



# **Barcelona Strategic Tourism Plan for 2020**

## **Strategic Diagnosis**

**September 2016**

**Tourism Department**

**Manager's Office for Enterprise and Tourism**

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## 1. INTRODUCTION

This document presents the results of the Diagnosis of the Barcelona Strategic Plan for 2020's preparatory work, out of which comes the strategic proposal for challenges and goals, for laying the groundwork for tourism-based initiatives in Barcelona for 2020.

The Strategic Tourism Plan for 2020, which we shall henceforth refer to as PET20, was created as a proposal for a government measure presented on 20 July 2015 and entitled "Impetus to the participatory process on the Barcelona tourism model". The document states the municipal government's pledge to prepare several strategic action strategies provided for under the Strategic Tourism Plan for 2015 and in the document entitled "Barcelona, Tourism and City. Bases for a Local Agreement for managing and promoting a responsible and sustainable tourism", presented in May 2015.

Likewise, the Municipal Action Plan (PAM) of February 2016, drafted by Barcelona City Council for the 2016-2019 period, includes the following in Action Line 2. "A Barcelona with the impetus for a pluralistic economy", line 2(5). "Sustainable Tourism", a commitment to drafting a Strategic Tourism Plan for the 2016-2020 period.

Presented on 6 September 2016, this Strategic Diagnosis document comes from the Diagnosis stage of the Barcelona Strategic Tourism Plan for 2020. It therefore contains the work carried out during the last few months, culminating in the presentation of the challenges and goals that Barcelona's tourism policies aim to address and on which basis the action proposals will be structured over the coming years.

### 1.1 Goals of the Barcelona Strategic Tourism Plan for 2020

The goals of the Strategic Tourism Plan for 2020 are as follows:

1. To prepare a roadmap for Barcelona's tourism policies over the coming five years, based on a participatory diagnosis.
2. To generate public debate and shared knowledge on tourism and its effects, through an analysis of the current situation and anticipated future scenarios.

3. To concurrently integrate the approaches towards tourism in the city of the various work spaces: PAM, PEUAT, Tourist Mobility Plan, Inclusive Tourism Plan, etc.

## 1.2 Plan Team

The Department of Tourism and Events has been coordinating the process of drafting the Barcelona Strategic Tourism Plan for 2020 since the end of 2015. For the purpose of completing this process, Albert Arias was put in charge of all the documents and the plan's subsequent implementation. Other people and groups were gradually brought in later on, making up the organisational structure of the Strategic Plan for 2020.

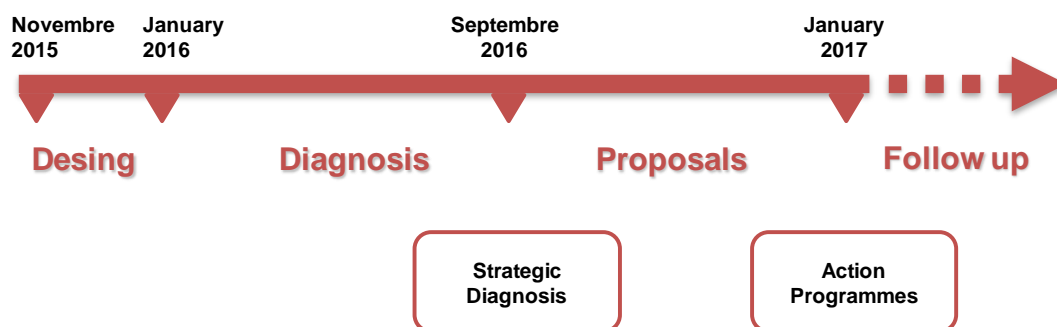
- Put in charge of the **Strategic Plan**, Albert Arias has been managing the plan's entire preparation and implementation, relying on Jordi Moll for its technical coordination.
- The **Technical Committee** drives and supports the process, ensuring the various dynamics required for the plan's implementation. Made up by Albert de Gregorio, the Manager; Joan Torrella, the Director of Tourism; Xavier Suñol, who is in charge of Strategic Projects; Alba Vidal, who is in charge of Management; Rosa Bada, the Technical Secretary for the Tourism and City Council and the rest of the Council's Department of Tourism team.
- The **Advisory Group** offer a professional and external approach to the process. It is made up of recognised experts: Enric Truñó; Maria Abellanet; Oriol Nel-lo and Julie Wilson.
- For the purposes of preparing a joint diagnosis and delving more deeply into specific issues of special importance, thirteen **reports** were commissioned, accompanied by discussion groups. Their rapporteurs are: Josep Capellà, Ángel Díaz, Luis Falcón, Daniel Imbert, Francesc López-Palomeque, Jordi Moll, Saida Palou, Ricard Pié, Nemo Remesar, Joan Manuel Ribera, Paolo Russo, Ramon Serrat, Elsa Soro, Enric Truñó, Josep Francesc Valls and Josep Maria Vilanova. Momentum<sup>co</sup> was in charge of providing the technical support in the participatory process and drafting the minutes.

- Other structures for coordination with institutional work spaces. The Strategic Plan has been taking part in various internal coordination and inter-institutional work spaces at the City Council (Barcelona Provincial Council, AMB and Turisme de Barcelona etc.) and other projects and participatory dynamics in the city, such as the Municipal Action Plan (PAM), the Special Urban-Development Plan for Tourist Accommodation (PEUAT), the Tourist Mobility Plan (PMT) and the Ciutat Vella Economic Development Plan.

### 1.3 Drafting the Strategic Plan for 2020: stages and activities

The process of drafting the Strategic Tourism Plan is divided into three parts: the preliminary design stage; the diagnosis stage and the proposal-drafting stage.

The entire task of designing a methodology was carried out at the work's **Design** stage, from November 2015 to January 2016, and an exhaustive evaluation made of the previous Strategic Plan (for 2010-2015), taking account of such initiatives as the World Tourism Code of Ethics, Biosphere certification and the Local Agreement for Managing and Promoting a Responsible and Sustainable Tourism. Analyses were conducted of the participatory processes for PAM-PAD for 2016-2019, cities and tourist destinations regarded as management benchmarks because of their features, and other important processes, such as the Special Urban-Development Plan for Tourist Accommodation (PEUAT) and the Tourist Mobility Plan.



The first stage for drafting the Plan, the **Diagnosis** stage, which was completed in September 2016, involved work analysing and diagnosing the current situation, future prospects and tourism in Barcelona. Tourism was dealt with at all times from a comprehensive perspective, in other words, as an inherent and inseparable element of

the city. Considerable effort was made throughout this stage to ensure the participation and involvement of local players, tourism-related productive sectors and experts in various disciplines that form part of the dynamics of Barcelona.

During this stage, data and opinions were analysed from several sources and appropriate studies were conducted to generate new knowledge in little-known areas. Professional meetings were also organised with experts, as well as work groups and meetings with the various political party groups. This Diagnosis stage led to the drafting of the **Strategic Diagnoses** document and the establishment of Barcelona's challenges and goals, as well as a review of its long-term vision, the Vision for 2020.

The second stage, the Proposals Stage, which went into operation in September 2016 and is set to finish in January 2017, will be defined and will work on the action proposals to be implemented within the framework of this Strategic Plan.

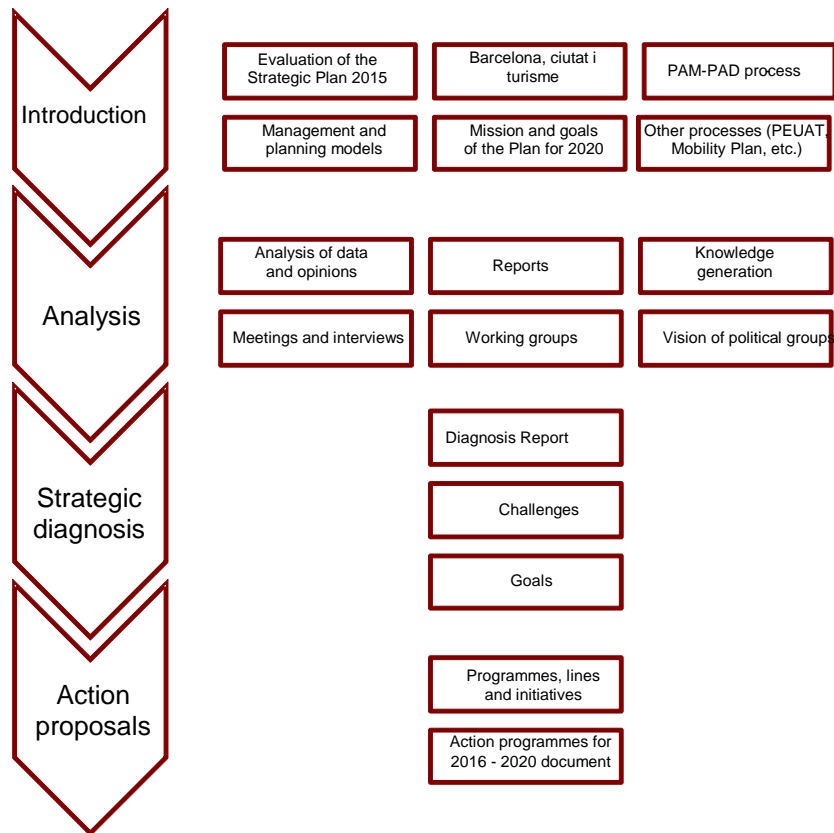
To conclude this section on methodology, it should be mentioned that the Strategic Tourism Plan for 2020 includes the accumulated experience of Barcelona as a tourist destination and the tourist policies that started to be implemented in 2008 under the Strategic Plan for 2015. In that respect, PET15 created its own working style in the field of tourism management that the new plan has adopted as its point of departure.

#### **1.4 Methodology**

The Strategic Tourism Plan for 2016-2020 aims to create shared knowledge on tourism in Barcelona through discussions and debates with all the players involved, as well as thorough analysis of the present situation and future scenarios.

In terms of methodology, several tools have been used in the process, such as analysis of data from diverse sources, group work on specific issues, meetings with municipal groups and the main players concerned and knowledge generation based on studies carried out. These methodological tools, organised in time, ensured the consistency and proper implementation of the process, invariably with the aim of creating a document diagnosing the current situation and a collection of proposals for managing tourist activities over the coming years.

## Method diagram



### 1.5 Reports and studies

This Plan also aims to generate new knowledge with a twofold goal. First, to make good any lack of information we may have in any aspects that turn out to be important for the plan's implementation, to meet the challenges, goals and proposals. Second, the plan intends to start, as the previous plan had done, new lines of knowledge that may be useful for promoting the tourism policies of the coming years.

In this respect, the Strategic Tourism Plan for 2020 has commissioned, or is about to commission, as many as five reports that are to be published once the final documents become available. These reports are as follows:

1. Impact of holiday letting on Barcelona's residential rental market.
2. Analysis of the environment impact of tourist activities.



3. Updated quantification of Barcelona's tourists and visitors
4. Analysis of jobs and employment conditions relating to Barcelona's tourist activities.
5. Analysis of commerce in Barcelona's popular tourist areas.

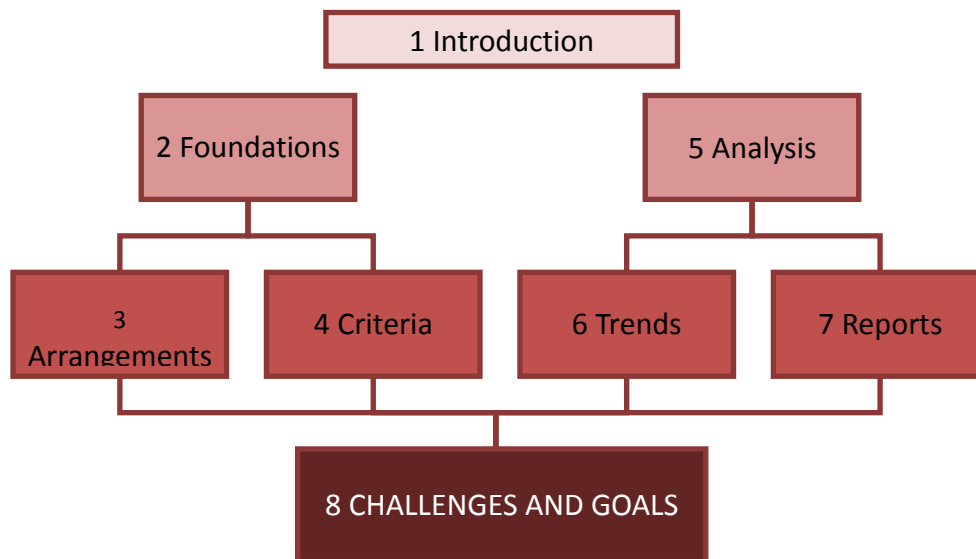
## 1.6 The Strategic Tourism Plan for 2020 within the framework of tourism policies

The Strategic Tourism Plan for 2020 came about, as mentioned above, from a Government Measure on 20 July 2015 entitled "Impetus to the participatory process on the Barcelona tourism model". This measure also included the establishment of the Tourism and City Council, the drafting of the Special Urban Development Plan for Tourist Accommodation and measures against illegal accommodation. Municipal policies relating to tourism, mostly coordinated by the Department for Tourism and Events, will likewise follow its course. Other plans and projects were also launched, in parallel with the Strategic Plan, such as the Tourist Mobility Plan and the Inclusive Tourism Plan.

Besides laying out the roadmap for tourism policies over the coming five years, as set out in its goals, the Strategic Tourism Plan for 2020 is tasked with ensuring the approaches and strategies of the various plans in operation are integrated. An exchange and dialogue was made to that end, during the preparatory period of the diagnosis stage, comparing notes with the teams in charge of the other plans and initiatives in order to create and convey knowledge, bring approaches into line and coordinate joint discussion spaces.

## 1.7 Structure of the document

The Diagnosis document's content has been divided into eight logically structured chapters which conclude with the **strategic challenges and goals** (8), the central part of this diagnosis.



The first chapter corresponds to the **Introduction** (1), where the document's general elements are explained along with the plan's goals, methodology and framework in current tourism policies. The second chapter presents the **Foundations** (2) of the plan and a review of the elements regarded as the legacy of the current plan, such as the Strategic Tourism Plan for 2015 and the "Barcelona, Tourism and City. Bases for a Local Agreement for a Sustainable and Responsible Tourism" document, the inescapable commitments that Barcelona has been acquiring in tourism and the Vision 2020 set out in the previous Strategic Plan (for 2015), as well as the Vision 2020 of the Catalan Strategic Tourism Plan for 2020. It is on these foundations that two of the plan's cornerstones are being built, making up the third and fourth chapters: **Initial provisions** (3) and the plan's conceptual premises; as well as the **Criteria** (4) establishing the desired action frameworks.

The fifth chapter introduces the elements that were used for the **Analysis** (5) of tourist activity. It does so by explaining the various sources of knowledge to understand the development, status and perception of tourism in Barcelona, as well as the results of the *Decidim Barcelona* participatory process under the framework of the Municipal Action Plan for 2013-2016. This analysis feeds through, though not exclusively, to the sixth chapter which summarises the **Main trends** (6) in urban tourism, focusing in particular on Barcelona's prevailing trends. The seventh chapter summarises the results of the thirteen **Reports** (7) that a group of experts were commissioned to produce, to undertake an in-depth study of the issues that were considered to need more

emphasis, and invariably accompanied by one or two work sessions with the parties concerned, or experts.

The eighth chapter deals with the results of the work process behind the plan's diagnosis (8). This last chapter is divided up into 5 areas and explains **the 20 challenges and 80 strategical goals** for structuring and justifying the plan's proposals at the final stage. A list of important aspects is also presented, by way of **Conclusions** (9), for setting out the aims of Barcelona's future as a destination.

