

TOURISM, IDENTITY AND ADDED VALUE

Coordinated by Jordi Fexas

The Catalonia Tourism Observatory is the first instance of integrated information, study, research and monitoring created in Catalonia. This instrument of tourism knowledge-management, part of the Government of Catalonia's Ministry of Tourism, was created with the aim of offering an effective tool for encouraging the competitiveness of the tourism sector in Catalonia and strengthening the Catalonia brand as well as its products and territories.

Thanks to the collaboration of Catalan International View we can use this internationally prestigious organ to present this monographic dossier on tourism in our country. The history of tourism in Catalonia, the new, modernizing public policies in the sector, identity as an added value to Catalan tourism in the twenty-first century... These are some of the topics that our specialists would like us to discover and reflect on.

Tourism is and should continue to be a great opportunity for countries like ours to better connect ourselves to the globalised world. At the same time we are strengthening our culture, identity and a strategic sector in the new added-value economy.

TOURISM IN CATALONIA: CONSIDERATIONS ON THE WAY TO A TRUE INDUSTRY

by Francesc Iglesias*

The development of tourism in Catalonia in recent decades illustrates a continual process of growth and improvement towards a true industry.

If one considers the growing importance of tourism in terms of wealth and job creation, we can see how its specific weight in Catalonia is more than 11% of GDP and 13% of employment, while it is also the driving force behind a number of other related economic subsectors (agriculture, manufacturing industries, construction, transport, business services, cultural industries, trade and more).

It is the cross-sectional nature inherent in tourism that makes it an object of recurring demands for promotion and investment by different government agencies, as well as business groups in the sector, agents and representative consortiums.

At the same time, it is surprising how a major economic and social activity, which has existed as a mass, specialist, seasonal industry in Catalonia for 50 years, has developed historically with relatively little support from the

governments and, above all, with no decisive and systematic policies in terms of orientation, planning, organisation and promotion.

Firstly, it is clear that the tourism industry and its business-generation capacity based on the convergence of favourable factors deserves praise, as it has made our sun and sand a desirable environment for the emerging demands of the new European middle classes since the 1960s. It made the most of a number of opportunities, using its strengths to create an original holiday destination and a highly price-competitive offer of leisure activities.

It is in the stages after the mass growth of tourism on our coast that the lack of planning and organisation of activities has become clear, exposing certain parts of the tourism sector to trends, inertias and vices that are difficult to overcome and manage. After decades of a Fordist, supply-driven



tourism market, Catalonia now has hotel facilities that in some areas are showing their obsolescence and, what is worse, show the results of a progressive dynamic of bad practices on the part of some travel agencies, often acting as predators of environment, cultural and territorial resources, compromising the very survival of parts of some destinations. Today, in Catalan holiday destinations there are certain tourism businesses that are struggling to survive in market conditions radically different from those that enabled them to develop.

In any case, the context of the current economic crisis and its contribution to accelerating change heightens the urgent need for new approaches to revitalise the more mature productive tourism sectors, enabling them to better meet new demands, with the aim of facing the more intense competition and challenges arising from transformations in the tourism industry value chain.

The evolution of the concept of tourist destination: from the concentration of supply to focus on demand

The concepts of the tourism industry have developed as tourism has started to consolidate its position as a major economic and social phenomenon. If one briefly examines how the concept of tourist destinations¹ has developed over recent years one can trace a historic thread that has produced various approaches by the administrations and has defined the challenges faced by agents in the sector on the way towards a true industry:

- In the first stage of development, from the 1960s to the end of the 1980s, the tourist destination was conceived as a set of basic accommodation and catering services creating a tourism space around a given product. This was a productive specialisation in supplying tourism services,

¹ CHIAS (2004) et al. *El papel de las motivaciones del turista en la formación de la imagen de destino turístico*. XVII Encuentro de profesores universitarios de marketing. Pages 673-688 Madrid, 22nd and 23rd September 2005.



where location was decisive. In this respect the destination served to concentrate supply. Thus, tourists have to travel to the place or destination that attempts to provide the necessary attractions to meet their needs. Tourist activity is highly vacational and seasonal, dominated to a great extent by the working and middle class seeking greater quality of life.

