

Barcelona's
tourism
activity:
development
and
management



Ajuntament de
Barcelona



Barcelona
Activa

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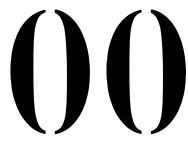
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Contents

00	PROLOGUE. TOURISM POLICIES IN BARCELONA	4
01	MANAGEMENT OF TOURISM IN BARCELONA	6
	01.1 Governance of tourism in Barcelona.....	6
	01.2 2012 - 2015 Strategic Framework and Barcelona Growth.....	7
	01.3 Municipal management of tourism within the economic promotion framework.....	8
	01.4 Interdepartmental coordination.....	8
	01.5 Tourism promotion: Turisme de Barcelona.....	9
	01.6 New financing: a tax on overnight stays at tourist accommodation.....	9
02	LINES OF ACTION	11
	02.1 Commitment to responsible and sustainable tourism.....	11
	02.2 Decongestion of tourism activity.....	12
	02.3 Effects, regulation and organisation of tourism.....	15
	02.4 Promoting economic activity.....	16
	02.5 Events.....	19
03	HISTORIC ANTECEDENTS AND BASIS OF BARCELONA'S TOURISM MODEL	20
	03.1 The Cerdà Plan and the Universal Exposition of 1888.....	20
	03.2 The Society for the Attraction of Foreigners, a pioneering model in public-private promotion.....	20
	03.3 The World's Fair of 1929.....	21
	03.4 City of fairs and congresses.....	22
	03.5 The Municipal Tourism Board.....	22
	03.6 Barcelona'92.....	22
	03.7 The 1993 Plan.....	23
	03.8 The creation of Turisme de Barcelona.....	24
	03.9 Intermediation and segmentation of markets.....	25
04	THE GROWTH OF DESTINATION BARCELONA	26
	04.1 Characteristics of Barcelona's tourism.....	26
	04.2 Behavioural model of tourism in Barcelona: attraction, concentration, redistribution.....	26
	04.3 Growth of supply and demand.....	27
	04.4 Diversification of markets: multi-motivation and de-seasonalisation.....	30
	04.5 Specialisation in professional tourism.....	33
	04.6 Geographic concentration of tourism activity.....	34
	04.7 International positioning.....	36
	04.8 Transport infrastructure for reaching city.....	37
	04.9 Cultural attractions and resources.....	38
05	TOURISM AND THE CITY	40
	05.1 Tourism and the city: process of reflection.....	40
	05.2 Challenges of tourism in Barcelona.....	42
	05.3 Citizens' perception of tourism.....	43
	05.4 21st century urban tourism trends.....	44



Prologue. Tourism Policies in Barcelona

Barcelona is a mature tourist destination that receives more than 27 million visitors per year, half of whom generate at least one overnight stay. Tourism in Barcelona is clearly international, de-seasonalised and its tourism is due to a variety of motivations, which helps ensure this sector remains dynamic and in a constant state of renewal. Barcelona today is a creative, diverse and cosmopolitan city that has become an indisputable icon in contemporary urban tourism, enjoying undeniable international prestige with a well-known, firmly-established image. Barcelona is Mediterranean and European, traditional and modern.

The city boasts a vast network of tourist services and infrastructure. Today, there are more than 360 hotels and nearly 10,000 tourist apartments distributed around the city. In the last twenty years, Barcelona has been immersed in a period of accelerated growth as regards services and tourist products – especially in terms of hotel accommodation –, and currently the sector is enjoying a phase of sustained growth.

Barcelona offers a huge diversity of cultural, commercial and leisure products and amenities aimed at local consumers and visitors. There are more than 35,000 shops, 9 buildings listed as World Heritage by UNESCO, many museums and exhibition centres and a rich tangible and intangible heritage. It is an undisputable fact that culture has become an eminent tourist value for Barcelona as a destination; culture has become one of the most highly rated aspects of the city, according to visitors to Barcelona, whatever the reason for their visit. Nevertheless, the growth and diversification of facilities continues in line with the growth and diversification of demand, adapting to new trends and retaining the city's identifying traits at the same time.

Barcelona's environmental, geographic, economic, political and cultural qualities have played a significant positive role in making the city a tourist attraction, though it should also be noted that communication and promotion strategies implemented over the years have also made a decisive contribution to the internationalisation of this destination.

As we enter the 21st century, tourism features amongst the city's main sources of income, with cultural promotion also having become a key factor in urban development. Tourism generates many benefits, as well as impacts that have a notable effect and change behaviours in the city: new geographies, new consumer zones, and new relationships are created, resulting in new challenges and demands.

Barcelona City Council plays a proactive role with regard to tourism, establishing the necessary tools and measures to ensure the sector develops correctly. Current municipal tourism policies focus on a dual objective, which consists in promoting tourist activity whilst also ensuring that its impact is positive and beneficial for the population as a whole. The maturity of any tourist destination depends on the provision of management and planning tools, as well as tools for promotion. At present, Barcelona's tourism policy is characterised by an integral, cross-cutting focus on all aspects of tourist activity. Work focuses on anticipating and managing its effects with a proactive attitude that entails taking decisions, seeking agreements and control. This is an innovative and pioneering new tourism policy model.

The different tourism policies that have been implemented in Barcelona over the decades were children of their time, driven by specific needs. The history of Barcelona as a tourist destination begins in the early-20th century, when the city's first public-private tourism promotion board was established, a pioneering initiative in Catalonia and an international benchmark. After the Fordism period, following World War II, Barcelona succumbed to a certain inertia and passivity with regards to promotion and management, despite considerable efforts having been made to attract business, trade fair and congress tourism and a clear market segment strategy. The restoration of democracy in the country and the proclamation of the city as Olympic host, followed by the celebration of the 1992 Games, ushered in a new tourism model, one based on diversification of markets and facilities. A lot of effort was put into promoting the city as a tourist destination, resulting in a considerable increase in supply and demand.

Records were broken in terms of visitor numbers and this had a significant economic impact, with the proceeds ploughed back into direct benefits for the local population (it is estimated that in 2012, tourist activity generated an economic impact equivalent to over 10% of GDP); moreover, there was intensive use of the city's icons and central spaces, and large-scale changes took place in terms of its territorial dimension. A review of Barcelona's tourism model and the subsequent establishment of a new tourism management and policy model testify to the city's maturity as a tourist destination. Accordingly, some of the priority measures in the new local tourism policy included a commitment to sustainable tourism, the goal of improving relations between tourism and the city, and the establishment of a new system of finance and redistribution of tourism activity throughout the territory.

We can safely state that Barcelona has gone from a tourism model based almost exclusively on promotion to a new paradigm that integrates promotion and management as the key concerns of the city's tourism policy. From an accelerated growth model, we have moved on to one based on sustained growth, maintaining the destination's competitiveness and internationalisation.

This document describes the different tourism policies that have been implemented in Barcelona over the years, tracing a continuous line through successive measures, models and entities right up to the present, marked by a new tourism management model for the city of Barcelona.

Taken together, the facts and figures that form the basis of this document show the effort and dedication that has been devoted to generate tourism intelligence in Barcelona, which is also a symptom of maturity and expertise.

01 Management of tourism in Barcelona

01.1 GOVERNANCE OF TOURISM IN BARCELONA

Over the last 15 years, tourism activity has undergone accelerated growth, positioning Barcelona as one of the most competitive city destinations and as a European and international leader. Barcelona's dynamic tourism business has had a significant and positive effect on urban growth, to the point where many economic sectors in Barcelona maintain direct, indirect or transversal relations with tourism. It is undeniable that tourism activity has helped boost the city's economy, generating benefits, not only for a specific sector, but also for the population as a whole. Tourism activity also generates considerable cultural dynamism, because it helps promote a vast variety of local resources and heritage, both tangible and intangible. Moreover, Barcelona's tourist attractions continue to drive the development of transportation infrastructure and improvements to services that help make city life more pleasant for residents and visitors. Attracting talent, creativity and innovation is the result and cause of tourists' interest in Barcelona. It is undeniable that tourism has helped to generate and attract enormous economic, social and cultural resources, without which we could hardly understand the current city model. That is where the maturity of the current tourism model in Barcelona resides: in establishing a new paradigm for tourism management, a framework for the establishment of different tools and measures aimed at multiplying the positive effects of tourism whilst minimising its negative impacts.

The emergence of urban tourism has highlighted the importance of harmonising tourism activities with the dynamics of the city itself. Tourism and the city are two inextricable elements, from the standpoint of both promotion and management.

Management of urban tourism is integrated into the overall management of the city. Most large and medium-sized cities in the western world are coming to understand that tourism management depends invariably on the management of cities. This is basically because tourism has ceased to be a specific, isolated economic sector; it has become a transversal activity that affects many aspects of city life. In view of this, Barcelona City Council has established a programme framework and new tools for the governance of tourism to ensure better integration of the interests and needs of both tourism and the city.

The maturity of Barcelona as a tourist destination is explained, in part, by the establishment of a new model for tourism management, positioning Barcelona as a leading international city in the field of tourism planning.

The tourism management model adopted by Barcelona is defined by the following characteristics:

1. Public-private sector partnership.
2. Integral, transversal tourism and city management.
3. Commitment to economic, environmental, territorial, social and cultural sustainability.
4. Promotion of tourism intelligence based on establishing data and tools for planning, action and evaluation.
5. Social responsibility and concern for the interests of citizens.
6. Protection of cultural facilities and values.

01.2 2012/2015 STRATEGIC FRAMEWORK AND BARCELONA GROWTH

Barcelona City Council's 2012-2015 Strategic Framework, the roadmap for municipal management, embodies the vision and goals that Barcelona aspires to achieve over the next four years. In it, tourism is called on to play a strategic role in the growth of the city, and several objectives are linked to it.

Similarly, measures included in the so-called *Barcelona Creixement* (Barcelona Growth) municipal programme, a set of policies and initiatives aimed at promoting the economic development of the city of Barcelona over the coming years, also take into account the importance of tourism in municipal management.

Development of tourism activity

More specifically, tourism is one of the economic sectors that promotion should focus on, along with healthcare, the biomedical industry, commerce, and ICTs and energy sectors.

To promote the development of economic activity linked to tourism.

(Strategic Framework. Goal 3.2.5).

Sustainable and responsible tourism activity

This section also includes a proposal that refers to Barcelona's leading role in the field of responsible and sustainable tourism.

To consolidate Barcelona as a destination committed to responsible and sustainable tourism.

(Strategic Framework. Functional goals/measures 3.2.4).

Tourism and the region

With a view to ensuring quality of urban life in all the city's neighbourhoods, in Point 4.9 (Urban Habitat), the Strategic Framework also focuses on the decongestion of tourism activity throughout the region.

To promote new urban attractors that can generate centrality across districts and distribute tourism throughout the city.

(Strategic Framework. City Goal 4.9).

This objective is also reflected in the framework of these Barcelona Growth measures in the following proposal.

To establish and implement district neighbourhood tourism plans and sector-based economic itineraries and facilitate the attraction of five new strategic international trade fairs and congresses to the city.

(Barcelona Growth. Measure 2).

Events

Finally, the Strategic Framework refers to the organisation of events, understood as a hub of attraction for people and talent and to promote economic activity.

To facilitate the organisation of events with added value for the city's economy.

(Strategic Framework. Strategic objective 3.4.4).

This aspect is also included in the measures provided for by Barcelona Growth.

To facilitate the attraction of five new strategic international trade fairs and congresses to the city.

(Barcelona Growth. Measure 13).

In short, and in line with a policy of promoting responsible and sustainable tourism, the end purpose of tourism is to improve the quality of life of the people of Barcelona.

01.3 MUNICIPAL MANAGEMENT OF TOURISM WITHIN THE ECONOMIC PROMOTION FRAMEWORK

In 2009, DOTE (the Directorate for Tourism and Events) was established within the framework of the Area of Economy, Business and Employment. DOTE has the following mission:

1. To promote and coordinate actions related to tourism management in the city so that, whilst maintaining its economic importance, it improves citizens' quality of life.
2. To promote the attraction, consolidation and loyalty to the city of events that are of economic interest.

DOTE's objectives are to plan, analyse and manage the externalities of tourism activities and to promote its positive effects and foster economic dynamism. Clearly, the establishment of DOTE reflects a strategic commitment from Barcelona City Council to manage and plan tourism in the city.

The importance of municipal tourism management activities is discussed and promoted within the framework of the *City of Barcelona Strategic Plan for Tourism*, a process of reflection with regard to tourism and the city during a two-year period from 2008 to 2010 that established the basis for harmonising and managing tourism and the city.

01.4 INTERDEPARTMENTAL COORDINATION

In June 2009, Barcelona City Council established the Technical Council for Tourism and the City. This transversal coordination body has the power to generate commissions within the municipal organisation, and it is linked to the governing bodies of the municipal administration through the Department of the Chief Executive Officer.

In February 2013, the Municipal Council for Tourism and the City, which is chaired by the Chief Executive and made up by managers of the different municipal offices attached to Barcelona City Council, proposed the establishment of a Tourism and City Commission to promote and monitor tourism measures that each of the different municipal departments are responsible for. The Technical Commission for Tourism and the City, which is chaired by the Assistant Manager for Strategic Projects, has since become a valuable tool for the coordination of tourism matters, ensuring close and effective interdepartmental coordination.

The Tourism and City Commission is formed by representatives of Barcelona's municipal departments and tourism bodies: the Deputy Manager's Office for Strategic Projects, attached to the Department of the Chief Executive Officer; the Office for Strategic Supervision (Department of the Chief Executive); the Office for Tourism and Events (Department of Economy, Business and Employment); the Office for Prevention (Department of Prevention, Security and Mobility); Office of the Manager of Urban Habitat; Department of Quality of Life, Equality and Sport; Office for Innovation (Department of Culture, Knowledge and Innovation); Office of the Global Communication Plan (Communication Department); the Eixample District Council; Horta-Guinardó District Council; Barcelona Municipal Services; Turisme de Barcelona.

The functions of the Tourism and the City Council are as follows: to perform tasks commissioned by the Technical Commission for Tourism and the City; to implement and coordinate 'Tourism and City' projects; to propose municipal action funded by resources generated from the collection of the tourist tax; to approve the annual report on sustainable tourism (for certification as Biosphere Responsible Tourism World Class Destination). At present, the priority projects undertaken by the Tourism and City Commission are the SIGT Tourist Information and Management System, monitoring the draft of District Tourism Plans and the Tourism website.

The Council for Tourism and the City seeks to provide a response to the different issues related to tourism activity generated in the city, with a focus on ensuring a consistent, coherent and effective line of action.

Establishment of the Council for Tourism and the City reflects the need and the city authorities' concern to provide a response to the complexities of tourism and its integration in the city, and this embodies a new tourism management initiative within the framework of a new model for municipal management and administration.

The model of interdepartmental coordination, consistent with the idea of tourism integrated into the city and a multi-vision of tourism activity, is pioneering and ground-breaking internationally, and it has helped position Barcelona as a leader in the urban tourism sector.

In fact, a strategy to position Barcelona's tourism management model internationally has already been launched through leading international institutions, thanks to participation at a number of high-level meetings.

- Global Sustainable Tourism Council.
- World Tourist Cities Federation, in Beijing.
- European Cities Marketing, promoted by Tourism and the City, at the Oslo and Nice sessions.
- SDN Week, in Washington.
- Conference of Sustainable Tourism on Destinations.
- Group to standardize Smart Tourist Destinations, Segittur-AENOR.