In short, this Strategic Diagnosis document for the Barcelona Strategic Tourism Plan highlights the work tables, participatory process and shared knowledge that will give way to the second preparatory stage of the plan's action proposals.

This document includes a series of annexes that form part of the Strategic Diagnosis Document, such as the participants' report, the events and presentations calendar, the work groups' minutes, the reports produced by the experts etc. You can consult this information, along with other documents and supplementary information, on the plan's web page:

<http://ajuntament.barcelona.cat/turisme/en/strategic-plan>

## 2. FOUNDATIONS

### 2.1 Justification

There is no better way to take on the future than by evaluating the legacy of the past. As emphasised in the introduction above, the Strategic Tourism Plan for 2020 is not intended to start from a clean slate. Quite the contrary, it is firmly aimed at building a roadmap for the next five years that is based on elements whose importance and universality ensure they have played a key role in the reflection, generation of knowledge and design of tourism management in Barcelona.

Three basic elements are presented which have been analysed in-depth and which are detailed in various sections below. First of all, we examine the Strategic Tourism Plan for 2015, the undisputed point of departure when it comes to reflecting on Barcelona's tourism management. Second, we analyse the document resulting from the "Barcelona, Tourism and City. Bases for a Local Agreement for a Sustainable and Responsible Tourism" reflection process where many of today's fully valid challenges and goals are summarised. Thirdly and finally, we go over the various international commitments Barcelona has made since the start of the last decade and which set out the bases for implementing a courageous policy for sustainable and responsible tourism.

The analysis and evaluation of these foundations, alive and constantly evolving, are what allow us to build two of the cornerstones that the goals of PET20 rest on, and which will be explained in the following chapters. On the one hand, the initial provisions, understood as the conceptual premises for tackling tourism, the city and their mutual relationship. On the other hand, the plan's criteria, which highlight the desired action frameworks for public policies relating to tourism.

### 2.2 Barcelona's Strategic Tourism Plan for 2015

The Strategic Tourism Plan for 2015 (henceforth referred to as PET15) was, without any doubt, the cornerstone that the current plans foundations have been built on. Drafted between 2008 and 2010 under Enric Truñó's management, PET15 represented a signal change in the conception of tourism, its relationship with the city and its management. A document with an exhaustive and innovative analytical study, a

diagnosis shared with a hitherto-unusual multitude of players, and a programme document that confirmed the need to go beyond the boundaries of promoting tourism and emphasise its comprehensive management and governance.

PET15, let's remember, had two main goals: helping to improve tourist activities in Barcelona and ensuring tourism fitted in better with the city. These are two goals based on criteria that were pretty novel in their time and which have proved to be essential today. First, a single concept was proposed for the terms "tourism and city", on the assumption that the one was inconceivable without the other and that the two were mutually built. Hence its statement that "the health of tourist activities in the city extends to the well-being of its population and has to be the cause and effect of the proper development of tourism in Barcelona". Second, it provided evidence that tourism was not just an economic sector, an industry, closed and independent, but that it was also part of a multiple and cross-cutting reality affecting "the whole of society and its economic, social, cultural and territorial life". Finally, it broadened the conventional spectrum of the concept of tourist, by underscoring the fact that the reasons for visits were numerous and that stereotypes were of no help in understanding the reality. To reinforce this, the idea was launched that tourists and visitors were "temporary citizens of the city, who use and consume it specifically according to their interests and length of their stay here".

On the question of reviewing the content of the diagnosis, it should be mentioned that many of the 150 aspects, trends and dynamics noted in 2009, after considerable analytical work, are just as valid today and can be completely integrated into the current diagnosis. It is also worth pointing out here that the reality of tourism in Barcelona has changed a great deal over the last few years: new disruptive activities have appeared, such as accommodation marketing through online platforms, new means of recreation-related transport, increased investments in accommodation, new legislative frameworks, greater numbers of visitors to neighbourhoods that seemed unthinkable five years earlier etc., therefore requiring updated analyses, adopting dynamics that did not exist at the time. Most of the 10 proposed strategic challenges and 40 assigned goals could likewise apply today. Even so, and once again, tourism-policy priorities and requirements are not static and have evidently swung towards prioritising impact and externalities as well as the need to innovate through coordination and co-production between players. Lastly, the evaluation of the status of

PET15's proposals in July 2015, which feature in this plan's annexe, was a key exercise for gauging the times we find ourselves in in 2016 and being able to review what was done during the 5 year lifespan of the plan and, therefore, what we have to focus on more, what we have to review or update and what we can rule out. This evaluation also allows a review of the reasons why measures have not been implemented or sufficient.

As well as the contents of the various documents, it should be mentioned that PET15 adopted an approach to tourism using a different methodology. First, a shared process was carried out over 2 years, ensuring an unprecedented number of players, putting the tourism issue to discussion and debate among institutions, departments and players that had never taken it into consideration before. Second, PET15 launched several research and information-gathering projects that continue to this day. Let us not forget that it drew attention, for the first time, to the fact that the number of visitors to the city was practically four times higher than the number of tourists staying in hotels. There were not six-point-something million tourists, there were 25 million visitors! It also promoted a study on the economic impact of tourist activities on the city, a figure that, according to the various scenarios, varies between 10% and 12% of the GNP, confirming the importance of all the activities that tourism consisted of. In this regard, besides these one-off commissioned studies, PET15 embarked on a series of studies on residents' and visitors' perceptions and opinions of tourism, which are now the cornerstone of the city's knowledge of tourism.

### **2.3 Barcelona, City and Tourism. Dialogue for a sustainable tourism**

2015 saw the start of a process for reflection and debate, to build the “Bases for a Local Agreement for Managing and Promoting a Responsible and Sustainable Tourism” commissioned by Dr Maria Abellanet. A sound proposal that aimed to be of use “to the various players involved in tourism and extend to the political, business and public arenas”.

Three well-attended participatory meetings were held for that purpose, with over 130 participants and a pluralistic range of representation, where there were discussions and debates on trends, diagnoses, challenges and proposals regarding tourism and the city:

- Meeting 1: Trends and diagnoses (06/02/15)
- Meeting 2: Key future challenges and issues (23/02/15)
- Meeting 3: Proposals for improving city-tourism relations (13/03/15)

It is undeniable that Barcelona Tourism and City followed the course of the Strategic Tourism Plan for 2015, which was heading towards its final year of life. The approach was clear: reflecting on tourism as something indivisible from the city and adopting recommendations for its management and promotion beyond political situations. And the results were exceptional. A sound, structured proposal was established in no time. To cut a long story short, 7 bases were established for the Agreement. They are given below:

- Smart management and distribution of tourist flows in the city and territory
- Reducing the negative impact that tourism has on the city
- Ordering, regulating and controlling tourist activities and anti-social attitudes
- Defining a new governance and funding model for tourism
- Boosting Barcelona's identity and uniqueness as a sustainable, competitive destination of excellence
- A fairer, cross-cutting distribution of the benefits that tourism generates
- Raising awareness of the benefits of tourism and encouraging public involvement

These bases have been fully considered in this plan's diagnosis, though they are ordered differently so they can fit into the current plan's structure and narrative. It would have been a blatant error not to do so, given not just the lifespan of the proposals – under a year from the start of the Strategic Plan for 2020 – but also the legitimacy of their construction and the multitude of voices they were built through.

Even so, besides the bases, the “Barcelona, Tourism and City” document features a list of 35 detailed action proposals focusing on the management of crowd flows, designing new icons, smart management of information, rules and regulations, tax and funding policies, promotion and marketing etc. While there is no exhaustive evaluation of the state of the proposals' implementation, and bearing in mind their heterogeneous nature and that they were not drafted either with a calendar or players responsible for their

implementation, we can say that over three quarters of the 35 proposals have seen their initiatives embarked on by the City Council or the Turisme de Barcelona Consortium.

## 2.4 Commitments adopted relating to Sustainable and Responsible Tourism

The Strategic Tourism Plan for 2015's reflections and proposals prompted the City Council's pledge, in 2010, to realise its commitments to sustainable and responsible tourism. These commitments are also key to the laying of the foundations for the current plan. The documents, approved and signed, are set out below chronologically and accompanied by a brief explanation and excerpt of their contents.

- A. 2010, 13 July. Municipal Commission for Economic Promotion, Employment and Knowledge.
- B. 2010, 20 December. The Responsible Tourism Charter is signed (Barcelona City Council, RTI, UNESCO).
- C. 2011, 30 June. The Biosphere World Class Destination certificate is obtained.
- D. 2013, 4 October. The Catalan Vision for Responsible Tourism for 2020: The Barcelona Declaration.
- E. 2015, 27 November. World Charter for Sustainable Tourism + 20.
- F. 2016, 13 April. Agreement for the creation of the Biosphere-Barcelona standard.

### Municipal Commission for Economic Promotion, Employment and Knowledge

During its meeting of 13 July 2010, the Municipal Commission for Economic Promotion, Employment and Knowledge gave its approval, with all the political party groups acting unanimously, to the following proposal, which became the starting point for the certification process and basis for the definition of the municipal policy for responsible tourism:

*To set out an action plan for introducing the Responsible Tourism System in Barcelona, obtaining Biosphere certification under the destination category, undertaking a commitment to the city's residents and thereby contributing to Barcelona's profile and*



*establishment as an innovative, leading, sustainable, distinguished, quality and added-value tourist destination.*

### Responsible Tourism Charter with the Institute for Responsible Tourism

Barcelona City Council's voluntary commitment to gearing the city's tourist activities towards a sustainable tourism model led to its collaboration with the Responsible Tourism Institute<sup>1</sup> (RTI), to achieve the Biosphere destination certification, in accordance with the World Class Destination standard. On 20 December 2010, Barcelona City Council, RTI and UNESCO signed the Responsible Tourism Charter, a document representing public recognition from the city of the firm commitment to advancing towards a new model for tourism development based on sustainability, cultural diversity and social responsibility.

Under the Charter:

*The application of the Responsible Tourism System in Barcelona involves positioning the city as a leading tourist destination, innovative in responsibility and sustainability, making sustainability a tourist product in itself and a distinguishing feature of Barcelona's tourism model.*

### Biosphere World Class Destination Certification

Finally, the RTI officially awarded Barcelona its Biosphere Responsible Tourism Certification, in the category of World Class Destination, on 30 June 2011, under the framework of the second Annual Meeting of the Global Sustainable Tourism Council. Taking part in the Biosphere Responsible Tourism System's establishment and certification process were all the areas of Barcelona City Council directly or indirectly linked to tourism sustainability, as well as other tourism-related organisations. Following the awarding of the certification, they had to continue working on updating the documents confirming the system's requirements were being met. Barcelona's Biosphere World Class Destination certification was renewed in July 2014 and extended for a further three years.

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<sup>1</sup> The Responsible Tourism Institute is an organisation affiliated to UNESCO and the World Tourism Organization (UNWTO) and is a founding member of the Global Sustainable Tourism Council (GSTC), which is supported by the United Nations Foundation, the World Tourism Organization (UNWTO) and the United Nations Environment Programme (UNEP).

### The Catalan Vision for Responsible Tourism for 2020: The Barcelona Declaration

A document resulting from the reflections made at the 7th International Conference on Responsible Tourism in Destinations, held in Barcelona on 3 and 4 October 2013. This “Barcelona Declaration” contains an agreement between the public and private sectors on the criteria, guidelines and commitments to be implemented for the future development of responsible tourism resulting from a process of collective discussion and debate. Once again, the challenges and goals established for Catalonia can readily be applied to Barcelona too. While the entire document is noteworthy, mention should be made here of one of the most significant and widely quoted statements in the declaration:

*“What is good for the citizen is good for tourism. The places that are good for living in are good for visiting. Efforts will focus on improving the quality of life of citizens, managing friction between residents and visitors and promoting dialogue and interaction between visitors and residents.”*

The declaration deals with tourism comprehensively, as a cross-cutting activity that affects the territory as well as many other economic, social, territorial and cultural activities. It is committed to assuming the environmental impact of tourism; to a governance that involves all the relevant players in the spirit of shared responsibility; that takes care of the sense of place where tourists *too* are its builders; that makes tourism inclusive and accessible; and which evaluates impact beyond conventional qualitative measures.

### World Charter for Sustainable Tourism + 20

Barcelona played a central role in drafting the World Charter for Sustainable Tourism + 20, which involved the updating of the World Charter for Sustainable Tourism signed up to in 1995. The new charter was declared on 26 November 2015 at the end of the Sustainable Tourism Summit in Vitoria-Gasteiz.

The World Charter for Sustainable Tourism + 20 includes the 17 Sustainable Development Goals adopted at the United Nations Sustainable Development Summit held in September 2015, and represents a great opportunity for steering tourism resolutely towards integrating and sustainable channels. The Charter likewise calls for

the preservation, not just of the actual quality of the destinations and tourist industry, but also of the tourists' capacity for satisfaction as priority goals, as well as the need for promoting alternative forms of tourism. Finally, the authorities and associations connected to this activity were called on to launch initiatives that would help to put into practice the principles and recommendations set out in the World Charter for Sustainable Tourism.

Of huge importance given its international value, the Charter declares that:

*“tourism has to use local goods and services to be able to boost its community links and keep economic drain to a minimum, while recognising social and economic cohesion as a fundamental principle for sustainable tourism development.”*

It also points out the need for:

*“considering the load capacity of destinations, not just in the case of nature spots, but also in city areas, especially where residents' quality of life may be compromised.”*

### Agreement for the creation of the Biosphere-Barcelona standard

Barcelona reaffirmed its commitment to sustainable tourism, in mid-2016, when it created the new Biosphere-Barcelona standard with the Responsible Tourism Institute, aiming to develop the certification's attributes in a unique way in Barcelona. The agreement with this independent body represented a further step towards strengthening the work carried out in the city in favour of sustainable tourism and encouraging other operators in Barcelona's tourism sector to join in and implement sustainable-development initiatives and programmes. The aim is to increase the certification's level of requirement by introducing the city's own criteria, which will be worked on jointly with the Barcelona Strategic Tourism Plan 2020.

## 2.5 Vision for 2020 in Barcelona's and Catalonia's strategic tourism planning

One of the essential elements of the strategic reflection was drafting the long-term “Visions”. Efforts were made here in both the Barcelona Strategic Tourism Plan for 2010-2015 and the Catalan Strategic Tourism Plan for 2013-2016 to plan the feasible scenario desired for 2020, coinciding with the horizon of this plan. Each of the two

document's "Vision for 2020" is set out below, to put on record the current plan's commitment to adopting both as its own.

### Barcelona Strategic Tourism Plan for 2010-2015

«In 2020, Barcelona will continue to be recognised as the Mediterranean's most dynamic and vibrant destination and as one of the world's main tourist cities, having established itself as a destination that goes well beyond its administrative boundaries.

It is a city where tourism is fully incorporated into its economic, commercial, social and cultural dynamics and where residents recognise visitors of all kinds as other (temporary) citizens. The hospitable nature of Barcelona's residents makes their city a desirable, friendly and different kind of place.

A metropolitan city that stands out for its environmental sustainability, excellent services, continuous capacity to amaze and novel offerings. Culture, creativity and knowledge are the driving force behind the city and its territory.

It is the real city, with its identity and dynamism, that makes it so attractive and the fact there is no place for "ghettos" or exclusively tourist neighbourhoods.

Tourist activities continue to contribute not just to Barcelona's success, by improving the quality of life of its residents and maintaining and creating new facilities, but also to the success of other economic sectors and to raising Barcelona's international profile».

