Catalonia Sector Development: The case of Cruise tourism competitiveness partnership in Barcelona

Ramón Masià
Member of the Executive Committee
Turisme de Barcelona
## Barcelona Tourism - Factsheet

### Tourists in European cities

<table>
<thead>
<tr>
<th></th>
<th>2000</th>
<th>2009</th>
<th>% var.</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>London</td>
<td>31,645,000</td>
<td>24,900,000</td>
</tr>
<tr>
<td>2</td>
<td>Paris</td>
<td>14,815,350</td>
<td>14,416,395</td>
</tr>
<tr>
<td>3</td>
<td>Berlin</td>
<td>5,006,235</td>
<td>8,262,957</td>
</tr>
<tr>
<td>4</td>
<td>Rome</td>
<td>6,291,888</td>
<td>7,737,404</td>
</tr>
<tr>
<td>5</td>
<td>Madrid</td>
<td>5,781,169</td>
<td>7,175,184</td>
</tr>
<tr>
<td>6</td>
<td>Barcelona</td>
<td>3,643,562</td>
<td>6,997,718</td>
</tr>
<tr>
<td>7</td>
<td>Dublin</td>
<td>4,282,000</td>
<td>5,476,000</td>
</tr>
<tr>
<td>8</td>
<td>Munich</td>
<td>3,742,710</td>
<td>4,983,632</td>
</tr>
<tr>
<td>9</td>
<td>Vienna</td>
<td>3,538,931</td>
<td>4,756,442</td>
</tr>
<tr>
<td>10</td>
<td>Amsterdam</td>
<td>4,015,000</td>
<td>4,627,700</td>
</tr>
</tbody>
</table>
Barcelona Tourism - Factsheet

- Between 80,000 and 100,000 jobs
- €7,500 millions per year
- Tourism is 10% of the city’s GDP

High economic impact of tourism in the city of Barcelona

Source: Barcelona Turisme
World’s Top Cruise Homeports

The Port of Barcelona is the European leader and the Mediterranean turnaround port for excellence. In fact, it is the 4th world top cruise homeport after the Caribbean ports.
## Barcelona Tourism - Factsheet

<table>
<thead>
<tr>
<th>Port</th>
<th>Passengers</th>
</tr>
</thead>
<tbody>
<tr>
<td>1  Miami</td>
<td>4,138,000</td>
</tr>
<tr>
<td>2  Port Everglades</td>
<td>3,228,000</td>
</tr>
<tr>
<td>3  Port Canaveral</td>
<td>2,488,000</td>
</tr>
<tr>
<td>4  Barcelona</td>
<td>2,070,000</td>
</tr>
<tr>
<td>5  Civitavecchia</td>
<td>1,819,000</td>
</tr>
<tr>
<td>6  Piraeus</td>
<td>1,807,000</td>
</tr>
<tr>
<td>7  San Juan (Puerto Rico)</td>
<td>1,393,000</td>
</tr>
<tr>
<td>8  Venice</td>
<td>1,215,000</td>
</tr>
<tr>
<td>9  Los Angeles</td>
<td>1,196,000</td>
</tr>
<tr>
<td>10 Palma</td>
<td>1,131,000</td>
</tr>
</tbody>
</table>

Source: Dream World Cruise Destinations Autumn 2009
Barcelona Tourism - Factsheet

Turn around: 54%
Transit: 46%

Source: Barcelona Turisme
Barcelona Tourism - Factsheet

The beginning:
• Tent “terminal”
Barcelona Tourism - Factsheet

Today:
- 7 modern terminals
What is the structure behind the success?
What is the structure behind the success?

Launching the Process

Public Sector
1987 - 1993
(Regional Government and Municipality)

Continuous Coordination Process

Private Sector
1993 - Today
(Chamber of Commerce)

Turisme de Barcelona
What is the structure behind the success?

Launching the Process
Public Sector
1987 - 1993
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1993 - Today
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Turisme de Barcelona

What do we do with the structure?
What is the structure behind the success?

Launching the Process

Public Sector
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1993 - Today
(Chamber of Commerce)

Turisme de Barcelona

From “Generic Promotion” to “Segmentation”

Implementation of Actions in the right direction
From “Generic Promotion” to “Segmentation”
From “Generic Promotion” to “Segmentation”

From **ONE** Barcelona to **MANY** Barcelonias

- Strategic segmentation of the different kinds of tourism where Barcelona could compete in.