01.5 TOURISM PROMOTION: TURISME DE BARCELONA

Established in 1993, Turisme de Barcelona, the successor to the earlier Municipal Tourism Board, acts as the city's tourism promotion agency. Turisme de Barcelona is formed by Barcelona City Council, the Chamber of Commerce and Barcelona Promotion Foundation. This initiative is jointly managed by the local authority and the private sector, and its purpose is to attract tourism activity and to provide services to visitors to Barcelona. The mayor of the city chairs the Board of the Consortium. According to the statutes, executive responsibility, through the presidency of the Executive Committee, falls upon the president of the Chamber of Commerce, which has delegated this responsibility to Joan Gaspart since the Consortium was established.

Every year, Turisme de Barcelona launches around 200 promotional activities, selected according to market segmentation, both by country and tourist typology. These initiatives are organised into different action programmes in which member companies (more than 600 at present) take part. These programmes are as follows:

- Barcelona Convention Bureau.
- Commerce and Barcelona Shopping Line.
- Barcelona Sports.
- BCNSHOP.
- Barcelona Culture and Leisure.
- Barcelona Gastronomy.
- Barcelona Premium.
- Barcelona Sustainable Tourism.

Additionally, the Consortium also manages a series of tourism products, such as Barcelona Bus Turístic (Barcelona Tourist Bus) and Barcelona Card, designed to help visitors get to know the city. The Consortium also manages a network of 20 tourist offices and information points, distributed mainly around the city centre. From the sale of these products, the Consortium generates resources that enable it to self-finance its activities. In fact, more than 90% of the Consortium's budget is self-financed, a percentage that has increased over the years.

01.6 NEW FINANCING: A TAX ON OVERNIGHT STAYS AT TOURIST ACCOMMODATION

Catalonia's Law 5/2012 establishes the Tax on Stays at Tourist Establishments (IEET), a tax that is levied by the Government of Catalonia. This law regulates the essential elements of the tax, establishing that money raised shall be channelled to the Tourist Development Fund and stipulating the share that local authorities shall receive from the revenues generated. The tax came into effect on November 1, 2012.

Local authorities receive 30% of revenue generated by the IEET. The city of Barcelona has a different status, the result of special tariffs, and, consequently, receives 34% of the tax revenues collected.

At its session of April 17, 2013, Barcelona City Council's Executive decided to transfer 50% of this revenue to Turisme de Barcelona and to directly manage the other 50%.

The local authorities that receive these funds have to devote the amount resulting from the application of the tax to specific tourism promotion activities within their respective territories, as specified in the action guidelines, and they must certify before the Government of Catalonia the effective use made of tax credits for tourism promotion.

The Second Deputy Mayor has been invited to form part of the Commission of the Tourist Promotion Fund as an observer. This Commission proposes the guidelines for action using revenue generated by the tax for stays at tourist accommodation.

The guidelines established by the Commission for the year 2014 as regards local authorities, ratified by the Bilateral Committee of the Catalan Government, are as follows:

Retention and specialisation policies

1. Speciality brands for destinations: family holidays and sports holidays. Seniors' holidays and accessibility.
 2. Improving the visitor's experience at tourist information offices.
 3. Language training plan for customer information and the provision of services.
 4. Improve tourist experiences by encouraging the creation of new tourism products.
 5. Use of ICTs to improve the tourist experience.
 6. Improve tourist signage at destinations.
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Policies to attract new tourism

1. Prioritise attracting domestic tourism, encouraging Catalan people to visit Catalan destinations.
 2. Plan to attract markets from the rest of Spain and international markets, coordinated with the ACT action plan.
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Regarding the part managed directly by the City Council, the procedure for agreeing which actions should be financed by the Tourist Promotion Fund in Barcelona is as follows:

1. The municipal departments submit proposals adapted to the guidelines issued by the Fund Commission through its representatives to the Tourism and City Commission.
2. The Department of the Chief Executive approves these proposals and prioritises them in time in order to finance them as income from tax revenue collection.
3. The Executive Council approves the projects.
4. Credit is assigned to the department or district charged with implementing the action, which proceeds to do so.

The Government of Catalonia will transfer the percentage of the tax revenue that corresponds to Barcelona on a quarterly basis. To date, the Catalan Government has transferred a total of 6,996,972 Euros corresponding to the period from 1 November 2012 (when the tax entered into effect) to 31 December 2013.

02

Lines of action

02.1 COMMITMENT TO RESPONSIBLE AND SUSTAINABLE TOURISM

The city of Barcelona has long been engaged in implementing environmental and social sustainability policies. A series of milestones show the huge effort made in recent years to resolve such critical issues like reducing noise, adapting public transport and making it more accessible, maintaining high levels of water savings and promoting a compact, mixed structure for the city and high levels of social cohesion and quality of life. All these are also important factors in making our city more attractive.

These efforts aimed at consolidating a sustainable city model have direct repercussions on the city's qualities as an urban tourism destination.

Barcelona has established a Citizen Commitment to Sustainability 2012-2022 plan as a forum to encourage and discuss public policies aimed at conserving the city's natural, cultural and social qualities. As a successor to the well-known Agenda 21 plan, which was launched in the late-20th century, this is a commitment that aims to renew and modernise the consensus process implemented in 2002.

Citizen Commitment to Sustainability 2012- 2022 establishes the following goals:

1. Biodiversity: from urban green areas to the re-naturalisation of the city.
2. Public space and mobility: from streets made for commuting to streets for living.
3. Environmental quality and health: from standard to excellence.
4. An efficient, productive, zero emission city: from a technological Barcelona to a smart Barcelona.
5. Rational use of resources: from the consumer society to responsible consumption.
6. Good governance and social responsibility: from sector-based intervention to effective coordination.
7. People's welfare: from a welcoming city to a cohesive society.
8. Progress and development: from concern for sustainability to a sustainability-based economy.
9. Education and citizen action: from raising awareness to duly informed responsibility.
10. Resilience and global responsibility: from isolated responses to global action.

In this context, as could be no other way, sustainability embodies one of the basic principles of the tourism model in Barcelona, and the City Council strives to ensure that sustainability criteria are present in all fields of action and aspects of tourism activity in the city to make this a destination that constantly works to renew and rethink its action and position itself firmly within the framework of responsible and respectful development.

The Citizen Commitment to Sustainability establishes a series of lines of action and, as regards tourism, defines clear goals as in Objective 8.7:

To advance sustainable tourism in harmony with the region and with positive effects on local communities. To work towards the joint responsibility of institutions, the tourist industry and visitors in the efficient use of natural resources, the maintenance of environmental quality and the conservation of our tangible and intangible cultural heritage.

Biosphere certification

In 2011, the city of Barcelona became the first urban tourism destination to obtain Biosphere Responsible Tourism certification, positioning the city as a leading urban destination in the field of sustainable tourism.

The Institute for Responsible Tourism (IRT) was the first certification body to be recognised by the Global Sustainable Tourism Council (GSTC). GSTC is an international body with more than 300 member institutions that, under the umbrella of the World Tourism Organisation (WTO) and the United Nations Foundation, engaged with the work of establishing and managing standards for sustainable tourism.

As part of its activity, GSTC has issued 'global sustainable tourism criteria', formulated as the result of a worldwide drive to develop a common language on sustainability in tourism.

GSTC is the only institution that issues worldwide certification in sustainable tourism, and recognises the Biosphere Responsible Tourism standard, having conducted a strict validation procedure, verifying that all the requirements of this standard are in line with its own global criteria. The Biosphere Responsible Tourism standard is the first certification procedure to obtain GSTC approval and guarantees certified bodies and their clients the certainty that the activities carried out conform to the following criteria:

1. Demonstrate sustainable management.
2. Maximise the economic and social benefits to local communities and minimise negative impacts.
3. Maximise the benefits to cultural heritage and reduce negative impacts to a minimum.
4. Maximise the benefits to the environment and minimise negative impacts.

From the standpoint of positioning Barcelona as a destination, the application of sustainability criteria brings competitive advantage and added value that distinguishes the city and enhances its image and international status. However, above all, conservation of the city's cultural and natural heritage increases its vitality and improves the quality of life for citizens and visitors alike.

More recently, in October 2013, the International Centre for Responsible Tourism (ICRT) at the University of Leeds, in cooperation with ESADE Sant Ignasi School of Tourism, celebrated the Seventh International Conference on Responsible Tourism in Destinations in Barcelona. This was the first time that the conference had taken place in Europe.

The conference received strong local partnership support from Barcelona City Council, Turisme de Barcelona, Barcelona's Provincial Council and the Tourism Agency of Catalonia. The conclusions led to the signing of the 'Catalonia 2020 Vision for Responsible Tourism: the Declaration of Barcelona', in which public and private sectors linked to tourism proposed criteria, guidelines and commitments to be implemented for the future development of tourism, aimed at promoting 'better places to live in and, consequently, better places to visit'.

02.2 DESCONGESTION OF TOURISM ACTIVITY

Due to its territorial and socio-demographic characteristics, Barcelona is a dense, compact city with a high rate of regional occupancy. The city has one of the highest population densities compared to its direct destination competitors. It is undeniable that in Barcelona there is a considerable level of territorial concentration as regards tourism supply and demand, particularly in certain areas of the Ciutat Vella district and around Sagrada Família and Park Güell, the most iconic and best-known sites here.

The distribution of tourism activity in the city is very uneven. There are neighbourhoods and areas where tourism intensity is particularly high, whilst there are other zones that have not been developed for tourism due to a lack of existing supply and demand. Pronounced imbalances exist and, as a consequence, economic, territorial, social and cultural impacts are uneven throughout the territory.

Urban tourism is concentrated, invariably, at certain points in a destination, sites generally described as outstanding and not to be missed. All tourists want to see and experience the most outstanding places in

destinations, the icons that make them unique and special experiences. The outgoing behaviour of urban tourists is explained, in part, by the very nature of the city break segment, which consists of relatively short stays in large or medium-sized areas that offer a large range of resources and products, as well as clearly-defined icons that represent or symbolise the destination as a whole.

As regards the location of hotel accommodation, the contrast is clear if we study its distribution by district: most hotels are located in the districts of Ciutat Vella, Eixample and Sant Martí, whilst others like Nou Barris and Sant Andreu have practically none, and that's why they are considered 'tourist deserts'.

A similar situation occurs in the case of tourist apartments, most of which are concentrated in the old part of the city, in the neighbourhoods of Eixample, Gràcia and Sant Martí.

The centrality of Ciutat Vella, both historically and geographically, turns this area of the city into a hot spot for the destination, as it acts as the indisputable tourist centre of Barcelona. Not only does this area accumulate a high density and diversity of uses, but it is also a rather peculiar urban zone, formed by narrow streets laid out according to medieval times. Its characteristics make this an area of outstanding tourist interest: a series of symbolic sites that distinguish and make this part of the city special in the eyes of the visitor. Moreover, many of the city's network of cultural and leisure facilities are also concentrated in Ciutat Vella, Eixample and Sants-Montjuïc.

Added to the high density of visitors and residents that travel around the city centre every day for work, we have to add the large number of passengers that embark or disembark at the port. These are cruise passengers for whom this area is the first (and, sometimes only) area that they will walk around and visit.

One of the challenges that face tourism management in the city is the existence of large regional contrasts and imbalances in the city as a whole, the consequence of excessive territorial concentration of supply and demand at just a few points in the city.

The decongestion of tourism activities is one of the main municipal lines of action, implemented to redistribute and balance the weight of tourism throughout the entire territory in order to ensure that the benefits generated by this activity are shared by as many inhabitants as possible.

District Tourism Plans

The Government's Measure for the Decongestion of Tourism Activity – District Tourism Plans was submitted to the Plenary Council on December 20, 2013.

The formulation and implementation of these District Tourism Plans provides the chance to distribute tourism activity throughout the city whilst encouraging the promotion of local resources and involving the various districts in tourism management. The main purpose of the policy for redistributing tourism is to decongest areas that are more saturated in terms of supply and demand, and to promote the attractions of the city as a whole.

As a result, District Tourism Plans provide a new tool for managing urban tourism that is implemented within the framework of new municipal governance and pursues two basic objectives: the redistribution of revenues and wealth generated by tourism across the territory, and the generation and promotion of new tourist flows throughout the whole city.

Tourism is an integral activity that affects and involves all areas of district management. It is also a transversal activity that requires the support and action of all departments of the City Council. At this stage, the following objectives have been established:

1. To highlight the characteristics of tourism activity in neighbourhoods and districts.
2. To demonstrate the important role that tourism plays in local economic development.
3. To foster contact between the tourist industry in districts, particularly hotels.
4. To link tourism to local commerce and restaurants.
5. To promote the importance of natural, cultural and intangible heritage in the territory as possible tourist attractions.

6. To draw up a 'tourist map' at both city and district level.
7. To show the importance of tourist information and signage.
8. To actively involve districts.

The result is a series of 54 measures grouped into 6 programmes, organising Council action: on the one hand, those managed by a central department or body, and whose actions affect all districts (transversal actions); and those that are specific to different districts, developing particular aspects in each corresponding tourism plan.

Programs

1. Information and promotion	Promoting actions to make neighbourhoods and districts better known from a tourism point of view.
2. Development of tourism activity	Promoting the potential attractions and resources in an area, fostering the development and creation of tourist products.
3. Strategic territorial projects	Including tourism aspects in key decongestion project.
4. Organization and regulation	Establishing regulations to minimise the effects of tourism activity and ensuring compliance with them.
5. Promotion of economic activity	Promoting tourism activity to generate economic activity and employment.
6. Tourism Management	Strengthening the necessary administrative structures.

Destination Barcelona

Barcelona is a municipality with an area of 100 square kilometres, but in fact it is a much larger territory because improvements in connectivity have gradually turned this into an urban *continuum*: Destination Barcelona. Today, Barcelona's area of influence is a complex conglomerate of tourist references that have become a powerful international benchmark. That is why such insistence is made on mutual cooperation between the city of Barcelona and its entire area of influence, based on a win-win philosophy that generates benefits for both.

When we speak about Destination Barcelona, we do so without referring to any precise geographic or administrative boundaries. The limits of a destination are largely marked out by demand. Visitors are the ones that finally establish the spatial dimension of the destination, giving it economic and social meaning. Accordingly, importance is given to citizens in the metropolitan area as a preferential target group for tourist promotion in the province. Similarly, as regards tourist promotion, the entire population of the Province of Barcelona are consumers of the city's tourism products and its surrounding metropolitan area, a segment has possibilities for future growth.

On the other hand, the regional tourist brand is promoted through supply (by both public and private stakeholders) in response to a need to organise and identify tourist spaces, which leads to promotional strategies for specific markets. A commission formed by members of the teams responsible for managing tourism at Barcelona Provincial Council, Barcelona City Council and Turisme de Barcelona reflected on this duality and searched for lines of cooperation through an agreement signed by all parties.

The recent approval of the so called *Costa Barcelona* tourism brand, which encompasses the areas of Maresme, Baix Llobregat, Garraf, Alt Penedès, Vallès Oriental and Vallès Occidental, offers the city of Barcelona an opportunity to continue building Destination Barcelona together (public authorities, promotional consortia and the private sector).

The three tourism brands in the Barcelona Province — *Costa Barcelona*, *Paisatge de Barcelona* and *Barcelona Pirineus* — and its eighteen 'tourism areas' include sea and sand, inland landscapes, art and cultural heritage, food and drink and a rich heritage bequeathed by an important industrial past and the benefits of thermal waters, spas, amongst many others.

