

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



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Turisme de Barcelona



Barcelona Tourism - Factsheet

Tourists in European cities

	2000	2009	% var.
1 London	31,645,000	24,900,000	-21.31
2 Paris	14,815,350	14,416,395	-2.69
3 Berlin	5,006,235	8,262,957	65.05
4 Rome	6,291,888	7,737,404	22.97
5 Madrid	5,781,169	7,175,184	24.11
6 Barcelona	3,643,562	6,997,718	92.06
7 Dublin	4,282,000	5,476,000	27.88
8 Munich	3,742,710	4,983,632	33.16
9 Vienna	3,538,931	4,756,442	34.40
10 Amsterdam	4,015,000	4,627,700	15.26



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



Barcelona Tourism - Factsheet

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

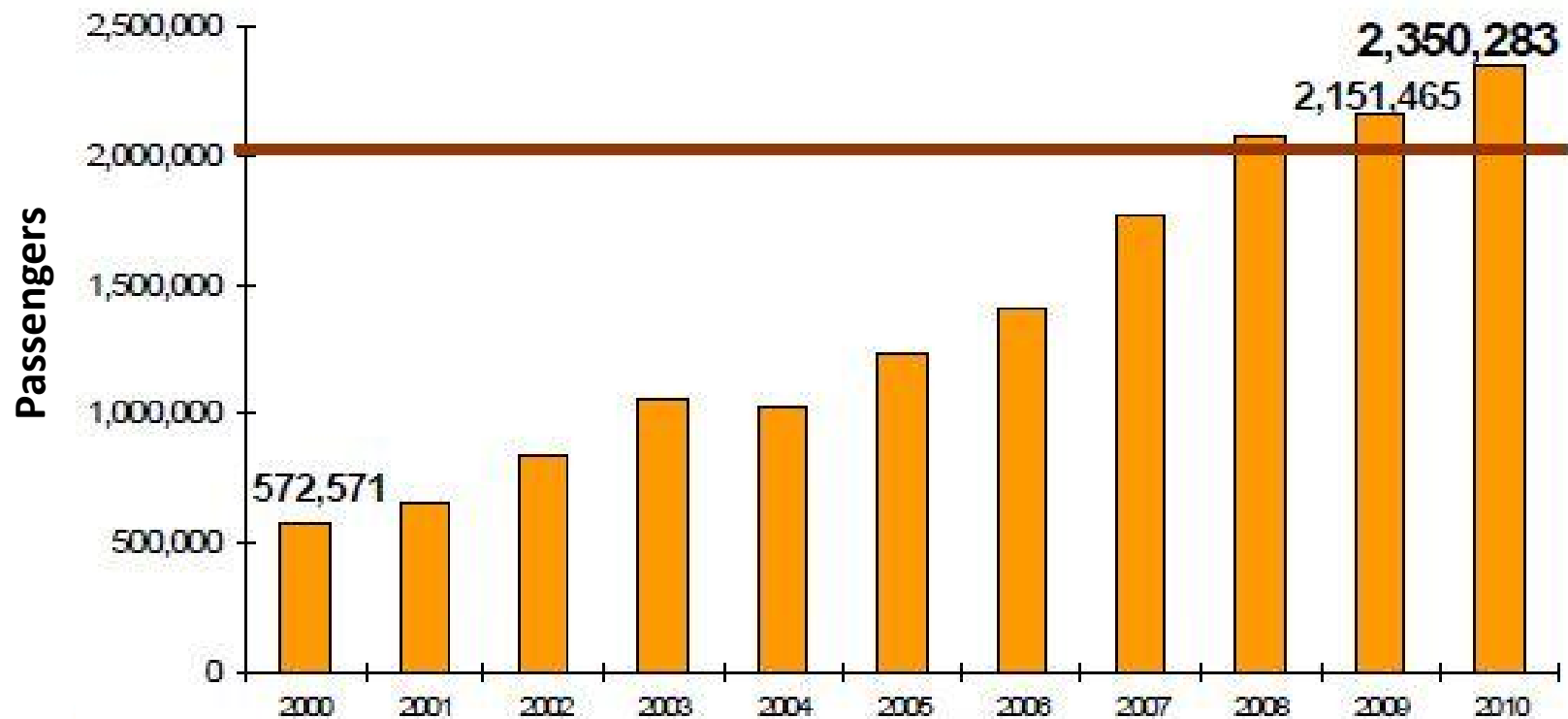
Port	Passengers
1 Miami	4,138,000
2 Port Everglades	3,228,000
3 Port Canaveral	2,488,000
4 Barcelona	2,070,000
5 Civitavecchia	1,819,000
6 Piraeus	1,807,000
7 San Juan (Puerto Rico)	1,393,000
8 Venice	1,215,000
9 Los Angeles	1,196,000
10 Palma	1,131,000