Source: Monitor, 1993
From “Generic Promotion” to “Segmentation”

736 members* of Turisme de Barcelona

- BConvention Bureau: 328 members
- BShopping Line: 178 members
- BGastronomy: 168 members
- BSports: 20 members
- BPremium: 45 members
- BCulture & Leisure: 61 members
- BBusTurístic: 49 members
- BCard: 88 members
- BPass: 19 members
- BMar: 1 member

* 23% of the companies are members of more than one programme or service of Turisme de Barcelona
From “Generic Promotion” to “Segmentation”

Turn around Port for Generic MED Cruises

<table>
<thead>
<tr>
<th>Turn around Port</th>
<th>Barcelona</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transit</td>
<td></td>
</tr>
</tbody>
</table>

Specialized cruise | Generic Cruise
From “Generic Promotion” to “Segmentation”

Estimated economic impact 2009

<table>
<thead>
<tr>
<th></th>
<th>Passengers</th>
<th>Spending/day (€)*</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transit</td>
<td>971,226</td>
<td>93.40</td>
<td>90,712,508</td>
</tr>
<tr>
<td>Turnaround Port</td>
<td>1,180,239</td>
<td>118.54</td>
<td>139,901,990</td>
</tr>
<tr>
<td>Same day (82%)</td>
<td>967,796</td>
<td>93.40</td>
<td>90,392,145</td>
</tr>
<tr>
<td>1 night (11%)</td>
<td>129,826</td>
<td>186.50</td>
<td>24,212,603</td>
</tr>
<tr>
<td>2 nights (5%)</td>
<td>59,012</td>
<td>279.60</td>
<td>16,499,741</td>
</tr>
<tr>
<td>3 nights (2%)</td>
<td>23,605</td>
<td>372.70</td>
<td>8,797,502</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>2,151,465</strong></td>
<td></td>
<td><strong>230,614,499</strong></td>
</tr>
</tbody>
</table>

*Sum of non-hotel related expenses per person/day (93,4€) and daily cost of accommodation (93,1€)

Source: Barcelona Turisme
From “Generic Promotion” to “Segmentation”

Direct spending of the shipowner at Barcelona’s turn around Port:

<table>
<thead>
<tr>
<th>ITEM</th>
<th>COSTS (millions €)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agencies comissions</td>
<td>45</td>
</tr>
<tr>
<td>Ship supplies (food, etc.)</td>
<td>18</td>
</tr>
<tr>
<td>Bunkering, repairs and maintenance</td>
<td>63</td>
</tr>
<tr>
<td>Ship machinery</td>
<td>38</td>
</tr>
<tr>
<td>Financial services</td>
<td>74</td>
</tr>
<tr>
<td><strong>TOTAL COSTS</strong></td>
<td><strong>683</strong></td>
</tr>
</tbody>
</table>

Source: Barcelona Turisme
Implementing in the right direction -
Public Private coordination
Implementing in the right direction - Public Private coordination

CITY
- Gastronomy
- Culture
- Accommodation
- Leisure activities

PORT
- Facilities
- Services
- Infrastructures
- Security

AIRPORT
- Routes/
- Frequencies
- Services

OTHERS
- Train
- Highways
- Logistics
Implementing in the right direction - Public Private coordination

- **Ideal infrastructures**
  Communications, Transports (airport, port, roads and railways), Hotels, Security and Quality Touristic Services

- **Brand investment** – City Promotion

- **Operational alignment**
  Have same goals and avoid misunderstandings/repetitions

- **Coordination**
  Public Institutions, Airport and Port Authorities, Customs Security, Immigration, Private Companies

Source: Port de Barcelona
Turisme de Barcelona: Budget

Revenue Budget 1994 - 2011

Own resources come from the BusTurístic and program membership fees

Source: Barcelona Turisme
Turisme de Barcelona: Objectives

Main challenges

• Involvement of Hidden Players
• Continuous investment
• Transforming Barcelona’s Airport into an international hub
• Increasing the dialogue with the city’s residents
Turisme de Barcelona: Framework

We followed the steps of the PPD Process

- Identify Sector Opportunities
- Sector Analysis
- Competitiveness Partnership Setup and Action Plans
- Implementation and Support Program
Thank you!

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