

Barcelona Treball

Tourism and hospitality

Sector Report 2013

With the collaboration of:
CETT

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The 10 keys to understanding the sector

The diversification of the tourism offer and the consolidation of new forms of tourism such as eco-tourism, urban tourism, adventure tourism, business tourism, cultural tourism and gourmet tourism, hint at future trends in the industry.

The sector

The tourism and hospitality industry is an economic driving force not only of the Spanish state, but also of Catalonia. The traditional “sun-and-beach” tourism is one of the industry’s main draws. Yet new forms of tourism have appeared in recent years making gourmet tourism, urban tourism, and leisure and cultural tourism an increasingly significant part of the Catalan tourism offer.

Main areas of activity

The tourism and hospitality industry comprises three main areas of activity: accommodation, restaurant services and tourism planning, management and marketing. The tourism and hospitality industry boosts the development of other sectors such as land and air transport as well as the cultural and leisure industries.

Trends

The appearance of phenomena such as low cost airlines; the use of smartphones, social networks and different technological applications for planning holidays and occasional trips, and for market, promote and retain customers; as well as a sustained increase cruises in the city, the proliferation of the internet as a means to plan holidays or specific travel, the diversification of tourism, and the development of sustainability policies applied to the industry characterise the evolution of the industry.

Economic significance

The tourism and hospitality industry is a pillar of the Spanish economy. In 2011 Synthetic Index of Spanish Tourism (tourism GDP) rose 2,6%, which means that in 2011 tourism grew almost four times more than in the rest of Spanish economy (0,7%). It has to be said that in 2011, tourism generated €2.678 million in 2010 and led to the creation of 17.000 net jobs. Tourism is as one of the sectors with the largest contribution to GDP growth, and the only one that has generated employment in Spain in 2011. Barcelona tourism generated an economic impact of €20 million and daily has a strong impact on sectors such as trade and catering as well as the projection of the Barcelona brand. Moreover, it is the economy that is better withstanding the crisis, which has enabled us to achieve a significant increase in the employment in recent years.

Employment

During 2011, the number of people working or intending to work in the tourism industry was 2.132.034, accounting for 11,8% of the active population in the Spanish economy and 15,9% of the active population in the services industry. Barcelona’s tourism generates 100.000 jobs..

Professional profiles most in demand

Most people working in the industry have a secondary level education (61%). Yet, the demand is progressively higher for those with a university education, particularly for people with an undergraduate degree in tourism. In fact, the greatest number of people who kept their jobs in 2010 were those with the highest levels of qualification. Similarly, owing to the specific characteristics of the industry, it is essential for both the more-qualified and the less-qualified profiles to speak languages, and specifically, to have an intermediate or advanced level of English.

Occupations most in demand

The sector employs a wide range of occupations, from the most traditional such as chef or tour guide to more recently created jobs such as quality specialist in tourism. Food and beverages services, which include the restaurant industry, employ the highest percentage of people (42% in 2010, almost 1.05 million). In this regard, the most in demand occupation is waiter, and it is subject to high staff rotation due to the high degree of seasonality within the sector.

Future scenarios

The industry trend towards specialisation has given rise to a strong demand for professionals specialising in very specific branches such as high cuisine chefs, profiles suited to the cruise business, personal shoppers, etc. These new profiles are associated with new needs presented by tourists, who are no longer concerned with simply visiting and getting to know new destinations and who seek the enjoyment of different experiences.

Weaknesses

Seasonality, labour rotation, lack of sustainability in some Spanish and Catalan tourist destinations, and the lower qualification of the professionals in the industry are just some of the weaknesses it presents.

Opportunities

Urban, business, gourmet and cultural tourism are types of tourism with ample growth margins in Catalonia and throughout Spain. The use of the internet as a means of information, consultation and purchase of tourism products still has considerable potential with respect to the marketing of products. In addition, these policies are beginning to incorporate technology tools and applications that provide specific services to new customers, such as the location on the map to set a destination, or that look for attract their loyalty.

