covered by destination Barcelona and the capital's links to other tourist offerings in Catalonia and the rest of Spain are now a potentiality to be reckoned with.

As far as demand is concerned, the plurality of profiles is very high, which favours the **deseasonalisation** of the activity throughout the week and throughout the year. Barcelona attracts visitors from a **wide variety of geographical origins**: three quarters of the tourism demand comes from abroad, with the French, Italian, British, German and North American markets being the most prominent. There is also a **wide range of motivations** for travel: 55% of visitors come to Barcelona for recreational purposes, 33% for professional reasons and 12% for personal reasons.

The growth and diversification in tourism supply and demand experienced in recent years have been accompanied by a certain **unease among the community**, who, in a relatively short space of time, have seen how the social, retail and urbanistic network of the city has changed significantly. In this context, opinions have emerged that are critical towards tourism, reflecting a disapproval, not so much of tourism in itself, but the lack of management of its impact or simply a feeling of abandonment.

Recently, the large numbers of visitors to Barcelona have highlighted the fact that it is **necessary to manage the impact of tourism within the framework of a new tourism policy for the city**. The problems stemming from massification, the processes of transformation in retail activities or the problems of coexistence and cohabitation in tourist areas – **mainly at the Sagrada Familia, the Park Güell and many places in Ciutat Vella**– are some of the complications that make it difficult for tourism to fit in with the city. Certain prejudices and stereotypes have emerged about tourists as a result of this unease and the tensions that are still to be resolved, and tourism has also been identified as responsible for some of the city's problems.

The conflicts associated with the massification and standardisation of the offering could pre-empt **certain levels of attrition with regard to tourism** and become a contributing factor to the deterioration of Barcelona, having adverse effects on the quality of life of the local community and spoiling the visitors' experience. Furthermore, it is important to remember that the image of Barcelona, like the image of every tourist destination, is prone to being undermined if the visitors themselves start to have bad experiences.

In addition to highlighting the need to manage and order tourism activity, the lack of conciliation between the community and tourism can also be explained, to a certain extent, by an **ignorance of its positive effects**.

We have established the existence of **polarised opinions** between praise and criticism, discourses that have fluctuated between self-satisfaction and rejection. The local press has played an important role on both sides of the pendulum, and it can be said that published opinion has struck a chord among certain groups in Barcelona society.

It is also important to mention the **contrast** between the **image perceived on an external level**, where Barcelona enjoys an excellent reputation, and the **citizen's gaze**, which, far from rejecting tourism and its benefits, has a more critical opinion of its impact.

As this critical view of tourism has been "kindled", an economic and financial crisis of worldwide scope has made us take stock of the value of the tourist industry, which is clearly cross-cutting, multisectorial and firmly established in Barcelona. However, it is nevertheless true that this **economic crisis can change many things**, both in terms of visitors' habits and the city's competitive conditions, as well as the tourist offering as a whole. This factor represents a new **challenge that Barcelona cannot fail to meet**.

Tourism must be everyone's concern, basically because the population as a whole receives the impact – both positive and negative – generated by this activity, either directly or indirectly. Taking this premise into account, we must face the future with the clear idea that tourism is a **shared, not-sectorial, project**. In this regard, we **must move forward towards a new idea of what urban tourism means in the 21st century**, and this must be done with the **greatest possible involvement of the community and institutions**.

After years of euphoria and strong growth, in the future we must **take a new approach to key aspects** such as tourism management, the importance of education and a search for complicities, the opportunities for the territorial deconcentration of the offering and adaptation to the demand, and the improvement of the activity in an increasingly changing and competitive environment, among other questions.

However, above all, **Barcelona has the ability and will to face the future with guarantees.**

> Strategic proposal

The second working phase of the Plan commenced with the definition of the **Strategic proposal**, which includes the **vision**, the **tourism model** and the **challenges facing tourism in Barcelona**.

The **Strategic proposal** was presented on 26th January 2010, in the Saló de Cent Chamber at Barcelona City Hall, during a ceremony chaired by the mayor of Barcelona, Jordi Hereu, and Miquel Valls, president of the Barcelona Chamber of Commerce. Also taking part were Joan Gaspart, president of the Barcelona Executive Committee, Jordi Williams Carnes, third deputy mayor and councillor for the Tax Office and Economic Promotion, and Enric Truñó, the coordinator of the Plan. The ceremony was attended by some 300 people who took part in the reflection process gathered in the Strategic Plan.