02.3 EFFECTS, REGULATION AND ORGANISATION OF TOURISM

The development of a firmly-established destination like Barcelona requires a well-grounded management and planning policy to maintain its quality and competitiveness. Within the framework of a new tourism model for Barcelona, the City Council takes on responsibility for the integrated management of tourism. In general terms, this entails assessing, organising and planning the development of tourism. The present municipal tourism policy takes a clearly proactive stance towards tourism management.

Nowadays, the City Council is committed to managing the effects of tourism in an integrated way, consistent with the urban model. The purpose of this model is to help improve the development of tourism as a whole, whilst also ensuring improved quality of life for citizens. To this end, various lines of work and measures are being implemented in order to manage tourism externalities to reduce its negative effects and maximise its benefits.

Tourist mobility

The management of visitor mobility is a key to the development of a destination. Accordingly, work focuses on organising the mobility of tourism in public spaces. A series of specific measures have been implemented:

1. Working group on Tourist Mobility and an Agreement for Mobility.
2. 'ZonaBus' bus zone plan to manage tourist coaches handled by B:SM.
3. Regulation of new forms of mobility amongst visitors.
4. Regulation of hotel parking; installation of sensors at tourist coach car parks.
5. Parking for motor homes.
6. Specific products (Bus Turístic, the tourist bus and Bus City Tour).
7. Promoting use of the public transport network (TMB and FGC); 'HolaBCN' travel pass; tourist information and signage.
8. Tourist signage for pedestrians.

Tourist safety and security

Security measures are a key to ensuring a positive visitor experience, and to this end the following measures are being implemented:

1. Increased patrols and prevention.
2. Production of materials for operators and visitors to encourage preventive behaviour and safety.
3. Liaison with consulates to transmit calming messages and improve the management of incidents.
4. Barcelona Security Council's Working Group on Commerce and Tourism Security.

Organisation and management of tourist sites

A series of measures are being taken to improve the integration of tourism in certain high concentration areas .

1. Traffic abatement measures around Sagrada Família, moving tourist coach parking away from the site.
2. Park Güell management plan, limiting maximum visitor numbers.
3. Mobility study at the Art Nouveau Sant Pau site.

Organisation and management of tourist accommodation

The growth of tourist facilities available in the city of Barcelona has been influenced to a great extent by the economic boom and expansion of recent years. One of the main characteristics of tourist accommodation in Destination Barcelona is its quality, diversification and specialisation, factors that no doubt increase the city's attractiveness for tourism, as it enables the destination to meet the needs of a large variety of market segments.

However, the emergence of new forms of tourist accommodation makes it necessary to regulate these new modes. Within the framework of the new municipal tourism management model, the city authorities are aware of

the need to regulate tourist facilities in the city, in terms of both their growth and specialisation and with regard to legal matters and territorial distribution issues.

Ciutat Vella's Usage Plan has become one of the most important measures implemented by the municipal government in order to regulate and organise tourist facilities, as its objective is to restrict the growth of tourist accommodation, both hotels and apartments.

The City Council has also launched a Tourist Establishment Inspection Plan that focuses particularly on tourist hostels and housing for holiday rental accommodation. As regards the latter, the supply of tourist apartments is characterised by areas of concentration: the Eixample district has the largest number (around 5,000) of tourist apartments, followed by Ciutat Vella, Gràcia and Sant Martí.

Precisely one of the greatest challenges regarding the regulation and control of tourist housing is licenses, especially since there are a large number of apartments that operate outside the law, most of them in the Ciutat Vella District. To this end, the Tourist Accommodation Working Group was set up to complement municipal efforts and to regulate and control this type of accommodation.

Within the framework of policies to regulate and control facilities, the City Council has also agreed to limit the growth of shops devoted to selling souvenirs in certain areas (Ciutat Vella, Sagrada Família, Park Güell).

1. Regulation of tourist housing.
2. Ciutat Vella Usage Plan.
3. Tourist Establishment Inspection Plan (tourist housing, hostels...).
4. TPAC Tourist Accommodation Working Group.
5. Souvenir shop usage plan.
6. Government Measure regulating tourist accommodation facilities (May 2014).

In May 2014, Barcelona City Council approved a government policy aimed at regulating and organising the supply of tourist housing in the city and at pre-empting any possible problems of co-existence. In order to draft this plan, the Council Executive agreed to suspend prior notifications of the start of tourist rental accommodation activity for one year, renewable for a second year, in a particular area with a view to formulating regulations to cover the entire city.

02.4 PROMOTING ECONOMIC ACTIVITY

The dynamic nature of the tourism industry in Barcelona has a highly significant and positive effect on urban growth, to the point where many economic sectors in Barcelona maintain both direct and indirect relations with tourism. It is undeniable that tourism contributes to the economic dynamism of the city to the benefit of the population as a whole. Indeed, it is estimated that economic activity generated by tourism in 2012 was more than 13,400 million Euros, which translates into an impact of 37 million Euros per day. Tourism activity also represents 10-12% of GDP, whilst generating more than 7,100 million Euros in GVA, a figure that rose by 51% from 2007 to 2012. In terms of employment, it is estimated that more than 120,000 jobs in Barcelona are linked to tourism.

The attractiveness of tourism in Barcelona also generates growth in accessibility infrastructure and improved services that help to make urban life more comfortable, both for residents and for visitors. Attracting talent and creativity and innovation is at the same time a result and cause of tourists' interest in Barcelona. Moreover, tourism also generates a lot of cultural activity, highlighting the value of a vast diversity of local resources and heritage.

Aware that the tourist industry continues to grow and prosper, and that its share in the economy continues to increase, the Department of Economy, Business and Employment has implemented a series of measures to foster the development of economic aspects of tourism activity in the city.

Support for industry

The provision of support for industry through advising and facilitating tourist business activities to all companies interested is a key line of action. Companies engaged in providing tourism products or services are given

encouragement and advice with a view to promoting excellence in management amongst tourism firms, particularly as regards their relations with public authorities.

Measures in this direction include permanent intermediation between the Barcelona Hotel Guild and the districts with regard to formalities related to their activity.

There is close and constant contact with professional associations in the sector, such as the Association of Tourist Apartments (APARTUR), the Catalan Association of Tourist Hostels (ACATUR) and the Catalan Association of Travel Agencies and Union of Outbound Travel Agencies (ACAV-UCAVE).

These professionals, who organise and form associations in order to improve the sector, help to promote the city, along with public authorities, as a competitive tourist destination through the many business projects they launch.

We should also mention cooperation in business projects that bring together ICTs and tourism.

1. Joint promotion with MTourism Mobile World Capital to link up the cultural tourist industry with companies engaged in new technologies.
2. Support for the Bdigital ICT Cluster Working Group.
3. Coordination with the Municipal Information Technology Institute (IMI) and the Strategic Operations Management Office (Area of Economy, Business and Employment).
4. Cooperation with the Fòrum TurisTIC congress on tourism and technology organised by Bdigital.
5. Advisory services for several entrepreneurial and business projects.

Tourism intelligence

The City Council has implemented numerous measures aimed at improving and increasing understanding with regard to the city's tourism industry. These are initiatives that improve coordination amongst the different operators involved and studies and research aimed at compiling knowledge about specific aspects of tourism.

Tourism intelligence Working Group	This is a working group linked to the Technical Council on Tourism and the City, established by the Deputy Manager's Office for Strategic Projects. The participants are the Office of Study and Assessment Service, the Technical Programming Office, Tourism Management and Turisme de Barcelona to coordinate all related issues and facilitate coordination in compiling studies and statistics on tourism with all stakeholders involved.
Tourism Information and Management System (SIGT)	<p>Led by the Department of the Chief Executive and drawn up jointly by the Office for Tourism and Events, the Technical Programming Office and the IMI, SIGT is a monthly report that sets out forecasts for tourism activity in the city and the evolution of the main tourism indicators.</p> <p>In order to draft the periodical report, contacts were established to ensure a regular flow of information from tourism industry supply and management organisations in the city: Port of Barcelona, Fira de Barcelona, Barcelona Convention Bureau, City Police...</p> <p>This report is sent to more than 150 people involved in the municipal management of tourism in the city: members of the Technical Council on Tourism and the City, including members of the Forum on Tourism and the City, District managers and members of the Urban Space Co-Responsibility Office.</p> <p>Copies of the report are also sent to a number of tour operators through Turisme de Barcelona and the Barcelona Hotel Association.</p>
Citizen survey on perceptions about tourism	This is a periodical survey conducted and drawn up by the Department of Opinion Surveys, commissioned by the Directorate for Tourism. The survey examines the degree of satisfaction amongst the people of Barcelona with regard to tourism, as well as their own tourism habits and residents' opinions about municipal tourism management. The survey is conducted three times per year, in February, June and September.
Study of the economic impact of tourism activity 2012-2013	This study measures both the direct impact (tourist spending) and the indirect impact (purchases of tourism services, generation of jobs and income) of tourism in the city. The study, conducted by the Higher Institute of Tourism Studies (University of Girona) will be published this year, 2014. The study is monitored by the Department of Studies of the Department of Economy, Business and Employment, the Technical Office for Tourism at Barcelona Provincial Council, the Technical Programming Office and Turisme de Barcelona.
Tourist surveys	<p>These annual surveys, which form part of the Statistical Plan for Catalonia, are conducted by Turisme de Barcelona. This year, the City Council is running the survey through the Department of Opinion Studies, attached to the Deputy Manager's Office for Strategic Projects and Tourism.</p> <p>Moreover, the sample has been increased to include the different types of visitors that stay in the city, and which are no longer limited only to hotels.</p>
Other	<p>In 2014, within the framework of an agreement signed by Turisme de Barcelona, Barcelona Provincial Council and Barcelona City Council, responsibility was undertaken for management and interpretive analysis of the 2014 Costa Barcelona Tourist Survey.</p> <p>Additionally, in 2014 a survey was made of tourists who connect to the Wi-Fi service, and a large data analysis was conducted of credit card transactions carried out in 2012, according to origin, type and seasonality of visitors to the city.</p>

02.5 EVENTS

Barcelona occupies a leading position in international business tourism rankings. According to the International Congress and Convention Association (ICCA), Barcelona is the world's leading city in terms of numbers of delegates and third in number of international congresses organised over the 2008-2012 period.

Attracting and retaining new events

The meetings tourism market is not a static market. Cities compete amongst themselves, and new destinations are constantly emerging, fighting to make a space for themselves by offering conditions that are often difficult to match.

Barcelona has specialised in attracting large congresses and it has established agreements with leading cities like Vienna to submit joint candidatures, alternating venues between the two cities.

Exercising its leadership role, the City Council promotes cooperation strategies amongst the different stakeholders involved: the Chamber of Commerce, Turisme de Barcelona - Barcelona Convention Bureau, Fira de Barcelona, business associations, universities... and establishes operational coordination mechanisms to implement specific initiatives. A good example of this is the process to make Barcelona the Mobile World Capital.

The context of competition amongst cities means associations and companies that organise congresses and events demand support as a condition for selecting one city or another as the host. Here, the factors that differentiate facilities in one city from the others are decisive.

Besides technical facilities, other factors that are greatly appreciated when it comes to making a decision may be the provision of contact guarantees with local authorities, both during the candidature process and during the celebration of the event itself, and the promotion of synergies with the city's economic system related to the specific theme of the event.

Events Landing

The City Council provides support to help events and congresses land in the city. To this end, the municipal authorities facilitate formalities and provide intermediation services with different operators in the city to ensure the event is organised correctly and that it fits perfectly into the urban dynamics.

1. Organising and convening transport and security commissions for congresses and events whose dimensions require coordination with the major operators in the city.
2. Handling requirements linked to commitments acquired with regard to events organised in the city, whether in the process of submitting candidatures or at other stages.
3. Establishing cooperation agreements with bodies that manage venues in the city to obtain the best conditions for event organisers (MNAC, DHUB, Fundació Tàpies and others).
4. Coordination between areas through participation in the Barcelona Events Commission and the Commission on Urban Land Uses.

03

Historic antecedents and basis for Barcelona's tourism model

03.1 THE CERDÀ PLAN AND THE UNIVERSAL EXPOSITION OF 1888; URBAN EXPANSION AND INTERNATIONAL PROJECTION

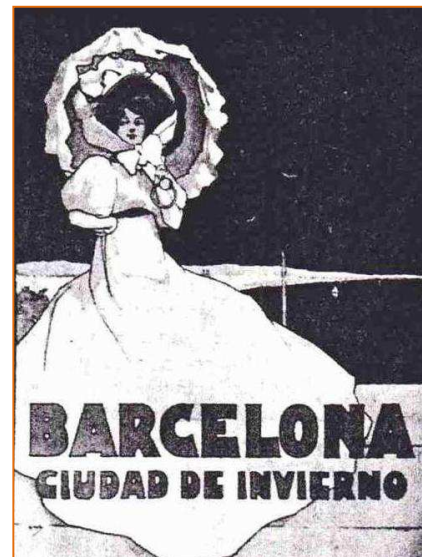
In the mid-19th century, the city of Barcelona began to expand over the surrounding plains and its international projection began just as the city adopted a new role in the geopolitical map of the time. The approval of the Cerdà Plan in 1859 and the celebration of the Universal Exposition in 1888 were key events that ushered in significant changes in the global concept of the city. Barcelona underwent its first major urban transformation in modern times.

The Cerdà Plan established a new organisation for urban life, ensuring better living conditions for the people of Barcelona, creating multi-centres and reinforcing the city's capital status. Thanks to its standing as an industrial and commercial city, Barcelona was selected to host the 1888 Universal Exposition, an event that attracted more than two million visitors during eight months of intense activity. The hotel and services sector grew and was modernised, the statue of Christopher Columbus was erected as an iconic reference point in the new city and La Rambla was converted into the undisputed city centre. There is no doubt that the 1888 Expo projected an image of Barcelona as an advanced, modern, lively, cosmopolitan city.

03.2 THE SOCIETY FOR THE ATTRACTION OF FOREIGNERS, A PIONEERING MODEL IN PUBLIC-PRIVATE PROMOTION

In 1906, Barcelona City Council constituted the Commission for the Attraction of Foreigners and Tourists, the first municipal organisation for the promotion of tourism in Barcelona and a pioneer in both Catalonia and Spain. The Commission achieved at least two major successes: the establishment of the first tourist information office in Barcelona, on the ground floor of the City Hall in Plaça Sant Jaume; and the creation of the first tourist poster and slogan for the city: *Barcelona ciudad de invierno* ('Barcelona, A City for the Winter').

Soon after this, the Society for the Attraction of Foreigners was born, a new tourism promotion body to replace the first municipal commission. The Society, which imitated the organisational model adopted by French tourism offices, pursued its mission for more than three decades (from 1908 to 1936). The new body, which was composed of representatives from Barcelona's public and private sectors, as well as institutions related to cultural, commercial and financial life, soon became seen as a benchmark in public-private tourist promotion, both in Spain and in the rest of Europe.



The Society, whose primary mission was to promote Barcelona as a tourist destination, was funded by public grants and donations by its private sector members. There was also a huge network of volunteers and delegates who provided all kinds of support, both in Barcelona and abroad. Over the years, the promotional model adopted by the Society for the Attraction of Foreigners, supported by coordination between the public and private sectors, was widely praised and imitated in other places, both in Catalonia and beyond.

In the early-20th century, Barcelona enjoyed promotion beyond its borders, with an indisputably European vision. The Society promoted highly attractive cultural and civic heritage and a greatly admired image that combined modernity and tradition, culture and nature, art and industry, Europeanism and Latinity. The Society members, influenced by the ideology of the period, were pioneers in a new paradigm for tourism, helping to position Barcelona as one of the most outstanding and attractive destinations on the new European map.