01 Introduction to the sector

The tourism and hospitality industry is one of the main pillars of the Spanish and Catalan economy. Specifically, in 2009 tourism in Spain accounted for 10.3% of GDP. Thus, Spain, Catalonia and Barcelona are tourist destinations with a very diverse cultural heritage that attract millions of international and national tourists each year.

Although sun-and-beach tourism had traditionally been heavily promoted in areas such as Costa Brava, Costa del Sol, the Canary Islands and the Balearic Islands, the appearance of new international destinations that are competitive not only in costs, but also in tourism offer such as the Adriatic Coast in Croatia, which offers identical climate and coastal tourism services features, has prompted a diversification of the Catalan and Spanish tourism offer. In this regard, the promotion of the cultural, natural and gourmet heritage of Spain and Catalonia brings with it a rise in urban and business tourism, rural and eco-tourism, and in sports and leisure tourism, all of which have become more important within the Spanish and Catalan tourism sectors. Specifically, Barcelona, which has a tourism offer very focused on architecture, culture and leisure, is ranked fourth in Europe in terms of foreign tourist visits just behind Paris, London and Rome. The city receives 25 million visitors a year and it is third in the world in number of conferences and conventions according to the rankings of the International Congress Association as well as the fourth European city receiving international tourism.

The tourism and hospitality industry, apart from being an economic sector in its own right, is also a driver of other industries such as the land and air transport, energy and communications industries.

The tourism and hospitality industry comprises three major areas of activity: restaurant services, which involves all activities associated with the provision of food and beverages; accommodation, which includes overnight stays in large and small hotels, guesthouses, hostels, rural homes, etc.; and tourism planning, management and marketing, which includes tourism activities administered through third parties and wholesale or retail travel agents.

02

Main areas of activity

Restaurant services

Restaurant services comprise activities linked to the provision of food and beverages. Specifically, the services can be sorted according to variables such as the place where the service is offered and the number of people that use it. Thus, on the one hand, there are premises that offer individual service such as cafeterias, bars, restaurants or other less customary establishments such as casinos, theme parks, etc.; and, on the other hand, there are restaurant services for communities, offered at training centres, health centres, company dining-rooms, etc. It should be said that the restaurant services sub-sector is the largest employer of people within the tourism and hospitality industry, accounting for 42% of the total.

Accommodation

This area includes the operation of facilities that enable tourists to stay in a place for a specific time. There are many types of accommodation, which can be grouped according to location (sea, mountain, etc.), additional services offered (spas, apartments, etc.) and the price paid for their use (hostels, hotels, etc.). Thus, there is a great variety of accommodation options such as hotels of different categories, guesthouses and inns, rural homes, spas, camping sites, hostels, mountain refuges, and tourist apartments, amongst others. It should be noted that, according to the Spanish Economically-Active Population Survey (EPA), the accommodation sub-sector employs 12.1% of all people working in the industry.

Tourism planning, management and marketing

The sub-sector of tourism planning, management and marketing encompasses activities associated with the management of tourism services through third parties. Thus, this sub-sector includes the services offered by travel agencies, wholesalers or other tour operators who essentially work in the promotion, organisation and marketing of tourism products that can range from train tickets to holiday packages that include accommodation, transport and restaurant services. Tourism planning, management and marketing tends to offer tourist packages which are increasingly diverse yet at the same time tailored to customers' needs.

03

Sector trends

Catalonia is a usual destination both for many Spaniards and tourists from the rest of the EU and other countries. For these preferences to continue, it will be necessary to increase the qualification of the sector's professionals, and to continue incorporating ICT. In fact, the ability to technify sector with specific applications is one of the trends that will shape its future.

ICT and tourism

The rise in the number of people with internet access has marked a turning point in terms of supply and demand for tourism products. Thus, the internet and new technologies allow access to a higher number of tourism offers and enable consumers to see and compare products in real time, which has helped end-customers to broaden their range of available alternatives and choose personalised options which are perfectly suited to their needs.

In this regard, the marketing of tourism products has increased in parallel to the growth of internet use. Yet, internet use has not replaced the traditional services of tourism planning, management and marketing performed by travel agents, as they still handle the largest portion of tourism product sales. In addition, many have created their own portals in order to market and sell their products over the internet.