- During the second stage of evolution, from the 1990s onwards, due to tourism's growing importance, the destination widened in meaning to include a set of services that facilitate and promote tourist activity. The horizontal nature of tourist activity and its economic impact highlighted the importance of meeting the challenges of mobility, infrastructure, facilities, urban planning, trade, transport and more. In this sense, the destination, without abandoning the idea of specialisation in supply, extended its territorial vision and included needs that appear to be outside the scope of tourism as strictly defined,

but which are decisive in increasing competitiveness. In this stage, the destination was a territory that provided support for logistic activities and services while having to reconcile tourist practices in the industry with the basic product (sun and sand, mountains, city, the countryside). In this sense, approaches that consider conserving environmental resources began to gain influence. With this concept, the keys to competitiveness involve making it easier for demand to hire the services and reach the destination under good terms of quality and price (promotion and marketing, airport, road and port links, and other factors).

- Finally, at the beginning of the twenty-first century, as a result of the social, economic and cultural transformations inherent in the new knowledge society, the concept of destination has moved closer to demand, in the sense that, apart from the territorial component, which is the tourism product itself, other aspects such as identity and cultural tourism have become crucial, in its broadest sense², intangible and emotional factors and the ability to live new experiences³. In this current stage, the consolidation of information and communication technologies (ICT) in the tourism industry value chain generate the overwhelming need to manage the avalanche of information that surrounds the decision to purchase in order to design products that meet the needs of a micro-segmented demand, in which ICTs play a key role. Here, the paradigm of tourism competitiveness centres on innovation and sustainability, understood in the triple sense of economic and social, cultural and environmental and a capacity to generate unique and authentic offers.

2 Cultural tourism in the broad sense of the word includes cuisine, architecture, history, wine tourism, art, design, handicrafts and more, as cultural expressions of the host community.

3 Walmsley, D J and Young, M Evaluative Images and Tourism: The Use of Personal Constructs to Describe the Structure of Destinations' Images, *Journal of Travel Research*, vol. 36, no 3, page 65. 1998.

The stages of tourism administration of the Government of Catalonia

Alongside this process, from the perspective of the Autonomous Government of Catalonia, the work of encouraging tourism was almost limited exclusively to promotion, from the 1980s onwards. It involved a primitive tourism industry, geared towards leisure holidays, which based its competitiveness on price and climate. In this context, the general organisation of the sector had clearly been overlooked, tacitly choosing a model of tourism *laissez faire*, as illustrated by the fact that the first general tourism organisation act was not passed until 2002⁴.

Following the abovementioned historical thread, the essential task of tourism administration was based on guaranteeing minimum regulations for accommodation and catering and the huge task of communicating and promoting the tourism offer through the creation of the *Turisme de Catalunya Consortium* in 1986.

The Barcelona Olympic Games represented a major boost for tourism in the city, providing Catalonia with a major tourist centre, adding the city of Barcelona, as a cultural, business and city break tourism product, to the holiday sun and sand tourism and the snow of the Pyrenees and the Vall d'Aran. In this sense, the decision in 1995 to create the consortium structure of *Turisme de Barcelona* represented a milestone in the commitment to co-responsibility between the public and private sectors in managing tourism promotion, and the task of lobbying for the sector to introduce tourist activity within the space and daily life of the city. This innovation in managing promotion was followed up by the Autonomous Government of Catalonia with the conver-

sion of the *Promoció Turística de Catalunya Consortium* into the *Turisme de Catalunya Consortium*, a promotional body attached to the Tourism Directorate General, even though private co-responsibility was inexistent.