03.3 THE WORLD'S FAIR OF 1929

Urban regeneration was happening all over the city, including large-scale works in the Gothic Quarter in the historic centre of the city and the 'Spanish Village' on the slopes of Mount Montjuïc. This was in preparation for the second great event that provided Barcelona the chance to turn itself into an international showcase in the early-20th century: the World's Fair, or International Exposition of the Electrical Industries of 1929. Like the Expo in 1888, this new event provided an ideal opportunity to give public spaces a monumental character and to provide Barcelona with facilities that distinguished it from the great capitals of the day. Puig i Cadafalch was one of the great architects of this transformation.



On the occasion of the 1929 World's Fair, Barcelona welcomed a huge numbers of visitors who occupied all the hotels in the city, a network made up of around one hundred establishments. Barcelona offered the experience of a cosmopolitan city: open-top buses took visitors on routes to enjoy the splendid views, public information offices were opened, guides were published, and routes, leisure facilities and viewpoints enriched the urban landscape. Thanks to all this, Barcelona achieved considerable international projection as the 'City of Light'.

The establishment of the Fira de Barcelona trade fair site in the 1930s symbolised the city's commitment to attracting large events. Over the decades, success in this area has helped to consolidate the Catalan capital as an undisputed reference point for the celebration of trade fairs and important events.

Barcelona is a historic tourist destination. The antecedents of the present tourism model are found in the early-20th century, when Barcelona's map and international tourist value had already been defined:

1. Barcelona, historic tourist destination.
2. Model of tourism promotion based on public-private partnership that would become an international reference.
3. Culture as a central element in urban tourism in the early-20th century.

03.4 CITY OF FAIRS AND CONGRESSES

After World War Two, tourism became a popular activity, concentrated particularly along the Mediterranean coast. Tourists only took day trips and short visits to Barcelona, forcing sectors and stakeholders in Barcelona's society to use their imagination to attract the interest of tourists and visitors.

In 1952, the International Eucharistic Congress took place, attracting many visitors and spurring the regeneration of parts of the city. Soon, the Gothic Quarter and Spanish Village became the destination's main icons. A network of municipal tourist offices was established whose principal function was to provide information, gradually expanding more and more over the decades.

In the 1960s, it was decided that Barcelona should commit to attracting a highly specific market segment, trade fairs and congresses, specialising facilities and adapting them to new demand. The establishment of new sites to host such events and the emergence of many specialist agencies, boosted by municipal support, helped Barcelona to take up a powerful position in the business tourism sector, to the point where, in the early-1970s, the Catalan capital was considered the leading city for fairs and congresses in all Spain. The segmentation of tourist demand followed a clear strategy to promote the city, a line of action which Barcelona pioneered.

03.5 THE MUNICIPAL TOURISM BOARD

In the early-1980s, the first municipal government voted in by democratic election established Barcelona Municipal Tourism Board, whose main mission was to promote tourism in the Catalan capital, which was then undergoing enormous transformation. The restoration of democracy was accompanied by significant urban and cultural regeneration in the city, as new public facilities and new urban spaces were created, and both the social fabric and the cultural heritage of Barcelona were renewed. During this period, institutions pursued the principal priority goal of restoring trust in the city itself, which was undergoing a large-scale process of deindustrialisation and the transformation of its economic model.

In the 1980s, a series of pioneering products and services were established in Spain, including the 'red jackets' (a service to provide information to tourists in the streets) and the tourist bus, which began to offer a service in the streets of Barcelona in the summer of 1987, enabling visitors to discover new views over the city.

Barcelona was in a state of change. The collective and institutional euphoria generated by the 1986 proclamation of the city as Olympic host had the effect of accelerating the urban transformation that had begun in the early years of the decade, and Barcelona's international profile began to rise.

The opening up of new spaces in the old part of the city and along the sea front significantly changed the image of Barcelona. Its *Modernista* (Art Nouveau) icons began to stand out strongly, and architecture gradually became the most highly valued aspect amongst visitors, more than half of whom still came here for professional reasons. Barcelona Convention Bureau (BCB), established in the early-1980s by the Tourism Board, was responsible for promoting congress activity in the city, attracting events to the Catalan capital. BCB boosted growth significantly in the congress sector by specialising Destination Barcelona in this area of tourism.

03.6 BARCELONA'92

In the early-1990s, an important paradigm shift occurred with regard to the tourism industry: firstly, the sea and sand model underwent endemic crises and a consequent loss of value; and, secondly, the liberalisation of air transport produced the direct result of bringing down the cost of long-distance flights, generating the emergence of new demands and new destinations. In this context of change, urban centres regained their tourist and cultural interest. As a consequence of this and, above all, the celebration of the 1992 Olympics, Barcelona became the protagonist of changes that were absolutely exceptional.

More than 9,000 athletes from 169 countries took part in the 1992 Olympiad; it is estimated that some 4,500 journalists covered the event; the accumulated television audience over the 16 days was 6,000 million spectators (more than 2,000 million viewers watched the opening ceremony on 25 July 1992 alone). The total number of visitors received during these days of the Olympic dream was 1.3 million. The result was instant international admiration for Barcelona. Topping all their expectations, this admiration rewarded the huge effort made by the people, businesses and public authorities in order to ensure the success of the Games. The Barcelona'92

Olympic Organising Committee, set up in 1987 and presided over by the mayor, Pasqual Maragall, played a leading role in this success, but the truth is that without the commitment and enormous institutional, business and civic support, the 1992 Games could never have achieved such success.

The role of the Olympic volunteers was absolutely crucial: more than 35,000 anonymous citizens provided support and organisational services throughout the fortnight of the Olympiad, and around 15,000 also helped to make the Paralympic Games a resounding success. This altruistic, voluntary participation constituted one of the most memorable benefits, one that has become firmly embedded in the city over the years, to the point where we can confidently state that the spirit of the Olympic volunteers embodies a veritable symbiotic link between the Games and the city.

The celebration of the Olympic Games signified the discovery of shared horizons, partly because the people of Barcelona became jointly involved in a single future project. The city changed, and citizens' perceptions of Barcelona seemed to be transformed.

The organisation of the Games marked a key turning-point in the contemporary history of the city, and its immediate legacy generated the most important changes in terms of tourism: the provision of services and resources grew and became exponentially diversified, whilst the city began to project a highly attractive international image and to enjoy a collective mood of great enthusiasm.

In the mid-1990s, Barcelona became immersed in a process of diversifying its business activity and the conversion of the economy to a service-based one, a process that was accelerated in part by the celebration of the 1992 Olympics in the Catalan capital. This situation was accompanied by a rise in the model of urban tourism and cultural consumption, a change in trends from which medium-sized and large European cities greatly benefited. Urban destinations enjoyed a veritable boom, and Barcelona was one of the main beneficiaries of this paradigm shift.

The 1992 Olympics left an exceptional legacy in the city. Facilities and infrastructure alike were transformed, though a controversial hotel plan was the cause of tense relations between public authorities and hoteliers, some of whom expressed misgivings about the arrival of international chains. The Hotel Plan, approved before the 1992 Olympic Games, increased the amount of hotel building land available in Barcelona, with the result that tourist accommodation increased notably, diversifying and becoming internationalised. Trade and catering and leisure and entertainment amenities also expanded, specialised and spread across the city.

The construction of the ring roads and the restoration of the sea front, symbols of the regeneration and opening up of the city, were the most outstanding urban planning projects completed during the period. Improvements to El Prat Airport, the construction of facilities at the Olympic Ring in Montjuïc, the Olympic Village and the Collserola Telecommunications Tower configured new urban geographies. Moreover, the establishment of new cultural facilities, such as the renovated National Art Museum of Catalonia (MNAC), the construction of the Municipal Auditorium, the Botanical Garden, the National Theatre of Catalonia (TNC) and the Barcelona Centre for Contemporary Culture (CCCB), generated significant change in the urban model.

03.7 THE 1993 PLAN

In the first half of the 1990s, most tourists stated that their main reason for visiting Barcelona was to attend trade fairs or for business. Meanwhile, leisure and cultural facilities continued to expand continuously. At this time, the situation in the tourism industry was rather complicated, particularly due to the international economic recession. In fact, tourism facilities and services grew so much that a situation of surplus supply was created. In 1993, for example, Barcelona had 155 hotels, but very low occupancy levels, which the industry attempted to increase by lowering prices. It was decided, however, that the time had come to rethink how infrastructure was used. A strategic change was required to ensure greater profitability.

During the late-1980s, the municipal administration and part of the hotel sector had started a dialogue about the tourism model in Barcelona. In 1993, this dialogue resulted in the drafting of a Strategic Plan, an analytical study and reflection that brought about a veritable transformation in the city's tourism promotion model.

The 1993 Plan comprised of a process of reflection and planning jointly undertaken by the public and private sectors, commissioned by Jordi Clos of Barcelona's Chamber of Commerce and drawn up by Josep Chías. The

goals set were to attract new and different visitor markets and to consolidate its tourism, as well as ensuring the profitability of services and facilities established for the Games. The purpose of the 1993 Plan was to increase tourism revenues generated by the Olympic legacy; this was an operational plan with highly specific objectives, reflecting the commitment and partnership forged between the public authorities and the private sector, an alliance of interests between institutions and businesses.

To achieve the goals set out in the Plan, it was decided to establish a new promotional body made up by representatives from the public and private sectors, an initiative that enjoyed mutual trust and generosity. For its part, the City Council gave up some of its leadership role to tourism companies, which got the chance to take part in the tourism promotion of Barcelona in exchange for part funding. A new model and new rules to play by were introduced in the field of tourism promotion, an area traditionally managed exclusively by the City Council.

The Municipal Tourism Board ceased its activities in 1993 after over a decade dedicated to reviving tourism in Barcelona, and the City Council launched Turisme de Barcelona, which would become a key player in more intense, efficient and professional promotion of Destination Barcelona.

In the mid-1990s, then, the goal was to attract new markets. It was necessary to reinforce marketing actions and campaigns, and to focus on new market segments according to profile, motivation and origin. The strategic reorganisation of 1993 was aimed at reversing the situation and transforming the city of Barcelona into an international destination, with segmented and significantly more supply and demand, a city where tourism should play an ever more important role in economic, social and cultural development.

In order to understand the present tourism model operating in Barcelona, we need to identify some of its more essential bases:

1. Favourable socio-economic situation and environment to position Barcelona's tourism model.
2. Decisive, historic commitment to the professional and events tourism segment.
3. The 1992 Olympics were a global showcase for Barcelona.
4. Strategic reflection and commitment and co-responsibility of public and private sectors.

03.8 THE CREATION OF TURISME DE BARCELONA

Barcelona's tourism model, to a great degree, is the result of the actions undertaken since the early 1990's by Turisme de Barcelona, which was created after the Olympic Games and was the fruit of a process of strategic reflection between public and private sectors. Turisme de Barcelona represents a fundamental inflection point in the history of tourism promotion in the city. It represents the dovetailing of interests between the public and private sectors and it is the most important institutional platform for tourism promotion of Destination Barcelona.



Turisme de Barcelona came into being due to a coalition of efforts and a fusion of talent. It began to function on January 1, 1994, which was the beginning of a new phase, a new model and a new tourism offer from the city.

The creation of Turisme de Barcelona made for a unique and pioneering experience in the context of Catalonia and Spain because at the time no other city on the Iberian Peninsula had a tourism promoter financed and directed by the public and private sectors. The creation of Turisme de Barcelona represented the joining of forces and resources of the public and private sectors in the tourism area, something which implied the centralisation of promotional actions in a single entity and line of work.

Turisme de Barcelona was given the task of promoting tourism for the city, that is, the marketing of this destination to target markets. According to its mission statutes, the essential function of the Consortium consists in "assuring compliance to the maximum degree possible between the goals of promotion and development of tourism and commerce in the city of Barcelona". Therefore, Turisme de Barcelona began working with a very clear objective: the growth of tourism activities in the city. At least three aspects were conducive to the rapid attainment of this goal: first, increased budgets and human resources for the institution, which directly increased the scope of work; second, the organization and adoption of a business-like attitude that gave a new treatment to

the city's tourism products, supply and demand; and finally, the opportunity of having a renewed and larger tourism and service offer.

Ultimately, the implementation of Turisme de Barcelona made more human and economic resources available for city tourism promotion as well as a new business strategy and an advanced marketing concept. Turisme de Barcelona's work is characterised by a double motivation: firstly, to offer a service – the promotion of this destination – and, secondly, to obtain a business-like output from the entity.

03.9 INTERMEDIATION AND SEGMENTATION OF MARKETS

Following the principles of the Plan of 1993, Turisme de Barcelona began to work on segmenting markets, trying to offer different Barcelonas to different visitors. In this way, more was achieved than would have been possible using the classic model of generic and undifferentiated promotion. At the same time, an advanced and specialised strategy was consolidated and based fundamentally on the segmentation of markets.

This is one of the most distinctive traits of the current tourism promotion model of Barcelona, which, together with the public-private relationship, forms the entity's promotional basis.

Turisme de Barcelona has developed a strategy of tourism promotion based on the segmentation of markets. Since its beginnings, it has tried to attract specific profiles of visitors, a fact that guarantees the vitality of the product offering and tourism resources and their constant renovation. The attraction of a heterogeneous public, whether according to the country of origin of the markets or the profile of the visitor, ensures year-round tourism activity and a diversity of services and products.

Turisme de Barcelona does not launch large international advertising campaigns, but rather works directly with prescribers (operators, travel agents and specialised journalists). It emits a reliable message and sells to markets at their origin. In the framework of this strategy, the work with travel wholesalers and with specialised press becomes absolutely essential. With a view toward adapting itself to current trends and to impact consumers in an original and direct way, Turisme de Barcelona also develops some promotional campaigns: ones that seek to persuade potential tourists in an innovative way.

Turisme de Barcelona carries out numerous annual promotional actions that, following the strategy of representation with prescribers and the segmentation of markets, are able to maintain Destination Barcelona's position in the tourism industry. These promotional actions are classified into five different types:

1. Familiarisation trips (fam trips).
2. Participation in workshops and presentations on Barcelona.
3. Organisation of special events and actions.
4. Presence at trade fairs.
5. Commercial visits.

The model of tourism promotion of Destination Barcelona is characterised by a few very particular traits, which are not easy to reproduce, among other reasons because they require certain advantages such as institutional and sector consensus. Consequently, the model of tourism promotion of Barcelona can be defined according to the following aspects:

1. A mixed public-private constitution.
2. The tourism promotion of Barcelona and the marketing of products as goals.
3. The creation and marketing of an original and an existing product.
4. The segmentation of markets and representation via prescribers.

04 The growth of destination Barcelona

04.1 CHARACTERISTICS OF BARCELONA'S TOURISM

Over the course of the past twenty years Barcelona has enjoyed continued growth on both the supply and demand side. The number of visitors has grown since the mid-1990s and so has the supply of services and products. Those who have committed to Barcelona, like local promotion stakeholders, business people in the sector as well as investors and international entrepreneurs, have contributed in a decisive manner to this process of growth.

Tourism in Barcelona is composed of a series of distinctive, original and specific traits that characterise it and give it a unique character. At the same time, it is important to note that tourism in Barcelona has developed following a pattern that is relatively common in other international urban destinations which also tend toward a diversification of markets and regional concentration. In summary, the main traits of tourism in Barcelona are the following:

1. Continued growth of supply and demand over the past twenty years.
2. Multi-motivation: with a diversity of segments, combination of interests and motivations.
3. De-seasonality: distribution of tourism activity throughout the year, without periods of inactivity.
4. Internationalisation: more than three quarters of tourists staying in hotels come from international markets.
5. A cultural offer, as well as local and international commerce, aimed at residents and visitors alike.

