ENI CBCMED
Cooperating across borders in the Mediterranean

Project funded by the EUROPEAN UNION

REGIONE AUTÒNOMA DE SARDIGNA
REGIONE AUTONOMA DELLA SARDEGNA

MEDUSA

DESTINATION REVIEW FROM A SOCIO-ECONOMIC, POLITICAL AND ENVIRONMENTAL PERSPECTIVE IN ADVENTURE TOURISM

CATALONIA

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MEDUSA

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The European Union is made up of 28 Member States who have decided to gradually link together their know-how, resources and destinies. Together, during a period of enlargement of 50 years, they have built a zone of stability, democracy and sustainable development whilst maintaining cultural diversity, tolerance and individual freedoms. The European Union is committed to sharing its achievements and its values with countries and peoples beyond its borders.

The 2014-2020 ENI CBC Mediterranean Sea Basin Programme is a multilateral Cross-Border Cooperation (CBC) initiative funded by the European Neighbourhood Instrument (ENI). The Programme objective is to foster fair, equitable and sustainable economic, social and territorial development, which may advance cross-border integration and valorise participating countries' territories and values. The following 13 countries participate in the Programme: Cyprus, Egypt, France, Greece, Israel, Italy, Jordan, Lebanon, Malta, Palestine, Portugal, Spain, Tunisia. The Managing Authority (JMA) is the Autonomous Region of Sardinia (Italy). Official Programme languages are Arabic, English and French. For more information, please visit: www.enicbcmed.eu

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CONTENTS

0. EXECUTIVE SUMMARY 1

1. SOCIAL, ECONOMIC AND CULTURAL PROFILE 2

1.1 GENERAL OVERVIEW 3

1.2 ADMINISTRATIVE, POLITICAL AND TERRITORIAL STRUCTURE 4

1.3 DEMOGRAPHIC EVOLUTION 5

1.4 ECONOMIC STRUCTURE 6

1.5 EMPLOYMENT AND LIVING CONDITIONS 7

1.6 LOCAL CULTURE 8

1.7 GENDER EQUALITY 8

2. INFRASTRUCTURES AND MOBILITY 11

2.1 GENERAL OVERVIEW 12

2.2 HARD INFRASTRUCTURES 12

2.3 SOFT INFRASTRUCTURES 19

2.4 ACCESSIBLE INFORMATION 21

3. ENVIRONMENTAL PROFILE 23

3.1 GENERAL OVERVIEW 24

3.2 PROTECTED AREAS 24

4. DESTINATION STRATEGY AND MANAGEMENT 28

4.1 TOURISM IN CATALONIA. IMPORTANT NUMBERS 29

4.2 THE DESTINATION MANAGEMENT SYSTEM 31

4.3 CATALONIA'S TOURISM STRATEGY 33

4.4 SUSTAINABLE TOURISM POLICIES 35

4.5 MAIN ATTRACTIONS 37

5. ANNEX 39

RESOURCES 43

ACRONYMS 46

0. EXECUTIVE SUMMARY

Catalonia is an autonomous region located in north-eastern Spain. With its own linguistic and cultural identity, Catalonia is a popular tourist destination and economic powerhouse.

The region is very well communicated, both nationally and internationally. There are 5 commercial airports, 52 ports and yacht clubs, 6 cruise ship ports and more than 12,000 kilometres of roads, connecting the region to any main European city in less than 12 hours.

Catalonia also has a vast range of soft infrastructures which allow both residents and visitors to enjoy nature. More than 9,000 kilometres of signposted footpaths, 6,400 kilometres of mountain-bike trails and 26 kilometres of authorised sea swimming lanes provide a perfect starting point for the design of special tourist products.

Geographically diverse and despite its small scale, Catalonia is a region with an exceptional and very rich natural biodiversity heritage.