The **Strategic proposal** document includes the following points:

- > City model
- > Vision *TurismeBcn2020*
- > Desired tourism model
- > Main challenges to be faced

City model

The city model presents here brings together **the main aspects and characteristic traits that define the Barcelona of today and the future**, namely, the type of city aspire to based on the current reality. The model addressed here integrates the traits defined by a broad number of actors from the city, including the municipal government, the institutions and representatives of the economic, social and cultural sectors.

The city model is understood as a **desired model**, which defines the main decisions about the city and, therefore, is a **fundamental element in the conceptualisation process and the proposal for the desired tourism model**.

A series of 20 substantial traits characterise the desired city model:

Barcelona wants to be a city which...

- > is heterogeneous and diverse, and places the emphasis on people
- > is tolerant and civic-minded
- > is inclusive, and committed to social cohesion
- > has an open attitude to welcoming visitors
- > is committed to culture and sport
- > has a broadly based and diverse social network that is committed to the city
- > has municipal leadership and shared complicities

- > is shaped by its neighbourhoods
- > is dense and compact and eschews segregation and compartmentalisation
- > is multifunctional, with a diversification of uses on a territorial level
- > is metropolitan
- > is the capital and engine of Catalonia
- > is the "capital" of the Mediterranean

- > is diversified, with a wide variety of economic sectors, with tourism activity among them
- > is enterprising, creative, innovative, committed to training, attracting and securing talent
- > and where the service and knowledge economy are a key component
- > has a retail offering with its own marked identity and makes the city what it is

- > is sustainable
- > has a strong international profile, is well connected and open to the world while preserving its own identity
- > is pioneering and with a desire to lead

Vision TurismeBCN2020

Although the present Plan has a Horizon for 2015, efforts have been made to project a vision over a ten-year period (2010-2020), in order to establish project that is broader in scope, leaving open the possibility of developing a new Horizon Plan for 2015-2020.

The proposed Vision seeks to visualise how we imagine Barcelona as a tourist destination in the future (2020).

“In 2020, Barcelona will still be recognised as the most vibrant and dynamic tourist destination in the Mediterranean and one of the world’s leading destinations, and has established its position as a destination that has gone way beyond its administrative boundaries.

It is a city where tourism is fully integrated into its economic, retail, social and cultural dynamic and where the community recognises all kinds of visitors as other (temporary) citizens. The hospitable character of the locals makes it a friendly, different city that people are fond of.

A metropolitan city which is distinguished by its environmental sustainability, its excellent service, its continuous ability to surprise and its groundbreaking initiatives. Culture, creativity and knowledge are the engines of the city and its territory.

The real city, its identity and dynamism form the basis of its appeal and there is no room for “ghettos” or neighbourhoods that cater exclusively to tourists.

Tourist activity continues to contribute to Barcelona’s success by fostering the improvement of the quality of life and social cohesion of its community, to the upkeep and creation of new amenities, and to the success of other economic sectors and the dissemination of Barcelona around the world”.

Desired tourism model

The proposed tourism model expresses the **type of tourism Barcelona aspires to**, as well as the role this activity has to play in the city and throughout the territory, and the complications that must go hand in hand with its development. The proposed tourism model justifies, responds to and “works” for the defined Vision.

The three core principles that define the tourism model:

> Coherence with the city model

The tourism model must be fully coherent with the city model. The relationship between tourism and the city must be based on **reciprocal feedback** and positive synergies, in a bidirectional sense.

In this regard, the management of urban tourism activities cannot be disassociated from the conceptual and operational framework of the management of the city.

The tourism model is part of the city model while helping to shape it, so that the coherence between both models is key, particularly because tourism leads to the development of the city and vice-versa.

> The balance or synergic relationship between visitors and residents

The relationship established between residents and visitors proposed by the Barcelona tourism model must be evenly balanced, insofar as there must be no competition or conflict between one or the other.

The coexistence between visitors and residents should be synergic as well as harmonious, based on cultural and economic exchanges and reciprocal contributions, understood as an enriching and mutually constructive experience.