### Catalan Strategic Tourism Plan for 2013-2016

«Catalonia 2020, a global tourism benchmark resulting from a wealth of quality experiences created from its assets and identity, forming a sustainable and competitive proposal of value, thanks to a shared and innovative public and private leadership model that prioritises quality over quantity, its ultimate goal being for tourism to help to boost the wealth and quality of life of Catalans».

### 3. INITIAL PROVISIONS

As stated in the introduction to this section, we will now present a few initial provisions built through the three elements we have described: the Strategic Tourism Plan for 2015; the “Barcelona, Tourism and City” document and the commitments undertaken. These initial provisions are a starting point, declarations on how this strategic plan envisages tourism and its management. It is seen as anything but irrelevant. Establishing these provisions in advance is essential for the subsequent construction of challenges and goals and will be all the more so when it comes to designing the proposals at a later stage of the plan. Seven initial provisions have been established and are shown below:

- The co-constitutive relationship of tourism and the city
- From tourism model to tourism city
- From tourist to visitor: broadening the spectrum of tourism
- Tourism, a collective issue
- A comprehensive management of tourism
- Variable destination geometries
- Sustainability and competitiveness: an inseparable pairing

#### 3.1 The co-constitutive relationship of tourism and the city

It has taken just a few years for Barcelona to become a *tourist city*. An estimated thirty million visitors every year, close to 40 million Prat airport users, over 130 thousand regulated tourist accommodation places etc.. Barcelona boasts a notable position in the various European city rankings and forecasts suggest it will continue so for the coming years. Barcelona, then, is and will continue to be a *tourist city*.

Despite the central importance of tourism in the city's make-up over the last 20 years, it is still too often dealt with as an outsider phenomenon, something unconnected with the city. A few reasons for this are: the constant creation of a very pronounced otherness – tourists, foreigners, who behave differently – which people will blame or hide behind when taking bad decisions; the constant identification of the traditional tourism model as responsible for good results but also negative effects in the city; and

the reluctance of a large part of society to accept that it will no longer experience anything more without the effects of the activities and tourist practices. In sum, the treatment of tourism as an exogenous and disruptive phenomenon; as a discrete and perfectly bounded object; as a sector - or even industry – on the margins of the city's economic functioning.

Far from being an outsider phenomenon, tourism produces the city and, at the same time, the city shapes tourism's possibilities. Tourism is an inherent and constituent part of the current urban phenomenon. Tourist activities cannot be seen as something strange in the city, they are not "out there", but part of its day-to-day activities, intrinsic dynamics and even daily life. So tourists do not have to be considered passive players "in the city" but rather as visitors with rights and duties "of the city".

This plan aims to break the dichotomous positions that clearly separate "tourist" from the "rest of the city", an approach that began with the previous strategic plan when it explicitly announced that "tourism is become a clearly structuring element of the city, seeing as its activity has a cross-cutting impact on the whole of society and effects its economic, social, cultural and territorial life in numerous aspects". At the same time, it is the city, its management and construction that provide the framework for tourist-activities.

### **3.2 From tourism model to tourism city**

It is precisely this co-constitutive relationship between tourism and the city that conveys a key conceptual challenge: moving on from discussions on "tourism models" to debates on building the "desired city". The challenges to managing tourism are city challenges, from the promotion to the externalities of the activities. It is inconceivable to think of intervening in the city without taking account of tourist activities and their effects, central features in a large part of the city. It is likewise considered to be completely inappropriate to think that tourism can be "modelled" without taking the city's "non-tourist" elements into account. The *tourist city*, the one shaped through the various tourist images, practices and activities, *shares and also belongs* to a much more complex, multiple and heterogeneous city.

We need to delve deeply into conceptions of tourism for managing the city. "Improving the way tourism fits in with the city", as PET15 proposed, involved incorporating tourism as an inherent part of today's urban condition. But a further step needs to be taken. Today's challenge is not just how to manage tourism in the city but also how to manage *the city with tourism*. In other words, the challenge lies in how to get the *tourist city* to coexist with the other needs of the multiple city that is Barcelona. Such a change in perspective is crucial when thinking of tools for managing the effects of tourist practices, *of the city's tourist uses*, that are increasingly being integrated into its daily dynamics. If we consider that tourism and the city are inseparable, we cannot act only on one of the parts without the other being affected. Taking all this for granted will also help us to stop dealing with tourism in such essentialist and aprioristic ways: tourism is neither good nor bad, it depends on the context, structural elements and their effects. Discussing controversial issues without turning to essentialism, uncovering each of the practices that make up the specific issue at hand; will certainly help to take decisions without adopting extremist positions.

### 3.3 From tourist to visitor: broadening the spectrum of tourism

The boundaries between what is and what is not considered tourism, as mentioned above, have been totally blurred by the practices of visitors themselves. Although traditional tourist circuits still capture the collective imagination, these are only a part of the phenomenon; there are many *tourist cities* that do not turn out to be so obvious or visible to the public eye: those of shops, visits from friends and family, those temporarily constructed through a one-off event, etc. It is obvious that there are spaces where these developments overlap with a greater intensity and the effects are notable. However, it is also a fact that many of the tourists or visitors, especially professionals or those on return visits, behave in ways that are very different and far removed from tourist stereotypes.

The drafting of the Strategic Tourism Plan for 2015 involved questioning the hegemonic frameworks of the conception of tourism in Barcelona linked to holidays - mostly the summer ones - or to trips abroad. Tourism had been historically associated for many years with the exoticism of travel or leisure outside the domestic arena and tourists were beings alien to the city, people who contemplated and enjoyed destinations passively, loaded with connotations and stereotypes: Mexican hats, cameras in hand,

naive poses etc. One of PET15's big landmarks was its diversification of images and practices in the city: not every visitor comes for the same reasons, visitors have very different origins, explore the city very differently and have different expectations as well. The people taking part in an international conference, going to a trade fair, visiting relatives or travelling on an organised trip are all equally tourists. Stereotypes were no longer used because the reality was much more diverse. However, besides tourists, PET15 published the impact of day-trippers, passers-by who didn't spend the night in the city but whose presence was key to taking the destination into account: day-trippers who visited the city during the day, travellers who made stop-overs here, cruise passengers and visitors from outside the metropolitan region for reasons other than work or study. PET15 proposed we stopped talking about tourists and referred to such people as visitors, to include this diversity of motives and practices.

### **3.4 Tourism, a collective issue**

Tourism has become a central issue, not just in political forums but also in the media and public opinion. The steady increase in visitor number and evidence of their effects have brought about a visible and pluralistic debate, made possible largely by the publicity that social media networks represent. Similarly, the municipal elections of June 2015 confirmed that tourism was a central issue in the city's political agenda. The indisputable impact of tourist issues in the public sphere emphasised something already stated in the Strategic Tourism Plan for 2015 and the "Barcelona, Tourism and City" document: the need for tackling tourism as a collective and participatory issue.

Tourism can no longer be treated exclusively as a sectoral-area product; the debate has to go beyond the voices of the parties concerned, being mostly businesses, enclosed in sectoral spaces or focused on marketing and promotion, both inside and outside the established authorities and institutions. The need is being spelt out for promoting a public debate for action, focusing on tourist cities and destinations rather than merely the business activities supplying the offer or the activities visitors carry out.

Hence the Municipal Tourism and City Council, which went into action on 2 May 2016, made up of a heterogeneous mix of players from the business sector and residents', union and cultural associations and which embodies this approach and answers a



historical demand from both the Strategic Tourism Plan for 2015 and the “Barcelona, Tourism and City” document.

### **3.5 The comprehensive management of tourism**

Today, it is clearer than ever that tourist activities have an impact on many of the city's areas, spaces and management tools not considered within the sphere of tourism: mobility, security, inspection etc.

While for years tourism policies centred exclusively on promoting and attracting large numbers of visitors, today's tourism management requires a comprehensive and cross-cutting approach. First, by coordinating, regulating and managing tourist activities strategically, bearing in mind not just externalities and negative effects but also their local-development potential. Second, by aligning tourist-promotion and marketing strategies with the city's communication, promotion and management strategies.

As a result, if issues relating to the city's running and strategies are to be comprehensively dealt with, the need for strengthening “public leadership in the management of tourism” should be explained. Such a leadership, of course, does not necessarily mean having to take decisions unilaterally. Quite the opposite, it has to promote and provide spaces and governance mechanisms that allow joint deliberation with a multitude of players on general and specific city-policy issues.

### **3.6 Variable destination geometries**

The concept of destination has to be dealt with from a twofold approach. First, it has a markedly virtual nature. Destinations are built through their image and narratives. These create expectations that visitors expect to realise. It's no surprise, then, that tourist marketing tools present agreeable and exceptional places worth travelling to, to discover. Second, these expectations are expressed in a clearly territorial way: visits, practices and activities are carried out in specific places, at the same time creating effects that shape them.

The Strategic Tourism Plan for 2015 successfully embarked on this twofold reflection. The need for a territorial strategy that would minimise the impact of visits on congested areas, while highlighting visits to other territories, to neighbourhoods in particular that extended Barcelona's projected image beyond its municipal boundaries. Barcelona as a tourist destination was more than the city centre and its urban continuum; it had to be conceived as a territory with a variable geometry made up of attractions or points of interest that went beyond its administrative boundaries, an idea that was developed by the Barcelona Provincial Council under the "Barcelona is much more" programme.

If we are to ensure destination Barcelona goes beyond its clichés, we shall need to boost our communication, promotion and management strategies with the environment and destination Catalonia, as shown in the Catalan Strategic Plan for 2013-2016.

### **3.7 Sustainability and competitiveness: an inseparable pairing**

There is no question today that a destination's competitiveness has to be tackled under criteria of sustainability and responsibility. Destinations can no longer be thought of in any way that does not guarantee their feasibility in time and space; they have to be examined both comprehensively and contextually, from a territorial perspective and by taking into account, as noted, the co-constitutive relationship between tourism and the city. It is here that the Strategic Tourism Plan for 2015 proposed what was by then a signal change in the priorities of tourism policies, in other words, to stop thinking about visitor attractions in incremental terms and start focusing on ensuring the destination's sustainability and to start making the players, be they private or public, responsible for their actions. A strategy clearly backed by the "Barcelona, Tourism and City" document and, as you would have expected, by the commitments that were signed up to under the framework of sustainable and responsible tourism.

If we are to ensure the success of destinations, maintain their uniqueness, endow every value chain with added value, guarantee and promote new experiences and turn tourism into an innovative activity with added value; we need to ratify the commitments to sustainability and responsibility signed by the city and, more importantly, have them implemented through specific and courageous action proposals.

## 4. CRITERIA

The last section of the chapter on Foundations sets out five criteria that establish desired action frameworks for public policies on tourism: sustainability, responsibility, redistribution, cohesion and innovation. The section, then, serves to clarify the concepts used during the diagnosis of this plan and was drafted from the summary of contents of the various documents presented earlier on.

### **Sustainability**

The policies, programmes, economic activities and relations between players that ensure the future well-being of destinations, without compromising the basic resources of territories and resident and visiting populations: environment, housing, public space etc.

### **Responsibility**

The ethical individual and collective action framework that is committed to minimising economic, environmental and social impact while ensuring that economic activities do not occur at the expense of resident and visiting populations' rights.

### **Redistribution**

The public and private mechanisms that ensure a fair distribution of the wealth generated by economic activities, through revenue from work, taxation and the territory's economic, social and business relations.

### **Cohesion**

Strengthening tourist activity links to the territory's players and population, as a means of implementing collective projects that look after the city, in all its complexity, as a common space and take into account the plurality of its voices and needs.

### **Innovation**

The impetus behind new forms of economic and social management and organisation that create shared value and help to multiply and strengthen links between economic, social and cultural players for their mutual benefit.

## 5. STRATEGIC ANALYSIS

This section contains an analysis of the current tourist situation to boost the challenges and goals proposals at the end of this diagnosis. This chapter has two large sections. First it explains the state of play of available knowledge and various tools, primary and secondary sources that the Council is producing or coordinating with other institutions and which are used for monitoring tourist activities in Barcelona. These and other mentioned documents are available on the City Council's tourism website<sup>2</sup>.

Second, this chapter also presents the results of the **decidim.barcelona** participatory process that gathered projects, initiatives and priority issues relating to the “Sustainable Tourism” strategic line.

### 5.1 Knowledge of tourist activities in Barcelona

Barcelona is one of the city destinations with the most information on their tourist activities, boasting its own statistics since 1989; of course, the features of its development over the last few years, its diffuse geographical boundaries and large cross-cutting activities have led to gaps in our information in key aspects. As we look to the future we are faced with several challenges over our city's tourism knowledge.

A good example of this knowledge is the **tourist profile** survey that has been broadening its horizons since 2014 to various types and providing us every year with an exhaustive snapshot of the tourists staying in Barcelona.

[http://ajuntament.barcelona.cat/turisme/sites/default/files/documents/enquesta\\_de\\_lactivitat\\_turistica\\_a\\_barcelona\\_2015\\_0.pdf](http://ajuntament.barcelona.cat/turisme/sites/default/files/documents/enquesta_de_lactivitat_turistica_a_barcelona_2015_0.pdf)

We also have a periodic **citizen perception** survey that gathers the opinions of Barcelona's residents on tourism.

[http://ajuntament.barcelona.cat/turisme/sites/default/files/documents/enquesta\\_percepcio\\_del\\_turisme\\_a\\_barcelona\\_2015\\_0.pdf](http://ajuntament.barcelona.cat/turisme/sites/default/files/documents/enquesta_percepcio_del_turisme_a_barcelona_2015_0.pdf)

The latest edition of this perception survey now has important district level information and has increased its sample number for the coming reports, to provide important data on neighbourhoods with a larger tourist-activity presence.

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<sup>2</sup> See: <http://ajuntament.barcelona.cat/turisme/en/documents>

Naturally, under the framework of the Strategic Plan for 2020's proposal, as pointed out in this diagnosis, several lines of analysis and research will have to be carried out to make up for the information gaps on various key aspects.

One of the aspects that we have to look at in greater depth is **the quantification of visitors**. Barcelona is estimated to receive some 30 million visitors each year, of which half stay in accommodation (tourists) and the other half are visitors who do not spend their nights there (day-trippers).

It is well known that these occupancy surveys only give us precise details on the numbers of tourists staying in hotels: 8.3 million in 2015. The data for monthly hotel occupancy, whether from Spain's National Statistic Institute (INE) or the Hotels Guild, allow us to evaluate the sustained growth they underwent in 2016, up by 6% on the previous year, according to the data from this July.

Further data will gradually have to be added to these, on other types of accommodation, hence this year's launching of the Tourism Data System project, run by the Tourism and Recreation Laboratory at the University of Rovira i Virgili, which will enable us to calculate the monthly figures for tourists staying in tourist-use flats (HUTs).

An agreement is also expected to be signed with AENA, to obtain statistical data on airport passengers and the possibility to conduct other surveys to improve our current estimates. Note too that 76% of the tourists that come to Barcelona do so through the airport, which saw an increase in passenger traffic, up to July 2016, of 12% compared to 2015.

The number of day-trippers visiting the city is quite unknown. We have precise details on cruise-passenger flows from data provided by Barcelona Port; but when it comes to tourists spending the night in other destinations and visiting Barcelona just for the day, we only have approximations for the numbers of those originating from Barcelona province. We will have to use data on other destinations in future, particularly, the Costa Brava and Costa Daurada, as well as information on passengers travelling on the railway network or tourist coaches.

The implementation under way of the **Tourist Mobility Plan** will also provide a notable source of knowledge on internal and external tourist-activity flows at destinations.

**Big Data analysis** offers a methodology for improving and deepening our understanding of the tourist flows created by day trips. Mention should be made here of the IoT Big Data Tourism Management project coordinated by Eurecat under the BigData CoE-Barcelona framework and which the GSMA and the Mobile World Capital Foundation are collaborating on.