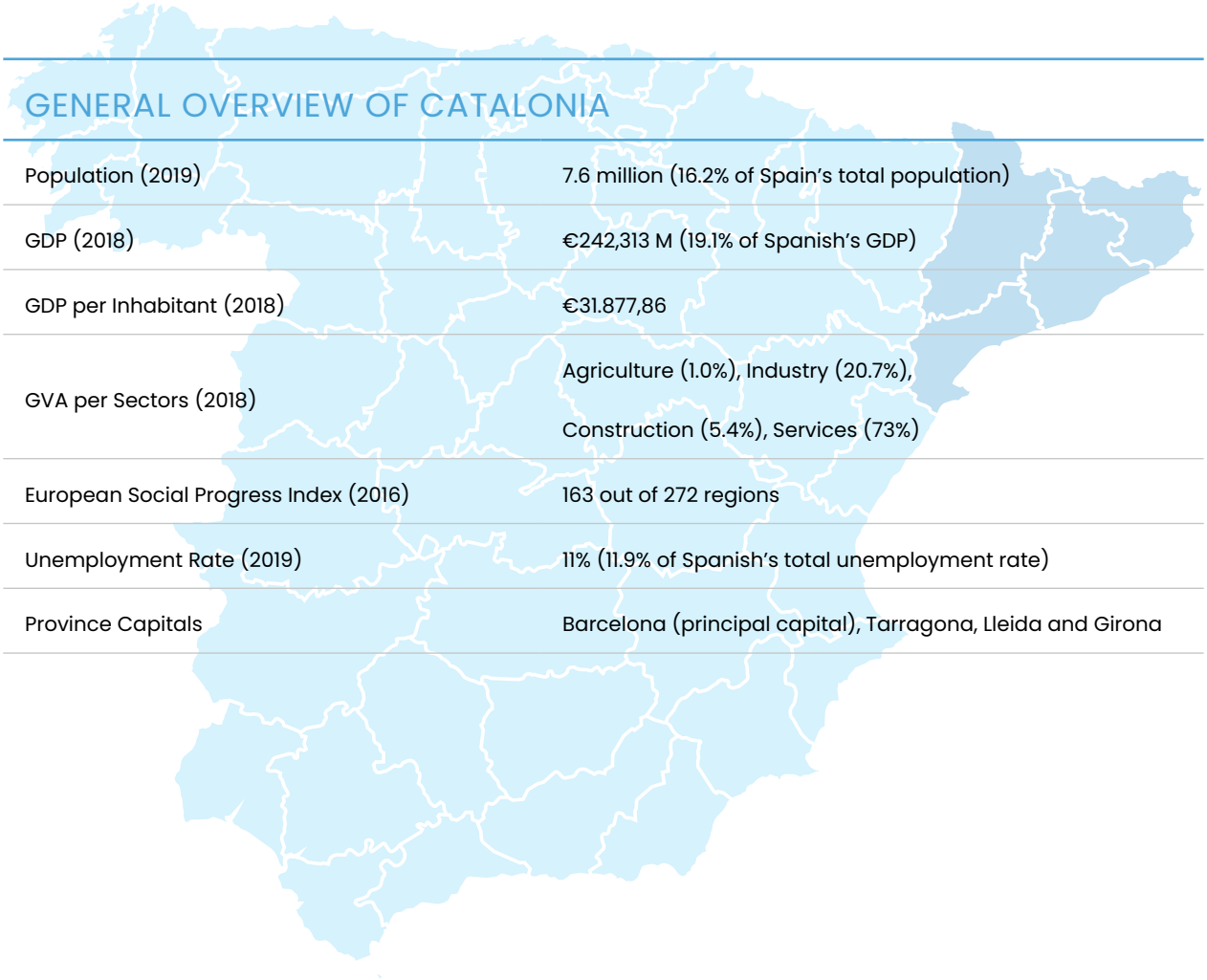
In terms of tourism, Catalonia is a prime tourist destination offering many attractions to all sorts of visitors. As a Mediterranean destination with a millennial history, with its own culture and language and a rich historical and natural heritage, Catalonia offers great scenic variety. In addition, its great capacity and excellent facilities place it among Europe's top tourist areas, with approximately 30 million tourists a year, more than half from abroad. Accounting for roughly 12% of its GDP, tourism is one of Catalonia's main sources of wealth and hence one of its strategic priorities.

1. SOCIAL, ECONOMIC AND CULTURAL PROFILE

1.1 General Overview

Catalonia is an autonomous region located in north-eastern Spain. It takes up, approximately, 32,000 square kilometres and it has borders with France and Andorra to the north and the Mediterranean Sea to the east. This strategic location has promoted a very strong link with other territories in the Mediterranean basin. It is administratively organised into four provinces (Barcelona, Girona, Lleida and Tarragona), with Barcelona as its main capital.

