Strategic Tourism Plan for Catalonia 2013-2016
and Catalan Tourism Directives 2020
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1 About this work

This document presents the results of the work undertaken to produce the Strategic Tourism Plan for Catalonia, to be implemented over the period 2013-2016, and the Catalan Tourism Directives, which aim to promote all the actions in the area of tourism for the Horizon 2020 in Catalonia.

The work was performed by a multidisciplinary team of professionals consisting of external consultants specialising in different areas of the tourism value chain, together with an internal team from the Catalan Directorate-General for Tourism, in a methodological consultative and participative process in which representatives of the tourism industry throughout the territory have helped build a vision and strategy and develop the proposals in the action plan.

The working structure considers the following topics:

• A diagnosis that presents the main conclusions from the analysis phase.
• The major challenges in the sector to which the Strategic Plan must respond.
• The foundations on which the future of the Catalan tourism industry must be built.
• The vision, strategy and Catalan Tourism Directives for the Horizon 2020.
• The prioritised, scheduled and budgeted action plan.
• A system of monitoring and control indicators.
• The inactivity scenario, if the Strategic Plan is not implemented.
• The mechanisms to facilitate initiating the Strategic Plan.

The success of the Plan will be determined by the will and commitment the sector demonstrates from this point onwards. The combination of the country’s know-how, collaboration between the different actors and the commitment to implementing this Strategic Plan could produce extremely important qualitative changes to ensure the decisive role the tourism industry has to play in Catalonia’s collective future.

Appended to this final report are the initial documents offering a comprehensive diagnosis of the tourism industry, among others.
Catalonia Vision 2020 · Strategic Tourism Plan for Catalonia 2013-2016

2 Introduction

Catalonia is one of the world’s leading tourist destinations, rich in natural and cultural resources, with a mature and relatively diversified sector. Modern tourism started in Catalonia at the beginning of the previous century, but its expansion took place from the 1950s onwards with the high demand for holidays from a Europe reborn after the Second World War, tourists seduced by the climate and the extraordinary quality of our natural and cultural landscapes, leading to the appearance of what is now called the ‘tourism industry’. For a better understanding of the Catalan tourism model and its current position, these 60 years may be explained through three key events.

1. First key event: The development of a highly successful international mass sun and sand tourism model, which by the start of the 1980s began to show symptoms of obsolescence due to a monoculture lacking innovation, diversification and reinvestment. Despite a growing awareness since then of the need to boost diversified, sustainable and quality tourism, successive property booms and lack of a consensus vision of tourism have contributed to an invasion of our coastal beaches with a tourism offer based more on quantity than quality, to the extent that today we have an excess offer, resulting in price cutting and a large number of tourist accommodation options on the coast that can only compete by lowering prices and, hence, quality. Despite this, all along the Catalan coast it is possible to find an increasing number of examples of diversified, quality, sustainable and responsible tourism, but which unfortunately are yet unable to spread sufficiently through their example. In addition, it is also worth stressing the success of the Port Aventura project, demonstrating that an offer other than sun and sand, together with an agreed territorial plan, can contribute to reinvigorating and completely repositioning a coastal destination. The increase in temperatures, due to climate change, may also be advantageous, as it could provide an opportunity to the sector by extending the ideal sun and sand tourism season. Despite a number of good examples, it may be concluded that in general our sun and sand tourism model, which generates more than half the tourism demand in Catalonia, is not competitive enough in terms of quality.

2. Second key event: The amazing and unexpected success of Barcelona as a tourist destination, which continues to break records despite the economic crisis. This success is especially notable given that there was initially no tourism planning, a fact that has subsequently proved to be of great help; rather, it was based on the development of citizen-based city model, a process in which the ‘90 Olympic Games was crucial, as it enabled sufficient efforts and resources to be raised to turn the city model into reality, while also proving to be one of the best global publicity campaigns a city could wish to have. Barcelona’s huge success as an urban destination has been the driving force behind the growth in all the tourism indicators in Catalonia in terms of quantity, and also quality, in the last 20 years. Without Barcelona’s success, which has in passing helped sell the coast and inland areas more effectively, tourism indicators in Catalonia might well have been in decline for some time. The success of the Barcelona model should thus lead to the conclusion that any major action that is only geared towards attracting tourism and not advancing the city or country’s strategic model might not be the best way of maintaining or enriching its current positioning, and may even destroy it.

3. Third key event: The slow but steady development of inland and mountain tourism, thanks to the creation of an extensive network of tourism and rural accommodation establishments, the growth of active tourism, adventure sports, ecotourism, golf and cultural tourism, among other factors, with the key support of an increasingly broad, diverse, innovative and renowned culinary offer, which is one of the main emotions users take home from a journey and a reason for returning to and recommending the destination. The culinary experience has recently been joined by an equally strong wine tourism. This development has also contributed notably to the inexorable inward spread of the ‘frontiers’ of coastal tourism, which increasingly needs to diversify its offer. Additionally, and in the specific area of mountain tourism, there is the particular case of snow tourism, with a long tradition in Catalonia and a large number of participants. Many mountain regions are almost exclusively economically and socially reliant on this form of tourism in coexistence with the endemic financial difficulties of most of the ski resorts, due to poorly planned business models and an increasingly adverse climate, due to the effects of climate change. Both inland and mountain tourism have developed and are sustained by internal and local tourism, a weakness that is becoming clear in the recession, but they are also demonstrating growing competitiveness with respect to international tourism. However, the potential of
the natural and cultural resources in the inland and mountain territories, together with newly developing parameters in demand, positions them as one of the main strategic investments in the Plan.

Over these 60 years, tourism has grown steadily to its position as one of the pillars of our economy, given that it represents 12% of the GDP, it is a major driving force for other productive sectors, it generates foreign current and, in the current context of severe economic recession, it is one of the few major sectors with short-term prospects for growth. Despite its importance, tourism is still a largely unknown sector in our society, full of stereotypes that create a superficial and pejorative vision.

One of the priority goals of the Strategic Plan is to raise awareness at all levels that tourism is not a sector, but a combination of many sectors, both productive and non-productive, private and public. During their experience, tourists interact directly as customers or users with sectors such as transport, accommodation, leisure, sports, shopping, culture, agriculture, fishing, food, the environment, knowledge, health, education, safety, justice, the territory, finances, public works and energy, to give a number of examples. The tourist interacts directly with practically all the sectors in our society and this is a factor that configures and defines the significant cross-sector nature of tourism, unlike any other sector. Tourists are veritable ‘temporary citizens’ who use public services and are direct customers of the country’s productive sectors.