Today, Barcelona is a successful tourist city. It enjoys wide recognition, high international rankings and a wide variety of target markets actively look for this product. Barcelona's attractiveness has to do with a multiplicity of elements that make it interesting to an enormous range of segments on the demand side, more than the classic pleasure-seeking or vacationing tourists. Visitors that have a very diverse profile come to Barcelona, differing in their country of origin and motivations. Education, business, health, sport and research are some of the motives that attract visitors to stay in the city. Barcelona as an urban tourist destination owes its success to its capability of combining the potential and strengths of a city with other activities. Urban tourism exploits the city's many activities, the urban poly-culture and the multi-motivation of citizens and visitors.

04.2 BEHAVIOURAL MODEL OF TOURISM IN BARCELONA: ATTRACTION, CONCENTRATION, REDISTRIBUTION

The behavioural model of supply and demand of tourism in Barcelona is characterised by accelerated growth in a very brief space of time. This growth process can be seen in three phases, which occurred in an interconnected way:

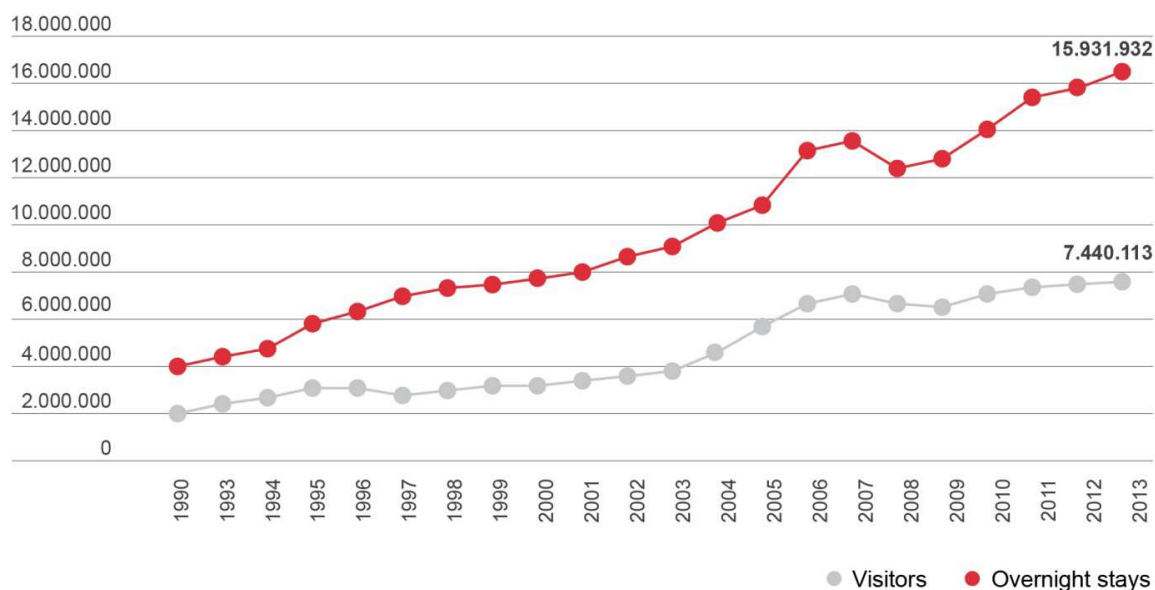
1. Attraction and diversification of markets.
2. Concentration around icons.
3. Territorial redistribution.

The first phase, of attraction and diversification, developed during the 1990s when the arrival of tourists as well as the supply of resources and services began to grow. Barcelona highly attractive and captures significant flows of tourists. Consequently, the city of Barcelona has been converted into a market of diverse segments, a destination that reaches very heterogeneous profiles of tourists, whether by geographic origin or reason for travelling. The second phase, of concentration, occurred as a result of dynamics that produced distinct points of interest within Barcelona, creating a focus where tourism concentrated in a prioritised way. The third phase appeared as a consequence of efforts to distribute tourism over the whole of the city, which is an attempt to broaden the range of attractions, services and access to spaces with less tourist density. Furthermore, this has happened in a short space of time in a dense and limited geographic space.

04.3 GROWTH OF SUPPLY AND DEMAND

The trend lines show increases in tourists and hotel reservations in Barcelona rising in a constant and exponential way since 1990 when there were 2 million tourists staying in hotels in the city for a total of 4 million overnight stays. In 2013, there were 7.5 million tourists staying in hotels in the city for an average stay of over two nights, resulting in a total of more than 16 million overnight stays annually. The following graph shows the growth trend of tourists and overnight stays in Barcelona's hotels.

Visitors and overnight stays at hotels



Source: Barcelona Hotel Association and Turisme de Barcelona.

It should be remembered that the information gathered on tourists and overnight stays in Destination Barcelona has traditionally reflected activity recorded at hotels and it has not included other tourist accommodation. In this sense, these snapshots of tourism activity in Barcelona, in terms of supply and demand, have been incomplete and not representative for years.

Barcelona occupies fourth place in number of overnight stays by international tourists in the ranking of European cities, behind leading destinations like London, Paris and Rome.

Ranking of the leading European tourist cities

International tourists	2005	2013	Variation 2013/2005
1. London	13.820.000	16.030.000	15.99%
2. Paris	9.013.611	9.109.078	1.06%
3. Rome	4.098.391	6.162.990	50.38%
4. Barcelona	3.913.766	6.054.388	54.69%
5. Vienna	3.222.041	4.848.179	50.47%

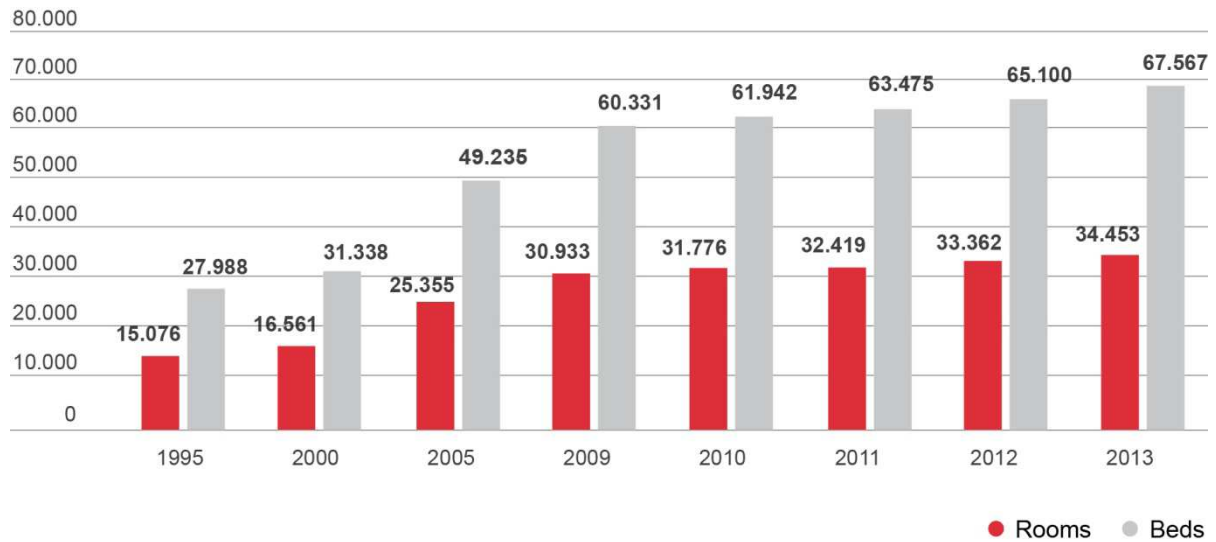
Source: Turisme de Barcelona.

The growth in hotel numbers has experienced various stages or cycles since 1990 when the Hotel Plan and private initiative resulted in a considerable increase in hotel business (between 1989 and 1993, there was an increase of 10%, which works out at 1,200 new rooms each year). After the Olympic Games and until the end of the 1990s there was a containment of growth in the hotel sector (annual growth was 1.7% or 250 new rooms each

year). At the start of the new decade, and as a result of the Universal Forum of Cultures in 2004, there was a very notable growth in the hotel industry and especially in the Besòs and new Diagonal areas (in fact, between 1999 and 2004, 1,400 more visitors could be accommodated). Since then the number of hotels and beds has continued to grow even though since 2009 growth rates are clearly more moderate.

After a stage of accelerated growth in hotel supply, there is currently a sustained growth. In a holistic and historical overview, the growth trend over the past twenty years in hotel supply can be clearly observed: in 1990 Barcelona had 10,000 rooms and places for 18,000 hotel guests, while in 2013 there were more than 34,000 rooms and places for more than 67,000 guests in more than 365 hotels.

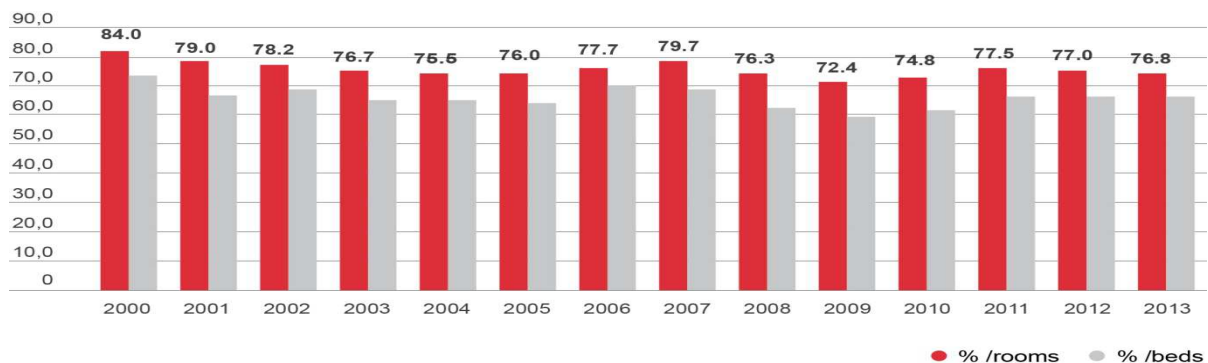
Number of hotel rooms and beds, 1995-2013



Source: Barcelona Hotel Association and Turisme de Barcelona.

It should be noted that the average occupancy rate at hotels in the city has remained above 60% since 2000, having surpassed 80% in 2000 and 2007. Undeniably, this data proves the good health of the city's hotel sector.

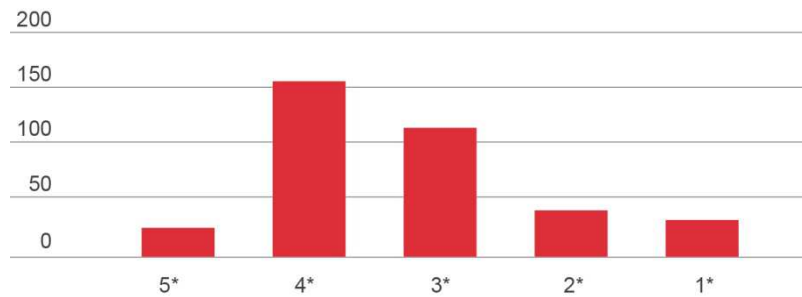
Hotel occupation rates for rooms and beds, 2000-2013



Source: Barcelona Hotel Association and Turisme de Barcelona.

There are a wide variety of types and categories of hotels though it should be noted that the supply of high-end hotels is very prominent and clearly superior to the rest, with a predominance of 3, 4, and 5-star hotels. Regarding the supply of hotels, it is worth noting that there is a notable presence of international brands and chains that coexist with locally-owned hotels. The offer is varied and diverse: in Barcelona we find luxurious, modern, boutique, classical and traditional hotels.

Hotel accommodation by category, 2013

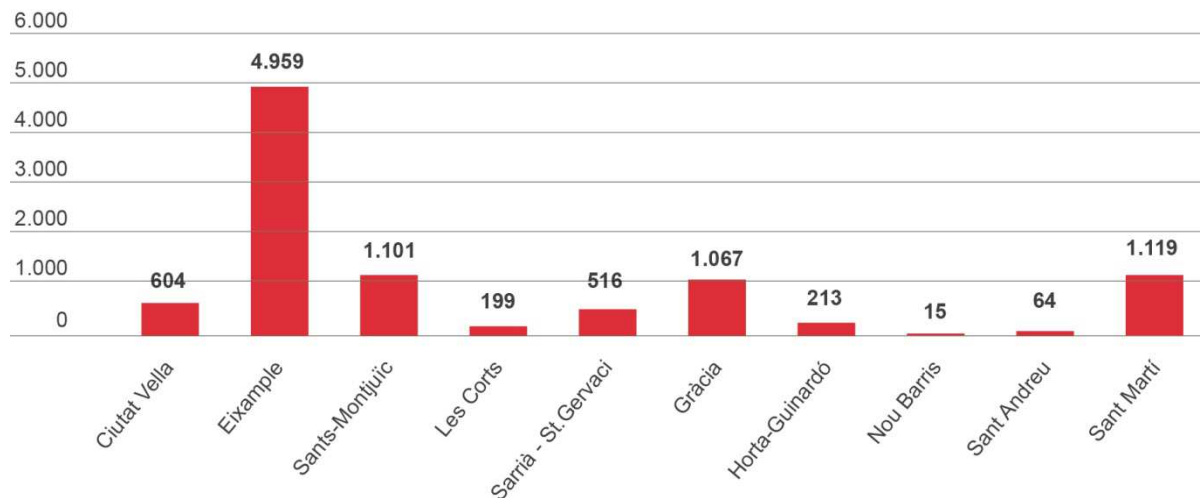


Source: Barcelona Hotel Association and Turisme de Barcelona.

The offer of tourist accommodation is very varied: even if there is a dominant hotel typology, it is also true that Barcelona has a very diverse range of accommodation, such as boarding houses, hostels, and tourist apartments.

Tourist apartments are a type of accommodation that has grown in recent years. Currently, the supply is nearly 10,000, coinciding with the same dynamics seen in the hotel industry, with the Eixample, Ciutat Vella and Sant Martí districts where the majority of this type of accommodation is found.

Licensed tourist housing, 2013



Source: Barcelona City Council.

Currently, Destination Barcelona receives a very high number of day trippers. In 2009 it is estimated that Barcelona received 24.5 million visitors annually: a total of 12 million tourists stayed the night in the city (practically half of them stayed in hotels while the rest stayed in different tourist accommodation and in the apartments of friends or family members). On the other hand, in 2009 Barcelona received 12.5 million visitors that did not stay the night in the city but rather visited for different motives: specifically, 6.5 million Catalans who live outside the metropolitan region come to Barcelona for work, business, tourism or administrative reasons. In this way, 6 million visitors come to Barcelona annually but do not stay the night. In 2012 it is estimated that the increase in the number of visitors was greater than 27 million annually.

Visitors to Barcelona (temporary citizens) 24,5 million	Visitors staying overnight in the Municipality of Barcelona 12 million	In hotels	54%
		Other accommodation	46%
		Pension	6%
		Tourist accommodation, apartments, rental house/apartment	8%
		With family/friends	21%
		Hostels, residences and others	11%
	Visitors that do not stay overnight in the Municipality of Barcelona 12,5 million	Catalans that visit BCN during the day but live outside BCN Metropolitan Region	52%
		Non-Catalans that visit BCN during the day	48%

The city's retail and commerce, which is directed at residents and visitors alike, is widespread, diverse and varied. In 2012 Barcelona had 35,000 shops distributed across 23 outdoor commercial centres, which offer a combination of walking, leisure and shopping. Barcelona has the longest commercial thoroughfare in Europe, a continuum of 5 kilometres of shops. In Barcelona there is a wide range of articles, local brands and shops and international firms that are distributed throughout its districts: from local shops that offer local and native products to shops or shopping centres that offer their clients exclusive or global products. Passeig de Gràcia and Rambla Catalunya are emblematic spaces in Barcelona's shopping offer, while neighbourhood shopping boulevards offer consumers tradition, proximity and internationalisation. Some of Barcelona's markets have also become spaces of tourist interest, especially those like the Boqueria Market, which is located in the central part of the city.