Barcelona Tourism - Factsheet

Turn around: 54%

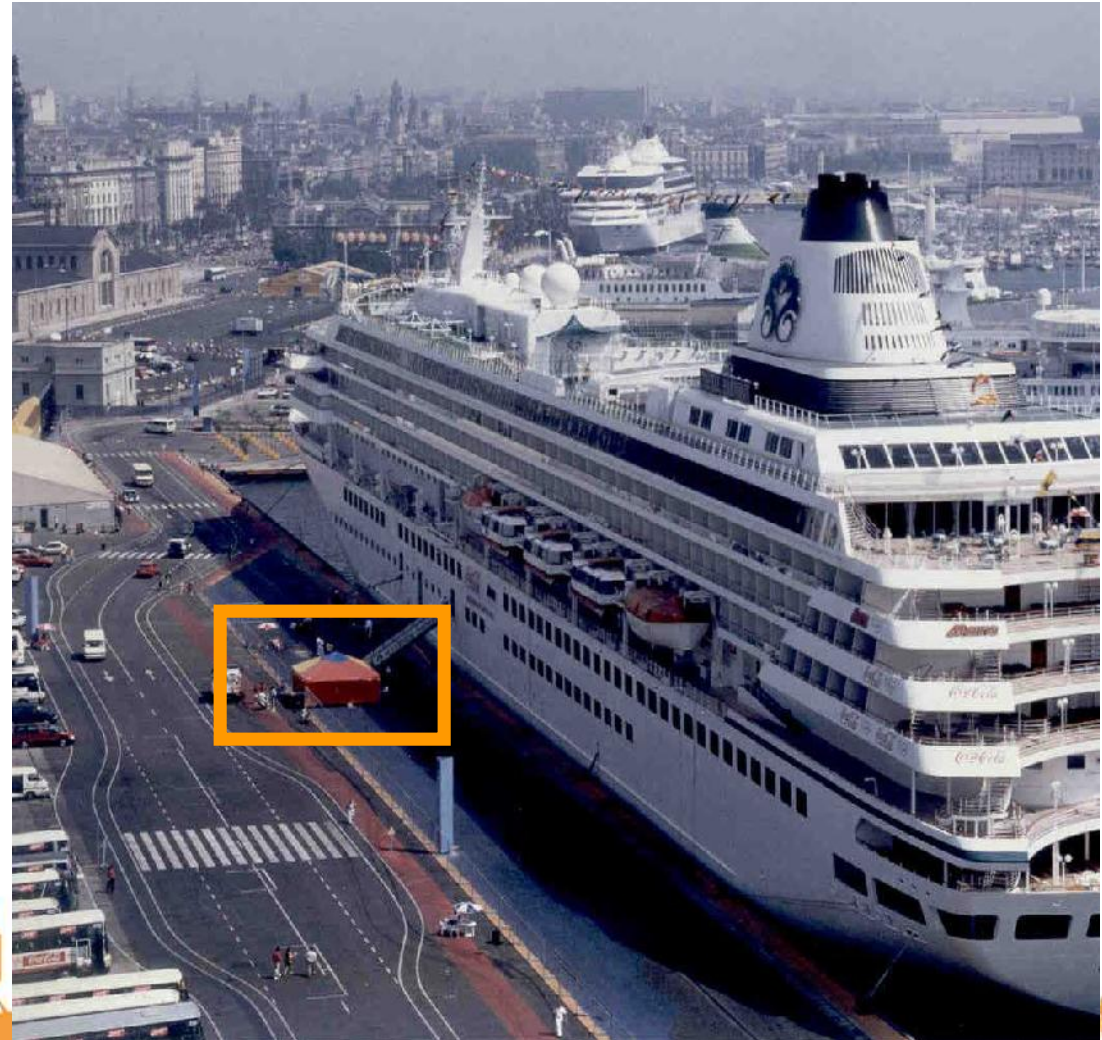
Transit: 46%



Barcelona Tourism - Factsheet

The beginning:

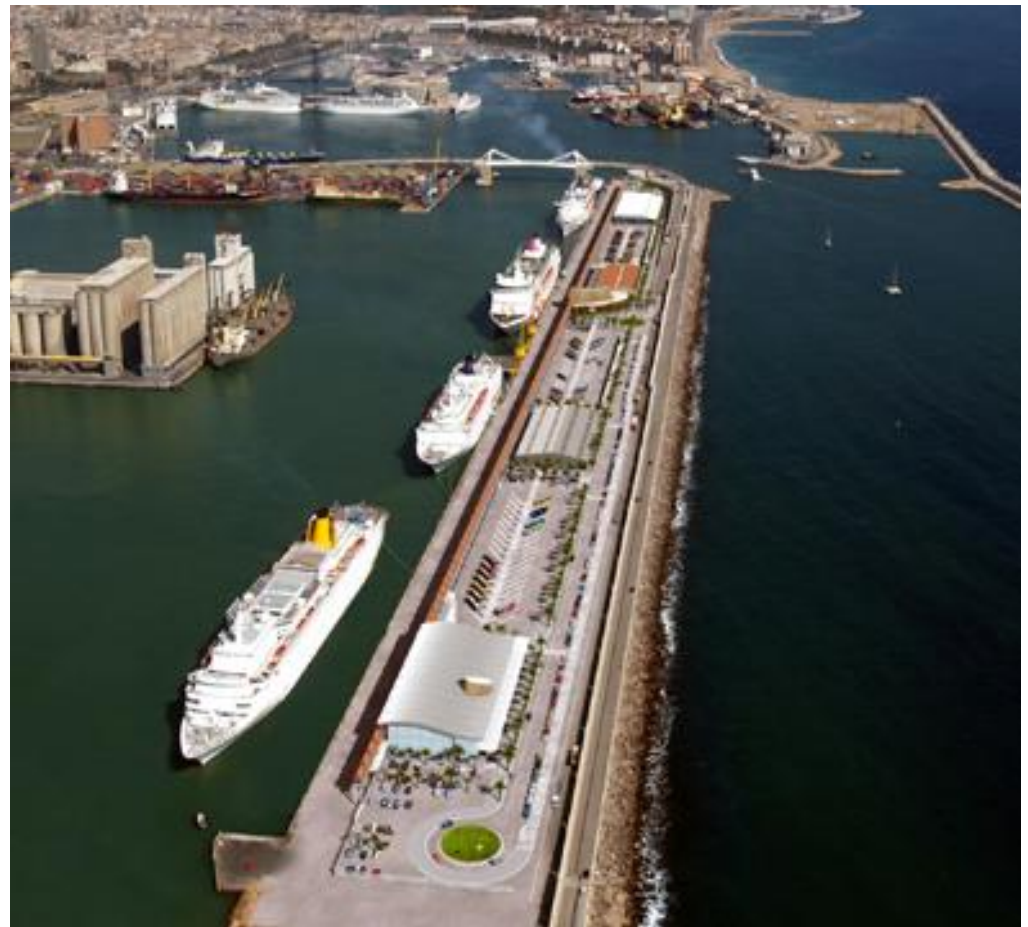
- Tent “terminal”