Although the stereotypical image of tourists is foreigners sunbathing or sight-seeing, it should be understood that cultural, nature, business, congress, convention, medical, academic, scientific, religious, culinary, sports, shopping, cruise or luxury tourism, to give just a few examples, are becoming increasingly important for the country in terms of both quality and quantity.

Directly related to this, it is also essential to understand that in a globalised world, and more specifically in a society such as Catalonia, which arises from and feeds off multiculturalism, the frontier between citizens and tourists tends to blur, as tourists are nothing other than temporary citizens who help enrich our economy, society and culture. In addition, the citizens of Catalonia are the leading tourists in the country, and this internal tourism is not just important because of its volume, but is also essential because of its ability to contribute to diversification, deseasonalisation and the territorial balance of tourism activity.

Despite being a sector of sectors, tourism has mainly been identified with the accommodation sector, and more specifically the hotel sector, which makes sense given that apart from travel agencies and tour operators, accommodation is the only sector that depends on or benefits exclusively from tourism. This is one of the main reasons why the current Law on Tourism in Catalonia considers tourism companies specialising in accommodation and tourism intermediaries as tourism business, and are thus the only ones over which the legislation has competence in terms of regulation, registration and inspection.

Despite this, it is also the responsibility of the Directorate-General for Tourism of Catalonia (DGT) ‘to design, coordinate and execute policies to promote competitiveness in the tourism sector, and innovation and quality in Catalan tourism products’. How, therefore, can the DGT effectively fulfil its responsibility over a sector of sectors when it only has direct powers over the sector dealing with tourism companies specialising in accommodation and tourism intermediaries? And how can it do this in the complexity of a government in which at local, regional, provincial, national and state level everyone has direct and often exclusive powers over some link in the tourism value chain? This is one of the historic contradictions in the tourism industry which this Strategic Plan not only aims to highlight but also to provide solutions for, wherever possible.

Another instrumental goal in this plan is to raise awareness of the fact that Catalonia is not so much a destination as a sum of many, diverse and sometimes conflicting destinations. A destination can be a town, a region or a province, but also a route, landscape, restaurant, hotel, campsite, ski resort or theme park, among others. Or a combination of these. Essentially, a destination is a space capable of offering an experience that is a reason for travelling. A space that does not fit into administrative frontiers. The destination will be competitive and sustainable, this being one of the end goals in the Strategic Plan, to the extent that its different actors are capable of working together in coordination to offer a demand-oriented value chain, and do this in a planned manner, with the aim of ensuring the impact of tourism is economically, socially and environmentally beneficial to the territory.

The creation of tourism products and experiences is thus the foundation for any destination. It is no use promoting a destination if it cannot offer a competitive product. And the essential raw material for a destination to create tourism products is its natural and cultural heritage, i.e. its landscape in the widest sense. The natural, urban or human landscape we relate to, the ‘features of a territory with all its natural and anthropic elements, but also the emotions they arouse when we contemplate them, the cultural image of the society in its territory in the material, spiritual and symbolic dimensions’. A landscape we must recover and...
adequately maintain if we wish to aspire to quality tourism, which in turn generates resources for improvement, management and conservation.

Along with the tourism sector planning included in the Plan, consumption of the territory’s resources (water, sun, biodiversity, coast, etc.) must always be seriously considered and taken into account to progress towards tourism that is sustainable in all aspects.

Over these 60 years of tourism, an extensive network of transport, accommodation, facilities and services for tourism has developed, with particular intensity during periods of economic growth, always based on the construction industry. Despite this, it is true that we still suffer from major deficiencies that affect our overall competitiveness; we have created infrastructure that is still significantly underused, while we also have a significant volume of obsolete tourist accommodation. This all indicates that what we need now is not more construction, but, firstly, to make what has been constructed profitable and, secondly, redirect our construction sector towards refurbishing what is obsolete and restoring spoilt landscapes, which could produce employment for a large number of people for a long time.

Tourism is thus a key motor for the Catalan economy and could be even more so during the current economic crisis. It therefore requires a different, specific treatment so that it does not lose, but increases, its potential as a driving force. Unfortunately, resources are extremely limited; thus this Strategic Plan adopts the principle of ‘do more with less’, but also defines the minimum requirements for progress. The setting up of the Tourism Development Fund (the ‘tax’) will be particularly helpful in this context, as long as it is invested taking into account the fact that a good product is required before it is promoted.

Tourism is a sector of sectors, so any tourism plan has to be a plan for the country. This Strategic Plan must switch from ‘hardware to software’. From ‘filling beds’ to selling sophisticated products in a competitive global market. From having abundant tourism resources, to creating a balanced and complementary portfolio of tourism products. From being a holiday destination to being a country of experiences. From receiving large number of tourists, to creating loyalty among sustainable customers. From quantity to quality.
3 Diagnosis

In 2011, Catalonia received 82 million visitors, of which 33.7 million stayed for at least one night and 48.5 million for a day. These tourism flows generated direct expenditure in the territory of €15.197 billion. Of the 33.7 million tourists staying overnight, 16.6 million were Catalans; 13.1 million were foreigners; and 3.9 million came from the rest of Spain.

Catalonia is a leading destination among its immediate competitors, in the Mediterranean, and Europe is the main tourism generating market.

Map comparing arrivals and expenditure of foreign tourists 2010. Source: WTO, IET Frontur and Egatur for Catalonia
Catalonia has around **600,000 beds in official tourist accommodation**, of which 48% are in campsites, 48% in hotels and 4% in rural tourism establishments. Eighty per cent are on the coast. However, it is calculated that the number of beds in unofficial establishments is over 1,000,000.

Catalonia has a seasonal pattern highly marked by the summer, but with a **maximum average occupancy in the high season of 58%**, which means that at the height of the 2011 tourism season, there were 242,845 unoccupied beds.
Catalonia is one of the world’s leading tourist destinations, but it should be stressed that this leadership, evident in terms of quantity, is not so clear in terms of quality. If one divides the number of tourists arriving in Catalonia by the area of the territory, we are easily the leaders in Europe, but if we divide income from tourism by the area of the territory, we drop to fifth place, notably behind countries with no coast.