> Economic, social, environmental and heritage sustainability

The principle of sustainability is based on the idea that the needs of future generations should not be compromised by satisfying present needs. **Sustainability must be addressed globally with political, social and economic measures that call for the involvement of society as a whole.**

The Plan therefore understands that the concept of sustainability includes a broad range of aspects, such as **economic, social, environmental and heritage sustainability.**

The main traits of the **desired tourism model** are as follows:

- 1 > An activity considered and managed as cross-cutting, multisectorial and with a wide territorial scope
- 2 > Based on active public management, interinstitutional cooperation and involvement and a public-private agreement
- 3 > Tourism is one of the main economic cornerstones of the city and fosters the distribution of revenue throughout the territory and among the community
- 4 > Tourist activity integrated in a natural way into the life of the community
- 5 > Tourist activity well integrated into the economic policy and the overall management of the city, where the tourism-business binomial is a priority
- 6 > Tourist activity involving the community
- 7 > The visitor, "temporary citizen", beyond the traditional concept of the tourist
- 8 > Diversified, deseasonalised and multi-motivational demand
- 9 > An inclusive rather than exclusive tourism, which is respectful and has rights and duties
- 10 > A tourist offering characterised by excellence
- 11 > Culture as one of the main linking elements of the offering
- 12 > A city for the community that visitors like
- 13 > Preserving and offering Barcelona's identifying symbols
- 14 > The city offers itself as a whole, with *stories* that can be shared between the community and visitors
- 15 > A city where the neighbourhood is a key element

16 > Preserving mixed uses of the territory

17 > Metropolitan city

18 > Barcelona, capital of Catalonia and the Mediterranean

The challenges facing tourism in Barcelona

Below the Plan sets out the **ten major challenges** which, taking into account the diagnosis expressed in chapter 3 of the “Strategic diagnosis” document, Barcelona has to face in order to move towards the established tourism model and make possible the proposed vision.

The challenges facing tourism in Barcelona are approached as the main **levers that will bring about changes in the present type of tourism** according to the desired tourism model. This means that each challenge has a marked **ability to transform and change in the future**.

The challenges are understood as the axes or vectors that will bring about an improvement in tourism in Barcelona. In order to achieve this, they must be taken on board by the broadest possible range of agents involved. The challenges **will involve agreements, commitments, and shared actions**.

- > **Territorial deconcentration** of tourist activity.
- > **Governance** of tourism within the framework of the city and its territorial environment.
- > **Generation of complicities** with society and institutions.
- > **Competitive improvements** to the destination and activities associated with tourism.

> Territorial deconcentration of tourist activity

- 1 > From Barcelona to **destination Barcelona**
- 2 > From the traditional icons to **new icons**
- 3 > From the icons to the **neighbourhood**

The territorial deconcentration of tourist activity involves the expansion of the destination to the metropolitan area, taking advantage of the possibilities of the new tourist space and its surroundings. At the same time, the territorial deconcentration of the activity involves highlighting new resources and urban spaces and giving greater protagonism to the neighbourhoods.

Deconcentration seeks to expand the framework for action, to foster a more equitable distribution of the economic and social effects caused by tourism, as well as a territorial reequilibrium, releasing the pressure on some zones of the city.

> Governance of tourism within the framework of the city and its territorial environment

- 4 > From tourist to **visitor**
- 5 > From tourism promotion to **a governance of tourist activity**
- 6 > From data to **the generation of shared knowledge**

The social and economic transformations that have occurred involve changes, adaptations and reformulations in the way cities are considered and governed. The dynamics inherent to the urbs, the growing sophistication and importance of tourism and the multiplicity of public and private actors involved, make them complex to govern.

The Plan therefore needs to move towards the development of new structures of management and coordination of tourist activity and their relationship with the city and different territories,

bearing in mind the current and desired roles of the different institutions, governments and sectors involved.

The generation and dissemination of information must play an important role in order to help achieve the necessary complicities, take the best decisions and favour the credibility of the activity.

> **Generation of complicities with society and institutions**

7 > From indifference to the involvement of the community

8 > From competition to complicity with Catalonia

In order to ensure that tourism functions correctly and is integrated naturally into the city, the maximum number of complicities is essential, with particular importance being given to the Catalan community and institutions according to their historic importance and/or shortcomings.

The involvement of the community is a necessary condition for the economic and social sustainability of the activity, and complicities with Catalonia and its institutions are something that has to be improved for their mutual benefit.

Considering the Barcelona resident also means fostering hospitality, extending a warm welcome to visitors, coexistence and reciprocal exchanges.