New technologies are encouraging, therefore, a greater demand by consumers who not only use the internet to conduct quick and functional searches to find out the price-quality ratios of the products they buy, but who also take the opportunity to hear and use the opinions of consumers published in 2.0 platforms and communities. In this regard, Web 2.0 has become a habitual instrument of consultation on the quality of tourism products. It allows collaboration between users that interact in ever more pervasive ways. We should also bear in mind the importance of 3G technology, which allows network access via mobile phones to search for tourism products, anywhere, anytime. Thus, the influence of smartphones in the tourism sector has been quick to get noticed. According to Google, 19% of hotel searches are made by these mobile devices, which means that one in five hotel searches consolidates this device as a priority. It has been estimated that 8% of Spanish mobile phone users will make a reservation this year. The reports and statistics known reinforce expectations for use of smartphones in the tourism sector, which will grow exponentially. Obviously, the big companies have already developed (or are in the process of doing so) their applications booking systems compatible with these mobile devices and applications in which the traveler can check-in the hotel, as well as applications to get access to the room with a log sent to the terminal. In addition to the importance of smartphones for trip planning (phase before travelling), these devices also allow viewing videos of the destination to complete the selection process and complete the hotel booking. Finally, the use of smartphones enables tourists to share the travel experience through social networks, which completes the process (phase after travelling).

Diversification in tourism

The development of transport and communications systems and the emergence of phenomena such as low cost flights, which have increased the number of passengers in secondary airports, have enabled the tourism industry to become less dependent on seasonality. As a result, people increasingly consume more tourism products for weekends and/or times that do not correspond to traditional holiday periods, causing the tourism offer to adapt to this trend. Undoubtedly, this versatility also responds to changes in travel methods. The individual plans, for example, account for more than half of visits by foreigners, to the detriment of vacation packages. There is also a positive correlation between independent travel and the hotel occupancy rate. The aging of the population has also contributed to the diversification of the tourism offer and its adaptation it to specific needs and habits of this group. In this regard, some professionals will provide more custom tour packages (which include the purchase of different services) just to meet the preferences of consumers who cannot or do not want to plan their tourism activities for themselves.

On the other hand, the concept of diversification of the tourism offer also includes the consolidation of alternatives to sun-and-beach tourism such as eco-tourism, active and adventure tourism, urban and leisure tourism, health tourism, business tourism, cultural tourism, gourmet tourism, etc. In fact, Barcelona, the major destination in

Catalonia, has an offer based largely on architecture, culture, leisure and gastronomy. Tourists who visited the city rated the architectural offer most highly, followed by culture. In that context, it is necessary to strengthen this offer not only in Barcelona but in the rest of Catalan destinations.

Finally, it should be mentioned here that Spanish tourism companies, especially those in the hotel industry, have taken advantage of the experience of several decades in the Spanish market to launch an internationalisation process particularly focused on Latin America and Europe. This has meant that a great number of job opportunities are now found outside Catalonia.

Qualifications of the staff

The new challenges and opportunities faced by the tourism and hospitality industry in Catalonia and Spain indicate the need to consider which factors and strategies should be developed to keep the industry competitive. We should undoubtedly highlight role that the qualifications of staff will have on the quality and the development of the industry.

Catalonia is a typical tourist destination for people in Spain, citizens of the European Union as well as visitors from other countries. In this regard, providing continuity to this option will involve asking for higher qualifications of the staff working in the industry. Thus, having trained personnel will become essential if tourism companies, hotels and business premises or establishments seek to stand out in a global market such as today's, in which there is an increasing number of destinations that can compete with Spain and Catalonia in terms of both the offer of tourism products and prices.

Similarly, the industry's investment in new technologies in order to improve management techniques and renew facilities will also require training to enable staff to adapt to such changes. Thus, although a process of sector concentration is underway, implying simplification of organisations and alliances between different stakeholders, particularly regarding the management of purchases and the provision of joint services, all organisational change that requires the use of new technologies requires people who know how to use them.