In terms of Spain, Catalonia is the leading destination with respect to number of tourists, but near the bottom with respect to expenditure per stay, below communities such as Madrid, Andalusia or the Canary Islands.
Catalonia has improved in terms of daily expenditure per tourist, but continues to be near the bottom in terms of length of stay.

It may thus be concluded that we have a ‘tourism industry’ which, despite its maturity and the quality of the natural and cultural resources on which it has been built, still needs to improve in terms of added value. Unfortunately, in many areas, a short-term speculative vision has predominated, invading many of the best landscapes in Catalonia with aggressive urban planning and low-quality architecture, taking advantage of a common landscape that it has not helped to improve through the wealth created; indeed, quite the opposite. To a certain extent, it may be concluded that the ‘tourism industry’ as a whole and on the coast in particular has in many cases not matched the quality of the tourism resources available to it. In this context, it is symptomatic that, while having tourism resources such as cuisine, culture or sport, in which Catalonia has produced geniuses and world leaders, Catalan establishments considered to be among the world’s best accommodations are the exception.

However, in recent years, and thanks to the efforts of numerous entrepreneurs to improve and diversify the offer based on criteria of innovation and quality and the importance of Barcelona as a destination, we have observed for the first time that the Catalonia destination is associated with products such as culture and cuisine above sun and sand, in a survey carried out among the main international tour operators as part of this project.
The main conclusions from this analysis phase are synthesised in the following diagnostic SWOT matrix (strengths, weaknesses, opportunities, threats).

### Weaknesses

- Legacy of a tourism model based more on quantity than quality, especially on the coast
- Degradation of the landscape, tourism’s raw material
- Excess and obsolescence of the accommodation offer in some areas, low levels of energy efficiency in the buildings
- Fragmentation and lack of coordination among private and public actors
- Low levels of service and language skills
- Low use of new communication technologies and low levels of innovation
- Low levels of statistical information and knowledge
- Obsolete and under-used network of tourist information offices
- Limited long-distance airline connections
- Deficient road signage
- Lack of funds in tourist towns
- Government agencies in charge of tourism lacking sufficient resources and influence

### Threats

- Increased world competition, in both value-added and low-cost products
- More competition from Mediterranean destinations
- Increased social unrest due to the recession
- Climate change, which will affect our diversity of resources and strengthen competition from the north
- The recession in priority generating markets
- Increased price of transport
- Lack of continuity in plans due to political changes
- Lack of a shared, coordinated vision among actors in tourism
- Budgetary restrictions that could limit the scope of the plan

### Strengths

- Great diversity and wealth of tourism resources in a manageable space
- European leader in sun and sand tourism
- Strategic geographical location and good connections with the European markets
- Wide offer of accommodation concentrated in a small number of destinations
- Mature business fabric, rooted in the territory
- Infrastructures and public services that generate comfort and security for the tourist
- Growing supply and demand for quality tourism services
- High internal tourism demand with and without overnight stays
• Country with a tradition of enterprise and capacity to specialise, renowned for research, knowledge and training, with a grand tradition of business associations and a number of governance models that are international benchmarks

• The Barcelona brand, one of the most highly valued in the world

**Opportunities**

• World tourism continues to grow, in particular in developing countries

• Coastal tourism demand will remain high, but with an increasingly segmented and more demanding client base, in terms of quality

• Increased use of new information and communication technologies by travellers, with a social, mobile and local orientation

• Promotion of the wide diversity of natural and cultural resources in the form of competitive and sustainable tourism products and experiences

• Rising temperatures, which could lead to an extension of the sun and sand tourism season

• Maximising the major potential of the network of tourist information offices

• Making the most of the entrepreneurial character of our society

• Building a potent international image of Catalonia as a land based on the values of common sense, spontaneity, living space, lifestyle, tradition and modernity, which are highly attractive to tourism

• Strengthening the tourism synergies between territories and actors

• Consideration of tourism as a strategic sector for the EU

• Development of the green economy and environmentally sustainable tourism as a tool for competition

The diagnosis leads to the conclusion that Catalonia as a whole is a mature, diverse, competitive and expanding destination, but a major part of its offer is obsolete; **therefore, its main challenge is to balance quantity with the quality of tourism.** This challenge can be met, because there are sufficient resources, but it will only be possible with a new orientation in the governance of tourism.

**Summary of the diagnosis**

- 12% of GDP and 15% occupancy

- 82 million visitors and €15.2 billion

- 600,000 beds in legal accommodation, with maximum occupancy of just 58%

- 1,000,000 beds in unofficial accommodation with no statistical, fiscal or official tourism quality control

- High reliance on European tourists and highly concentrated in the summer

- Leadership in quantity of tourists by size of territory, but not in tourism income by size of territory or by population

- Length of stay and expenditure per tourist less than in Spanish Autonomous Communities with tourism

- Great success of Barcelona, which partly compensates for the tourism model based on largely unsustainable exploitation of the coast in environmental and economic terms

- Overlapping responsibilities among government bodies creating duplications and inefficiencies

- Lack of knowledge of supply, demand and competition

**Main challenge**

- A proposal of sustainable and competitive value that will enable quality indicators to rise without renouncing a tourism model inevitably linked to quantity
The main challenge facing Catalonia as a tourist destination is balancing tourism quantity with quality, attracting tourism of greater added value to ensure economic, social and environmental sustainability in the future. However, meeting this challenge means first considering other fundamental challenges.

**The challenge of governance**

Aspects such as the highly fragmented public sector in Catalonia, overlapping responsibilities in the field of tourism between different government bodies in the same territory, atomisation of the association system of tourism SMEs, representation in the sector in the hands actors who are not particularly representative, or a culture of poor cooperation between the public and private sectors are some aspects affecting the development of the new tourism model. In addition, a specific focus is required to accompany the country’s spirit of enterprise, facilitating the creation and development of business activity and employment in the tourism industry, with a clear orientation towards international markets.

**The challenge of sustainable development**

Aspects such as aggressive urban planning, lack of respect for the landscape, the creation of accommodation with little added value, the lack of business innovation, absence of re-investment and the tourism monoculture have meant that in certain destinations the social, economic and environmental cost in some tourist segments is higher than the benefits generated. Thus, firstly, it is necessary to identify the destinations or businesses that base the tourism or business model on unsustainable foundations, as an initial step to influencing an obligatory process of transformation towards sustainable models. In this section, stress should be placed on ensuring adequate tourist mobility in terms of both arriving and getting around once there among the country’s different destinations.