This pilot project, which was implemented over the summer, combines several sources of information on mobile telephones and WiFi which enable analyses to be made on the entire destination, as well as the vicinity around the Sagrada Família, to provide systems that allow tourist flows to be monitored and therefore better managed.

Likewise, to ensure the availability of this type of data, the next municipal telephone contract will have to include a clause under which the operator that secures the contract will have to periodically provide the Big Data with data it has at its disposal.

As for knowledge of **tourist accommodation**, the implementation of the Special Urban-Development Plan for Tourist Accommodation (PEUAT) represented an exhaustive analysis, and the creation of our own census, which will provide us with dynamic data on the various forms of accommodation on offer.

Acting as a supplement to such information, inspection work and systematic analysis of the illegal accommodation on offer through web crawlers allow us to mark out their dimensions.

Based on studies launched under the previous Strategic Plan we know the economic impact of tourist activities, the relative impact of tourism on the economy, the importance of its sectoral cross-cutting nature and the diverse effects it has in the territory; but we have to start several new **cost-benefit analyses** that also affect the **social returns of tourism** and its **redistribution**.

A more in-depth analysis of the **environmental impact** of tourist activities from Barcelona Regional is therefore becoming a key knowledge tool in this area. The first stage of this analysis is based on the information available and, in parallel, the gathering of information on specific types of consumption in the tourist sector; with a view to calculating the ecological footprint according to the various types of tourists visiting the city.

Another field of crucial interest is that of **jobs** created by tourist activities. The data we have are only partial and fail to give a true picture of employment conditions, which is why several studies have been conducted, some in collaboration with the Barcelona Economic and Social Council, as a means of improving our knowledge.

It is worth noting, finally, the work carried out in conjunction with the Barcelona Provincial Council and the Barcelona Tourism Consortium to create the **Tourist Activity Observatory** as a collaboration platform for generating and deepening knowledge of tourist activities in Destination Barcelona, understood as the city and its territorial surroundings. The results of this joint work were published in *Tourism statistics 2015. Barcelona: city and surroundings*, which includes the main data on tourist activities.

[http://ajuntament.barcelona.cat/turisme/sites/default/files/documents/estadistiques\\_de\\_turisme\\_2015\\_barcelona\\_ciutat\\_i\\_entorn.pdf](http://ajuntament.barcelona.cat/turisme/sites/default/files/documents/estadistiques_de_turisme_2015_barcelona_ciutat_i_entorn.pdf)

## 5.2 decidim.barcelona

The **decidim.barcelona** participatory process was carried out during the months of February and March 2016, to establish the Municipal Action Plan for 2015-2019. This process opened up various participatory channels for the city's residents. Based on an initial proposal from the municipal government, a collective process was opened offering an extensive range of mechanisms linking participation in person to neighbourhoods through face-to-face meetings, discussions and debates and proposal-collection trolleys; with digital participation through the <http://decidim.barcelona> platform and social media networks.

To mark the start of the Strategic Tourism Plan for 2020, a decision was taken to support and coordinate various debates and face-to-face meetings under the strategic line of "Sustainable Tourism" within the "Pluralist Economy" cornerstone.

### Face-to-face meetings coordinated under the Strategic Tourism Plan for 2020

DATA	DISCUSSION ISSUES	DESCRIPTION
09/02/2016	Tourist mobility	Presentation of the Tourism Mobility Plan, calendar, methodology and work spaces

<b>14/03/2016</b>	Regulating tourism in the city	Presentation of the various management tools and mechanisms in operation and envisaged for managing tourism and debates on possibilities and needs for the city.
<b>15/03/2016</b>	Taxation and social return from tourist activities	Debate on the tax possibilities of tourist activities and visits and rethinking current mechanisms for promoting responsible tourism.
<b>16/03/2016</b>	Tourist destinations and promotion	Debate on a comprehensive approach to destination Barcelona and its promotion mechanisms, to align with the management needs of tourism and the metropolitan territory.
<b>29/03/2016</b>	Mechanisms for managing tourist accommodation	Debate for dealing with the management, regulation and promotion mechanisms of accommodation practices which fall outside PEUAT's area of action.
<b>31/03/2016</b>	Employment and enterprise in the tourist sector	Debate on the labour market's challenges, employment conditions and business organisations in the tourist sector, to influence the possibilities of municipal action in this regard.
<b>01/04/2016</b>	Tourism, Culture and Heritage	Debate on the impact of visitors on monuments, events and the cultural fabric of the city, as well as the possibilities for planning, managing and coordinating with the players.

A total of 7 face-to-face city meetings proposed through the Strategic Tourism Plan were held in coordination with other plans and projects under the framework of the city's tourism policies. The "Tourism Mobility" meeting was coordinated with the Tourist Mobility Plan's managers as well as the "Management Mechanisms for Tourist Accommodation" meeting that addressed related issues that had not yet been dealt with directly under the Special Urban-Development Plan for Tourist Accommodation. An open day was organised, entitled "Governing Tourism in the City", to play host to an extensive debate on tourism-governance mechanisms, with three speakers taking part who opened the debate: Claire Colomb (lecturer and researcher at the University City of London), Ángel Díaz (an ALS director) and Meritxell M. Pauné (a journalist at La Vanguardia). The other meetings were closed door, with a captive audience proposed under the Strategic Plan, to make an initial attempt at dealing with such issues as taxation, promotion tools, occupancy policies and relationship between tourism and culture and heritage. You can find all these on the plan's website.

The city's district also proposed a series of face-to-face meetings supported under the Strategic Plan. These meetings were more or less specifically about tourism and its



effects in the districts, with very interesting results for capturing the interests, challenges and concerns of citizens.

### Face-to-face meetings coordinated through districts with support from the Strategic Tourism Plan for 2020

DATA	District	DISCUSSION ISSUES	DESCRIPTION
11/02/2016	Sant Martí	Tourism and uses of urban and public space	Urban-Planning Regulations on unique spaces in the district (Rambla del Poblenou, terraces, music activities, craft fairs) and the impact of tourist accommodation.
01/03/2016	Les Corts	For an inclusive tourism	Debating the inclusive tourism project through awareness-raising operators and launching an inclusive tourism network in the district.
11/03/2016	Horta - Guinardó	The top of La Rovira hill, how to preserve its nature?	Dealing with governance, management of visits and the relationship of tourism with the neighbourhood to preserve its uniqueness, positive communal life and enjoyment.
18/03/2016	Eixample	Tourist pressure in Sagrada Família	Tourist pressure, occupation of public spaces, co-responsibility, control and tax returns.
16/03/2016	Eixample	Tourism and gentrification in Sant Antoni	How to provide for tourist pressure, new markets as a risk, use of public spaces,
30/03/2016	Ciutat Vella	Redistribution of benefits from tourism in the territory	Collaboration mechanisms between the district's economic and social fabrics.
11/03/2016	Ciutat Vella	Reducing the impact of tourism	Impact of tourist accommodation and regulation proposals Management and regulation mechanisms set around mobility
04/04/2016	Gràcia	Governance, management of tourist activities (accommodation, mobility), makes tourism fit in with neighbourhoods.	Tourism in Gràcia: challenges and opportunities

Besides its face-to-face meetings and debates, decidim.barcelona has collected action proposals, in an open and pluralistic way, relating to the “Sustainable Tourism” strategic line, as well as support and comments on these. The proposals have different sources. In addition to those gathered at face-to-face meetings, the municipal government, associations and individuals were freely able to offer action proposals for their inclusion in the current legislature's municipal programme.

The data for the entire activity relating to “Sustainable Tourism”, following the completion of the revision and evaluation of all the process' proposals, demonstrates

the great interest in tourist issues. We present the proposals here, under the original title the platform appeared with textually:

### Most-voted “Sustainable Tourism” proposals

Events and activities	Initiatives	Votes	Comments
Strategic Tourism Plan for 2016-2020	58	793	165
Park Güell Master Plan	7	590	32
Protecting local commerce against the negative effects of tourism	3	406	13
Special Urban-Development Plan for Tourist Accommodation (PEUAT)	43	380	78
Territorially developing the Strategic Tourism Plan	8	339	22
Boosting sustainable and responsible tourism	6	227	17
Implementing investment programmes to mitigate the negative effects of tourism	6	218	9
Reclaiming the Rambla for Barcelona's residents	18	177	38
Controlling and closing down illegal tourist flats	4	165	12
Unique layout of Rambla del Poblenou	3	131	3
Tourist activity arrangement and criteria plan	8	121	18
Regulating spaces for dealing with tourism issues in various neighbourhoods	8	118	20
Amending taxation to make good the impact and costs of tourist activities	8	117	18
Taking measures against tourist poaching	8	109	14
Tourism observatory	7	107	13
Initiatives on the impact of tourism in the district	6	103	8
Establishing funds from Spain's Institute of Economic Studies (IEET) to compensate excess tourist pressure	8	76	10
Preserving the Parc dels Tres Turons, including the anti-aircraft shelter area	9	75	15
Territorially developing the Strategic Tourism Plan	16	68	22
Co-responsibility programme for the tourist industry in environmental control and effects	7	65	7
Implementing a plan for detecting unregulated tourist activities	2	58	6
Redistributing the allocation of tourist taxes	1	58	3
Establishing joint decision-making and management in the area surrounding the Sagrada Família	5	56	9
Raising the profile of spaces linked to historical memory	1	36	5
Reclaiming the historical memory of our neighbourhoods	4	35	0
Sign-posting Parc de Collserola's cultural and nature contents	4	33	2
Guided tours through Sant Andreu	2	26	2
Front-loading terraces throughout the Sagrada Família vicinity	1	25	2
City and Tourism Council	3	21	4
Opening the Casa de l'Aigua in Trinitat Vella and connecting it to the one in Trinitat Nova	1	18	4
Promotional map of spaces of interest in Sant Andreu	2	16	5
Signage Plan	1	13	1
Inclusive tourism project: the District headquarters	1	12	0
Tourism Plan	2	11	2
Making a historical map of real-estate property	1	11	0
Controlling tourist flats	1	10	0

Reprising the debate on extending the Sagrada Família Temple	2	9	0
Launching positive community measures among residents and shops in Ciutat Vella	4	8	2
Extending cultural and historical signage in the district's neighbourhoods	2	7	1
Creating a relations and exchange space with historical city centres with high levels of tourism	1	7	0
Providing information on the district to the various players and operators	1	5	0
Drafting projects that include the work line on inclusive tourism	1	4	1
<b>General total</b>	<b>284</b>	<b>4864</b>	<b>583</b>

As can be seen in the following table of proposals ordered by number of votes received, the “Strategic Tourism Plan 2016-2020” was the one that received the most support, with 793 votes, 556 comments, 1092 talks at the various meetings and as many as 58 related initiatives. We also need to take into account that the proposal for “Territorially developing the Strategic Plan” was also one of the most voted for with 339 votes, 22 comments and as many as 16 associated initiatives.

The initiatives allocated to the Strategic Plan are heterogeneous and disparate. We offer you the first twenty. The proposal for drafting a “fair and rational regulatory framework” for sharing home was the most acclaimed, though the most controversial too, as can be read in the comments. There are very broad proposals such as “Tourism for Barcelona's residents” and “Tourist routes “as well as more specific ones, such as the mandatory use of headphones by tourist guides on tours.

### Action proposals assigned to the Strategic Tourism Plan 2016-2020

Initiatives	Vote s	Commen ts
<b>Strategic Tourism Plan for 2016-2020</b>	<b>793</b>	<b>165</b>
We want a fair and rational regulatory framework for sharing our home	267	60
Professionalising tour guides	80	8
Tourism Reduction Plan	63	6
Strategic Tourism Plan for 2016-2020	56	66
Tourist guides with headphones	46	5
Tourism inspection services	41	2
Highlighting tourist guides' knowledge	38	7
Launching strategies to enable Barcelona's residents to enjoy cultural facilities that draw large numbers of tourists	31	1
Launching an agreement for jobs in the tourist sector.	28	0
Supporting internal initiatives and tourism-promotion associations	12	0
Boosting inspections of illegal tourist offers.	12	1
Tourism for Barcelona residents	12	1

Involving the hotel sector in its surroundings	10	1
Promoting and regulating collaborative tourism.	9	1
Regulating and controlling tourism	9	1
Creating a touristic quality seal	8	0
Tourist routes	8	1
Designing awareness-raising initiatives aimed at tourists.	7	0
Regulating and controlling tourism	6	0
Fostering innovation and enterprise in the tourist sector.	5	0
<b>Territorially developing the Strategic Tourism Plan</b>	<b>68</b>	<b>22</b>
The district's tourism plan	31	14
Height limitations and hotel-building permits	20	0
Fostering a more family-orientated and cultural tourism in Gràcia	3	0
Opening communal meeting spaces between residents and visitors.	3	1
Opting for a Sustainable Tourism model	2	0

Source: <http://decidim.barcelona>

Initiatives from the proposal for Territorially Developing the Strategic Plan provide for the creation/updating/revision of the District Tourism Plans and limits to accommodation places.

## 6. TRENDS IN TOURISM

This section aims to include the ten main trends in tourism that especially affect Barcelona. The selection is not intended to be exhaustive in number or detail of its contents. These trends have been included because they were regarded as important for their novelty, breakthrough and importance in the context of Barcelona.

- 1 Increasing tourism in the cities
- 2 Increased sensitivity for the geopolitical situation
- 3 Tourists' use of metropolitan infrastructures
- 4 Sudden appearance of new intermediaries and tourist activities
- 5 Increase in offers and new modes of tourist accommodation
- 6 Increasing relative influence of tourism on the city's economy
- 7 New tourist, visitor and resident profiles
- 8 Changes in trends in residents' perceptions of tourism
- 9 Overcrowding and pressure from highly popular tourist areas
- 10 Socio-demographic development of highly popular tourist areas

### 6.1 Increasing tourism in the cities

In a global context, tourism has been becoming increasingly influential on the economy in both urban areas and other territories. The World Tourism Organization estimates that 1,184 million international tourist journeys were made in 2015, compared to only 1,134 million in 2014. The last six years were a period of strong growth in tourist demand. Europe, with a 3% growth, led in absolute terms, with 15 million more international tourists and a total of 582 million arrivals. It is expected in the long term, according to UNWTO forecasts, that there will be some 1,800 tourist journeys in the world in 2030, representing a constant annual growth of between 3% and 4%.

City tourism is the largest growing sector in the tourism market in a period where other types of tourism are either not growing so fast or even reaching a plateau. According to IPK International 2015 data, the number of city journeys grew by 82% from 2007 to 2014, creating 22% of the total for all the holidays. This source also asserts that in advanced countries, such as the UK, city journeys are now the most popular holiday trips, ahead of sun and beach holidays.

Urban tourism in Europe continues to grow at an accelerated rate. 2014 saw Europe's citizens making close to 70 million international journeys, representing a 60% increase compared to 2007 (+7% annually). Another piece of data that allows us to estimate the size of European city tourism are the 400 million night-stays made in 2014.

This growth in urban tourism raises great challenges at a social, economic and geographic level. The World Health Organization itself maintains that tourism leads to substantial changes in cities and increases the pressure on their residents. This highlights how urban tourism has been creating a shared challenge for the world's cities.

Barcelona's tourism-activity data show a clear trend towards growth. If we take the number of tourists staying in hotels as a reference, a historical series of figures allowing us to analyse developments over time, the city saw over 8.3 million tourists in 2015, compared to 1.7 million in 1990. Tourist demand has grown by 17% over the last 5 years, representing a significant growth, despite the instability and volatility of the economic and social environment. Visitor studies and indicators are being updated as the strategic plan is drafted, to enable reliable data to be obtained on the total volume of the city's tourist demand.