In this regard, businesses, organisations and entities in the industry have begun to consider their staffs as strategic tourism assets that can help to differentiate them from the competition. Thus, quality will become progressively more important to the tourism and hospitality industry, and this trend will necessitate a higher level of staff qualifications.

Sustainable tourism

Catalonia welcomes millions of tourists each year and generates a considerable turnover, but the wealth generated by tourism, particularly sun-and-beach tourism, has negative effects on the areas of sustainability and the environment.

The climate is threatened by global warming and the associated rise in temperatures and sea levels. In fact, a report by the Spain's Ecologists in Action confederation warns that the Spanish coast will have lost 50 metres of beach by the end of the century. Consequently, the sustainability of the Catalan tourism model will require the adoption of measures that reduce the effects of climate change and promote sustainable tourism.

The last two sessions of the International Conference on Climate Change and Tourism (Cancun 2010 and Davos 2011) underscored the urgent need to mitigate greenhouse gas emissions, particularly those resulting from transport and accommodation activities. The Conference helped raise awareness amongst industry players (business operators, customers and staff) and encourage their participation in measures to curb greenhouse gas emissions.

Newly built tourism facilities have adopted environmental sustainability standards, and it will be necessary for those facilities that have not adopted such measures to do so within the near future.

Moreover, an increasing number of tourists show concern about not only the quality of tourism facilities available, but the degree to which they have been developed in accordance with and adhere to sustainability criteria. Similarly, tourism businesses and institutions are already aware of the social and economic benefits associated with the proper management and administration of tourism resources. Barcelona got the Biosphere certification of responsible tourism in 2011, which demonstrates the commitment of the city to a model of sustainable and responsible tourism.

The technological future of tourism: essential tools

The technological future of tourism is closely related to the potential development of the sector and the strategic direction of tourism enterprises. Those with higher levels of use of ICT, diversify their activities, offer products/services tailored to different market segments, adjust rates in these segments, and carry out marketing strategies aimed at each of the different segments. Thus, the technology applied to the tourism sector help to expand activities and market, reduce costs and design new strategies. It also promotes innovation because it serves to remove obstacles. Innovation in the tourism sector and based on the intensive use of ICT has begun to

take shape and will continue to do so in the future by opening new marketing channels and communication. And these new channels have been associated with certain tools or applications as listed below.

The Auto booking, allowing, for example, have the travel planned by telephone or automated expense reporting. The Guest Management System, a database that makes possible, for example, that a hotel concierge check the outputs to improve the organization of transfers to the airport, or a hotel manager check the time taken to resolve a problem in a room. The Gammification, a marketing strategy based on rewarding loyal customers with free stays at the hotel, with the assignment of a higher room category or giving additional contracted services. The Augmented Reality, allowing tourists to experience almost a real travel through multimedia resources for visualizing the history and characteristics of the destination (monuments, streets, etc.), the activities (parties, shops, services, etc..) or a future projected infrastructure, all at the same time. Services geolocation, which gives an immediate access to services (buying tickets, opening and closing shops, leisure activities, etc.). Bloc trips, content creation of quality tourism that can be published in blogs and social networks, which increasingly affect the reputation of tourist destinations.

Cruise ships: tourism on the rise

The cruise tourism is relatively recent and is expected that the actual growth margins will be maintained in the future. The port of Barcelona is the first cruise port of Europe and the Mediterranean (in 2011 there were 900 scales and arrived 2,5 million passengers to the city). It is the fourth in the world, only passed through ports of the Caribbean. In addition, cruises have become more diversified and have become an alternative to consider when choosing holiday destination. Thus, in addition to the classic sea cruise, are arising river cruises, thematic cruises (focused on a particular topic, for example, sportive, or for specific population, such as singles) and cruises aimed at businesses.