**The challenge of creating new tourism products**

It is safe to say that Catalonia is rich in tourism resources, but still poor in structured, innovative, competitive and sellable tourism products, especially in international terms. Starting with sun and sand, which is and must continue to be one of the main driving forces in our tourism industry, there is a long way to go in developing tourism products and experiences in our territory, a process in which, as will be shown, the time available and the combination of different resources are two key factors, together with the use of new communication technologies.

**The challenge of knowledge and intelligence**

Without information there can be no knowledge, and without intelligence it is very difficult to set obtainable goals and define adequate strategies. The highly complex nature of the Catalan tourism industry, together with dependency on a large number of external sources of information, means that the Catalan Directorate-General for Tourism does not have sufficiently extensive, homogeneous or stable information to carry out its task adequately. The current possibilities and sources of information are large and varied, and thus a knowledge unit must be strengthened with the capacity to centralise this information to then make it available to the whole tourism industry.

**The challenge of excellence**

It may be stated that key aspects, such as the advanced use of new communication technologies, language skills, training, attracting talent, innovation management, a spirit of enterprise or quality of service, are some of the weak areas in our tourism industry and which represent important hurdles to obtaining the increasingly necessary levels of excellence in an environment of recession and high competition.
4 Foundations for the future

The tourism industry is so intimately linked to the socioeconomic, cultural and environmental reality of Catalonia that the future of the industry is directly dependent on foundations that also support the model of our country.

1. A geostrategic hub for Mediterranean, European and world tourism

Historically, Catalonia has known how to make the most of its excellent geographic location, not just to develop its own, differentiated culture from numerous, diverse influences, but also to develop a network of physical, virtual and personal communications that have made it a geostrategic hub in the Mediterranean, European and world contexts. This has facilitated an intense, permanent flow of people, both internally and externally, for personal, work or leisure purposes, which has shaped to our tourism industry. The future of our tourism thus depends largely on maintaining and developing this communications network, both internally and connected to the world.

2. Comprehensive and synergic management of the Catalonia destination together with the diverse destinations within it

In the same way that Catalonia’s territorial wealth is based partly on developing local administrative structures that have facilitated management in close contact with the reality of each town, region or province, in conjunction with the Government of Catalonia, Catalonia’s tourism potential is based on the existence of numerous, diverse destinations that have developed their own, differentiated tourism experiences. Thus, it is necessary to combine an autonomous management model that ensures the particularities of the different destinations together with a comprehensive model that strengthens Catalonia as a destination of destinations, avoiding duplications and inefficiencies, and developing the multiple synergies that exist among our destinations.

3. A wide diversity of experiences based on Catalonia’s wealth of heritage and plural identity

Catalonia is a destination rich in tourism resources thanks to the quality and diversity of its natural and cultural heritage. The basis of the tourism industry is the capacity of its actors to transform those resources into marketable tourism products that end up as pleasurable experiences for users. Using the coast as an example, whereas in the 1950s all a good sun and sand product required was building a hostel next to the sea, today what is needed is a wide range of activities with a growing presence of the inland territory. The future of our sector requires permanent innovation in developing new experiences to enjoy our natural and cultural heritage, a task in which the role of small and medium-sized entrepreneurs is crucial.

4. Cooperation between actors and know-how in all activities in the tourism value chain

The tourism experience is the result of a long, complex value chain that involves a large number of public and private actors. For the value chain to work, it needs each of its links (transport, accommodation, activities, cleaning, safety, etc.) to work autonomously through skill and experience, while the different actors coordinate their work so that the value chain flows through cooperation. This requires promoting public-private, public-public and private-private cooperation, which is also necessary for the country to work.

5. Platform for innovation, creativity and excellence

Tourism has generally not needed to innovate and seek excellence to the same extent as other sectors, thanks to its given natural and cultural resources, which are highly attractive to tourists. However, in times of severe economic crisis and stiff competition, it is essential for innovation and excellence to become part of society’s daily life, particularly in the tourism industry. In-service training, language skills and advanced use of new technologies are some of the tools that must be incorporated to put our country and our industry on the road to excellence.
5 Vision and strategy

5.1 Vision 2020
‘Catalonia 2020, a world reference in tourism’ resulting from the wealth of quality experiences created from its assets and identity, producing a proposal of sustainable and competitive value, thanks to a shared, innovative public and private leadership model that prioritises quality over quantity, with the end goal of ensuring tourism contributed to increasing the wealth and improving the quality of life of Catalans.

5.2 Goals 2016
The priority goals in the Strategic Plan with respect to 2016 stress improvement in tourism quality indicators:

1. Increasing daily expenditure per tourist
2. Increasing total income from tourism
3. Increasing income outside high season (September to June)
4. Increasing the average length of stay per tourist
5. Increasing the tourist repeat rate
6. Increasing the tourist satisfaction rate
7. Reducing the offer of obsolete accommodation
8. Increasing the strength of the Catalunya brand
9. Improving territorial balance in GDP from tourism
10. Improving tourist use of natural and cultural heritage in a sustainable manner

The Vision 2020 and the goals for 2016 are the foundations for the Catalan Directives 2020 and the Action Plan 2013-2016.

5.3 Tourism model
The size the tourism industry has reached in Catalonia means it is no longer possible to reject a quantity-based model, but a major boost needs to be given to improving the quality, investing in tourism with greater added value with respect to the economy, culture and environment. The Strategic Plan will thus prioritise actions aimed at growth in terms of quality.

Tourism quality must be measured from the twin perspective of supply and demand.

In this context, quality is the result of working with criteria of both competitiveness and sustainability.
In the tourism industry, this balance between competitiveness and sustainability can only be achieved through a system of governance based on cooperation between the public and private sectors.

![Diagram of Competitiveness & Sustainability](image)

Governance: leadership and public and private cooperation

Tourism development model for Catalonia 2020

‘SUSTAINABLE COMPETITIVENESS’

The model of ‘sustainable competitiveness’ will be based on the Catalan Tourism Directives for 2020 and will be implemented through an Action Plan 2016. The degree to which it is achieved may be measured by a list of indicators.

### 5.4 Catalan Directives

The Catalan Directives are the long-term strategic foundations on which the actions in the Plan are to be based. The five Catalan Directives are:

1. **An international project for the country**: tourism is one of the foundations for Catalonia’s national project, with an increasingly international outlook.
2. **Catalonia, a destination of destinations**: Catalonia, a harmonious set of autonomous, sustainable and competitive destinations.
3. **The product, the basis for marketing**: a quality offer targeted at quality demand.
4. **Cross-sector tourism management**: cross-sector intelligence, efficiency and influence as the foundations for the Directorate-General for Tourism.
5. **Excellence**: training, innovation, languages, new technologies and environmental sustainability as key elements for excellence.