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

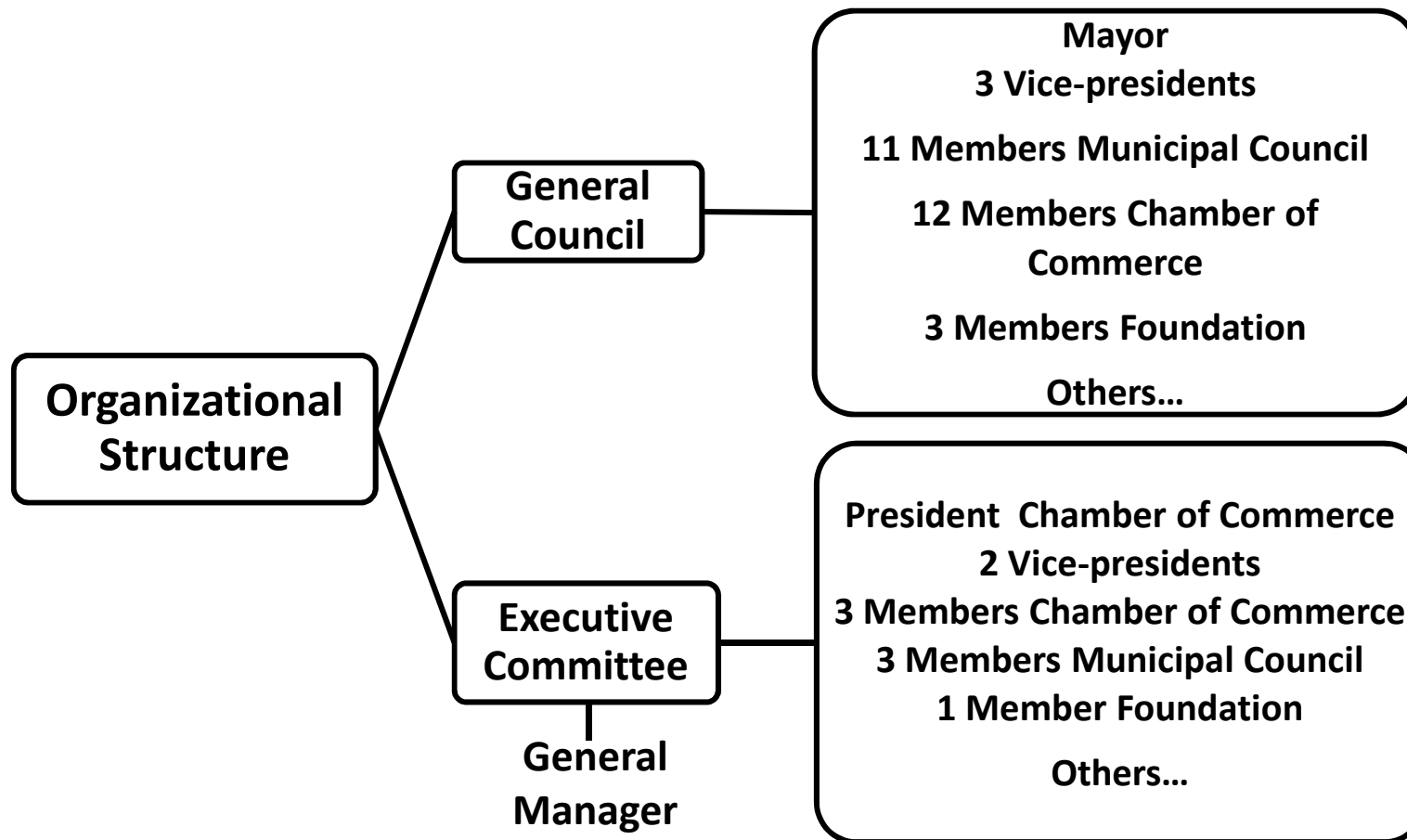
(Chamber of Commerce)



Turisme de Barcelona



Turisme de Barcelona: Structure



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Turisme de Barcelona

What do we do with the structure?



What is the structure behind the success?

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Turisme de Barcelona



From **“Generic Promotion”** to
“Segmentation”