04 The sector in figures

Economic data

- Barcelona ended 2011 with a positive performance in all tourism indicators and surpass four maximum figures: 15,5 million overnight hotel stays, 2,6 million passengers, 7,3 million tourists and €1.900 million in tourist spending with credit cards. The city is the 4th city in Europe and 16th in international tourism reception in the world according to Euromonitor International 2011.
- Barcelona remains the first destination on Mediterranean cruises and the 4th worldwide in 2011, with more than 2,3 million passengers for the tenth consecutive year. The Port of Barcelona is ready for growth in internationalization of cruise passengers, because it has an airport with direct flights to major U.S. cities, a significant event considering that most passengers are Americans.
- Barcelona airport in 2011 was the ninth in the ranking of European airports in terms of passenger volume with 34 million passengers, a record for the city, which improves in one place the classification of the Airport Council International. In 2011, Barcelona Airport also recorded the largest annual increase (6,5%) in comparison to the major European airports.
- The celebration of fairs and congresses has a great significance to the city; in 2011, Barcelona hosted nearly 2.300 international meetings and conferences with the participation of 650.000 delegates. Fira de Barcelona is the main actor in this field and has a portfolio of more than 70 shows that receive 35.000 companies (direct and represented) and 3 million visitors. 15 shows are internationally references and are listed in the top three of its speciality in Europe. The contribution to the economy of the city and its surroundings is estimated at €2.500 million.
- The number of foreign tourists who visited Spain in 2012 was 56,9 million with a spending of 38.863 million (January-August), according to the survey of tourist expenditure (Egatur).
- In 2011, the Synthetic Index of Spanish Tourism (tourism GDP) rose 2,6%, i.e. tourism grew nearly four times more than the whole of the Spanish economy (0,7%) . Also, generated €2.678 million euros in 2010, with a net creation of 17.000 jobs over the year. Thus, tourism ranks as one of the sectors with the largest contribution to GDP growth and the only one that generates employment in Spain in 2011.
- According to the Tourism Expenditure Survey (Egatur), the expenditure by international tourists grew by 7,9% in 2011 in Spain, reaching €52.796 million, with an average expenditure of €934 per tourist. In Catalonia, foreign tourists spent €11.273 million, with an average expenditure of €823 per tourist.
- Barcelona tourism generates an economic impact of €20 million per day, and has a strong impact on sectors such as trade, catering as well as the projection of Barcelona brand.
- In 2011, Barcelona has 382 hotel establishments that offer 70.624 seats.
- According to the annual tourism balance of the Observatory of the Department of Enterprise and Employment, in 2011, in Catalonia there were 5.307 tourist accommodation establishments (hotels, campsites and accommodations) with a capacity of 585.061 seats. Compared to 2010, these figures represent an increase of 1,9% in hotel establishments and 0,7% in tourist accommodation establishments.
- From January to October 2012 Barcelona hotel establishments received 6.441.042 tourists which have made 13.889.473 overnight stays, figures that exceed +1,6 and +3,2%, respectively, in the same period in 2011. Contractionary trend in domestic demand also affects many countries in the European Union, while evolving a dynamic tourism coming from Russia, Africa and other emerging areas.
- In Catalonia, until August 2012 hotel establishments had received 11.567.992 passengers, whit 35.041.210 overnight stays, which represents a little variation compared to 2011 (a decrease of 0,8% and an increase 0.2%, respectively).
- According to the Tourism Expenditure Survey (Egatur), between January and August 2012, Catalonia, Balearic and Canary Islands were the most benefited region by foreign tourists. In Catalonia, tourists from France and Russia were the main generators spending.