Tourism as a national project is the central directive, while excellence is a cross-cutting directive that must impregnate the whole Strategic Plan process.
5.5 Territorial strategy

The structure of the Catalonia destination must be based on four large territorial areas that offer differentiated and complementary experiences. The territorial model is based on ‘sustainable competitiveness’ in each area of tourism, adding the generation of synergies between areas. These four areas are:

The coast
- Area that covers the entire Catalan coast.
- Destinations with very high demand in summer concentrated on sun and sand, but with a growing, diversified offer throughout the rest of the year.
- Model that combines large over-developed destinations, marinas and small, charming villages.

Urban
- Area consisting mainly of Barcelona, but with the growing importance of the provincial and other regional capitals.
- Destinations that offer experiences all year round with a strong modern, cosmopolitan component.

The mountains
- Area consisting mainly of the Pyrenees, but including other areas with strong potential, such as Els Ports de Beseit and El Montseny.
- Model that combines attractive valleys, high-mountain landscapes and adventure.

Inland
- Area consisting of the large strip between the coast and the mountains.
- Destinations that offer experiences all year round, while preserving their traditional soul.
- Model that combines cultural and rural sites with winemaking and culinary territories.

Each area is notable for specific models that act as frames of reference for developing the destinations. These reference models are not unique, closed or exclusive.

### Strategic models for the Catalan tourist destinations

- **Coast**: Large destinations, Marinas, Charming coastal villages
- **Urban**: Cosmopolitan, world capital, Cities with character
- **Inland**: Cultural sites, Wine-making and culinary sites, Rural and natural landscapes, Picturesque villages
- **Mountains**: Leisure and adventure valleys, Unique valleys, High-mountain landscapes
5.6 Product and market strategy

The product strategy is based on developing 17 tourism products classified into two large categories.

**Main Products**
- Urban
- Cultural
- Coast
- MICE
- Cruises
- Wine and culinary tourism
- Snow

**Niche products**
- Luxury
- Education-knowledge
- Active-nature
- Major events
- Sports
- Leisure
- Golf
- Rural
- Wellness
- Medical

The main reason or decisive factor in the decision to travel and ensure a significant volume of arrivals

The market strategy proposes a broad classification of the markets into three categories.

Those markets that represent the main source of tourism income to Catalonia and which should get the highest share of the budget

Those markets with secondary importance to Catalonia tourism income, but which have major short/medium-term potential

Those markets that currently do not generate much income for Catalonia, but which represent an opportunity through marketing campaigns targeting specific segments, thus generating future value

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<td>Middle East, East Asia, South Africa</td>
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<td>Nordic countries</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Nordic countries (Denmark, Finland, Norway, Sweden)  
Baltic countries (Estonia, Latvia, Lithuania)  
Middle East (Oman, Qatar, United Arab Emirates, Kuvaid)  
Ex-Soviet Union countries (Ukraine, Belarus)  
East Asia (South Korea, Hong Kong, Macao, Taiwan, Singapore)  
Ex-Soviet Union countries (Ukraine, Belarus)
This matrix presents the potential for developing different Catalan products in different markets identified in the Horizon 2020.

**Products matrix - markets for Catalonia in Horizon 2020**

<table>
<thead>
<tr>
<th>Markets</th>
<th>Main products</th>
<th>Niche products</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>TOTAL</td>
<td>Urban</td>
</tr>
<tr>
<td>Catalonia</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rest of Spain</td>
<td></td>
<td></td>
</tr>
<tr>
<td>France</td>
<td></td>
<td></td>
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<tr>
<td>Italy</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Switzerland</td>
<td></td>
<td></td>
</tr>
<tr>
<td>United Kingdom</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Netherlands</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Germany</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nordic countries</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Russia</td>
<td></td>
<td></td>
</tr>
<tr>
<td>USA</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Portugal</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ireland</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Austria</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Baltic countries</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Central Europe</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ex-Soviet Union countries</td>
<td></td>
<td></td>
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<tr>
<td>Japan</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Brazil</td>
<td></td>
<td></td>
</tr>
<tr>
<td>China</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Middle East</td>
<td></td>
<td></td>
</tr>
<tr>
<td>East Asia</td>
<td></td>
<td></td>
</tr>
<tr>
<td>South Africa</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: T&L, 2012
5.7 Organisation and governance management strategy

Implementing this Strategic Plan requires the application of an adequate governance model that establishes instruments, personnel and organisations that must take on specific responsibilities, initiating, managing and assessing the Plan, bearing in mind the significant cross-sector nature of the industry as the main difficulty and, consequently, cohesion as the main challenge.

The principles on which the tourism governance model is based are:

- **Institutional capacity and area of authority.** Institution-building and strengthening the areas of authority of public agents; promoting representation and cohesion among private agents.
- **Leadership** by the Government of Catalonia Directorate-General for Tourism.
- **Alignment, commitment and active co-participation** of all public and private agents in the tourism industry.
- **Public-private partnerships.** Promoting territorial, business and productive development through partnerships.
- **Management based on effectiveness and efficiency criteria,** making full use of existing management structures and rationalising the management of government bodies
- **Management and finance.** Provide the sector with mechanisms to manage projects and raise capital resources.

The handling of tourism by the government in Catalonia must be structured into four large, fully coordinated areas and thus run by managers with a highly cross-cutting vision of the organisation.

**Organisational management model of the government for matter of tourism**

To avoid duplication causing an overlap of powers, different tourism government bodies are obliged to work together, combining resources and agreeing on goals, strategies and action plans.
The **Taula de Turisme** has become a fundamental tool in relations with the private sector.

The purpose of the **Inter-ministerial Committee** and the **Inter-governmental Coordination Platform** is to strengthen, firstly, public-public coordination between Catalan Government ministries and, secondly, between other government bodies with competence in tourism.

The mission of the **Catalan Tourism Agreement** is to ensure that the main actors in the sector adopt the **Strategic Tourism Plan** as their own and commit to implementing it in writing.

The **Tourism Development Fund** must ensure economic resources are generated for the effective implementation of the Strategic Plan’s foundations.