It is geographically diverse, with 580 km of coast, a high mountain barrier (the Pyrenees) in the north and a wide depression inland. With its own linguistic and cultural identity, Catalonia is a popular tourist destination and economic powerhouse.



GENERAL OVERVIEW OF CATALONIA

Population (2019)	7.6 million (16.2% of Spain's total population)
GDP (2018)	€242,313 M (19.1% of Spanish's GDP)
GDP per Inhabitant (2018)	€31.877,86
GVA per Sectors (2018)	Agriculture (1.0%), Industry (20.7%), Construction (5.4%), Services (73%)
European Social Progress Index (2016)	163 out of 272 regions
Unemployment Rate (2019)	11% (11.9% of Spanish's total unemployment rate)
Province Capitals	Barcelona (principal capital), Tarragona, Lleida and Girona

1.2 Administrative, political and territorial structure

Catalonia is an autonomous community within Spain. Recognised as a historic nation, it has its own government, the Generalitat de Catalunya, which has legislative, executive and administrative functions. The Catalan government has its own exclusive responsibilities as well as others which are relinquished by the Spanish central government. Tourism responsibilities are included in the latter.

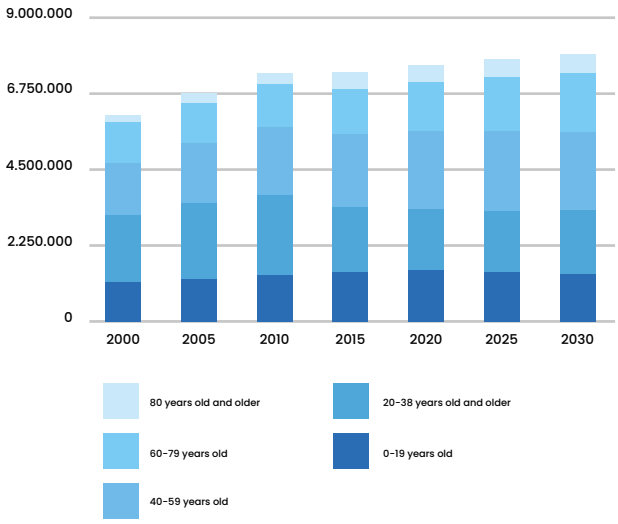
In terms of territorial structure, Catalonia is divided into four provinces – Barcelona, Girona, Lleida and Tarragona – and, at a lower level, into 42 counties. Barcelona city is its principal capital where most of institutions and official headquarters are located.

1.3 Demographic evolution

Catalonia has 7.6 million inhabitants, with an equal male-female ratio. It represents 16.2% of Spain's total population and 1.5% of the European Union's. By age group, the largest consists of people aged 40-59 (31%), followed by inhabitants aged 20-39 (24%). The population density in Catalonia is far higher than in Spain (239 inhabitants/ km2 and 93 inhabitants/ km2, respectively), although there are very big differences among territories and cites within Catalonia.

Catalonia's population will increase, based on official statistical estimations, to 8 million inhabitants by 2030 thanks to immigration. By this year, there will be around 1.8 million people over 65, representing 22.3% of Catalonia's total population (in 2018, they represented 18.8%).

POPULATION EVOLUTION IN CATALONIA 2000-2030 (BY AGE GROUP)



Source: IDESCAT

MAIN CITIES WITH MORE THAN 20,000 INHABITANTS (2019)

	Population	Pop density
Barcelona	1,636,762	16,149.6
L'Hospitalet de Llobregat	264,923	21,364.8
Terrassa	220,556	3,143.6
Badalona	220,440	10,407.9
Sabadell	213,644	5,653.5
Lleida	138,956	654.5
Tarragona	134,515	2,324.0
Mataró	128,265	5,693.1
Santa Coloma de Gramenet	119,215	17,030.7
Reus	104,373	1,976.0
Girona	101,852	2,603.6
Sant Cugat del Vallès	91,006	1,886.9
Sant Boi de Llobregat	83,605	3,894.0
Manresa	77,714	1,865.9

Source: IDESCAT

Geographically speaking, Barcelona and its metropolitan area comprises 64.2% of Catalonia's total population. This figure will grow as the inland territories are expected to lose population in favour of the more dynamic areas within the region. Despite this territorial concentration, Catalonia has a network of intermediate cities of great dynamism.