Implementation of Actions
in the **right direction**



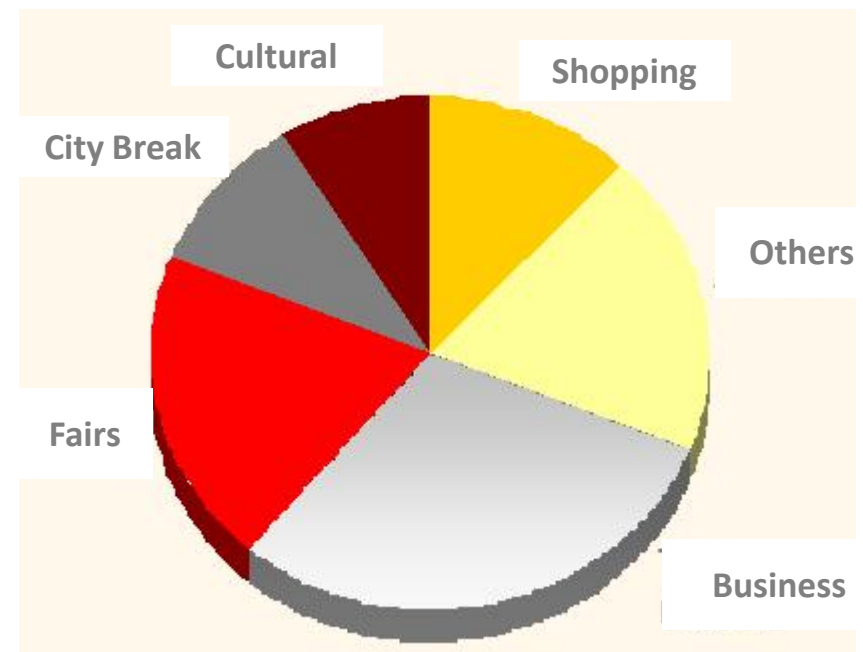
From “Generic Promotion” to “Segmentation”



From “Generic Promotion” to “Segmentation”

From **ONE** Barcelona to **MANY** Barcelonas

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



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

Turn around Port		Barcelona
Transit		
	Specialized cruise	Generic Cruise



From “Generic Promotion” to “Segmentation”

Estimated economic impact 2009

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

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



From “Generic Promotion” to “Segmentation”

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

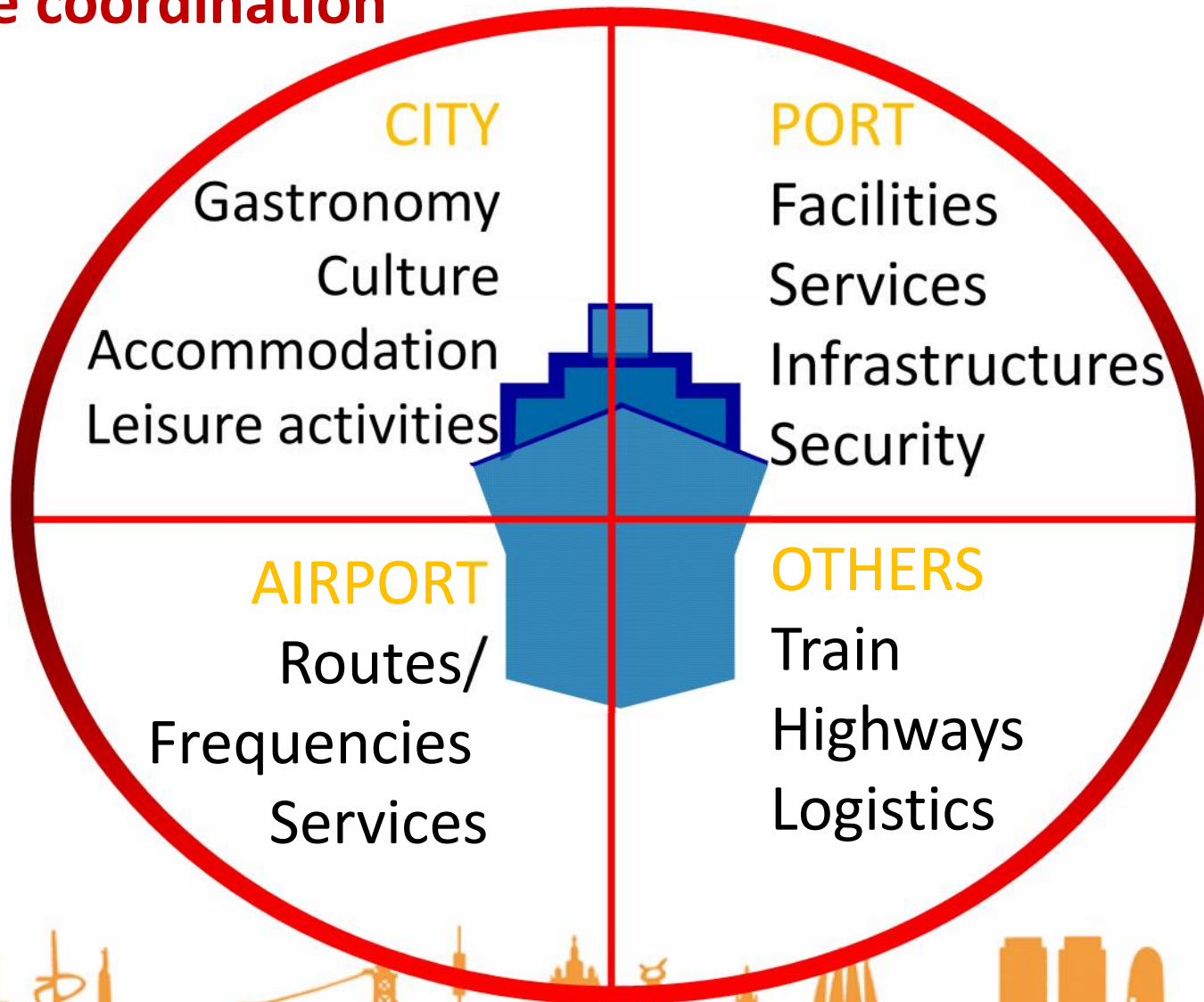
ITEM	COSTS (millions €)
Agencies commissions	45
Ship supplies (food, etc.)	18
Bunkering, repairs and maintenance	63
Ship machinery	38
Financial services	74
TOTAL COSTS	683