**CREATUR** will be a support service to businesses, entrepreneurs and investors with an active presence throughout the territory.
The Strategic Tourism Plan for Catalonia provides specific measures through the following Action Plan, to be implemented by 2016, structured into five Catalan Tourism Directives that are the basis for the Catalan tourism strategy in Horizon 2020. Thus each directive has an associated specific programme of actions.

The Catalan Directives and the action programmes

<table>
<thead>
<tr>
<th>Catalan Directives</th>
<th>Progammes</th>
<th>Sub-programmes</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Governance system</td>
<td>1. Framework agreement</td>
<td>2.1 Territory</td>
</tr>
<tr>
<td>2. Development of destinations</td>
<td>1.2 Governance tools</td>
<td>2.2 Offer and infrastructures</td>
</tr>
<tr>
<td>3. Product development</td>
<td>1.3 Boost to business with international outlook</td>
<td>2.3 Quality</td>
</tr>
<tr>
<td>4. Tourism administration and management</td>
<td></td>
<td>2.4 Management</td>
</tr>
<tr>
<td>5. Excellence in the tourism industry</td>
<td></td>
<td></td>
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</tbody>
</table>

The Action Plan consists of five programmes. The programmes consist of 16 sub-programmes which in turn consist of proposals for 37 projects whose overall purpose is to help achieve the goals of the Strategic Plan. The list of programmes and the specific goals of each programme are listed below.

**Governance Programme**

As indicated in the Directives, the Governance Programme is the core programme, in the sense that the Strategic Plan is unlikely to be implemented if a clear and effective governance framework has not been established.

The specific goals of the programme are:

- To coordinate a long-term state-wide policy on tourism as part of the Vision 2020 and with the commitment of all the Catalan and Spanish ministries.
- To generate a framework of close collaboration between public and private agents, combining their efforts to ensure the smooth running of the tourism value chain.
- To use the synergies between different tourism management organisations, optimising resources, avoiding duplication and obtaining maximum efficiency.
- To establish an active, coordinated dynamic in order to implement the tourism model, the Catalan Directives and the Action Plan established in the Strategic Plan.

The main lines of the governance system are:

- **Sub-programme 1.1 Agreement Framework**: The establishment of a Catalan Agreement on Tourism in Catalonia which commits the Catalan government, the business world and civil society to develop a sustainable model of tourism consolidated as one of the main driving forces in giving the Catalan economy and society the boost it needs at this moment of severe economic crisis.
- **Sub-programme 1.2 Governance Tools**: The establishment of specific governance tools in the public and private sector in order to generate commitment, align goals and collaborate on projects.
• **Sub-programme 1.3 Boosting Business**: The production of tools to boost business and encourage the creation and successful running of business and investment projects, making the most of public-private collaboration among national and international agents.

**Destination Development Programme**

This programme establishes the basis for developing the tourism area within the model of sustainable competitiveness. The goals of the programme are:

- To create new instruments for regulating and planning the use of the tourism areas and resources consumed by tourism in the territory, throughout the tourism experience value chain (transport infrastructures, hotel spaces, resources, tourism activities, and more).
- To generate pilot experiences to create new models of smart destinations.
- To develop support manuals to help destinations develop in terms of tourism in accordance with the proposed tourism model.
- To increase the quality of the tourism experience in all areas.

The main lines of the Destination Development Programme are:

- **Sub-programme 2.1 Territory**: This sub-programme aims to draw up a tourism sector territorial plan that defines the tourism area and regulates its use, digitising tourism landscapes to promote, regulate and plan new tourism products and experiences and ultimately identify and implement a project integrating tourism signage in Catalonia.
- **Sub-programme 2.2 Offer and Infrastructures**: The sub-programme proposes specific actions to rehabilitate obsolete accommodation, also taking into account the new climate conditions, improving energy efficiency and increasing renewable energy in the tourism sector, authorising homes used for tourism and ultimately strengthening tourist mobility from a wide vision of transport.
- **Sub-programme 2.3 Quality**: The sub-programme for quality aims to give a major boost to the quality of the offer, rehabilitating it and reaching the required standards at each destination, as well as identifying and providing adequate market positioning for the companies and activities involved.
- **Sub-programme 2.4 Management**: The sub-programme aims to develop four smart destinations in Catalonia as a pilot test and create a manual for the successful development of the territorial tourism models proposed for the tourist destinations and towns in Catalonia.

**Product Programme**

The purpose of this programme is to develop a diverse, competitive and sustainable offer of tourism products to compete in an international environment and attract an increasingly segmented and demanding clientele.

The goals of the programme are:

- To attract a profile of tourist that spends more and stays longer.
- To diversify the product offer, avoiding excessive reliance on classic products, generating new sources of income and reducing the pressure on traditional tourism resources.
- To improve the territorial balance, attracting more tourists to inland and mountain areas through the new product offer.
- To increase the tourist satisfaction rate thanks to new tourism experiences and improving the offer of new or existing products.
- To gain maximum benefit from the country’s resources and tourist attractions structured around a new enriched, competitive and diversified product offer.

The main lines of the programme are:

- **Sub-programme 3.1 Product Management**: A number of projects are proposed that aim to develop, regulate and promote the tourism product in order to compete internationally with a varied, structured and consolidated offer.
- **Sub-programme 3.2 Large Projects**: The active support for large tourism projects is in response to two factors:
  - The desire to create major icons that highlight and position Catalonia on the world tourism map.
  - The desire to promote investment opportunities in all Catalonia’s areas of tourism to generate business and employment.
Tourism Administration and Management Programme

The purpose of the Tourism Administration and Management Programme is to adapt the organisational model and tourism administration management tools to criteria of efficiency and effectiveness in order to adequately meet the challenges of the Action Plan proposed in the Strategic Plan.

The goals in the programme are:

- To create an administrative and authoritative framework based on values of institutional collaboration, avoiding duplication among different tourism and non-tourism government bodies.
- To conceive an appropriate management model to implement the projects defined in the Plan.
- To generate a tourism development fund to help finance the development and promotion of products and destinations.
- To ensure the existence of a strong information, knowledge and intelligence system for the Catalan tourism industry.