## **6.2 Increased sensitivity for the geopolitical situation**

The world's complex present-day situation can be grasped by the large quantity of global-scale processes and interests and, at the same time, by the interdependence between places on a world level. Tourism, far from being an outsider phenomenon, is strongly conditioned by geopolitical trends.

The predictable exhaustion of traditional sources of energy, such as fossil fuels, is creating considerable tension on an international scale. Hence the inevitable geopolitics around petrol and the economic consequences arising from its price. The interests and policies of countries can be divided up in several ways. For example, there are differences in policies between producer, dependent and large-consumer countries. On the tourist level, rises in petrol prices have effects on the cost of tourist travel, besides the environmental impacts on their destinations. The last five years

have seen a notable fluctuation in petrol prices, a situation that will presumably continue in the future and affect tourism in general and tourists' travel habits. A foreseeable rise in petrol prices could lead to less tourist travel, significant changes in transport systems used by tourists and increased taxes, etc.

Another element to bear in mind are the civil wars and armed conflicts occurring in the eastern and southern Mediterranean regions, as well as the recent spate of terrorist attacks in cities and tourist areas throughout the world. These sustained conflicts and the one-off attacks are both causing changes on the tourist map, influencing travellers' preferences and making safety one of the key factors for choosing destinations. Barcelona clearly appears to have been affected by this situation and everything is pointing to the fact that its social and political stability compared to other Mediterranean destinations and European cities is a key element in the constant growth of visitors. Barcelona, however, is unfortunately not free from such uncertainties and global threats.

### **6.3 Tourists' use of metropolitan infrastructures**

Tourist travel has been evolving, with most of contemporary-society populations repeatedly travelling as tourists. The increase in such travel has been compelling territories aiming to be competitive to provide more and better transport and accessibility infrastructures.

Barcelona over the last few years has received new facilities and services. These infrastructures provide the city with services, reflecting a genuine change of scale in the Catalan capital's connections and communications. Thanks to Barcelona airport's new terminal and other facilities, the volume of passengers has risen from 9 million a year in 1990, to over 39 million in 2015, representing a four-fold increase in volume. As for trains, following its launch, the Barcelona-Madrid high-speed line saw 3.7 million passengers in 2015.

These infrastructures constitute a competitive advantage for the city, as they involve an increase in capacity for attracting investments and could use the opportunity to coordinate investments in new areas of urban interest. That is why we need an efficient

management if we are to ensure their feasibility, by internalising their running costs to the full and reducing the environmental impact caused by passenger traffic.

In the case of the airport, the facilities and services of this infrastructure allow us to establish a network of international flights that link Barcelona to a large number of airports and cities throughout the world. This phenomenon is also occurring with the port's facilities and services, where ships carrying 2.5 million cruise passengers are arriving and connecting the city to the main ports of the Mediterranean and rest of the world.

Of course, these and other infrastructures used by tourist and the city's residents are having a big impact on the environment and causing negative effects, requiring considerable attention. The effects of climate change and impact on the environment caused by tourist activities have taken centre stage on the international tourist-institution agenda. The World Tourism Organization [www.unwto.org](http://www.unwto.org), the World Travel and Tourism Council [www.wttc.org](http://www.wttc.org), and the European Travel Commission [www.etc-corporate.org](http://www.etc-corporate.org), among other bodies, have been intensifying their implementation of programmes for reducing the impact on the environment, working with such programmes as Agendes Locals 21 with recommendations on tourism and travel and basic Guidelines on European-tourism sustainability.

A study conducted over the last few years on the activities tourists do on their travels highlights the high consumption of resources this involves and therefore tourist-related costs. An ecological and environmental protection conscience has evolved. A large number of studies, then, have arisen emphasising this and attempting to make tourism a more sustainable activity. These studies on reducing the impact and on the need for conservation have raised tourists' environmental awareness. Environmental sustainability is having an increasing impact on the requirements of demand. These changes, along with the implementation of regulations and certificates, have led to changes in the sector's offer with regard to efficient use of resources and reduced impact. The transport sector has made this issue a priority and is working to bring about a drastic reduction in emissions and a reduction in the consumption of resources.



## 6.4 Sudden appearance of new intermediaries and tourist activities

Among the main changes that have occurred in the tourist sector over the last few years, mention should be made of the appearance of two key phenomena brought about by the establishment of digital and mobile communication: the appearance of new intermediaries in the tourist sector and the development of services under the framework of the "collaborative economy". Both phenomena have major implications, not just for tourist activities, but also for the other economic-activity sectors, the city and for society as a whole.

The sudden appearance of the collaborative economy is a complex phenomenon that has its origins in the cooperative movement and in the organisational structures of citizen solidarity. Many activities are enshrined in this concept, from basic models for a free supply of services to a community, to platform-exchange models on websites and networks that provide exchanges and the recycling of goods and services based on a brokerage business model. Note, however, the diversity of forms taking refuge today under the umbrella of the collaborative economy and which champion companies as diverse as Airborne, Bert, Home Exchange, Couch surfing and Blackboard, to name a few, having a major effect on tourism. The emergence of these new operators in the tourist environment is revealing a genuine change of model not just in marketing but also in tourist products.

At the same time, and thanks to the available technologies, the value chain's intermediaries have undergone significant changes. Some of the traditional travel agencies have been replaced by online tourist services and product sales agencies (Oats) such as Pigeon-breasted, Bravo fly-Rumbo and Travelogue. Online recommendation platforms (ORS), such as Trip Advisor and viceroys.con, platforms monitoring the market's offers and prices, etc., have likewise appeared and become increasingly important.

## 6.5 Increase in offers and new modes of tourist accommodation

As for accommodation offers, Barcelona has become a city with accommodation boasting the highest quality services and facilities. Barcelona had over 67,603 accommodation places in 381 hotels in 2015. This range of hotel offers is

complemented by other types of tourist accommodation, such as 9,606 Tourist Use Flats with an estimated 40,462 places, 111 hostels with 9,024 places and 268 pensions and boarding houses with 6,036 places. These figures show that Barcelona can provide accommodation for tourists in over 123,000 regulated places. Compare this to 2010, when its overall capacity for providing accommodation for tourists came to around 70,000 regulated places.

This process of growing offers of beds is strongly linked to three phenomena. On the one hand, the constant growth in offers of places in tourist hotels. While there were 187 hotels with 31,338 places in 2000, there were 328 hotels with 61,942 places in 2010. Today, as mentioned above, there are now 67,603 places in 381 hotels in the city. It is worth mentioning here that hotels over the last few years have become assets in the financial market. It is hardly surprising then that over 60% of hotel investments in 2015 came from investment funds.

The second reason is the rapid and significant rise in other forms of accommodation. When the Administrative Simplification Act and regulations on tourist-use flats (HUTs) came into force in 2011, this led to a surge of requests for permits in the city. While there were 2,349 HUTs throughout Barcelona in 2010, by October 2014, following the halt put on permit issues, there were 9,606, representing a four-fold increase in the total number of HUTs in the city in a little over 3 years.

Another area that has recorded large growths is hostels, which offered over 9,000 places in 2015. This growth in number of offers took place at the same time as a change in visitor demand. This is reflected in the opinions gathered from the surveys conducted on Barcelona's tourists. The 2015 results of these surveys suggest that the city's tourists chose to stay in hotels as their first option, even though all the other forms of accommodation put together made up the majority option.

Lastly, we should take into account the illegal holiday-let accommodation, a fluid offer that can reach up to 4,000 unlicensed announcements and which are marketed on platforms such as airbnb, homeaway, nuimba, wimdu, etc., according to the estimates of the City Council itself. In addition, we should add to this the close to 6,500 announcements for rooms to let in shared flats that are found on the market on a lot of these platforms, a form of accommodation that is clearly not regulated under Catalan

legislation, although the loophole here is expected to be closed soon under the coming Tourism Act.

## 6.6 Increasing relative influence of tourism on the city's economy

The dynamism of tourism can be translated into an increase in the economy created by activities directly or indirectly relating to tourism. The latest available study on the economic impact of tourism in Barcelona (University of Girona 2013) estimates that the aggregate turnover for tourism lies somewhere between 8 billion euros and 9.7 billion euros. This turnover represents between 10% and 12% of the city's GNP, according to various considered scenarios, and generates between 96,000 and 120,000 jobs, representing 14% of the total.

Compare that to 2013 when tourism and travel around the world generated 9.5% of GNP and 8.9% of jobs in the city. In 2013, tourism in Spain represented 10.7% of its GNP and over 2.2 million jobs, whereas in the same year in Catalonia it represented somewhere between 10% and 12% of GNP and 350,000 jobs.

As for development over time, the general effects for tourism and employment continued to rise steadily, with a very notable growth from 2007 to 2012.

Table 22. Effects in terms of GVA generated by visitors to Barcelona. 2007, 2009 and 2012.

Scenario	2007	2009*	2012	Variation for 2009-2012	Variation for 2007-2012
Pessimistic	3.681.791.638	3.168.885.974	5.650.264.040	78%	53%
Intermediate	4.578.288.040	3.845.538.904	6.511.548.266	69%	42%
Optimistic	4.739.811.071	3.901.934.633	7.168.088.106	84%	51%

\*Data from the business-as-usual scenarios created in the 2009 report for AQR.

Table 23. Effects in terms of occupancy created by visitors to Barcelona. 2007, 2009 and 2012

Scenario	2007	2009*	2012	Variation for 2009-2012	Variation for 2007-2012
Pessimistic	62,169	51,828	96,120	85%	55%
Intermediate	77,243	64,416	110,888	72%	44%
Optimistic	79,077	71,226	122,260	72%	55%

\* Data from the ad hoc scenarios created in the 2009 report for AQR.

The growth of tourism has played an important role in reflating the city's economy. Barcelona takes sixth place in the ranking of Europe's main cities in 2015, coming after London, Paris, Berlin, Rome and Madrid. This economic dynamism could be seen in the creation of its new tourist-sector businesses. It also appealed to professionals and businesses from other sectors that saw future business opportunities in tourist activities.

Barcelona has a series of international hotel operators, businesses that have been committing themselves to the city over the last ten years, with significant establishments and massive investments. It is not surprising then that the city comes third in the International Congress and Convention Association (ICCA) ranking of international cities with the largest number of organised meetings, after Berlin and Paris. Finally, when it comes to major rankings, we should note that Barcelona Port headed the 2014 classification of European ports.

As for commerce, one segment has specialised in providing services for the city's tourist demand, so abandoning the more traditional commercial formats and opting for international fashion and retailing brands, a large part of which are found in Barcelona's main shopping areas.

Despite the effect of dragging and generating economic tourist activities, excessive dependency is leading towards an uncertain future. It is important here to bear in mind that tourism is present in dynamic cities with advanced economies and plays an important role, though it is not the only activity sector. The dependency or supremacy of an activity sector over others implies negative effects and risks, such as increases in prices, instability in employment and a lack or exclusion of other activities.

## **6.7 New tourist, visitor and resident profiles**

Changes of habits in modern society often promote increased mobility. This raises many challenges for the management of cities, given that more and more short or very short-lasting lifestyles can be observed among residents.

On the tourism level, this complex phenomenon of cities and their residents also raises questions over the traditional definition of tourists and day-trippers. Leaving aside the

technical debate over this issue, what is certain is that the presence of training centres, businesses, research centres and hospitals etc., are generating short-lasting flows of tourists and residents. These sectors, despite the difficulty in quantifying their impact, are generating a huge number of temporary tourists and residents in destination Barcelona.

In Barcelona's case, its training centres, which notably include all its universities, are creating a considerable rise in the number of student arrivals in the city that are increasingly less seasonal, due to their summer courses. Businesses with corporate headquarters and large research centres are also creating a volume of workers and researchers residing temporarily in the city for a fairly long period of time.

Meanwhile, as an urban tourism destination, Barcelona has seen a change in the reasons tourists are visiting the city. Leisure has become the main reason for their visits here. Holidaying was the main reason for most tourists (63%) in 2015. Other tourists spending their nights in Barcelona did so for professional (22%) or personal (13%) reasons.

Professional reasons have been showing a downward trend since the start of the 1990s. In 1990 most of Barcelona's tourists (69%) were visiting for professional reasons. By 2000, just under half of the city's tourists (46%) and by 2015 just over a fifth (22%) were visiting for those reasons. While the number of tourists visiting for professional reasons has grown substantially in absolute terms over the last 25 years, its proportion has changed owing to the extraordinary rise in tourist numbers visiting purely for leisure. Leisure tourists rose to 23% in 1990 and to 63% in 2015.

Barcelona has become a benchmark urban-tourist destination because of its capacity to exploit its offer of unique services and facilities and, in particular, its capacity to combine activities with a Mediterranean lifestyle and leisure, features that are maintaining its attractiveness as a tourist destination.

## **6.8 Changes in trends in residents' perceptions of tourism**

According to an opinion survey conducted on city residents, more than 90% of those surveyed believed that tourism was beneficial for the city. These results, as we would

expect, varied according to the various areas of the city and profiles of the people surveyed. While most of the city's residents were in agreement over the benefits brought by tourism to such districts as Ciutat Vella and Gràcia, there was a wider base of people who did not regard it as a beneficial activity, a stance reflecting the direct reception of the impact on the most-visited areas.

Nevertheless, benefits aside, what is true is that tourism has been causing considerable debate among the city's residents, as it often complicates positive community life between tourists and visitors. As a result, a large proportion of residents (43%) considered tourism to be reaching its limits in terms of the city's capacity to provide services for tourists. This opinion varied according to place of residence and profile of the person surveyed. It was in the city's central districts, such as Ciutat Vella and Eixample, that the heavy pressure of visitors and tourists was taking its toll, creating an opinion of the city's capacity for tourist services reaching its limit. At the same time, close to half of residents (47%) were of the opinion that there was no need to continue attracting further tourists in the future. Meanwhile, as mentioned above, concerns over tourism became a public and collective issue to the point where the last Barcelona barometer (May 2016) put tourism as the city's fourth biggest problem, with 6.6% of the first spontaneous answers.

On the other hand, mention should be made of various social movements, platforms, assemblies and coordination committees whose demands focus on tourist issues, be it its continued growth over the last few years, calling for its reduction; or territorial players championing the city's rights; or against certain practices, such as tourist accommodation in residential buildings. The appearance of these new players is not exclusive to Barcelona and is notable in many of the cities with high tourist pressure in Europe and the United States.

## **6.9 Overcrowding and pressure from highly popular tourist areas**

Barcelona's territorial features make it a small city in geographical terms (101 km<sup>2</sup>), with a high population density (15,887 residents per km<sup>2</sup>) and high territorial occupancy, compared to other European cities. Besides these territorial features, it is essential to take into account that tourism has a tendency to concentrate in certain geographical points. Tourist supply and demand both tend to be distributed unequally

over the territory, with tourist intensities high in some neighbourhoods and areas and low in others. Such concentrations end up creating a superimposition of uses in areas of high intensity, uses typical of the city and tourists, producing problems of saturation and over-exploitation of space.

For their part, tourists concentrate their movements in destination points, places such as the ones mentioned above, which they identify as iconic and crucial. Barcelona's most visited space is the Rambla, which is estimated to play host to over 100 million pedestrians a year. Another highly used space are the city's beaches and sea front, which are capable, as iconic spaces, of attracting a large number of users, residents, visitors and tourists alike. Several public spaces in Ciutat Vella, Plaça Catalunya, Passeig de Gràcia, Sagrada Família and Park Güell are just a few examples of high-intensity areas, spaces where there is a high economic, territorial, social and cultural impact.