If we examine the development of tourism, the growth since the mid-1990s is evident, as illustrated by data on tourist arrivals and port and airport traffic to Barcelona, Girona and Reus, with the consequent impact of low-cost airlines on air traffic. There are also other key factors, such as the deseasonalisation of demand beyond leisure holidays and the consequent increase in journeys with the reduction in accommodation at the destination. In this regard, the arrival of new information technologies has transformed habits of consumption, promotion and marketing, while there has been a growing increase in the value of rural tourism, culture, business tourism and cuisine.

In this context, the change of government in 2003 saw the start of a new stage in the public management of tourism, being the result of actions to meet the challenges in an industry that has grown dramatically, involving the implementation of the first general tourism organisation act in the history of the country.

The Catalonia Strategic Tourism Plan 2005-2010: a new agenda for tourism

The response to the challenge resulted in the consensus definition of the Catalonia Strategic Tourism Plan (PETC) 2005-2010, which was conceived as an unprecedented 'road map' jointly for government agencies and the private sector. This was the first of its kind in both Catalonia and Europe, and was conceived as a document to

4 In the context of Spain, the autonomous communities that passed general tourism organisation acts before Catalonia (2002) were: the Basque Country (1994), the Canary Islands (1995), Castile-León, Galicia and Extremadura (1997), Andalusia, the Balearic Islands, Madrid, Aragon, Castile-La Mancha and Cantabria (1999); La Rioja (2001).

provide a comprehensive and cross-sector analysis and diagnosis of tourism and its challenges and determining factors within the scope of a specific country.

The idea of the ‘road map’ was justified by the fact that it was conceived not just as a tool for the Catalan Government’s tourism authority, but was also aimed at all administrations in the territory with responsibility for tourism, at other government ministries with responsibility for areas relevant to tourism, and, above all, the private tourism sector, as a shared agenda to be developed.

The structuring of the PETC into 10 programmes and 48 actions has been the overall driving force for the actions of the Directorate General for Tourism and *Turisme de Catalunya* since 2005 and, above all, has inspired the direction of a number of policies of the ministry currently responsible⁵, beyond the boundaries of responsibility strictly for tourism, such as *Gastroteca* or *Artesania de Catalunya*, as initiatives run by the Trade DG.

Although the PETC did not define the operational aspects of its programmes and actions in terms of a schedule and budget, it set a number of concepts and challenges that have been decisive in the Government of Catalonia’s influence on the success of its tourist activity, given that Catalonia was for the first time conceived as a complete tourist destination.

The inspiring principles and axes of the PETC are defined in a tourism model based on sustainability, innovation, focus on demand, territorial balance and collaboration, and cooperation and coordination between public and private agents.

Among the action programmes, without providing an exhaustive analysis which lies outside the scope of this article, are such key aspects as the need to coordinate policies in the areas of responsibility of other government ministries⁶, the importance of strengthening the Catalonia brand⁷, the definition of territorial product creation plans, the creation of the Catalan Tourism Agency, the creation of

5 The Ministry of Innovation, Universities and Enterprise. Previously, responsibility for tourism had switched between the ministries that were also responsible for consumer affairs and/or industry.

6 The Ministries of Culture, Territorial Policy and Public Works, Agriculture or Environment.

7 Catalonia has 10 territorial tourist brands (Girona-Costa Brava, Costa Daurada, Terres de Lleida, Barcelona, Pirineus, Vall d’Aran, Catalunya Central, Terres de l’Ebre, Costa de Barcelona-Maresme and Garraf).

1977-1989

1990-2002

1979 – The Statute of Autonomy included tourism as an exclusive area of authority
 1979 – III Tourism Congress of Catalonia (Barcelona)
 1980 – Creation of the Ministry of Tourism and Consumer Affairs
 1982 – First Decree on the organisation of campsites
 1986 – Creation of the Catalan Tourism Promotion Consortium
 1986-1987 Sector regulations for tourist accommodation (requirements, minimum services, classification)
 1989 Decrees on organisation, classification, and tourist apartment rental companies
 1994-1998: First sector regulations (travel agencies, tourist apartments, tourist guides, decree on prices, bookings and complementary services, organisation and classification of catering, accommodation, residence (country cottages) establishments, among others).