The main lines of the programme are:

- **Sub-programme 4.1 Regulations:** The sub-programme presents a comprehensive update proposal for the Law on Tourism to provide necessary and sufficient legal support to the Strategic Tourism Plan and a regulatory cost-cutting plan to simplify administrative processes for our tourism companies and entrepreneurs.
- **Sub-programme 4.2 Organisation and Management:** The sub-programme proposes the adaptation of current management structure in the general handling of tourism by the government in order to adequately take on the implementation of the plan and face the major challenges in the sector.
- **Sub-programme 4.3 Intelligence:** This proposes projects aimed at producing tools for information gathering and data processing, not just for knowledge generation, but also for smart forecasting geared towards decision making.

Excellence Programme

The Excellence Programme aims to act as a strategic cross-cutting element that guides the work with criteria of excellence. Elements such as training, technology, innovation, languages and social responsibility are some of the essential proposals in the programme. The goal is to position Catalonia at the forefront of international tourist destinations.

The main lines of the programme are:

- **Sub-programme 5.1 Training:** Based on the diagnosis carried out by the Economic and Social Council of Catalonia, a plan will be drawn up to deal with the current deficiencies in the vocational training system, working from the tourism schools. Specific attention will be placed on improving language skills in the sector, particularly English.
- **Sub-programme 5.2 Innovation and Technology:** This sub-programme aims to boost two of the most significant deficiencies in the Catalan tourism industry: innovation and the advanced use of new technologies. Preliminary studies indicate where these deficiencies are particularly prominent and offer proposals for action.
- **Sub-programme 5.3 Social Awareness Raising:** This sub-programme incorporates two campaigns that aim to raise awareness in society of the importance of tourism to the country and among Catalan companies of the need to work towards a socially responsible business system.
- **Sub-programme 5.4 Environmental Sustainability:** The purpose of this sub-programme, together with the aspects of environmental sustainability in the Destination Development Programme, is to raise awareness in the tourism industry of the importance of the elements and effects of climate change and implement ecoefficiency measures in tourism establishments.
The implementation of the Strategic Plan programmes and sub-programmes will require the drawing up, definition and execution of the outlined projects and actions that facilitate the development and achievement of the Plan's goals and strategic lines, to gradually and definitively achieve the tourism model defined in Horizon 2020 for Catalonia, as a complete destination.

In an appendix, the Strategic Tourism Plan for Catalonia includes an initial proposal for specific projects in the context of the progressive programmed territorial application and implementation. These are 37 projects associated with the corresponding file, which list, identify and deploy the essential elements required for each action: lines of work; operational goals; public and private agents involved; and the approximate budget to carry them out.

It is important to stress here that the budget estimate refers directly to the specific project, not the costs of executing measures and actions arising from it. These, inevitably, will be assigned in the programming and planning established for each of the 37 projects of specific actions proposed by the Strategic Plan or by new measures and actions that may arise as the Plan develops.

In this context, it should be stressed that the 37 programmes presented in the appendix to this document are given as proposals. These projects are subject to constant evolution, resulting from the monitoring and development of the Strategic Plan as a whole and monitoring by the public and private operators who may be involved in its development and execution. A possible result of this situation is the grouping of projects,
modifications to the intensity and extent of the actions, establishment of new projects or, above all, their suppression or postponement to a new strategic phase, as part of the vision established in the Catalan Tourism Directives 2020.

In this framework, it is obvious that, at each moment and stage in the Plan’s development, attention must be paid to the budgetary and financial context which will affect each and every project and action in the Plan. This scenario involves a gradual Plan deployment schedule regarding the specific orientation for the project proposals contained in the appendix to the Plan.

6.1 Prioritisation

All the projects presented have been assessed on the basis of two major principles, importance and simplicity, in order to visualise a framework of priorities, which will be useful with respect to the availability of funds to implement the Strategic Plan. These areas consist of different criteria:

- **Project importance criteria:**
  - Improving sustainability
  - Improving competitiveness
  - Increasing leadership in the sector
  - Economic impact
  - Project necessity
  - Related goals
  - Time of ROI

- **Project simplicity criteria:**
  - Monitoring results
  - Simplicity of execution
  - Resource requirements
  - Independence of the actions
  - Independence of the agents

The projects assessed using the above criteria are positioned in the project priority matrix and the Plan execution framework. Each quadrant in the matrix gives a specific reference.

- **High and fast return quadrant:** The quadrant that includes the most important and beneficial projects for meeting the goals and which are least difficult to implement. These are projects to be started in the medium term.

- **Strategic return quadrant:** These are the most important and beneficial projects. Their completion will require significant efforts, given their complexity. Although it might not be possible to implement some of them in the short term, they should not be left to the end, as their complexity means they would not be finalised in the period of the Plan.

- **Rapid improvement quadrant:** Measures of relative impact, but comparatively easy to carry out. They can be initiated at any time.

- **Continual improvement quadrant:** Highly complex projects with lower relative impact, factors that place them on the second level of priorities. Their execution should be continual in the medium and long term.

Although the quadrants give a clear picture of priorities with respect to the importance and simplicity of each project, the schedule for starting each project may be influenced by other factors. In other words, the ideal implementation scenario may be affected by parallel implementation of projects in different quadrants and thus different levels of priority due to interdependence between projects and the complexity of others that require more time for implementation. These combined priority levels, which should be reflected in the implementation schedule, should be shown in the colours of the bubbles in the project prioritisation matrix.
Project prioritisation matrix

- **Strategic return quadrant**
  - Improve sustainability
  - Improve competitiveness
  - Increase industry leadership
  - Economic impact
  - Degree of necessity
  - Strategic goals that are met
  - Time of ROI

- **High, rapid return quadrant**
  - Tourism quality
  - Catala Agreement
  - Tourism tax
  - Snow and mountains
  - Intemational Committees for Tourism
  - Wine and culinary
  - Knowledge
  - Tourism and corporate social responsibility
  - Culture
  - Active Nature
  - Health
  - Cruise
  - Sports
  - Tourism museums
  - Benchmarking of business models
  - Smart destinations
  - Satellite account

- **Continual improvement quadrant**
  - Research statistics plan
  - Digital catalogue of tourism landscapes
  - Tourism mobility
  - University syllabuses
  - GIS Systems
  - Tourism signage
  - Project funding framework
  - Energy efficiency
  - Regularisation of tourist dwellings
  - Tourism mobility
  - Law on Tourism
  - Office network

- **Rapid improvement quadrant**
  - CREATOR
  - Tourism ICT
  - Tourism quality
  - Destinations model
  - Wine and culinary
  - Knowledge
  - Tourism and corporate social responsibility
  - Culture
  - Active Nature
  - Health
  - Cruise
  - Sports
  - Tourism museums
  - Benchmarking of business models
  - Smart destinations
  - Satellite account
### 6.2 Estimated budget

Estimated budget of the cost of the actions in the Plan.