The supply of tourist and shopping services has increased very significantly over the years, adapting to the preferences of the local and global consumer. Regarding growth in tourism supply and demand, it can be said that Barcelona is characterised by the following traits:

1. Accelerated and dual growth of supply and demand.
2. Diversification of tourist accommodation types.
3. Internationalisation of the offer.

04.4 DIVERSIFICATION OF MARKETS: MULTI-MOTIVATION AND DE-SEASONALISATION

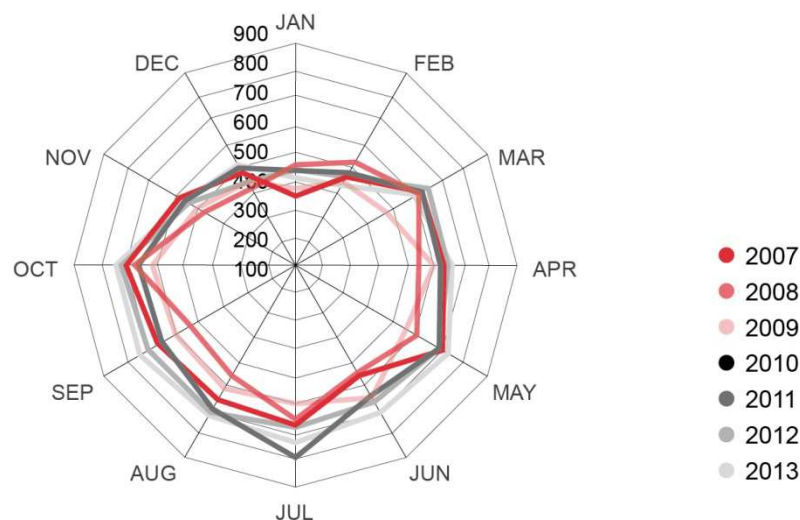
The diversification of markets is one of the most prominent traits of Barcelona's tourism. It is a destination which is characterised for attracting very diverse visitor segments as regards country of origin as well as their reason for travelling. Currently, there is an infinite diversity of specific targets that visit Barcelona, that are spread over the year and are distributed across the entire city. The most prominent markets according to typology are the following: cultural tourism, professional tourism, medical tourism, incentive tourism, educational tourism, LGBT tourism, sport tourism, business tourism, luxury tourism, gastronomy tourism, cruise ship tourism, etc.

The direct spend generated by tourists in Barcelona was more than 9,100 million Euros in 2012, a figure that amounts to a total of 25 million Euros daily. These magnitudes represent a daily spend of 654 Euros per tourist, a figure which has increased by 20% with respect to 2009. It should be kept in mind that the total spend per professional tourist is greater: 732 Euros per day on average (an amount which has increased by 27% between 2009 to 2012).

Visitors' average stays tend to increase year after year in the same way, and the number of repeat tourists also grows: the number of tourists who return to Barcelona is always on the rise. For all of these reasons, tourist activity in Barcelona is relatively multi-seasonal and spread over the entire year. In fact, in 2013 the increase in the number of tourists was accompanied by an increase in the length of stay.

For a number of years now the behaviour of tourism demand in Barcelona has been spread out over the year even if during the summer months tourist activity grows by a significant amount. This behaviour of the generally de-seasonalised demand can be explained in part by the diversity of motivations and origins of the tourists who visit Barcelona for cultural, pleasure, business, professional, medical and educational reasons, among many others. Barcelona is a lively and dynamic city that offers a wide quantity and variety of tourist and para-tourist activities throughout the year. It is a rich and diverse supply that residents also get permanent and even preferential use of.

Seasonality of tourists (in thousands)



Source: Turisme de Barcelona.

The number of repeat tourists is certainly very high: close to 50% of the tourists who stay in the city's hotels have been to Barcelona before. This fact shows the interest that Destination Barcelona generates and the diversity of attractions that motivate tourists to visit and, at the same time, it shows the interest that new tourists have.

Repeat rate (%)

	1990	2000	2010	2012	2013
1st visit	20.9	42.2	43.3	53.7	52.7
2nd visit	9.9	13.4	23.5	14.8	13.7
3rd visit or more	69.2	44.4	29.9	25.7	28.3
Don't know/No answer	–	–	3.3	5.8	5.3
Total	100.0	100.0	100.0	100.0	100.0

Source: Turisme de Barcelona.

Regarding the average stay of tourists at Barcelona's hotels, it is currently 2.18 nights, which has increased since 2005.

Average stays at hotels

	1990	2000	2010	2012	2013
Nights	2.19	2.48	2.1	2.14	2.18

Source : Turisme de Barcelona.

It can be shown that Barcelona's tourist demand is comprised of very diverse geographic and motivational markets, a fact that contributes to the distribution of tourist activity over the course of the year and to the vibrancy of a sector that must constantly adapt and reinvent itself in order to satisfy visitors.

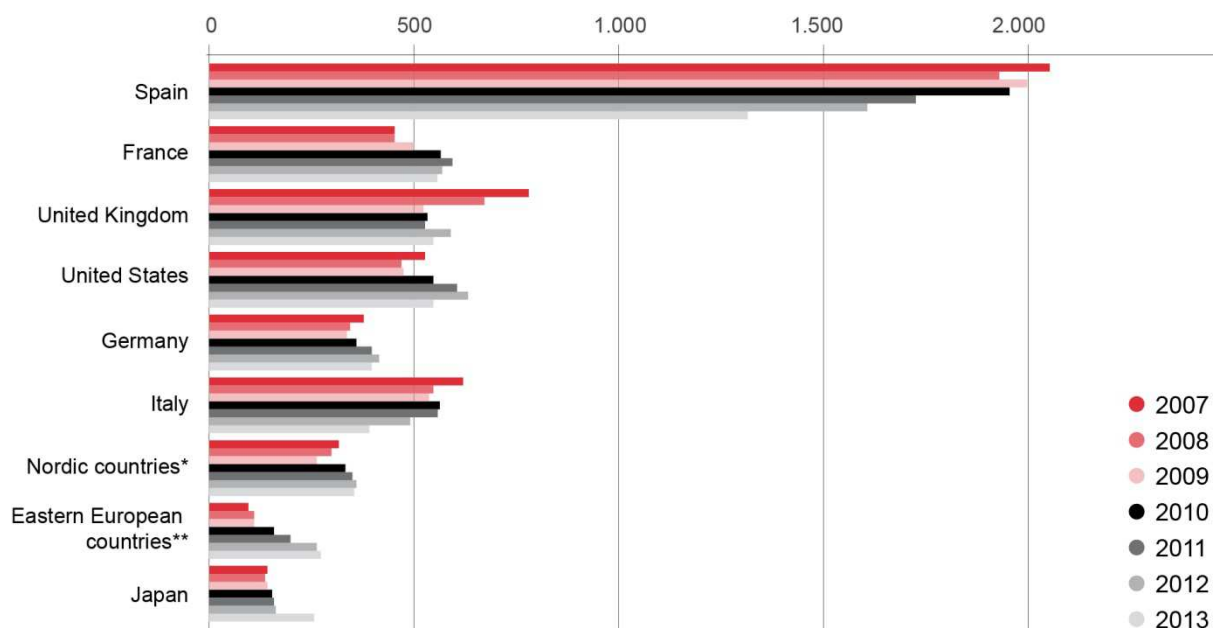
1. Diversity of geographic origins with a predominance of international tourism.
2. Multi-motivation in terms of demand: diversity of segments, combination of interests and motivations.
3. Distribution of tourist activity over the course of the year.
4. High percentage of repeat visitors.

Regarding the nationality of tourism, it should be noted that over 75% of tourists who visit Barcelona come from beyond Spain's borders. Without a doubt, this proportion shows the excellent positioning and interest that Destination Barcelona generates throughout Europe and beyond. The importance of tourists from BRIC countries should also be kept in mind since these growing and expanding countries account for a greater number of tourists with each passing year (in Barcelona, there has been an important growth in Russian and Chinese markets).

The fact that 75% of tourists who visit Barcelona are not Spanish and that this number is growing means there has been a proportional decrease in national tourism, which has strengthened tourist activity in the context of the economic recession.

Following the general trend, tourists staying in accommodation also shows similar trends, since more than three fourths of these visitors come from international markets. In addition, it should be noted that the trend is towards an increase in international tourism to the detriment of the national market.

Tourists at hotels, by nationality (in thousands)



* Sweden, Norway, Denmark, Finland / ** Russia, Poland, Czech Republic.

Source: *Barcelona Hotel Association and Turisme de Barcelona*.

It is particularly interesting to look at types of demand because a more qualitative study of visitor profiles allows us to identify the wide diversity of markets. Regarding reasons for travelling, tourists visiting Barcelona can be defined by their multi-motivation, which indicated a combination of various attractions and reasons for visiting Barcelona. In 2013, 50.6% of tourists stated that their reason for travelling to Barcelona was for holidays; on the

other hand, 30.8% of tourists said that their main motivation for coming to Barcelona was for business, and 10.1% came for trade fairs and congresses; without a doubt, professional motives continue to be especially important within the framework of Barcelona's tourism. Finally, 8.5% of tourists arriving in Barcelona stated that their main reason for visiting the city was personal. Taken together, the profile of tourists visiting Barcelona is clearly multi-motivational, which is a characteristic of 21st century urban tourism.

Visitors at hotels according to reason for travelling (%)

	1990	2000	2010	2012	2013
Holidays	22.7	42.2	43.3	53.7	52.7
Professional	9.9	13.4	23.5	14.8	13.7
Personal and others	69.2	44.4	29.9	25.7	28.3
Total	100.0	100.0	100.0	100.0	100.0

Source: *Turisme de Barcelona*

04.5 SPECIALISATION IN PROFESSIONAL TOURISM

Barcelona has a long tradition of promoting professional tourism, a market segment which brings added value. Barcelona's competitiveness in the professional sector is more internationally consolidated and recognised since various official rankings have highlighted their importance in recent years. In 2013, the International Congress and Convention Association (ICCA) ranked Barcelona as the fifth city worldwide in number of international congresses hosted. In fact, over the past 10 years, Barcelona has always been in the top 4 of the ICCA ranking.

ICCA ranking

2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
2	1	3	4	5	8	2	2	3	5	4

Source: *Turisme de Barcelona*

Currently, Barcelona has a very extensive infrastructure for hosting events, meetings and congresses. In 2000, for example, Barcelona International Convention Centre was considered the largest facility in southern Europe. In recent decades, the development of large meeting rooms and the leadership of the Palau de Congressos has contributed to growth in congress activity, while positive synergies (such as the creation of a new image for the city) have boosted growth in the trade fairs, congresses and meetings segments in the city. The role played by Barcelona Convention Bureau, foremost in the strategic positioning of Barcelona in this market, should not be forgotten.

In 2013, 2,039 professional meetings were held in Barcelona, bringing together nearly 600,000 delegates, the vast majority of whom are international delegates. The figures for events and delegates have grown quite considerably with the passage of time: in 1990, for example, 373 meetings were held, attracting a little fewer than 100,000 delegates. The various halls at Fira's Montjuïc base were visited by more than a million people in 2013.

Professional tourism or MICE (Meetings, Incentives, Conventions and Exhibitions) brings important benefits for destinations since it is a market segment with added value. In general, this visitor profile combines professional activities with other cultural, commercial, gastronomic and pleasure interests and it generally has higher daily spending budgets than conventional tourists. In Barcelona it is estimated that the professional tourist segment has an economic impact of 1,435 million Euros annually. Professional tourism is a market segment that takes place at various times of the year, especially during the autumn and spring months, which contributes to the de-seasonality of tourist activity.

Barcelona has been able to attract large events to the city which have shown their loyalty over the course of time, for example, the Mobile World Congress (GSM), with more than 80,000 participants. Barcelona has specialised in

hosting congresses in the medical field, with the maximum exponent of this branch being the International Congress of Cardiology, which brings in more than 30,000 delegates. The Global Meetings and Events Expo (EIBTM) is also held in Barcelona with an attendance of more than 15,000 delegates.

The professional tourism market is clearly consolidated in Destination Barcelona and it is characterised by internationalisation and diversity:

1. Consolidation and growth of the professional segment.
2. Internationalisation of the origin of events and delegates.
3. Attraction of large international events.

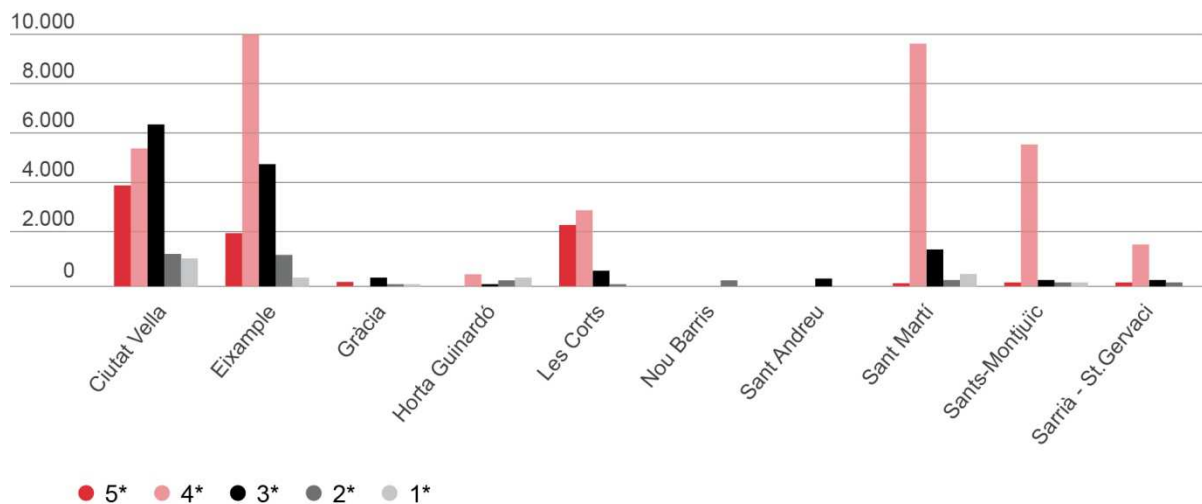
04.6 GEOGRAPHICAL CONCENTRATION OF TOURISM ACTIVITY

Urban tourists tend to concentrate in certain areas of a destination, places that become identified and representative and essential. All tourists want to see and experience the most emblematic and must-see spaces, those symbolic references that confer a special and unique experience. The outgoing forms of the urban tourist can be explained, in part, by the uniqueness of the City Break travel model, which consists of relatively short stays in medium to large regions that have a wide range of resources and products but also very well defined icons that represent the whole of the destination.

It is undeniable that there is an important regional concentration of tourism supply and demand in Barcelona, especially in certain parts of Ciutat Vella, the areas surrounding the Sagrada Família and Park Güell, which are the most prominent icons of a destination. Barcelona, because of its territorial and socio-demographic characteristics, is a dense, compact city and with high rates of occupancy. In fact, Barcelona is one of the tourist destinations with the highest population densities compared to other direct competitors.