Employment data

- In 2011 hospitality in Barcelona has 70.726 affiliated to Social Security: 60.372 are employees and 10.354 are self-employed (85% and 15% of the total, respectively). The sector accounts for 7,3% of the total affiliated to Social Security.
- Regarding sub activities, restoration has 46.374 employees (76,8% of the hospitality industry), more than half (52,8%) is working in restaurants. Moreover, hosting services absorb 13.998 employees (23,2% of the sector), which include hotels as the area with more employees (87,8% of the hospitality area).
- The hospitality industry in Barcelona is the area where there were a major employment growth in 2011, 3,2% resulting from the positive development of both employees (+3.7%) and the self- employed (+0,8%). Among the employees, employment growth was slightly pronounced in hosting services (+4,0%) than in food services and drinking (+3,6%).
- According to the annual tourism balance, in 2011, the Catalan tourism industry recorded 356.513 people employed on average, representing 11,6% of the total employed people in the Catalan economy.
- According to the annual report of employment in the tourism sector made by Institute of Tourism Studies in Spain, in 2011, there were 2.132.034 people working in the industry or intending to work in it. The food and beverage services industry was the area with more active population (48,4%), followed by accommodation services (16,9%), other tourist activities (19,6%), and transportation of passengers activities (12,6%).
- Regarding the employment profile of the sector in Spain, in 2011, 54% were men and 46% women. 42.9% of people that were working in the sector were between 30 and 44.
- In 2011, 79,2% of total employment was salaried (1.687.823 people), 67.1% of them had an indefinite contract, while the self-employed accounted for 20,8% of (444.006 people), 4.1% less than in 2010 (18.763 fewer). The hospitality sector had 71,5% of self-employed, 66,8% of them were in food and beverage services.
- The temporary employment rate is decreasing with age: for employees under 30 the rate stood at 55,7%; for the group aged between 30 and 44 years was 31 %, and for employees with more than 45 years, 16,5%. Regarding nationality, 22,5% (478.793 people) were foreign.

Sources. Latest data available: INE: National Institute of Statistics (Annual Survey of Services); Institute of Tourism Studies; Exceltur. Alliance for Excellence in Tourism. Directorate General of Tourism and Department of Business and Employment of the Government of Catalonia; Tourism Expenditure Survey (Egatur); Idescat; and Institute for Tourism Studies in Spain.

05 Professional profiles most in demand

Most highly-qualified professional profiles

Training profile

The more-qualified professional profiles have a degree in tourism or in any other training cycle in higher education in the area of tourism and hospitality – for instance, guide, tourist information and assistance, tourist accommodation management, tourism information and marketing, etc.

In addition, these profiles very often occupy positions of responsibility and carry out management tasks, so it is advisable for them to have additional training such as a Master's degree in hotel management. On the other hand, the trend towards specialisation in the tourism and hospitality industry is giving rise to a strong demand for professionals to perform very specific tasks. Hence, once the basic training has been done, it is advisable to do specialisation courses that certify expertise in a specific area: for example, sustainable tourism, cultural tourism, rural or thermal tourism, etc.

Finally, it must be said that tourism professionals should have some training related to the application of the new technologies applied to management, advanced knowledge of management, of quality tourism and an advanced level in a foreign language, preferably English.

Skills profile

The industry professionals, apart from the expertise necessary to carry out a job, should develop skills related to dealing with people. Thus, for a tourism and hospitality professional it is essential to possess skills such as customer orientation, customer-friendliness, empathy and an ability to communicate.

On the other hand, it must be said that on many occasions people working in the industry are people who launched a tourism business that has expanded over time. In this regard, the entrepreneurial nature of the people working in the industry is essential and, consequently, it is very useful to have developed a set of skills associated with people management, teamwork and, in particular, self-confidence and a capacity for leadership, negotiation and adaptability to changes.

Examples of jobs in the Barcelona Treball directory

- ✓ [Catering services manager](#)
 - ✓ [Hotel marketing manager](#)
 - ✓ [Technical expert in quality tourism](#)
 - ✓ [Technical expert in organisation of conventions, congresses and events](#)
-

Less qualified professional profiles

Training profile

The less-qualified professional profiles include those with either vocational training or Level 1, 2 or 3 qualification diplomas issued by the Catalan Institute for Professional Qualifications (ICQP). For instance: middle-level technical expert in cuisine and gourmet studies; middle-level technical expert in catering services; technical expert in basic cuisine in restaurant-bar operations, in guest flat operations, or in basic catering operations; technical expert in management of tourist accommodation; tourism agent; tourism promoter; technical expert in pastry; technical expert in promotion of local tourism, etc.

In addition to the required vocational training, it is advisable for these professional profiles to attend courses on dealing with people more effectively. In this regard, it is important to have knowledge in customer care and tourism quality. Similarly, it is essential to have a basic level of English in order to understand the needs of tourists from other countries. In this regard, it is important to take courses in English applied to tourism that may provide instruction in specific vocabulary. Finally, it is also essential to have a basic user-level knowledge of computers which includes, at the very least, internet and word processing skills.