<table>
<thead>
<tr>
<th>Programme and Project</th>
<th>Total</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Estimated budget</strong></td>
<td>€6,644,000</td>
<td>€4,550,000</td>
<td>€4,370,000</td>
<td>€4,174,000</td>
<td>€4,128,000</td>
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<tr>
<td>6.2.1. Estimated budget</td>
<td></td>
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<td></td>
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</tr>
</tbody>
</table>

**Programme 3: Development of the tourism brand**

- **6.2.1. Estimated budget**
  - 6.2.1.1. Development of the destination brand
    - 6.2.1.1.1. Strategic tourism plan for Catalonia 2013-2016
      - Estimated budget of the cost of the actions in the Plan.

**Programme 4: Development of the tourism economy**

- **6.2.2. Estimated budget**
  - 6.2.2.1. Promotion of the destination
    - 6.2.2.1.1. Strategic tourism plan for Catalonia 2013-2016
      - Estimated budget of the cost of the actions in the Plan.
7 Inaction scenario

Change is not easy, but inaction is more costly.

Failure to implement this Strategic Plan could mean increased tourism with little added value, together with a decrease in high added-value tourism, and a subsequent progressive reduction in sustainability in the Catalan tourism industry in environmental, cultural and economic terms, together with a deterioration of the Catalunya brand as a destination and region.

Just as harmful as inaction would be lack of professionalism in the implementation of the Plan. In this context, there are three issues considered essential in the process:

- Technical development, professionalization and performance management of the work teams.
- Rigorous measurement of goal development and achievement.
- Clear and constant communication among all the parties involved.

The Strategic Plan presents a wide range of recommendations and proposals in the field of tourism policy that indirectly influence other ministries. Well implemented, the Plan has the potential to produce a comprehensive transformation on a country-wide scale.

8 Methodology

The process used different sources and methodological tools:

1. Study of primary sources
   - Structured and semi-structured interviews
   - Questionnaire among main actors
   - Tour operator survey
   - Thematic workshops

2. Study of secondary sources
   - Catalan and Spanish public documentation centres (INE, Ideestat, Exceltur, etc)
   - European and world documentation centres (WTO, WTTG, etc)
   - Documentation provided by the government agencies in charge of tourism in Catalonia
   - Studies from specific research departments (Infocenters)

3. Visits to tourist attractions and infrastructure
   - Assessment and reconnaissance of the main tourism infrastructures and facilities
   - Assessment of tourist sites, attraction, accessibility, infrastructures and services

4. Benchmarking and analysis of best practices in the sector
   - Identification of tourism benchmarks and analysis of the best practices, considering:
     - Competitiveness and tourism models developed
     - Innovation in tourism products
     - Differential factors that could be applied to Catalonia

5. International outlook, experience and forecasts
   - Consultants with international experience and vision
   - Estimates based on forecasts and growth of supply and demand were calculated from highly reliable secondary sources

1. Primary sources

- Personal interviews

Over 100 personal interviews were conducted with numerous interested parties from both the public and private sectors. Public bodies such as local councils, employers’ associations, local and territorial tourism institutions and the managers of the main tourist attractions, among others, were asked to collaborate.
• **Email questionnaires**

The open questionnaire was sent to over 120 agents, obtaining 61 responses. This questionnaire also involved public and private sector agents. The questionnaire gathered data on awareness of the need for a Strategic Tourism Plan, the main challenges facing the sector from actors’ differing perspectives and, finally, the contribution that these agents could make to improving the tourism industry through their organisations and businesses.

• **Survey among tour operators**

The survey was prepared in five different languages (English, French, Spanish, Chinese and Japanese) and was sent to a total of 9,683 tour operators. The number of responses was 311, of which 260 were in English, 35 in Spanish, 12 in French, 3 in Japanese and 1 in Chinese.

The aim of the questionnaire was to obtain full, up-to-date information on different aspects:

- Profile of international tour operators with interests in Catalonia.
- Profile of international tourists who currently travel to Catalonia.
- Competitiveness of Catalonia with respect to other tourist destinations and products.
- Positioning and image of the Catalunya brand in the main generating markets.

• **Territorial workshops**

Four territorial workshops were organised, one per provincial capital, as a consultation tool aimed at key representatives of the tourism industry in the area. The main agents from the tourism industry (both from the private sector, public institutions and the academic world) took part in the workshops, as part of a consultation process aimed at validating the proposed strategies and obtaining proposals to draw up the Action Plan.

The territorial workshops involved a total of 106 professionals from the Catalan tourism industry from:

- national, provincial and local government.
- Industry federations and associations.
- Leading companies in the sector.
- Professionals from tourism research and specialist media.

• **Secondary sources**

A large number of secondary sources were used to carry out a comprehensive and detailed analysis of the sector, including:

- Catalan and state public documentation centres (INE, Idescat, Exceltur, Turespaña, etc.).
- European and world documentation centres (WTO, WTTC, Travel and Tourism Competitiveness Index, etc.).
- Information provided by the Catalan government agencies managing tourism.
- Information provided by our own research department, Infocenter, accessing over 50 specific studies of interest.

2. **Visits to tourist sites, facilities and infrastructures**

The potential of tourist sites was assessed first-hand, including aspects such as attractiveness, accessibility, infrastructures and services. A detailed assessment and reconnaissance of the main transport and communication infrastructures was also carried out.

3. **Benchmarking and analysis of best practices in the sector**

Key destinations for the development of different internationally renowned tourism products and models were chosen and an analysis was carried out to identify key tourism models for Catalonia as a tourist destination with a varied offer that emphasises excellence.

4. **International outlook, experience and estimates**

The work team was supported by consultants with years of experience in the sector and an international outlook. The estimates made in the project to forecast demand and growth in the market were calculated using the most reliable secondary sources possible.
This main document of the Strategic Tourism Plan for Catalonia 2013-2016 is supplemented by a list of documents produced throughout the work process, specifically:

- Appendix 1. Analysis and diagnosis of the tourism industry in Catalonia
- Appendix 2. Analysis of the tourism offer in Catalonia
- Appendix 3. Analysis of tourism demand worldwide and in Catalonia
- Appendix 5. Report of the results of the territorial tourism workshops
- Appendix 6. Report of the results of the survey among tour operators