Implementing in the right direction - Public Private coordination



Implementing in the right direction - Public Private coordination



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

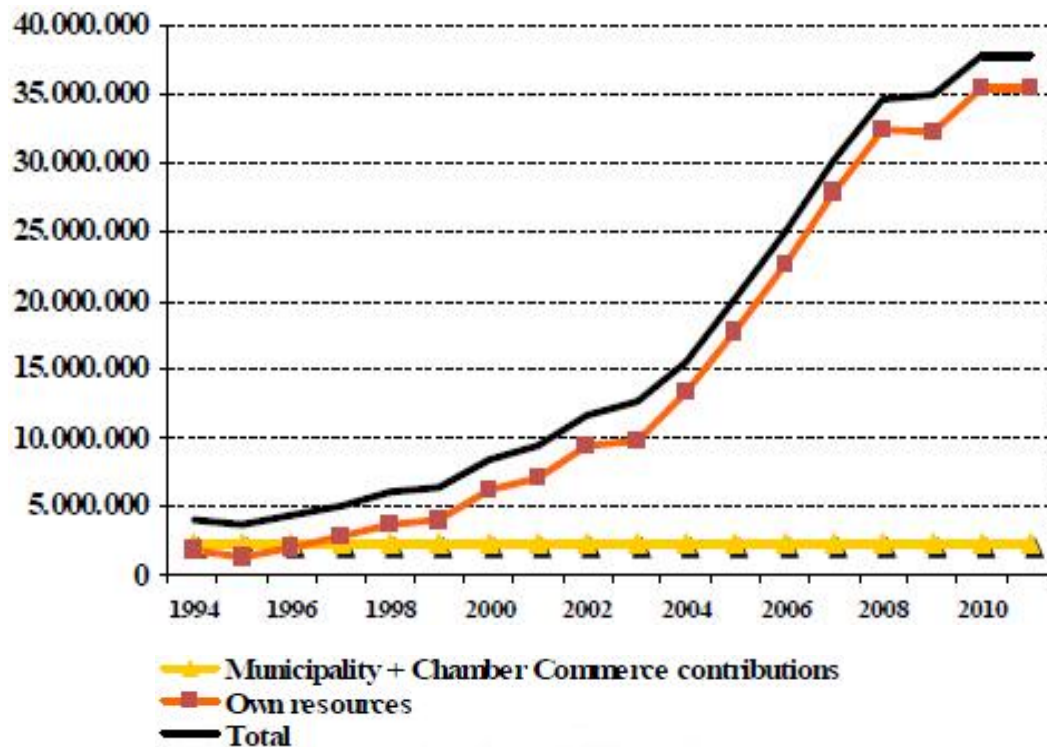
- **Coordination**

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



Turisme de Barcelona: Budget

Revenue Budget 1994 - 2011



Own resources come from the BusTuristic and program membership fees



Sustainability



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



Thank you!

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