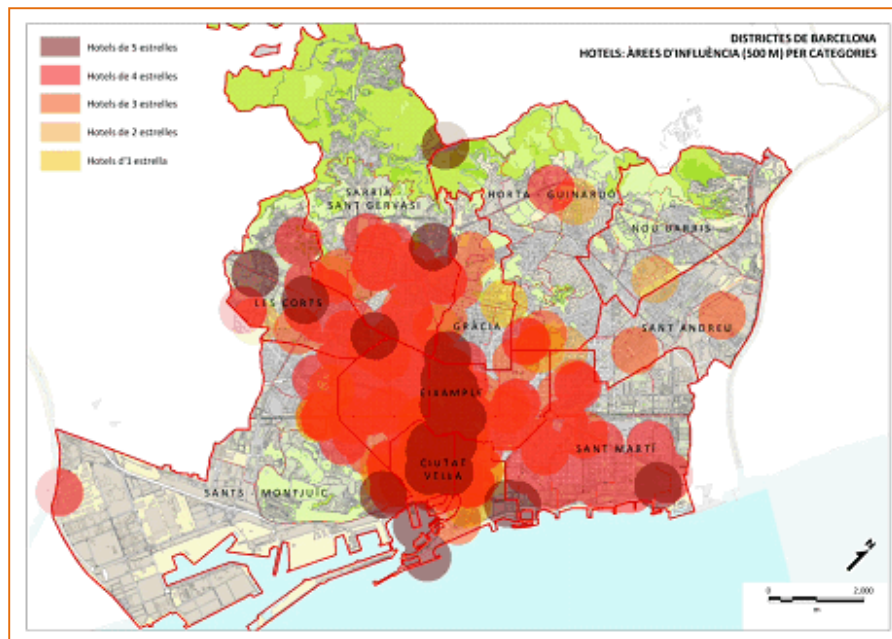
Regarding the location of accommodation, the contrast is evident if its distribution is analysed by districts: while Ciutat Vella, Eixample and Sant Martí have the largest quantity of hotels, districts such as Nou Barris and Sant Andreu practically have none, making them virtual tourist deserts.

Hotel beds by district and category, 2013



Source: Barcelona Hotel Association and Turisme de Barcelona.

The spatial concentration of hotel establishments reflected in the following image shows the existence of areas or points with an excess of tourist pressure:



A similar situation occurs in the case of tourist apartments, the large majority of which are concentrated in the old part of the city and in the Eixample area.

The centrality of the Old Town, both historically and geographically, makes this part of the city a focal point of the destination. In fact, Ciutat Vella has become a destination within Destination Barcelona since it acts as an undeniable tourist centre of the city. It must be kept in mind that Ciutat Vella accounts for a very large proportion of Barcelona's resident population, in addition to the fact that it is very heterogeneous (nearly 40% of the registered population of Ciutat Vella is not from Spain). The historical part of the city does not just have a high density of residents, but it is also characterised by having a particular urban makeup, with narrow streets, old buildings and a medieval layout. Ciutat Vella has physical properties that are clearly of interest to tourists, a sum of symbolic values that make it special in the eyes of visitors. Regarding cultural and leisure sites distributed throughout the city, a very important part of these are to be found in Ciutat Vella. According to a ranking of places in Barcelona, Ciutat Vella has some of the most-visited places by tourists, such as the Aquarium, the Picasso Museum or the Zoo. In addition to the density of visitors, residents and individuals who go there for work or to study or just pass through the district each day, we should include passengers that embark or disembark from cruise ships at the Port and for whom the lower part of Ciutat Vella is their first and, on occasions, their only contact or area of consumption in the city.

It is estimated that nearly 80 million people use La Rambla every year, the vast majority of whom are foreigners. The intensive use of this public space, so characteristic of the lives of the people of Barcelona, requires new measures of management and regulation of supply and demand. Ciutat Vella is a district that lives principally from the retail and service sectors. Hospitality and restaurants occupy nearly 30% of the productive space of the district. Ciutat Vella is the second most popular district in terms of hospitality and restaurants in the city (more than a fifth of its surface area is assigned to these activities), and it is equally important to note that, in spite of conserving a unique neighbourhood shopping experience, it is leaning towards tourism specialisation in the retail sector, which could take away quality of life for residents. The markets of the district have been converted into important tourist attractions: Santa Caterina market receives over 2.4 million visitors annually and Barceloneta market receives around 1.2 million. On the other hand, in recent years, the streets of the Gòtic and Raval neighbourhoods have seen the opening of new innovative and creative shops that enhance commercial originality and, at the same time, transmit a modern, innovative and avant-garde design. Ciutat Vella is home to a large quantity of public administration buildings as well as banks and buildings dedicated exclusively to the commercial

sector. Ciutat Vella has more than 30% of its surface area assigned to Barcelona's cultural activity, a fact which has generated dynamism and added cultural value to the district.

Destination Barcelona is characterised by a prominent territorial concentration of tourism activity, which is synthesised in the following items:

1. Territorial concentration of supply and demand at different points of the city, especially in the old part (Ciutat Vella district).
2. Existence of important territorial contrasts and imbalances over the whole of the city.

04.7 INTERNATIONAL POSITIONING

Barcelona is considered a dynamic, entrepreneurial, innovative city that offers different aspects that make it attractive for living, working, visiting and investing in. To begin with, its strategic location makes it a gateway and crossroads for international relations and connections, which clearly favours its strategic importance. Barcelona has excellent transportation infrastructure and new projects related to mobility that can be beneficial given the possibilities of international, European and peninsular connections.

The Catalan capital and its metropolitan area have a population of nearly 5 million people; it is part of a mega-region of 25 million inhabitants. Catalonia, for example, has nearly 7,000 businesses that work in activities related to innovation, the majority of which are located in Barcelona and its metropolitan area. Barcelona is ranked as the sixth top European city for doing business in and Catalonia attracts approximately 36% of all foreign investments in Spain. Certainly, the city of Barcelona is at the head of many international rankings, especially regarding quality of urban life, attraction of foreign capital and entrepreneurial spirit, among others.

Barcelona's international prestige is widely recognised as seen in international studies and comparisons. In 2010, for example, the Financial Times Group's *fDi magazine* positioned Barcelona 5th best European city in its *European City of the Future* ranking. In 2009, Forbes published a ranking of the world's happiest cities, placing Barcelona in third place worldwide. In 2008, E&Y's *BaroMed Attractiveness Survey*, placed Barcelona as the top capital in the Mediterranean. In the ranking of city brands created by *The City Brand Barometer 2007*, Barcelona was the third best city in terms of brand strength while Paris and London tied for first place.

Barcelona has a highly diversified economic structure, which differentiates it from other large cities that rely on just one or two economic sectors or subsectors. Its industrial basis, which is above average compared to other European metropolitan areas, has maintained its competitiveness, specialising production and managing its exports; examples include the automotive, consumer electronics, pharmaceutical and the agro-foodstuffs sectors. However, the 21st century's growth model is based increasingly on services in which new projects are knowledge-intensive and are carried out by highly skilled workers. In this sense, the city of Barcelona is in a process of controlled transition to a knowledge economy; advanced activities such as business services, cultural industries, media production, information and communication technology, biotechnology, the sustainable mobility industry and aeronautics are clearly rising in Barcelona. At the same time, the city's traditional economic activities, such as retail, restaurants, food, medical services, design, advertising and logistical services, among others, continue to play a very important role in Barcelona's economy, which is committed to innovation while maintaining tradition.

Barcelona has positioned itself as one of the most internationally valued urban tourism destinations, which is in favour because of its climatic, geographical and socio-economic conditions. Barcelona is a competitive tourist city, and it is often compared to long-established tourist destinations such as Paris, Rome, Madrid and London, all of which are state capitals. In fact, Barcelona has been one of Europe's fastest growing cities in terms of tourism in relative terms. Unquestionably, the City Breaks trend has favoured Barcelona's position, and one could consider that the Catalan capital has become an international leader in urban tourism. In a ranking of the main tourist destinations in Europe, *European City Tourist Destinations* places Barcelona as the sixth top European destination in 2012. This same report ranks Barcelona in fourth place in terms of attracting international tourism behind big cities like London, Paris and Rome.

The international positioning of the city of Barcelona and the causes and effects of its consolidated tourism is defined by the following traits:

1. Constant opening of new and different international markets.
2. Strong positioning in international rankings.

04.8 TRANSPORT INFRASTRUCTURE

Barcelona Airport is the best in Europe, according to the International Airports Council. The opening of the new T1 terminal in June 2009 and a clear commitment to opening new intercontinental routes has consolidated Barcelona's position as a hub in southern Europe, with an immediate potential capacity for 55 million passengers annually and potentially up to 70 million with the future satellite terminal. Just 12 km from the city centre and 3 km from the port, this cutting edge infrastructure is key to the city's economic strategy. Currently, El Prat Airport handles an annual volume of over 35 million users.

Passengers at Barcelona Airport

	1990	2000	2010	2012	2013
Spain*	5.506.309	6.281.897	8.562.700	8.902.752	7.981.430
International	3.544.071	9.524.425	17.574.674	23.678.946	25.030.286
BCN-MAD Regular fliers	n.d.	4.003.218	3.072.162	2.562.805	2.199.019
Total	9.050.380	19.809.540	29.209.536	35.144.503	32.210.735

*Rest of Spain excluding BCN-MAD regular fliers . *Source: AENA and Turisme de Barcelona.*

The Port of Barcelona is a natural gateway for goods from Asia. It is the top port in the Mediterranean and 9th in Europe in terms of container traffic. The Port handles more than 50 million tons a year, which shows the export capacity of the region. Currently, the Port is the leading cruise ship port in Europe and the Mediterranean and fourth in the world behind three ports located in the state of Florida in the United States. In 2013, 835 cruise ships came through the Port of Barcelona with nearly 2.6 million cruise passengers. Importantly, more than half of the cruise passengers that pass through the port of Barcelona use the city as a starting and ending point of a circuit, which makes the economic impact of this market segment far more important for Destination Barcelona since, in many cases, the passengers that start and end their trip in Barcelona stay a night at a hotel.

The quality of transport infrastructure ensures that tourists' access to Barcelona is secure, diverse and growing:

1. Consolidation of air transport as the principal means by which tourists arrive in Barcelona.
2. Strong positioning of the Port of Barcelona as an arrival and departure point for cruise ships.
3. Consolidation of El Prat Airport as a strategic hub for the Mediterranean and internationally.

04.9 CULTURAL ATTRACTIONS AND RESOURCES

Barcelona has a rich legacy of heritage seen across the entire city: the legacy of a Roman and medieval past, of industrial and commercial vitality, and showpieces of unique artistic and architectural styles. Barcelona boasts an accumulated cultural heritage which shows a vibrant past stretching back into history. Barcelona has nine buildings declared World Heritage sites by UNESCO: La Pedrera, Park Güell, Palau Güell, the Art Nouveau Sant Pau site, the Palau de la Música Catalana, the Sagrada Família, Casa Batlló, Casa Vicens and the Crypt at Colònia Güell. Taken together, they form a unique collection of *Modernista* architecture, which is precisely one of Barcelona's most distinguished cultural treasures. The city's architectural offer is the best rated aspect by tourists visiting Barcelona, with an average score higher than 9 out of 10. The cultural offer, in the broadest sense, is the second most highly rated item by tourists.

The city's urban heritage is distributed throughout the entire city, blending naturally with new and original creations and cutting edge urban design. This mixture of elements is considered one of the great attractions of Barcelona, creating an urban map full of stylistic contrasts, where the old and the new are integrated spontaneously. For example, the Agbar Tower and the Museum of Design in Barcelona, located at Glòries are indisputable examples of new architecture and design in Barcelona, acting as icons and inextricable elements of the new urban landscape and skyline.

While new architectural references are erected, the classics do not lose their lustre: year after year, Sagrada Família is the most visited site in Barcelona (in 2013 it received over 3 million visitors, reaching a record figure). Next, the Aquarium and the Museum of Barcelona Football Club, with 1.7 and 1.5 million visitors respectively, are sites that attract the majority of sightseers. We must not forget that cultural sites such as the Picasso Museum and La Pedrera are also listed as some of the most visited sites by tourists, contributing to Barcelona's international projection and its cultural prestige.

Visitors to sights

Top 10	2012	2013
1. Church of La Sagrada Família	3.233.526	3.176.970
2. Barcelona Aquarium	1.647.163	1.718.380
3. FC Barcelona Museum	1.540.648	1.506.022
4. Poble Espanyol of Barcelona	1.223.875	1.258.645
5. Montjuïc Castle	1.159.042	1.072.000
6. Barcelona Zoo	1.080.187	1.070.104
7. La Pedrera	861.583	944.509
8. CosmoCaixa Barcelona	788.176	716.877
9. CaixaForum Barcelona	971.101	686.151
Total	13.454.170	13.064.884

Barcelona has a very powerful cultural offer; it is diverse, constant and undoubtedly an international benchmark. Throughout the year there are all kinds of leisure and cultural activities aimed at very different local and foreign audiences. Concerts and music festivals with an international impact (such as Sonar and Primavera Sound), sporting events (from Barça soccer games to World Aquatics Championships or Formula 1 racing at Montmeló), as well as various exhibitions and theatrical performances, which together mean a wide range of permanent and exciting cultural events throughout the year. It is not just chance that Barcelona is known for being a creative and highly innovative and lively place, which undoubtedly makes it attract for visitors.

The creation of thematic events around a figure or concept has often determined the geography and calendar of Barcelona's tourism. Themed years, such as the Gaudí Year in 2002, and the Universal Forum of Cultures in 2004, has generated significant tourist flows and positioned the city's brand image.

The urban environment of Barcelona is one of the city's main resources and tourist attractions. Barcelona's lifestyle, part of a Mediterranean culture, is characterized by a generally popular and active character that gives great importance to everything that occurs in public spaces. Lifestyles linked to the Mediterranean tradition, blended with entrepreneurship and cosmopolitan values are the main values of Destination Barcelona and tourists see them as differentiating the city. Tourists are major consumers of public spaces, in part because strolling is a preferred tourist activity and in many cases the main activity. It is no wonder then that entertainment and the city's lifestyle form a major tourist attraction that Destination Barcelona has maintained throughout history.

Attractive resources also include natural elements that integrate and set the city apart, such as the sea and beaches, and the mountains of Montjuïc and Collserola. Taken together, Barcelona's beaches measure over 4.5 kilometres; they have good services and accessibility, and the public use them. Collserola nature park, north of the city, and Mount Montjuïc, in the southwest, offer different types of leisure entertainment and foster contact with nature. They also give the city a mountainous and Mediterranean backdrop. Barcelona has seventy parks and gardens of different types (historical, thematic, forests and urban gardens) spread over the city. Greenways connect the various natural areas in the city.

The climate of the city, which averages between 15°C and 20°C year-round, attracts many tourists and visitors, but the truth is that without the city's collection of heritage and culture, Destination Barcelona would never have achieved the international recognition it currently enjoys.

Barcelona's attractions and cultural resources have helped associate the city's international positioning and brand image with cultural values:

1. Tourism values culture.
2. 9 World Heritage sites.
3. Increase in the number of annual visitors to the city's cultural sites.

05 **Tourism and city**

05.1 TURISME AND THE CITY: PROCESS OF REFLECTION

Since the mid-nineties, growth in tourism supply and demand has generated significant economic and cultural benefits that have affected Barcelona's citizens, institutions and economic sectors directly and indirectly. At the same time, tourism also creates repercussions and major needs, especially as regards social, industrial, institutional and territorial issues. In a sense then, tourism becomes an ambivalent and dual reality, a reality that, as it consolidates and intensifies, also requires changes and reviews.