1997 - Creation of the promotional body ‘*Turisme de Catalunya*’
 1997 – Creation of TURISPRO – a workshop for professionals and companies
 2001 – III Tourism Congress of Catalonia (Tarragona)
 Law on Tourism (2002)
 2002 – Creation of Tourism Promotion Awards
 2004 – III Tourism Congress of Catalonia (Girona)
 2004 – Creation of the Family Tourist Destination Stamp
 2005-2010 Strategic Plan
 2005 – Creation of the Tourism Observatory
 2005 – Strategic agreement on the internationalisation, job quality and competitiveness of the Catalan economy
 2006 – Decree on Rural Tourism Establishments
 2006 – Creation of the Sports Tourist Destination Stamp

2007 – Creation of the Sub-directorate General for Tourism Planning
 2007 – Creation of PLADETUR, an incentives plan for tourism development
 2007 – Law creating the Catalan Tourism Agency
 2008 – III Tourism Congress of Catalonia (Tarragona)
 2008 – First BUY Catalunya (Large workshop on tourism marketing)
 2009 – Opening in Teià of the first Tourist Welcome Centre of the CAT Network
 2009 – Inauguration of the Way of St James of Galicia
 2010 - Rural tourism classification system by wheat ear symbol
 2010 – Creation of the Catalunya Convention Bureau
 2010 - Catalan Research and Innovation Plan

2003-2010

the Catalan Tourism Observatory as a tool to obtain intelligence on tourism, moving forward in legislative modernisation and administrative simplification, improving quality, improving tourist information and, in general, raising awareness and increasing the degree to which tourism is valued among Catalan society.

The success of the PETC lies in the decision to prioritise certain aspects of the agenda, which has created the need to move beyond the plan itself, as some programmes have been overtaken by circumstances and have exceeded supply through the implementation of their policies and actions.

In this sense, the tourism authority itself, consisting of the Directorate General for Tourism (DGT) and the *Turisme de Catalunya* (TC) promotion consortium, has changed its structure and internal organisation in order to focus more on the joint needs of the tourism industry defined in the PETC.

Firstly, *Turisme de Catalunya* set up the Catalan Tourism Agency (ACT)⁸ with the aim of building wider co-responsibility in the private sector, under the principles of co-decision making and co-financing, and providing it with greater involvement in the promotion and marketing of the tourist industry and Catalonia as a destination.

Secondly, the Directorate General for Tourism developed a new *Sub-di-*

rectorate General for Tourism Planning, to meet the needs for the design, promotion and creation of the tourism product contained in the PETC⁹. It is worth mentioning that the PETC itself has been exceeded in this context, providing a much fuller response to the actions as they were defined and has successfully influenced the desire to organise and integrate the development of tourism with the demands of the target public and the territory's capacity and potential.

The success of the PETC is due to a qualitative factor, as it has acted as the guidelines for everyone working in tourism both inside and outside Catalonia and because it has set a sufficiently ambitious precedent to continue along the route of making tourism the strategic consideration that it deserves to be, as one of the country's economic driving forces and a factor for territorial balance.

Finally, going beyond the current PETC, the government's tourism authority is working to define new challenges for 2011-2014 that must be included by Catalan destinations in the new trends outlined in tourism after the first major worldwide crisis in the industry, and which demand new proposals in terms of innovation and sustainability, in its triple sense of identity, economics and environment, in order to reinforce attractiveness, quality, competitiveness, territorial balance and social and economic profitability.

⁸ The Catalan Tourism Agency was founded by law in December 2007 and came into force on January 2010, once its articles of incorporation had been approved in December 2009.

⁹ The creation of long national routes (the Way of Saint James of Galicia, the Pyrenean Counties Route), the network of Tourist Welcome Centres and in general identity-based product creation engineering.

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