If we analyse the territorial distribution of the various assets, tourist services and tourist uses, we will come to the same diagnosis, that there are concentrations and overcrowding in some of the city's spaces. The accommodation offers are highest in the districts of Ciutat Vella, Eixample and Sant Martí and lowest in those of Les Corts, Gràcia and Horta-Guinardó. Commercial and restaurant offers specialising in tourism are mainly located in the city's central shopping hubs, notable among which are: the Barna Centre, Cor Eixample, Passeig de Gràcia, La Rambla, Rambla de Catalunya, Raval. Cultural and recreational offers are also mostly to be found in such districts as Ciutat Vella, Eixample and Sants-Montjuïc.

It is for the above reasons in general that the city has a large number of diverse tourist resources. This plurality and variety preferentially exploit tourism icons, which in Barcelona's case can be found concentrated geographically, and which, owing to their capacity to attract, create overcrowding problems and community disputes between users and residents, in areas such as the Rambla, Barri Gòtic, El Raval, Sagrada Família and Park Güell, to name a few. Despite the management efforts made over the last few years, this phenomenon of concentration, instead of improving, appears to be on the rise, extending to other zones and areas in the city, certainly due to the great rise in numbers of visitors and tourists.

## 6.10 Socio-demographic development of highly popular tourist areas

Ciutat Vella's centrality is turning this district into a particularly complex space. The district has gone through many changes over the years and has been subject to very diverse and important social and economic dynamics. While the District's municipal authority has been implementing social and economic programmes for years, to promote the economic and social reflation of its neighbourhoods, this territory continues to raise numerous challenges for the future.

Ciutat Vella is a district with a much higher-than-average population density and immigration index; and with a lower-than-average age and income per capita for Barcelona. The economic effects of both the crisis and the economic transformation has been causing a steady flow of residents out of the district. In 2015 Ciutat Vella housed 6.2% of Barcelona's population. The district has lost over 11% of its population over the last 8 years, especially in the Barri Gòtic, where it has lost 45% of its population since 2007, according to data on the local population register.

This loss of the resident population was hardly helped by the effects of the tourism-influenced urban development transformations on the district's housing and shops. The conversion of housing blocks into hotels and housing units into tourist-use housing (HUTs) led to a rise in rental prices as well as other practices that finally harmed and penalised the district's residents. The municipal government has been working for a long time on urban-planning tools to correct and fight against the loss of the population and gentrification with specific plans, including the Ciutat Vella Use Plans and the current Special Urban-Development Plan for Tourist Accommodation (PEUAT).

Lastly, according to the opinion survey conducted on residents, most of Barcelona's residents (64%) believe tourism has an impact on prices in the city, against a mere 15% who think otherwise. A recent report prepared by Barcelona City Council evaluating the city's residential rental market shows there has also been a rise in prices and a reduction in supply in the neighbourhoods with the most tourist activities, although the cause for that cannot be directly attributed to it.



## 7. REPORTS

### 7.1 Justification

This chapter presents the results of the shared diagnosis process prepared from reports on thirteen specific themes. This exercise has enabled us to delve deeper, debate and prepare a report by sixteen experts in the matter, who have turned this plan into a more representative document.

The choice of issues responds to a twofold need. First, to provide a deeper, more qualitative approach to issues that could not be analysed through the available sources and which required a stance, discussion and narrative. Second, to delve more deeply into issues considered relevant after the decidim.barcelona process, on the one hand, and the evaluation of the existing information gaps, on the other. The final relationship of issues and rapporteurs, as well as the dates and number of allocated work sessions were as follows:

	Subject	Rapporteur	Date	Nº Participants
1	Tourism in the Districts	Jordi Moll	20/04/16	16
2	Employment and labour market in the tourist sector	Nemo Remesar	17/05/16	11
3	Marketing for a sustainable and responsible destination	Joan Manuel Ribera	18/05/16	14
4a	Private sector's relationship with the Authorities	Ángel Díaz	20/05/16	8
4b	Private sector's relationship with the Authorities	Ángel Díaz	10/06/16	4
5	Collaborative economy and other common economies for a better integration of tourism in the city	Paolo Russo Elsa Soro	23/05/16	18
6	Planning and urban-development management tools around tourism	Ricard Pié Josep M <sup>a</sup> Vilanova	24/05/16	19
7	Territorial strategy and tourism management in Barcelona's metropolitan arena	Francesc López Paolomeque	26/05/16	18
8	Sustainable and responsible enterprise	Josep Capellà	27/05/16	7
9	Smart tourism and city	Luís Falcón	31/05/16	13
10	Strategies around the trade and restaurant sectors	Josep Francesc Valls	06/06/16	11
11	City, heritage and tourism	Saida Palou	07/06/16	13
12a	The effect of cruises on destination Barcelona	Daniel Imbert- Bouchard Ramon Serrat	15/06/16	16
12b	The effect of cruises on destination Barcelona	Daniel Imbert- Bouchard i Ramon Serrat	20/06/16	13
13	Turisme de Barcelona today	Enric Truñó	16/06/16	11
	<b>Total nº of participants</b>			<b>192</b>

With the plan's managers and executive staff working together, a framework was established for the starting point, the issues to be debated, the goals of each group and the make-up of participants in the various Work Groups. A total of 15 meetings, each lasting two to three hours, were held in the months of April, May and June, livened up by the Momentum<sup>co</sup> team. The meetings all had a very similar structure, with one or two exceptions. First, the debate was framed around diagnosing the plan. Later on, after a brief presentation from those attending, the individuals in charge of the reports introduced the subject and opened the debate based on a guide previously shared with those attending. Finally, to conclude the meeting, the participants were called on to summarise their key ideas. The results of the process were captured in an event shared between the participants and the rapporteurs.

These meetings had a twofold purpose. First, to deal with the issue at hand from a broad and shared perspective with participants. Second, to help rapporteurs in their task to prepare the diagnostic that supplemented their initial knowledge.

For the purposes of meeting and comparing various visions and sensitivities regarding tourism in Barcelona, a balance was sought between the interests of the parties and the voices of other experts. The overall composition of those attending was divided as follows:

- Representatives of the public sector: **39%**
- Representatives of the private sector: 24%
- Academics and experts: 24%
- Turisme de Barcelona: **9%**
- Local resident representatives: 4%

The sessions' conclusions and debates made a contribution of indisputable interest to the process of the Plan. All the materials and documents generated are available on the plan's web space <http://ajuntament.barcelona.cat/turisme/ca/pla-estrategic/activitat>, featuring data on the meetings, their minutes, lists of participants and diagnosis documents.

Note too that even if the reports are consultation documents authenticated by their authors and the pluralistic discussion process, under no circumstance may the final document or minutes of the meetings be regarded as binding parts of the plan.

## 7.2 Summary of the contents

We present a summary below of the goals of the discussion and debate on the documents and the meetings, in addition to a collection of the three most important ideas of the key diagnosis documents. We recommend you read them thoroughly for a better understanding of the documents as well as the minutes of the fifteen work meetings.

### 1. Tourism in the districts

The diagnosis document on tourism in the city's districts reflects the opportunities that tourism implies for the districts and the way that the activities in the city's districts and neighbourhoods have to continue to be planned and managed.

The city's 10 districts have their own unique and specific features. That is why the starting points and needs for each of them are so different. Tourism in the city is an established reality that creates economic activities, but which is not free of imbalances. Spatial concentrations of tourist activities create opportunities for districts to redistribute positive effects and the mandatory need to reduce negative effects.

Some of the most important strategies for combating tourism's externalities in the districts are:

- Prioritising the management of tourism's effect on the city's districts and neighbourhoods.
- Working on diversity in the districts rather than making everything homogeneous in the territory.
- Reviewing the districts' management needs.
- Tackling directly the control of illegal accommodation, improving the tools for territorial management and the indicators for flow and mobility management.

## 2. Employment and labour market

The aim behind this report on employment and labour market is to provide tools for creating subsequent reflection on how to boost a sustainable tourism development that benefits the whole local population, through better access to the labour market (by improving its employability), improved employment conditions and the creation of new quality jobs with the final goal of offering a fairer distribution of the economic benefits and, in general, improving the well-being of the population.

It also explains the need to improve the governability of tourist-management tools and bring about greater involvement in the public sphere and establishing larger participatory spaces. To this end, we therefore need to involve the territory's main social and economic players in a space where debates and decisions can be made on strategic lines and shared commitments to the labour market.

Here are a few of the key aspects:

- Qualitative improvements to employment brought about by the sector as well as the creation of new stable and quality jobs.
- Promoting quality employment as a key element for redistributing wealth and social returns.
- Promoting commitment and consultations among all the economic players.
- Improving knowledge and information with indicators and metrics that allow their monitoring.

## 3. Tourist marketing for a sustainable and responsible destination

The report on tourist marketing for a sustainable and responsible destination aims to set out the marketing strategy that has to be followed in a destination as successful as Barcelona, so as to contribute towards developing a sustainable model. Barcelona has become one of the world's main tourist destinations but this situation is not free of challenges and these need to be tackled with communication tools.

Some of the key aspects for ensuring the future of the destination are:

- The main strategy for contributing to the sustainability of Barcelona as a city and destination is for tourist marketing to be put at the service of the city's welfare. The city has to find a balance between its roles as a city for living, working and enjoying.
- Concentrating promotion efforts on the products that Barcelona intends to offer with a strategy and a rich narrative of the city.
- Prioritising the promotion of tourist sectors that bring social, environmental and economic value, as these constitute genuine quality tourism. It is among these sectors that internal tourism is probably one of the most sustainable the city can have.
- Promoting training processes, ongoing improvements and certification in responsible and quality tourism which allow us to distinguish companies working to bring value to destinations.

#### 4. Private sector's relationship with the authorities

As for the private sector's relationship with the authorities, the text deals with relations between institutions, associations and individuals from the public and private sectors and the way they have to be shaped in the future. It mentions the need for adapting to the current context for joint work on the city's tourist policies.

Notable key aspects in the document are:

- The public sector has to be capable of providing information on everything it is doing and of adopting and better understanding business dynamics. The private sector has to understand the determining factors in the city's tourist management and to create a long-term responsible vision geared towards sustainability.
- The traditional public-private confrontation has to give way to cooperation, allowing work on a joint model that ensures sustainability.
- Defining clearly the roles of the public and private sectors in planning, implementing and managing tourist activities.
- Boosting joint-work strategies between the public and private sectors, to share future scenarios and objectives, as well as information and knowledge.
- Extending and dynamising the foundations of business representation, in order to boost innovation and involve all the new activities currently shaping

Barcelona's range of tourist offers and making up a large part of its capacity to attract.

## 5. Collaborative economies and other common economies for a better integration of tourism in the city

The text explores the current dimensions of the collaborative economy and its role as an engine for new tourist models and practices, referring to the specific case of Barcelona and highlighting the most popular platforms operating in this sector, as well as the pros and cons they apparently bring.

Having analysed the social and environmental effects in Barcelona and other cities, it then calls for a definition of a commons framework for characterising these models and evaluating the convenience of backing (or regulating) their expansion, from a public-authority perspective, depending on their level of capacity for contributing to the transition towards a fairer and more cohesive and inclusive city model than the one produced by traditional tourist-sector practices.

Here are a few of the key aspects:

- Distinguishing practices that come under the collaborative umbrella, for the purposes of separating commons-based ones from extractive and corporative ones.
- Defining a favourable strategy for collaborative commons practices, by evaluating their social return and contribution towards a fairer and more redistributive economic model.
- Promoting social-innovation mechanisms that are based on use, joint management and the generation of new knowledge available to everyone through open data.

## 6. Planning and urban-development management tools around tourism in the territory

The document aims to reflect on the urban-development planning and management tools that are available today for dealing with tourist uses of territories and cities. It initially examines Barcelona's position today as an unavoidably tourist city, an essential step for taking on the effects of tourist practices as the city's own challenges. It also analyses key aspects of the need for urban-planning regulation and management, to ensure the right to the city, focused in particular on the guarantee of the right to

housing and competition for the use of shared urban resources such as infrastructures, services and public spaces. It also evaluates the tools currently available in urban planning for dealing with the management and planning of the city's tourist uses.

Its notable key aspects are:

- Tourism as an economic power house of the post-industrial city is affecting property values in such a way that people can no longer enjoy permanent residence in extensive areas of the city.
- Pressures on property from tourist accommodation, fierce competition with local economic activities and competition for shared basic resources as the main challenges to be managed.
- The need for reviewing the general regulatory framework for deactivating, when not eliminating, speculation on land suitable for development and built for developing tools for satisfying the property's social function.

## 7. Territorial strategy and tourism management in Barcelona's metropolitan arena

The metropolitanization of tourism is a general phenomenon found in many large cities, besides Barcelona and its metropolitan surroundings. This implies a change of scale in tourist activities, a new situation that is made more complex, and a brand-new scenario for the public management of tourism. The diversity of tourist activities in Barcelona and its metropolitan surroundings sketch out maps of unequal intensity, areas, variable functional tourist spaces (according to the spatial specificity of each activity), which do not necessarily coincide with municipal-authority, county or metropolitan (AMB) boundaries. Even so, the diverse nature of the tourist phenomenon and cross-cutting character of its economic dimension do not allow for public action, as an expression of the authority's management aim and/or competence (layout and planning as administrative jurisdictions).

Notable issues in this report are:

- The need to order, plan and channel growth in tourism by avoiding the perception and partial and interested initiative of acting only from Barcelona's perspective, to export problems to the metropolitan surroundings. Action is required from all the players (public and private) in the whole territory, with the roles that correspond to their circumstances in each case.

- Considering other metropolitan-level planning tools so work can be done on metropolitan territorial strategy and tourism management.
- Promoting communication among players, their coordinated action and cooperation in projects is one of the key challenges. Faced with this complex situation and dysfunction with the institutional framework, we might want to proceed with caution, advisable also given the limitations in management, ordering and planning competence and tools in the matter and in the territorial areas.

## 8. Sustainable and responsible enterprise

The diagnosis on sustainable and responsible entrepreneurship focuses on the situation of entrepreneurship, its sustainability and responsibility; and reflects on the opportunities for prompting a transition of Barcelona's business structure towards sustainability and responsibility through support and joint work with an emerging productive fabric, which individually and collectively opts for this paradigm.

Notable main issues in this report are:

- Increased demand for sustainable and responsible tourism in line with the trend of western societies towards a more responsible and ethical consumption.
- A commitment to sustainability is a cross-cutting city-wide commitment, involving all tourist attractions and services that interact with visitors.
- The authorities, especially the local ones, have to commit themselves to leadership and action. Their practices and programmes are of special value, setting an example to the other players in the destination.
- Positively discriminating all the tourist events promoted by the administrations, procuring sustainable accommodation, ecological taxis, public transport and selective purchasing.
- Promoting business and services with seals and certificates that are used for advancing towards a more sustainable and responsible model.

## 9. Smart tourism: challenges and possibilities

Thanks to the opportunities offered by a strongly digitised society, the document aims to reflect on the integration of data-acquisition systems, the building of knowledge from these and their activation in the management of the city and for incentivising private initiatives.



To that end, the role of technology in the tourist-value chain is first of all analysed through a summary description of how this has been established in each section of the value chain, and how it has been generating new business models. The features of the data on smart tourism are set out below, distinguishing between statistical data and Big Data and their impact for managing destinations.

The most notable aspects of the document are:

- The importance of sharing information between public bodies and private companies, promoting the acquisition of own data as well as the implementation of methodologies for processing data from authorities.
- The metropolitan vision as a territorial scale and the active role of territorial phenomena for developing sustainable tourism.
- The potential of Big Data for taking on the challenges of monitoring, evaluating and taking decisions on managing tourist activities in the city.