1.4 Economic structure

Catalonia is one of Spain's premier economies, contributing 19.1% of the total Spanish GDP. Historically a trading nation, Catalonia maintains an economic activity that has always depended on its ability to connect with the rest of the world. Its location in the Mediterranean area and its transport infrastructure, as well as its trading, entrepreneurial and open economy have given it a top-rank strategic position in the south of Europe.

The Catalan economy grew by 2% in 2019,[1] as did the Spanish. Although this figure confirms the slowdown in Catalonia's economy, after having exceeded 3% in previous years (3.9% in 2015, 3.4% in 2016, 3.3% in 2017 and 2.6% in 2018), this is the sixth consecutive year of positive growth, restricted by the weakening of the global economy as commercial tensions and geopolitical uncertainties have increased. Catalan GDP growth in 2018 was higher than in the euro area (1.9%),[2] with a projected rate of around 1.2%[3] for 2019. A moderate slowdown is anticipated for 2020, which will also be reflected in the economy of the entire euro area.

Catalonia as a whole has a long industrial tradition. Food, chemicals, motor vehicles, energy and pharma are the main industrial sectors. And today, this strong industrial base and a powerful ICT sector are key elements in making Catalonia Annual average a driving force in industry 4.0. Between 2014 and 2018, Catalonia won 22 out of the 37 grants from the European Commission's 5G PPP initiative, aimed at helping research entities to finance projects related to the new 5G technology. The region region is also a reference model for its innovation and research system. Catalonia has 12 universities, 63 research centres, 22 technology parks, 15 research hospital institutes and 6 advanced technology centres. From 2014 to 2018, Catalonia received 1,070 million euros from the Horizon2020 programme, invested in 2,137 projects.

GDP IN CATALONIA 2018 (% OF ANNUAL REAL CHANGE)

Agriculture	-0.4
Industry	1.1
Construction	4.7
Services	2.9
GDP	2.6

Source: Idescat

Based on the latest available data, in 2018, all economic sectors grew except for agriculture. The industrial sector was the most affected by the weakening of global trade while services continued to grow at a stable rate, as did the construction sector, which moderated its performance but still showed significant increases.

1. Estimated data by IDESCAT (Statistical Institute of Catalonia).
2. Latest official figure published by the European Commission.
3. Forecast by OECD.

Together with industry, trade and tourism are important activities. Tourism accounts for 12% of the Catalan GDP and has become one of the most significant economic activities. With more than 19 million foreign tourists (2018), Catalonia is one of the top European destinations showing 22.2% of the Spanish total tourist accommodation places and 2.5% of the EU.[4]

According to the Financial Times, in 2018 and 2019 Catalonia was the best region to invest in in Southern Europe. Barcelona and its metropolitan area form not only a leading economic and technological centre in Europe but also a centre of trade, culture and services, and a first-rate tourist destination.

1.5 Employment and living conditions

The unemployment rate in Catalonia rose to 11% in 2019, lower than the Spanish average rate (14.1%) but still higher than the euro zone figure (7.4%). It is especially problematic among some groups such as young people, those with only a basic level of education and non-EU nationals.

The labour market continues to be dysfunctional in several ways. Besides the high number of temporary jobs, the high percentage of involuntary part-time jobs is significant (more than 50% in 2018), as well as the high turnover of temporary employees, who have very short contracts (43.4% of temporary contracts in 2018 were for one month at most).

In 2018, tourism generated 14% of the employment in the total Catalan labour market.

Based on 2018 statistics, the average annual net income per household in Catalonia was €13,338, slightly higher than the Spanish figure, which was €11,412.

Lastly, as far as living conditions are concerned, Catalonia has a Gini index[5] of 30.3 (33.2 in Spain) and a gender equality rate of 70, the same level as the whole Spain and slightly higher than the EU average.[6]

4. Data published by the Generalitat of Catalonia.
5. Coefficient calculating the inequality in the income distribution.
6. Data 2017.

1.6 Local culture[7]

93.8% of the citizens of Catalonia understand Catalan, the official language along with Spanish and Aranese. Catalan is the common language used at school and its use is standard in the media, financial world and cultural productions. With regard to Spanish, nearly all citizens understand and speak it.

Catalan culture, architecture and history have developed their own unique, global identity over the centuries. An innovative flair, creativity, capacity to absorb different influences, co-existence and tolerance have shaped a culture that is both national and cosmopolitan. Traditionally, art and thought trends seep into Catalonia as a result of the country's geographic location, open to Mediterranean and European countries, and also due to the leading spirit and attraction created by Barcelona.