Skills profile

For these professional profiles, person-to-person skills such as empathy, customer focus and interpersonal communication are those with the most importance. On the other hand, the professional success of such profiles will to a certain extent depend on their initiative, capacity for self management and planning, flexibility, capacity to adapt to changes and interest in gaining expertise in the cultural and social aspects of their work (e.g. significant events and history of the city or region where they work).

Examples of jobs in the Barcelona Treball directory

- ✓ [Cook](#)
 - ✓ [Chambermaid or bellboy](#)
 - ✓ [Tourist guide](#)
 - ✓ [Guide for activities in the natural environment](#)
-

06

Future scenarios

Weaknesses

- Deteriorating of global competitiveness due to the increasing prices in comparison to competitors, and a smaller increase in productivity.
- A culture of innovation is not settled in the country, as well as R&D culture. There is a small investment in innovation regarding the specific weight of the sector in the economy.
- The labour situation of professionals working in the industry, mainly in sun-and-beach tourism, is marked by seasonality and labour rotation.
- Low qualification of the people working in the industry. The tourism and hospitality industry, and particularly the restaurant services sub-sector, has traditionally employed people with low levels of professional qualification.
- Lack of planning and environmental awareness in the sector, which condition the gradual implementation of measures to reduce its impact on the environment.
- Lack of planning and environmental awareness within the industry, which determines the progressive implementation of measures geared to reducing its impact on the environment.
- The concentration of demand and supply in certain regions, as more than 66% of hotel rooms are in four Autonomous Communities (Catalonia, Balearic Islands, Canary Islands and Andalusia).
- Lack of knowledge of Catalan and Spanish cultural heritage abroad. Identification of Spain as a tourist destination for sun and beach.
- Loss of prestige of Spanish brand abroad as a result of the economic situation in the country.
- The need to renew specific tourism infrastructures and implement urban planning and landscape management master plans.

Threats

- The industry is made up of a high number of family companies with conservative management styles who find it difficult to adapt to and implement the social and technological changes experienced by the industry.
- Certain areas of Spain and Catalonia are still anchored in a model of low-quality and low-cost sun-and-beach tourism with a high degree of massification. This model now must compete with other emerging destinations (Croatia, Turkey, etc.) offering similar products at more reasonable costs.
- The massification of destinations such as Costa Brava, Costa Daurada and Costa del Sol (in terms of both people and the quantity of buildings) can make tourists who had traditionally frequented the Spanish coast look for sun-and-beach destinations with less massification of people and facilities.
- The current economic situation may serve to maintain the decrease in the number of overnight stays of tourists who are residents of Spain. The Spanish tourism industry may also lose more competitiveness.
- Low cost airlines have started operating in major airports and their use of secondary airports will depend on the freezing of fees by AENA.

Strengths

- Governments see sustainable tourism as a strategic priority. In fact, the Spanish *Plan Turismo 2020* (a strategic document agreed by the industry for the next decade) insists on the need to develop a sustainable model through the proper planning of new tourism products and the correction of existing ones, particularly in regards to some sun-and-beach tourism destinations considered "mature". This Plan entails, amongst other lines of action, the creation of an Observatory of Tourism and Sustainability to assess the impact of

tourism on the economy, the environment and society.

- Spain in general, and Catalonia in particular, have a first-rate cultural and natural heritage which makes it possible to generate attractive and customised offers for a varied population. According to the diagnosis made by Turespaña, urban tourism still has high growth potential and the challenges in this area involve transferring a differentiating value to existing destinations and promoting new ones.
- The dynamic potential of the industry's SMEs making fuller use of the internet has started to manifest itself. In fact, they can generate very flexible products such as customised trips capable of satisfying new consumer demands.
- Low-cost flights have favoured areas of Catalonia that, while considered tourist destinations, were not considered first-choice destinations.
- The internet has definitively taken root in the direct marketing of tourism products. Moreover, it is within the reach of any company, regardless of size or economic status. Thus, the technology gives its advantages to the tourism industry: it facilitates the process of purchasing services (reservations, tickets ...), provides information, allows the marketing of tourism products and services, and dissemination and promotion of destinations, etc. The modernization of the sector generates a constant barrage of new products for businesses and consumers.
- The rise of organisations that promote the adoption of quality seals ensures compliance with certain basic requirements of the tourism industry.