## 10. Strategies around the trade and restaurant sectors

The text of the report on strategies around the trade and restaurant sectors deals with the opportunities that these sectors represent when there are tourists and visitors in the city from other neighbourhoods and municipalities in the Metropolitan Area and rest of Catalonia.

The key issues in this report are:

- Shopping has gone from being a complementary activity to part of the tourist-travel plan. Buying from local shops is an activity that strongly attracts locals and European tourists and which is taking on greater and greater importance every day as a reason for travelling.
- The diverse range of commercial offers in Barcelona promotes the creation of an urban commercial identity and the personalisation of neighbourhoods and hubs as spaces of particular attraction in the city.
- Each hub or neighbourhood has to pool the efforts of its retailers and players such as proprietors, APIS, banks, etc., and the City Council to develop its uniqueness and capacity to attract visitors and tourists.

- We have to boost tourist attractions by making the most of existing icons and creating others in neighbourhoods, to provide opportunities for benefiting from tourism in every part of the city.
- Improving the welcoming process for clients (locals and tourists), to improve shopping experiences.

### 11. City, heritage and tourism

This report deals with the relationship between heritage - understood broadly, pluralistically and heterogeneously - and tourism. To do that, certain key issues are explained to help us to reflect on them, taking account of the complexity of this relationship. First, the difficulty of framing heritage in the tourist context is explained in an essentialist way, and the risks involved in tracing a line between what is touristy and what is not. It highlights the importance of heritage as a key element in the attractiveness of a tourist destination like Barcelona, but also champions heritage as a multiple object and, as such, capable of taking on several roles, even different interpretations and experiences, at the same time. It therefore calls for compatibility of functions between conservation and enjoyment, assuming that these necessarily have to be complementary.

As key aspects, the following are to be noted:

- Intensity of uses, forms of consumption and compatibility of functions are important challenges that have to be taken in management.
- We need to ensure that heritage contents and values are not distorted, trivialised or impoverished whilst ensuring quality in transmitting knowledge of heritage and making it accessible and adapted to the various types of public.
- Tourism can help to emphasise heritage that is neither hegemonic nor iconic, by reawakening an interest in visiting and promoting such assets, by seeing to aspects of their material management and ensuring their variety.

### 12. The effect of cruises on destinations

The report considers how to coordinate the way cruise activities currently fit in with Barcelona and its tourist model over the coming years. It does this comprehensively and by taking account of the complexity of the issue to be dealt with, proposing several aspects for tackling an established scenario and forecasting growth over the coming

years. The economic aspect of its impact, and also the necessary investments and derived costs; the social and territorial aspect, dealing with the effects of cruise activities in Barcelona as regards mobility, tourist products and their itineraries, in relation to neighbourhoods next to the port, etc.; as well as the environmental angle, by tackling the activity's environmental impact.

Some of the report's notable key aspects are:

- Lack of widespread knowledge of the activity, both with regard to potential positive effects and externalities. This is worsened by a lack of available information and studies.
- Increased concern over the impact of cruises on the environment, as well as the serious effects of visits to the territory.
- Lack of spaces for dialogue among the various players and paucity of influence the City Council has over the decisions taken at Barcelona Port, making it difficult to have a joint strategy between the various institutions.

### 13. Turisme de Barcelona today

The document aims to reflect on the current situation of the Turisme de Barcelona consortium and propose strategic criteria for its future. To do that, the origins and evolution of Turisme de Barcelona are explained as a tool for promoting and receiving visitors, a key tool for understanding Barcelona's place as a destination. It also reflects on the possibilities of reconsidering promotion and communication tools, their alignment and integration with the city's tourist strategy.

The most notable aspects of the document are:

- There is still a need in the present environment for marketing, promoting the destination, attracting specific demand sectors under certain criteria (interests and criteria framed by the destination's managers).
- Updating Turisme de Barcelona as a tool for public-private promotion and adapting it to the new needs of the city's tourist policies.
- Changes to the tool will have to be accompanied by institutional changes. While public-private cooperation is conceived as an optimum scenario, it also provides for the need for rethinking its members' participation and representation; suggesting a new municipal funding model; and working jointly on the destination's new strategic elements.

- Turisme de Barcelona has to rise to this new situation, take on new responsibilities, find a new point of equilibrium, take part more actively than ever in the debate on tourism and become part of the common challenge, the city.

## 8. STRATEGIC CHALLENGES AND GOALS

We present the results of the work process of this diagnosis stage below, as strategic challenges and goals. For these purposes we have structured them into five areas, defined during the design stage of the plan, after assessing the preliminary documents. These areas respond to the wish to systemise the results and making them easier to read, without losing sight of the comprehensive and complex view of the tourist phenomenon in the city. The areas, however, must not be understood as unconnected, water-tight compartments. On the contrary, the challenges and goals are clearly inter-related.

### Work Areas of the Strategic Tourism Plan for 2020



## Area 1. Governance

**Challenge 1.1.** Strengthening **municipal leadership** to guarantee an extensively participatory governance of tourist policies and thereby ensuring a **pluralistic and diverse representativeness of players**.

Tourism is a collective issue and its activities are cross-cutting in nature and affect the building of the city; that is why it is the public authorities that have to take charge of its management. This public leadership has to set out the possible action frameworks with the main goal of ensuring the city's general interest. To do that, it will have to launch participatory spaces for the co-production of tourist policies in conjunction with the private sector and social and community players, without losing sight of open participatory mechanisms.

*Goal 1.1.1. Creating participatory spaces for discussing and debating municipal tourist policies with the various players.*

*Goal 1.1.2. Turning the Tourism and City Council into the main shared work space for debating and reporting.*

*Goal 1.1.3. Ensuring a fair composition of the parties and taking into account the pace and potential for action of the various participating players.*

*Goal 1.1.4. Guaranteeing a pluralistic and diversified representation of the private, social, trade-union and community players in the various participatory spaces.*

*Goal 1.1.5. Strengthening open-participation tools through virtual participation tools.*

**Challenge 1.2.** Strengthening the **links between authorities** to line up the strategies at different scales and with different areas and authorities.

Most of the challenges around tourism in Barcelona cannot be dealt with solely by the local authority. Spaces need to be found for joint work with the various institutions responsible for the regulatory and executive framework of tourist policies; as well as non-government institutions. These spaces have to help with tackling the shared challenges, lining up political and technical positions, to coordinate the strategies from the various territories, areas and institutions.

*Goal 1.2.1. Strengthening permanent work spaces with the various public authorities to line up management strategies and share executive and legislative needs: Generalitat of Catalonia; Barcelona Provincial Council and the Barcelona Metropolitan Area, municipalities and tourism trusts.*

*Goal 1.2.2. Creating and/or strengthening joint work spaces with public, private and government-assisted institutions that have an effect on the shaping of the destination: Barcelona Port, Barcelona-El Prat Airport, Fira de Barcelona etc.*

*Goal 1.2.3. Activating and establishing national and international networks for sharing tourist-management challenges, strategies, tools and criteria that go beyond promoting and marketing.*

**Challenge 1.3. Integrating the policies** of ordering, regulating, funding, communicating and promoting tourism with a shared strategy.

Tourist activities are diverse in form and function: accommodation, transport, personal services etc. Each of the activities has a sectoral set of rules that are answerable to different areas and institutions. An integrated management involves thinking about the complex network of activities to tackle the effects of the activities jointly. Tourist management, then, has to be of a cross-cutting nature and enjoy a central space in the authority if it is to guarantee its functions.

*Goal 1.3.1. Continuing the administrative and regulatory development to enable Barcelona to become a benchmark in management, ordering, funding and promoting tourist activities.*

*Goal 1.3.2. Finding innovative administrative formulas for bringing greater effectiveness to the coordination of plans and management tools relating to the city's tourist uses.*

*Goal 1.3.3. Promoting coordination between tourism-management strategies and other territorial and sectoral municipal policies.*

*Goal 1.3.4. Integrating the Turisme de Barcelona Consortium into coordination spaces around the policies launched by the city.*

**Challenge 1.4.** Generating **open information** as a key element for decision-taking.

Open knowledge is key to our ability to maintain and design tourist policies. The last few years have seen considerable progress in the gathering and publication of information on tourist activities. Even so, we need to keep up our commitment to fund, produce and publish more and better data, reports and monographs with innovative methods for obtaining, managing and displaying information.

*Goal 1.4.1. Creating a Tourism Observatory to lead and produce knowledge, as well as open knowledge on tourist activities, in coordination with other authorities and public and private institutions.*

*Goal 1.4.2. Gain more in-depth knowledge of key aspects that have an impact on tourism management: labour market and employment conditions, real-estate impact, commercial fabric, tourist uses of mobility etc.*

*Goal 1.4.3. Opting for new tools for obtaining, managing and displaying information - Big Data, Artificial Intelligence etc., - to improve our knowledge of tourist activities and manage the territory and mobility flows more efficiently, among other areas of application.*



## Area 2. Tourist management

**Challenge 2.1.** Strengthening the **links between tourist activities and other economic areas and social and cultural players** in the territory to create opportunities.

Far from being foreign to the city, tourism is part and parcel of it. We need to think, then, about ways of integrating its activities in the territory's business and social initiatives, to generate dynamics that multiply the positive effects derived from the presence of visitors in the city and to encourage tourist agents' participation in local and community development plans for the territory they are located in.

*Goal 2.1.1. Integrating tourist activities and businesses into local and community development policies to have a positive impact on improving conditions in the neighbourhoods.*

*Goal 2.1.2. Operating new public-private community cooperation tools, based on co-producing projects under sustainability and responsibility criteria.*

*Goal 2.1.3. Strengthening relations between commercial offers and visitors, to maintain a diversified and local fabric, periodically monitoring the effects.*

*Goal 2.1.4. Informing visitors of the city's cultural-activities calendar and promoting the use of and visits to facilities that are not oversubscribed.*

*Goal 2.1.5. Promoting measures that make tourist practices and activities more accessible - accommodation, transport, services - for people with disabilities.*

**Challenge 2.2. Managing the impact** of tourist activities to make them compatible with daily life in the city.

Tourism-sustaining activities have a big impact on the city. Whereas many of the practices are integrated into and positively complement the daily running of the city, others generate high social, economic and environmental externalities, such as

competition for basic housing resources or urban space. We need to ensure positive community life and compatibility with residents' lives by managing, regulating and controlling externalities.

*Goal 2.2.1. Finding formulas for balancing costs and benefits, through shared responsibility frameworks with players, without having to activate control or disciplinary mechanisms.*

*Goal 2.2.2. Looking out for illegal accommodation, in particular unlicensed flat letting, which puts housing access at risk.*

*Goal 2.2.3. Preparing comprehensive management plans for over-visited spaces, to minimise their negative impact, in collaboration with private and community players.*

*Goal 2.2.4. Drafting a Tourist Mobility Plan that reduces the impact of tourist uses of mobility, both in regular public transport services and specific tourist uses.*

*Goal 2.2.5. Exploring systems that allow real-time knowledge of mobility flows, for the purposes of managing them, correcting them and boosting visit spaces.*

**Challenge 2.3.** Building **standardised criteria for evaluating the social return** of tourist activities and being able to highlight good practices.

To ensure greater social return from tourist activities, and for the purposes of highlighting good practices and fostering their development, we need to set the criteria to enable an evaluation of how businesses fit in with their environments and in their activities. These criteria have to be aligned with international standards without losing sight of Barcelona's actual context.

*Goal 2.3.1. Promoting our own certification system, Biosphere-Barcelona, adapted to the reality of urban tourism in Barcelona and allowing us to highlight activities that satisfy these criteria.*

*Goal 2.3.2. Establishing indicators and protocols for evaluating grants and funding in territorial, sectoral and development projects to ensure the greatest possible social return.*

*Goal 2.3.3. Positively discriminating the promotion and procurement of services and activities certified with legitimate quality seals.*

**Challenge 2.4. Evaluating and regulating new disruptive activities** and eliminating illegal activities, in particular those that pose a danger to basic citizen rights.

The last few years have seen a series of completely new activities in the tourism framework, such as accommodation and transport-mediating platforms, the collaborative-economy umbrella etc. Deep reflection is required here for singling out these activities. On the one hand, they will have to launch and promote social innovation with a positive impact on the city. On the other, they will have to regulate those that end up merely mining the benefits and not bringing any added value to the destination or even putting residents' basic citizen rights in danger.

*Goal 2.4.1. Promoting innovative business initiatives that create quality jobs and do not monopolise basic resources such as housing or urban spaces.*

*Goal 2.4.2. Finding spaces and tools for boosting the collaborative commons economy, having previously set out the criteria to be able to be considered as such.*

*Goal 2.4.3. Controlling and bringing disciplinary action against activities which, under the umbrella of innovation and technology, involve deregulating activities, unfair competition and performance with strong externalities, be these accommodation, transport, restaurants, guided-tour services or any other area of activity.*

## Area 3. Territorial strategy

**Challenge 3.1.** Ensuring a **social and economic balance** in the areas with greater tourist pressure, giving priority to **maintaining and attracting the resident population.**

The effects of tourist activities vary in intensity throughout the city. Accommodation, range of commercial, cultural and recreational offers, proximity to an icon or attractive space for visiting can put critical pressure on the resident population in some cases. This pressure affects their quality of life and even, in the case of real-estate pressure, put their continued presence in jeopardy. Actively promoting strong roots among the population is key to ensuring a social and demographic balance and also to helping to maintain the range of local commercial offers and ensuring the efficiency of public services. Maintaining the quality of life of residents is what will prevent these central areas from becoming exclusive containers for tourist uses and losing the uniqueness that makes them so attractive.

*Goal 3.1.1. Promoting the permanent residence of locals through multiple forms of leases and housing contracts.*

*Goal 3.1.2. Fostering local and community development plans in the more popular territories, to ensure greater social return from the activities and allow the building of alternatives to the visitor economy.*

*Goal 3.1.3. Creating formal and stable participatory and work spaces in the districts with a greater tourist presence to share proposals and initiatives among the various players in the territory and the City Council.*

*Goal 3.1.4. Involving tourist operators to integrate the various paces, seasons and temporary periods in the management of the more popular spaces.*

*Goal 3.1.5. Adopting differentiated municipal action for each of the realities and necessities while strengthening the coordination of cross-cutting initiatives and municipal professionals in their territorial work.*

**Challenge 3.2. Reducing the ecological footprint of tourist activities** in accordance with international guidelines and standards.

Extending the destination's sustainability criteria must involve reconsidering and extending all environmental aspects. While urban-tourism practices - in a dense city such as Barcelona - are mostly not typified by a differentiated consumption of resources with regard to the city's daily uses, we must not forget the environmental guidelines and commitments acquired at an international level. In addition, we need to take into account the prevailing use that tourists make of such means of transport as aeroplanes and boats, activities that have a high environmental impact, as well as the metropolitan dimension of the phenomenon.

*Goal 3.2.1. Preparing environmental-impact indicators for tourist activities and modes of transport for accessing the city in order to be able to monitor these periodically and launch a communication campaign for visitors and residents.*

*Goal 3.2.2. Building environmental guidelines through international standards to minimise the impact of the activities and means with greater impact.*

*Goal 3.2.3. Promoting the publication of the data on ecological footprints in the city, to open up a debate on management possibilities.*

*Goal 3.2.4. Promoting means of sustainable mobility under the Tourist Mobility Plan, to reduce the impact of visitor mobility.*

**Challenge 3.3. Strategically promoting cultural, heritage and recreational attractions in the extended area of the destination**, by analysing possible general effects in advance.