To generate institutional complicities in all spheres also means reinforcing Barcelona's role as the Catalan capital and raising the profile of Catalonia.

> **Competitive improvements to the destination and the activities associated with tourism**

9 > From "accelerated" growth in recent years to the consolidation of sustainable growth "post-crisis"

10 > From the tourist city to leadership in tourism and the city

In the world today, strong competition between cities means that the competitiveness of the destination as a whole and the sectors in particular are key factors to success. There can be no long-term success without sustainability and there is no sustainability without the ability to be competitive.

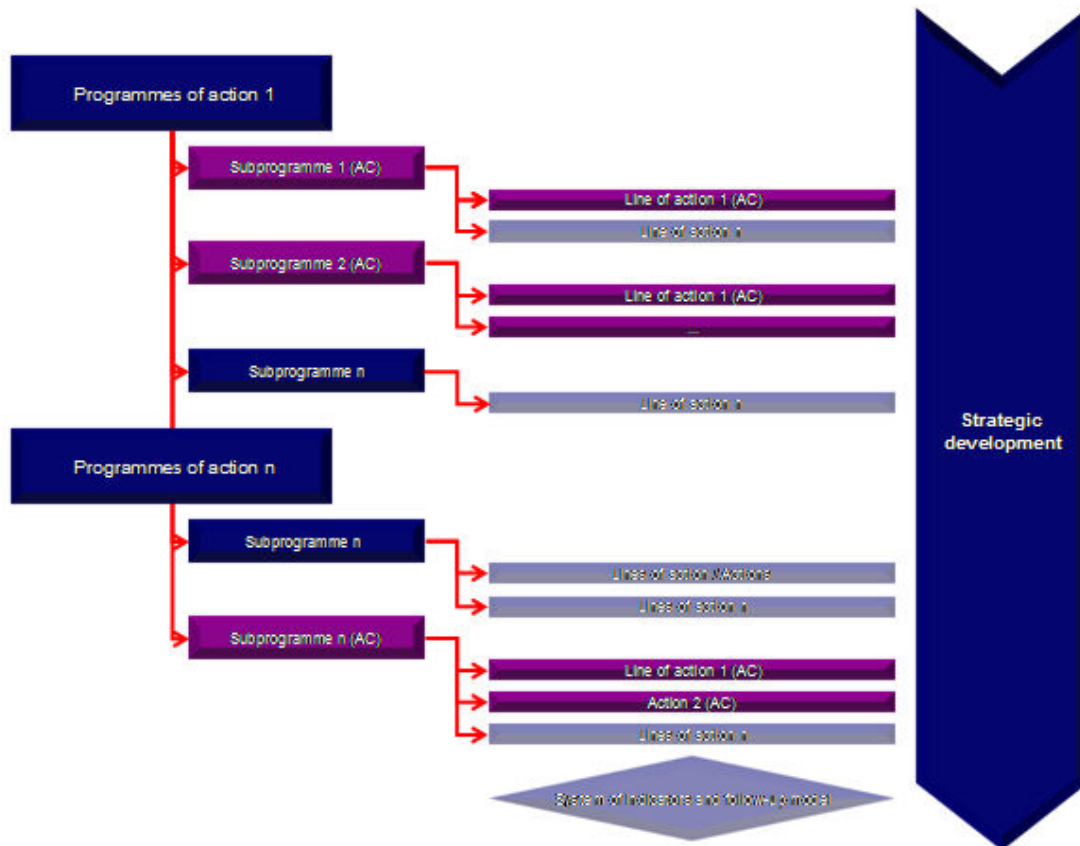
Barcelona's tourism boom of recent years has proved the strength of the product, the solvency of business and the competitiveness of the destination until today. Nevertheless, the rarefication of the current economic and financial environment, as well as the strong competition between destinations, makes it necessary to consider a sustainable evolution over time, while consolidating the merits achieved.

Despite having the conditions and aptitudes to achieve a leading position in urban tourism over time, Barcelona must work towards the continuous improvements in the competitiveness of the destination and the different sectors involved.

> Developing actions

Implementing the programmes

In order to provide an answer to the previous challenges, as part of this working phase, which will conclude in summer 2010, a series of lines of action will be established that will be grouped together as programmes and subprogrammes in order to facilitate its implementation and subsequent monitoring.



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