Evidence of some friction and citizen disagreement with respect to tourism, together with the need to increase its positive impact, motivated the municipality to initiate a process of review and reconsideration of Barcelona's tourism model. The City Council proposed developing a strategic plan. Turisme de Barcelona, after 15 years of working to promote the destination, joined the initiative. The council's strategic framework and roadmap established a series of objectives related to tourism as part of its 2008-2011 program; specifically, in action point 3.8, it proposes "promoting a tourism model that promotes a balance between residents and tourists, preserving the identity values of the city," which is why stakeholders agreed on the need for a strategic plan and the capability to plan for receiving tourists and ensuring the quality and sustainability of this business sector.

The Strategic Plan for Tourism of the City of Barcelona started in 2008, some time before the arrival of the international economic and financial recession. The Strategic Plan, therefore, is an initiative to protect tourism and especially the city that gives life to the product.

The Strategic Plan is an unprecedented process of reflection on tourism and the city, based on a dual objective:

1. Promote improvements to tourist activity in the city.
2. Improve the match between tourism and the city.

Additionally, the Strategic Plan proposes a series of secondary goals or purposes:

1. Determine the impacts tourism generates in the city, taking into account its different qualitative as well as quantitative variables.
2. Reflect on Barcelona's tourism model.
3. Adapt Barcelona's tourist development to a framework of sustainable growth.
4. Involve citizens in the city's tourism project in a positive way.

The Strategic Plan for Tourism of the City of Barcelona was implemented in 2008 - 2010 and made provisions for the strategic horizon up to 2015. The plan was commissioned by Enric Truñó, former councillor for tourism at the City Council and founding member of Turisme de Barcelona. In terms of methodology, the Plan encourages the dynamics of action-reflection between a large number of representatives including institutions, citizens, culture, politicians, the private sector, media and universities, which ensures a deep, diverse and contrasting debate. It is,

therefore, a plan that encourages an open, transparent, public and institutional debate on Barcelona's tourism model.

The Strategic Plan proposes a new perspective regarding the integration of tourism in the city; it assumes a new narrative for tourism, which should not be seen as a single economic sector outside the pace and needs of the city, but a naturally integrated business operation. The concept of city and destination must not contradict or overlap, but complement. The process of the Strategic Plan allows for the construction of a new approach in relation to tourism, while the foundations are laid for a new tourism policy.

In the framework of the first work phase of the Plan, the analysis phase, significant effort went into mapping out the reality of tourism in Destination Barcelona with a rigorous and holistic approach, which is achieved, essentially through two channels: data generation and knowledge and acquisition of opinion. Several studies and reports were carried out that helped to understand the reality of tourism in Barcelona (its economic impact, quantification of visitors, the presence of brand Barcelona in social networks, etc.). At the same time, debates on the different aspects of Barcelona's tourism model were encouraged in different environments and working groups. For example, 11 working commissions were formed to discuss various specific aspects of the city and tourism (Commission of Tourist Areas and Icons, Barcelona Districts Commission, Commission of the Metropolitan Area; Commission Barcelona, Capital of Catalonia; Commission Ciutat Vella, Accommodation Commission, Commerce Commission, Restaurant Commission, Mediation Commission, Commission on Tourism and Culture, Business and Tourism Committee). Many different stakeholders from the public and private sector, civil society and institutions in Barcelona participated in the commissions, discussing, analysing and proposing actions to improve the integration of tourism in the city. Together, a complete picture of the situation of tourism in Barcelona was built up, while identifying challenges and needs.

In a ceremony at Barcelona's Saló de Cent (City Council's Ceremonial Hall), the Strategic Diagnosis of tourism in Barcelona was presented before a diverse audience represented by the most important stakeholders in tourism and Barcelonian society. The commitment assumed was to work towards a new tourism model that is consistent and respectful of the city and includes the following principles:

1. Consistent with the city model.
2. Balance of relations between residents and visitors.
3. Economic, social, environmental and monumental sustainability.

A wide range of action programmes were developed to improve tourism in Barcelona and its fit with the city, which were divided into a total of 15 programmes, with responsibility and implementation largely left to the destination's public and political institutions, but also to the private sector and social organizations in Barcelona:

1. Destination Barcelona
2. Neighbourhood and districts
3. Ciutat Vella
4. Tourism exploitation of infrastructure and new centralities
5. Tourism marketing
6. Adaptation of the product
7. Information and service
8. Environmental sustainability
9. Professionalization
10. Sustainability and pedagogy
11. Support and partnership with industry
12. New governance and financing
13. Municipal management of the effects of tourism activity
14. Tourism intelligence
15. Tourism and city leadership

The Government's Strategic Plan Measures were presented to the Plenary of the Municipal City Council in late 2010.

05.2 CHALLENGES FOR TOURISM IN BARCELONA

There are 4 major strategic challenges to improve tourism in Barcelona and its place in the city and these highlight the need for forging new relationships, commitments and shared actions between civil society, public and private tourism institutions and the city:

1. Territorial de-concentration of tourism.
2. New governance of tourism within the framework of the city and its territorial surroundings.
3. Engaging the involvement of society and institutions.
4. Leadership and improved competitiveness of the destination and of its activities related with tourism.

First of all, the challenge of territorial de-concentration highlighted the need to redistribute and balance tourism activity over the whole of Barcelona, decongesting the most saturated spaces and encouraging the attraction of visitors to less crowded areas. This is why the metropolitan area was also included in the new concept of Destination Barcelona, since the expansion of tourism supply and demand exceeded the administrative limits of the city itself. The challenge of territorial de-concentration of tourism points to a need to promote new icons and tourist attractions across all the neighbourhoods and districts of the city in order to reduce tourist pressure on consolidated icons (especially in the district of Ciutat Vella, certain neighbourhoods in the Eixample district and Park Güell).

Challenge of territorial de-concentration

1. From municipal Barcelona to Destination Barcelona.
2. From traditional icons to new centres.
3. From icons to neighbourhoods.

The challenge of the new governance of tourism calls for a change in the political model, which basically focused on the public sector management of tourism, setting up new mechanisms for action. Thus, there was a proposal about the need to put effort not only into promoting tourism but also into its management, which encouraged new structures for coordination and shared decision-making in the field of tourism.

Challenge of new governance

4. From tourist to visitor.
5. From tourism promotion to governance of tourist activity.
6. From the generation of information to the creation of shared knowledge.

The challenge of generating cooperation between institutions and citizens aims to overcome attitudes of indifference, competition or aversion produced by some segments of the population and institutions within and outside Barcelona. Therefore, the challenge was to improve community involvement in relation to tourism and a greater cooperation with the rest of Catalonia.

Challenge of the creation of cooperation

7. From citizen indifference to citizen cooperation.
8. From competition with Catalonia to cooperation with Catalonia.

Finally, there is a challenge in terms of the leadership and improved competitiveness of the destination and tourism-related activities to create sustainable tourism growth, as we have left behind the days of accelerated growth. In this sense, the new tourism model of Barcelona must be characterized as a destination that is mature, innovative and able to reinvent itself constantly, maintaining its appeal and attractiveness and also its decision-making capacity.

Challenge of improved competitiveness

9. From accelerated growth to consolidation of sustainable growth.
10. From tourist city to leadership in tourism and the city.

Reflection started by the Strategic Plan on Tourism highlights the need to manage and organize the impacts of tourism as part of a new tourism policy for the city. The problems of overcrowding, the processes of transformation of business activities or cohabitation and coexistence problems in tourism settings are some of the complications that hinder the fit of tourism in the city. The goal is to ensure that the activity of tourism takes place harmoniously with citizen dynamics and according to the city model, through the coordination of all stakeholders involved. Thus, management and control measures must be applied to tourism in the municipality in order to ensure the quality of supply and preserve the necessary balance of uses, without falling into excessive specialisation of space and loss of identity.

The goal is that competition or conflict do not occur, and if they do arise, to resolve these in function of the collective benefit. In short, the growth of tourism must be made within the parameters of balance and fairness so that tourism growth produces the least friction possible and provides maximum benefit to the community.

If in 1993, after the creation of Turisme de Barcelona, efforts were mainly directed towards the promotion of tourism in the city, now the priority of city government is to develop municipal management of tourism. In fact, Barcelona City Hall is a pioneer in the integrated management of tourism, employing a cross-functional approach to public policy implementation: economic development, security, mobility, urbanism, culture and sports. This has been confirmed by Exceltur (an organisation formed by major Spanish tourism companies) in the report *URBANTUR*, which placed Barcelona in first place in Spain in terms of tourism competitiveness. In this sense, the role of the Council and Forum on Tourism and the City to help create interdepartmental municipal management coordination was crucial. In this way, the incorporation of tourism into the management and administrative bodies of the city was favoured by a more comprehensive vision of tourist activity, while creating synergies with other related activities such as education, culture, sport, foreign investment, attraction of talent or attracting major events, among others.

05.3 CITIZEN PERCEPTION OF TOURISM

Data from surveys measuring the public's perception of tourism have given very favourable results. However, we must not lose sight of the fact that the growth and diversification of tourism supply and demand experienced in recent years has been accompanied by some citizen concerns; in a relatively short time span the social, commercial and urban fabric of the city has changed significantly. In this context, some criticisms of tourism have emerged. These are not disapproving of tourism in itself, but of the lack of management of its impacts or simply the feeling of abandonment. Following these unresolved tensions, certain prejudices and stereotypes of tourists have been created, just as in the past tourism has also been identified as the culprit for some of the problems of the city.

Conflicts related to overcrowding and standardisation of tourism could be early warning signs that the friction caused by tourism could become factors in Barcelona's deterioration, damaging the quality of life of citizens and visitors' experiences. We should not forget that the image of Barcelona, like any tourist image, is susceptible to deterioration if visitors themselves begin to have bad experiences.

Opinions range from praise to criticism, speeches range from complacency and rejection. One cannot fail to mention the contrast between the image perceived externally, where Barcelona enjoys an excellent rating, and the view of residents who, while not rejecting tourism and its benefits, have a more critical opinion in relation to its impact.

Tourism must be shared by everyone, mainly because the whole population feels its effects, both positive and negative and either directly or indirectly. Given this premise, we must face the future keeping in mind that tourism is a shared, multi-sector project. In this regard, it is necessary to move forward with the new idea of 21st century tourism, and it must be done with the involvement of community and institutions.

05.4 21ST CENTURY URBAN TOURISM TRENDS

In 2012, there were more than 1,000 million international tourist arrivals, and half of them reported that their main motivation was leisure travel. The World Tourism Organization forecasts that in 2030 there will be around 1,500 million arrivals worldwide; despite the current context of economic and financial crisis, the number of international tourists continues to grow exponentially.

In the 21st century, the geographical expansion of tourism coincides with an absolute diversification of markets: there are increasingly more tourists worldwide, and they are becoming more and more diverse. China ranks as one of the leading markets for outbound and inbound tourism, which shows the huge value of tourism in emerging economies. Undoubtedly, tourism is becoming one of the major industries generating employment and economic growth around the world, while also establishing itself as one of the main engines of cultural revitalization and social change.

Today cities have become real tourist attraction nodes, hubs for the consumption of leisure, culture and services. One can see that tourism has become an almost indistinguishable reality in the transformation to service economies that medium and large cities and their metropolitan areas are experiencing, most of which have become objects of growing preferential tourism consumption.

Unlike the situation of a couple of decades ago, contemporary tourists tend to make more trips throughout the year, which favours urban destinations and the City Breaks trend, which are relatively short and frequent trips to cities. This model coincides with an important and previously unseen reality on the global map: for the first time in history, most of the world's population lives in large urban and metropolitan areas in the world. Therefore, it is natural that cities become very diverse and multifunctional places, sites that are constantly adapting to the demands of its citizens and temporary visitors.

The planning and management of tourism should expect that the new urban tourist may often move spontaneously with the rhythm of a city, taking decisions as they come often without previous planning, 'just in time' decisions. The new tourist searches for information at the destination site and plans their experience during the trip (and not just before). This trend requires cities to provide facilities and tools to help take decisions, move and act in real time. There needs to be a commitment to becoming a smart city, in which both locals and visitors can access information, recommendations and services to make urban life more comfortable and flexible. Barcelona offers information technology to help make urban consumption decisions and this means locals and tourists have access to various city resources. In this respect, the digitisation of information and its transmission through virtual channels ensures better experiences and knowledge of the city.

Today, the quality of any tourist experience is intrinsically related to the value, quality and quantity of the service offer, but above all, to the ease and level of real interaction the visitor has with the destination. This leads to a more intense relationship between tourists and destinations. It should be kept in mind that currently, tourists have an active and prominent role as prescribers (direct, instant and reliable) of the destination. The contemporary tourist experience is no longer confined to a strictly individual sphere, but rather it is shared on a global level, and this determines the expectations and motivations of potential markets.

The contemporary tourist, and especially the urban tourist, is characterized by a variety of motivations. For this reason they make use of a significant amount of resources and urban services, many of which are targeted simultaneously to both tourists and locals. As such, it is clear that the boundaries between tourist cities and non-tourist cities are increasingly blurred, since there is an almost natural integration of tourism consumption and local consumption. For managing tourism, the city government has opted for a coherent, integrated approach that is respectful of the city model.

However, increased tourism in Destination Barcelona opens the way to the creation of a new urban model, which in spatial and social terms defines new central areas around consolidated icons. At the same time, it creates new poles of attraction in the urban landscape, such as Torre Agbar at Glòries and also in @22 (which is an area converted from a former industrial area), and also the Diagonal Mar area (which connects the city with Besòs and beyond). The newly renovated Born marketplace has embellished a new central space in Ciutat Vella. Without a doubt, the definition of new scenarios contributes to the economic and geographic expansion of tourism, both within the city itself and beyond. New uses of urban space appear out of necessity. New appropriations and new heritage are created that continuously redefine the ties between the city and the Destination. Indeed, the

dynamics of tourism supply and demand create a tourism 'real space' that goes beyond the administrative city boundary.

In the last decade, Barcelona has designed a 'tourist district' that expands beyond the traditional tourist areas and icons. Supply and demand spreads out to the metropolitan area and new areas of the city, traditionally neglected by tourism. The axis connecting Barcelona, the Gran Via trade fair and the airport has contributed to the displacement of accommodation towards Llobregat, mainly along the coastal corridor. Given that one of the main challenges of the Strategic Plan on Tourism for the City of Barcelona is the creation of de-congestion flows both in the immediate centre as well as towards a larger radius, the discontinuous tourist city will continue to have increasing importance.

The phenomenon that has contributed most notably to the definition of the new urban model of Barcelona is the incorporation of neo-residents into the social fabric. This is a new urban class in the city, attracted by its cultural, recreational, leisure and social offer. These new citizens, who tend to stay temporarily, are characterized by a very high level of internal mobility. They are residents and not tourists, but their behavioural patterns are converging. In fact, some studies show that neo-residents consume more culture than tourists or locals. Therefore, this group of temporary residents has an intense relationship with the cultural, recreational, leisure and social offer of Barcelona, which in turn vitalises the city. All in all, the distinctions between residents and non-residents tend to be increasingly blurred.

Despite the diversity of residents and temporary visitors that Barcelona currently hosts, the truth is that there is also clearly a static society that is strongly rooted and identifies emotionally and symbolically with the city. In Barcelona, as in many other European cities, there is a certain density of residents who give the city its social structure and maintain strong links between geography and biography.