Tourist activities are generally highly concentrated in central areas and the areas closest to the city's tourist icons. Diluting concentrations and therefore expanding tourist numbers in neighbourhoods must take into account the limited load-bearing capacity of some promoted points of interest, such as Turó de la Rovira. This situation calls for a return to the territorial strategy of tourist promotions in accordance with the

territory's features and capacities. We need to think about the neighbourhoods, hubs, heritage sites and territories that are suitable for receiving more visitors without posing any danger to their residents and natural and cultural heritage. That is why we need to extend the municipal territory's focus and the territorial scale of the destination to three levels: metropolitan, provincial and Catalan region.

*Goal 3.3.1. Promoting a coordinated territorial strategy among the various authorities with the competence to promote attractions such as new centres, routes, landscapes and experiences beyond their municipal boundaries.*

*Goal 3.3.2. Lining up current promotional strategies to strengthen the attractions that can ease congestion in the overcrowded areas in Barcelona's city centre.*

*Goal 3.3.4. Boosting the attractions that are accessible by public transport and with suitable access infrastructures for visiting.*

*Goal 3.3.4. Making the conservation of the cultural and natural heritage compatible with its enjoyment, by ensuring that visits are compatible with its social function.*

*Goal 3.3.5. Protecting cultural, identity and heritage contents and values against distortions or over-simplifications.*

**Challenge 3.4.** Rethinking **the tools of urban management** to tackle the effects of intense and mobile uses by visitors and tourists in the city.

Managing the tourist city requires reviews of the municipal tools in urban-planning matters, tax mechanisms and byelaws. Many of these tools are currently designed for managing a city of permanent residents, and they have little capacity for affecting intensive, mobile and temporary uses by visitors. New systems and management tools will have to be introduced to balance the costs and redistribute the benefits of the wealth generated by tourism. Note that such a review of urban management tools would have to work on a metropolitan scale, given that a large part of the tools coming into play are from the metropolitan area.

*Goal 3.4.1. Promoting deep reflection to adapt urban-development management tools - planning, ordering, inspecting - to take on the challenges of the city's tourist uses.*

*Goal 3.4.2. Finding new funding mechanisms - taxes, rates, public-sector charges - to compensate the balance between the costs and benefits of the activities, in particular the ones that generate negative externalities.*

*Goal 3.4.3. A decisive influence on general metropolitan planning - PGM, PDU and other territorial planning and ordering figures - to incorporate tourist uses of the land and find forms of urban-development compensation for their uses.*

*Goal 3.4.4. Incorporating the intensity, traffic volume and mobility of visitors when designing spaces, transport and facilities.*

## Area 4. Work and business

**Challenge 4.1.** Ensuring **decent working conditions** as a central element for redistributing the wealth generated by tourism.

Tourist activities offer an important job opportunity for the city residents. As tourism generates 17% of direct, indirect and induced jobs in the city, we need to ensure decent living conditions to enable continued residence in the city, through tourism-related work. Guaranteed quality jobs, paid under collective agreements and fair and healthy conditions, is the cornerstone to redistributing the wealth generated by tourism in the city.

*Goal 4.1.1. Reviewing the City Council's outsourcing and tendering policies, to promote social clauses and ensure the quality of employment conditions.*

*Goal 4.1.2. Including employment-condition clauses in any tourist-quality seal promoted by the City Council.*

*Goal 4.1.3. Promoting an agreement on quality of employment conditions among tourism-related private players and unions. A work and coordination space for implementing joint action programmes with players.*

*Goal 4.1.4. Strengthening disciplinary measures to ensure better compliance with current legislation and coordinated work with the competent authorities.*

**Challenge 4.2.** Promoting a **responsible and innovative entrepreneurship** to guarantee **shared-value creation**.

Responsibility and innovation are elements of great strategic value which have to be on the agenda for all the players involved in tourism. Shared-value creating requires the promotion of new business formulas where profits and social needs complement each other, so we can respond to the destination's shared challenges and needs. For their part, the authorities must take on the role of guaranteeing this new business culture, by setting an example through their companies, promoting good practices in a



discriminatory manner and arranging funding programmes and lines aimed at this landmark.

*Goal 4.2.1. Promoting certification with sustainability insignia for all municipal companies that provide tourist services*

*Goal 4.2.2. Creating knowledge-transfer and innovation spaces among economic and social players to enable the sharing of experiences and methodologies and the creation of links and synergies between them.*

*Goal 4.2.3. Raising awareness among established entrepreneurs of the advantages that undertaking medium and long-term sustainability and responsibility commitments represent for optimising service management.*

*Goal 4.2.4. Designing programmes for fostering and the active economic promotion of responsible entrepreneurship under the framework of tourist activities and boosting new, more redistributive business models.*

*Goal 4.2.5. Choosing to positively discriminate in favour of companies committed to Sustainable Tourism for events promoted by the authorities: sustainable accommodation, ecological taxis, public transport, selective shopping etc.*

**Challenge 4.3.** Boosting the entrepreneurial capacity of tourist areas **by launching and establishing other economic activities** throughout the entire value chain.

Launching new economic areas through tourism is one of the key future challenges for the destination. Established tourist businesses can accelerate the launch and establishment of other complementary economic activities providing services to other spheres of the city's consumption and production economy. Economic activities based on sustainable, responsible and redistributive models will improve the tourist value chain.

*Goal 4.3.1. Exploring new meeting and coordination spaces among the city's various economic and social players, to create business synergies.*

*Goal 4.3.2. Creating formal and informal knowledge-exchange programmes between Barcelona's businesses and business and administration delegations coming to the city for different reasons.*

*Goal 4.3.3. Strengthening the links between business-tourism programmes and the local business network, to strengthen relations and generate multiplying dynamics.*

*Goal 4.3.4. Improving the representativeness of the traditional tourist sector and fostering the structuring of the representativeness of the new economic activity sectors that are linked to tourism.*

**Challenge 4.4.** Promoting tourist-**service training and professionalisation** to ensure excellence and competitiveness.

From now on, professionalisation of services will be a central element in the destination's competitiveness and excellence, for the purposes of ensuring product quality, workers' employment guarantees and capacity for resilience to changes. Excellent training at the various levels (professional, employment and university), in accordance with the sector's real needs, is therefore an inevitable step for the future.

*Goal 4.4.1. Adapting ongoing training to the sector's needs and fostering measures for improving the qualifications of the staff who are currently working in the sector.*

*Goal 4.4.2. Developing employment training programmes for activities linked to tourism with recruitment commitments from private companies.*

*Goal 4.4.3. Strengthening the links between university centres and the authorities to enable a greater tourism-based knowledge transfer.*

## Area 5. Promotion and marketing

### **Challenge 5.1. Building an inclusive and pluralistic tourist narrative, focusing on the destination's sustainability.**

The city promoted abroad has to strengthen its residents' sense of belonging to it and its neighbourhoods. This narrative has to take account of plurality of lifestyles and cultural expressions. In addition, this narrative has to be not just rigorous but also multiple and rich, so it avoids falling into the trap of presenting a monographic and clichéd image of a city. A narrative where the city is a space of [peaceful coexistence where the trajectories of its residents and visitors come together and which is far removed from being a commodity.

*Goal 5.1.1. Building a participatory and shared, pluralistic and diverse city narrative that gives a voice to every player in the city.*

*Goal 5.1.2. Extending the cultural narrative which is currently meagre and stereotypical, to broaden references and emphasise the importance of heritage and memories.*

*Goal 5.1.3. Broadening the spectrum of the promoted image beyond icons, to attract visitors to places without crowds, outside municipal boundaries, by including attractions and resources from Barcelona's surroundings as part of the destination.*

*Goal 5.1.4. Normalising visitors and their practices in the destination's actual image and narrative, to the extent they are part of it, by promoting awareness of the mark left by their visit.*

### **Challenge 5.2. Integrating tourist marketing** into the city's communication, reputation and promotion strategy

Tourist-marketing strategies have to be concurrent with and complementary to the city's economic-promotion and business-attraction strategies. At the same time, this

promotion strategy must not lose sight of the goal to encourage the resident population to discover their own city, through its tangible and intangible heritage and its cultural and commercial offers, which need to be central elements in promotion policies.

*Goal 5.2.1. Preparing a coordinated City Marketing strategic with Barcelona City Council's Areas of Communication, Tourism and Promotion.*

*Goal 5.2.2. Finding new public-private coordination formulas based on specific projects for promoting products and temporary and non-structural events.*

*Goal 5.2.3. Boosting internal marketing to strengthen resident citizens' interests and to help them to discover other realities in the city itself and its surroundings.*

### **Challenge 5.3. Rethinking the promotion and communication strategy to guarantee the destination's sustainability.**

From now on comprehensive tourism management will have a bearing on the tools of public and state-assisted authorities, so that they satisfy the strategic and operational criteria of the city's tourist policies. The tourism promotions implemented by the city's municipal authority must not be exclusively determined by the economic return criterion of the activities it promotes. The promotions have to be capable, not just of highlighting and promoting practices and services that create greater social return, but also of minimising their externalities in accordance with the destination's territorial strategy.

*Goal 5.3.1. Fostering promotion based on tourist-territory strategies rather than the quantitative capture of visitors.*

*Goal 5.3.2. Working jointly with private players to design strategic promotion and communication criteria for a sustainable and responsible destination.*

*Goal 5.3.3. Positively discriminating by promoting sustainable and responsible practices.*

*Goal 5.3.4. Focusing on image, promotion and communication of the destination in the practices and activities that fall under sustainability criteria.*

**Challenge 5.4.** Adapting the tools of promotion and communication to influence **visitors' expectations at source** as well as **flows at destination**.

Promotion and communication tools are the destination's opinion leaders at source, through the images and expectations they generate. That means they may influence visitors' planning by broadening the possibilities for their visits. This broadening and redefining work will have to be carried out jointly with the players, that is, the big marketing companies, and with the micro-rapporteurs and opinion leaders. At the same time, we will have to think about the possibilities of intelligently managing information at destination, through the multiple offline and online communication channels available, as a means of diluting overcrowding in areas, offering alternative places to visit and underscoring established events.

*Goal 5.4.1. Redefining the running and funding of the Turisme de Barcelona Consortium as a state-assisted public-private, tourism-promotion tool, to respond to current needs in promotion, communication and marketing strategies.*

*Goal 5.4.2 Promoting new narratives and images of the destination to lower people's interest in visiting overcrowded icons.*

*Goal 5.4.3 Adapting visitor-reception information policies, to highlight less crowded points of interest and promote the current cultural and sports calendar in the city.*

*Goal 5.4.4. Turning visitor assistance offices into spaces of interest for residents where they can find current information on the city's events.*

## 9. CONCLUSIONS

The **Strategic Diagnosis** presented here aims to provide the foundations on which to build today's proposals and thereby define the scenario for destination Barcelona for 2020. This exercise was the result of a thorough review of previous documents and commitments, during which we revised them and emphasised aspects that are relevant today, as a means of ensuring the destination's sustainability and the maximum social return of the activities that shape it, while also ensuring the well-being of the city playing host to them and its permanent residents.

The **issue of tourism governance** is certainly one of the key elements, bearing in mind the long road that still lies ahead. The number of tourists continues to grow and the destination has become a world benchmark in urban tourism. This new scenario opens up new collaboration possibilities between the public and private sectors. It will therefore be crucial for us to find new cooperation, co-responsibility and joint funding frameworks if we are to make our destination more sustainable and responsible. Competitiveness and sustainability will only be possible through public leadership of management, close cooperation of private players and involvement from the public and social players. The recent launch of the Tourism and City Council was a landmark, but we need to strengthen work between different players, institutions and authorities; and provide new spaces and tools for tourism-related territorial and sectoral policies.

**Managing tourist activities and their effects** is another crucial fundamental aspect. The intensification and expansion of some practices linked to the city's tourist uses represent a challenge when it comes to managing asymmetric situations in negotiations for the city's space. The survival of local commerce, access to decent housing and efficient means of public transport are all affected today by tourist practices. Managing it comprehensively is one of today's key challenges. So activities linked to the "collaborative economy" or the loosening of control promoted under the EU's Services Directive; are key elements to take into account given the lack of mechanisms for ensuring sustainability is an effect of comprehensive management rather than just a starting point.

Another central aspect that allows us to confirm this diagnosis is the **need to further develop the territorial strategy of Barcelona the tourist destination**. On the one hand, we need to think about and coordinate the territories which shape this variable geometry that is destination Barcelona. From now on, strengthening the destination will include diversifying offers and communication beyond the city's administrative limits and so working jointly with the Generalitat, the Barcelona Provincial Council and other destinations in Catalonia. On the other hand, it is becoming crucial for us to consolidate spaces if we are to tackle the management of tourist activities in the metropolitan sphere, beyond product creation, based not just on efficiency criteria, but also on territorial strategy criteria, to highlight or protect spaces that are considered key.

The diagnosis provides evidence of **the need to strengthen the employment strategies for tourism**. It is not enough to mention an estimation of jobs - direct, indirect or induced - that are created by tourist activities in the city. It is time we started speaking about the quality of these jobs' conditions and also to think about the mechanisms for promoting and highlighting good practices that could emerge as the main redistributive tool for the wealth created. But in addition to that, we also need to **rethink some of tourism's business forms**, which are excessively based on making profits from the land and leaving aside such key aspects as social innovation, added value of the activities chain and possibilities for complementing other areas that are not essentially tourist: commerce, research, consultancy firms, service companies etc.

Lastly, we need to take account of the importance of **the destination's promotion and communication policies**. Promoting and marketing have to fall into line with the city's interests, not just as a result of the promotion tools' business landmarks. The development of urban marketing towards more comprehensive approaches where the distinction between visitors, residents and businesses is becoming increasingly diffuse, is one of the clear lines we need to follow. A communication that has to be tackled internally, building new interaction frameworks that help to combat tourism-phobia, using thoughtful approaches without creating mirages or narratives that can counter the needs of daily life in the city.

Barcelona has always promoted itself abroad as a desirable city. This international promotion was key to the city becoming what it wanted to be. Today Barcelona can

promote itself, through the capacities of its international leadership, as a destination that squares with the image of the democratic, just and fair city we wish to be. **A destination that becomes the spearhead of sustainable tourism. A welcoming city that offers multiple lifestyles that pose no risk to the survival of those who live there and which are capable of ensuring greater social return, allowing the enjoyment of its visitors.** This is the challenge today.



## ANNEXE

### 1. Strategic Tourism Plan for 2020

Full information on the Strategic Tourism Plan for 2020 is available at

<http://ajuntament.barcelona.cat/turisme/ca/pla-estrategic>

### 2. Work group reports and minutes

All documents relating to the Reports: documents, minutes, report on the process and rapporteur CVs.

<http://ajuntament.barcelona.cat/turisme/ca/pla-estrategic/activitat>

### 3. Barcelona Strategic Tourism Plan for 2010-2015

The previous Strategic Plan's main documents are available at

[http://ajuntament.barcelona.cat/turisme/sites/default/files/documents/101029\\_pla\\_estrategic\\_turisme\\_ciutat\\_barcelona\\_2010-2015.pdf](http://ajuntament.barcelona.cat/turisme/sites/default/files/documents/101029_pla_estrategic_turisme_ciutat_barcelona_2010-2015.pdf)

### 4. PET15 Evaluation

The document of the Evaluation of Strategic Tourism Plan for 2015. July 2015.

<http://ajuntament.barcelona.cat/turisme/ca/pla-estrategic/documentacio>

### 5. Barcelona, City and Tourism

The entire document of Barcelona, City and Tourism. Dialogue for a sustainable tourism. Bases for a local agreement for the management and promotion of responsible and sustainable tourism. Presented in April 2015.

[http://ajuntament.barcelona.cat/turisme/sites/default/files/documents/150409\\_barcelona\\_ciutat\\_i\\_turisme\\_cat.pdf](http://ajuntament.barcelona.cat/turisme/sites/default/files/documents/150409_barcelona_ciutat_i_turisme_cat.pdf)