In Catalonia, the most modern trends coexist in harmony with the most deeply-rooted traditions, some of which have been declared Intangible Cultural Heritage by UNESCO. Folk festivals are a good reflection of how the people of Catalonia have preserved their cultural heritage.

1.7 Gender equality

Gender equality-related fields are the order of the day. In fact, "gender equality" is specifically established as one of the 17 Sustainable Development Goals of the 2030 Agenda, set by the United Nations in 2015, which envisages a world of universal respect for human rights and human dignity, the rule of law, justice, equality and non-discrimination. Based on the composite indicator that measures the distance a society has to go to achieve full equality among women and men, the so-called Gender Equality Index, in 2017 Catalonia ranked 9th in Europe in this field. This indicator's objective is to reflect the reality of gender equality in important aspects of welfare and people's development, going from 1 to 100 –1 being the highest inequality and 100 the highest equality. As mentioned above, in 2017 the Gender Equality Index in Catalonia was 70.9 %. Given the existing margin of improvement, in 2019 the Catalan government approved its "Strategic Plan of Gender Equality Polices 2019-2022", which includes more than 320 actions to be implemented during this period in favour of equality for women with an estimated budget of €72.5 million. This plan, which is the continuation of other plans already implemented in recent years, is aimed at deploying all those terms established in the Law 17/2015 of 21st July, promoting equality between women and men. The key areas which this document takes into account revolve around: co-education

7. Source: Generalitat de Catalunya

and promotion of equal models and values, promotion of equity in the labour market and the co-responsibility in the uses of time, prevention and eradication of gender-based violence, social and political participation of women, and personal and communal empowerment, making women visible and eliminating sexist communication, and a cross-sectional approach to the gender perspective in public policies. In short, this Strategic Plan aims to become the main tool to make progress, involving the whole of Catalan society, in achieving effective equality between women and men and also eradicating any type of sexist violence.

The above-mentioned Strategic Plan includes data showing the current situation of women in Catalonia:

- In 2017, women in Catalonia earned 14% less than men.
- In the same year, 54% of enrolments for Catalan universities were women. In engineering careers, women represented only 25% of all students.
- Only 20% of the boards of directors of companies in the stock market are women.
- In 2019, women's employment rate was 47.4%.
- Women devote almost twice as much time to domestic tasks as men and 85% of people asking for unpaid leave to take care of children or other relatives are women.

Tourism is one of the main economic sectors worldwide and given its transversal character, has a pivotal role to play in boosting and promoting actions to achieve gender equality in our society. And, as in other economic sectors, it has also an important margin of improvement in this field.

In fact, when talking about sustainable tourism it implicitly includes a gender approach. The UNWTO together with the UN Environment Programme identifies twelve goals to be achieved by so-called sustainable tourism. One refers to "quality of work", aimed at improving the quantity and quality of locally created jobs without any kind of discrimination (including gender, race, etc.).

By the same token, several international institutions aimed at promoting sustainable tourism development worldwide use indicators related to the social sustainability (professional opportunities for the local community, human respect, gender equality, etc.) to monitor the level of sustainability of the tourist sector.

8. Source: https://www.htsi.url.edu/ca/igualtat-genere-turisme/

This key role of tourism in gender equality is fully recognised by the UNWTO when referring to the 2030 Agenda: "Tourism can empower women in multiple ways, particularly through the provision of jobs and through income-generating opportunities in small and larger-scale tourism and hospitality related enterprises. As one of the sectors with the highest share of women employed and entrepreneurs, tourism can be a tool for women to unlock their potential, helping them to become fully engaged and lead in every aspect of society".

The second edition of the "Global Report on Women in Tourism", published by the UNWTO in 2019, reveals that:

- 54% of people employed in tourism are women while in the broader economy this percentage is 39%.
- In hospitality, women hold less than 40% of managerial positions, less than 20% of general management roles and less than 8% of board positions.
- Women in tourism earn 14.7% less, while in broader economy this percentage increases to 16.8%.
- 23% of tourism ministers are women while, in terms of general government ministers, this figure is 20.7%.

Regarding the Catalan tourist sector, the current Strategic Tourism Plan of Catalonia already considers this gender equality as one of the elements to be taken into consideration when developing a sustainable and responsible tourist destination model.