Opportunities

- Other factors of a social nature such as the fragmentation of holiday periods, not only in Spain but also in the rest of European countries, make it possible for tourism consumption to take place throughout the year and not just during the summer period. This situation offers new opportunities for the marketing of tourism products. In fact, de-seasonality is one of the main points of the *Plan Turismo 2020* with regards to reviving sun-and-beach destinations.
- The growth of urban, cultural, gourmet and sports tourism already generates new business opportunities, which can in turn generate new employment in the industry.
- Strengthening cruise tourism, which currently involves more than 2 million tourists in Catalonia. This trend may result in new job opportunities for cruise ship staff and crew.
- The appearance of low-cost transoceanic flights will open new doors to tourism brands that know how to sell and have a consolidated image of quality.
- Today, the analysis of the models and the new marketing strategies based on ICT technologies are essential to the future of the sector. In fact, the key players in the field of marketing focus to generate knowledge and content in real time.
- Develop a digital strategy, with global vision, focusing on loyalty, differentiate and get a good brand position is the commitment of future companies.
- Increasing the training and the qualifications of staff with the aim of enhancing the quality of services and improving the image of the industry. To achieve this, it is necessary to generate human resources policies to recruit top professionals and retain talent within companies and organisations that are active in the local area.
- Tourism quality certificates such as the "Q" certification and the ECEAT - INTERNATIONAL system address environmental concerns that exist in the industry and are an example of the rise of new occupations such as quality tourism experts, whose job is to establish methodologies to make tourism more sustainable. Any occupations related to tourism planning and development will have to consider sustainability and respect for the environment.
- Improve the coordination of tourism promotion activities of different destinations and administrations, preventing dispersion, to achieve scale economies and make an intelligent use of them.

07

Useful links

International organisations

World Tourism Organization (WTO)

http://www.unwto.org/index_s.php

Spanish organisations

Institute of Tourism Studies (IET)

<http://www.iet.tourspain.es>

Exceltur. Spanish Alliance for Tourism Excellence

<http://www.exceltur.org>

Institute of Spanish Tourism Quality (ICTE)

<http://www.ictes.es>

Tourism Round Table

<http://www.mesadelturismo.com>

Spanish Confederation of Hotels and Tourist Accommodation (CEHAT)

<http://cehat.com>

Spanish Association of Hospitality and Restaurants (FEHR)

<http://www.fehr.es>

Spanish Confederation of Travel Agency Associations (CEAV)

<http://www.ceav.info/publico/constitucion.htm>

Gremi d'Hotels de Barcelona

<http://www.barcelonahotels.es>

Barcelona Turisme

<http://www.barcelonaturisme.com/>

National events (fairs, conferences, etc.)

Feria Internacional de Turismo, FITUR (*International Tourism Trade Fair*)

<http://www.ifema.es/ferias/fitur/default.html>

International Tourism Show in Catalonia (SITC)

<http://www.salotourism.com>

HOSTELCO (International Restaurant, Hotel and Community Equipment Exhibition)

<http://www.hostelco.com>

International portals

European Cities Marketing

<http://www.europeancitiesmarketing.com/>

Destinet. Sustainable Tourism Information Portal

<http://destinet.ew.eea.europa.eu>

Global Code of Ethics for Tourism

<http://turismo-sostenible.net/documentos/codigo-etico-mundial-para-el-turismo/>

European Charter for Sustainable Tourism in Protected Areas

<http://www.european-charter.org/home/>

Development Assistance Network for Tourism Enhancement & Investment (DANTEI)

<http://www.dantei.org>

National portals

Portal Comunicatur. Informació turística professional

<http://www.comunicatur.info/>

Hosteltur Portal

<http://www.hosteltur.com>

Nexotur (daily e-newsletter)

<http://www.nexotur.com>

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