Despite the lack of information and specific data regarding gender equality in the tourist sector in Catalonia, some figures show that there is still a long way to go in this sense. As a case in point[8]:

- In Barcelona, only 30% of the 220 hotels from 3* to 5* are managed by women. In other words, roughly speaking, only 60 women manage hotels in one of the world's major tourist centres.
- The salary gap in the tourist sector is around 20%, lower than in the broader economy with this figure increasing to 30% in Catalonia.
- Wage differences are bigger in technical careers and intermediate studies.
- Although the young population (16-24 years old) has a more precrous living situation, this is the age range where differences between women and men are lower.

In conclusion, gender equality is an important variable when talking about sustainable tourism. Catalonia's DMO is aware of this fact and has already included it as part of its current Strategic Tourism Plan with the objective of making it a sustainable tourist destination from all possible different points of view.

2. INFRASTRUCTURES AND MOBILITY

2.1 General overview

Catalonia has a complete transport infrastructure system, which allows people to move not only within the region but also to quickly and easily connect with the main cities in Europe. Airports, roads, trains, public transport, etc. and a wide range of the so-called "soft infrastructures", which enable citizens and visitors to move around in a more sustainable way, are key for the competitiveness of Catalonia as an economic powerhouse and as a leading tourist destination worldwide.

Air Transport	Sea	Roads	Railway	Soft infrastructures
5 commercial airports	52 ports and yacht clubs	12,000 km of roads	High-Speed connection national and internationally	9,000 km of signposts ways
+100 airlines operating	6 cruise ship ports	Access to the network of European roads	500 train and railway stations	6,400 km of MTB trails
				26 km of authorised open water routes

2.2 Hard infrastructures

Catalonia is a well- connected region, both nationally and internationally and by different means of transport: air, land and sea. A wide network of roads, together with railway, airport and port facilities, has turned this area into a worldwide hub.

Catalonia wants to promote the mobility of people and goods through fast, safe and efficient transport systems by strengthening connectivity between infrastructures and the logistics system and working to improve the accessibility of the country for the general public.

Airports

Catalonia has five commercial airports. In 2019, they generated traffic of almost 56 million passengers (4.6% more than in 2018). Barcelona airport concentrates 95% of this volume, making it one of the 1% of global cities that generates 40% of worldwide passengers air traffic.

VOLUME OF PASSENGERS IN CATALAN AIRPORTS 2019

	Volume of passengers	Variation vs 2018
Andorra – La Seu d'Urgell	NA	NA
Barcelona – El Prat Josep Terradellas	52,686,314	5%
Girona – Costa Brava	1,932,255	-4.40%
Lleida Alguaire	58,600	30.60%
Reus – Costa Daurada	1,046,062	0.80%
TOTAL	**55,723,231**	

Source: Aena, IDESCAT

Barcelona – El Prat Josep Tarradellas

Barcelona – El Prat Josep Tarradellas is, by far, the major airport in Catalonia. It has become a worldwide model and the most important airport in the Mediterranean region.

It is the second airport in Spain and the sixth in the European Union in terms of volume of passengers. In 2019, almost 53 million passengers took off or landed in Barcelona thanks to the more than 100 airlines that fly to 219 destinations in 64 countries.

Out of all the routes available, 47 of them are intercontinental, a figure which must be taken into consideration because it shows the high degree of international connectivity that it gives to the city. Future plans for the airport include La City, a 150-hectare area with hotels, office buildings and a wide range of facilities, plus the new rail link between the T-1 terminal and the city centre. In addition, the L9 underground line has been extended to the airport, its fast link to the city being of considerable advantage for passengers.

Girona – Costa Brava

Girona – Costa Brava airport is located in a prime location as it is close to the Costa Brava, the Pyrenees and the cities of Girona and Barcelona.

Thanks to low-cost airline operations, Girona-Costa Brava airport has enjoyed spectacular growth in recent years, with passenger levels exceeding the five million mark in 2009. However, the airport has followed a negative tendency due to the reduction of operations and in 2019 it dealt with 1,932,255 passengers.

Reus – Costa Daurada

Reus airport is approximately three kilometres south-east of the city and 13 kilometres from Tarragona city centre.

Due to the operations of low-cost airlines and the 2008 opening of an operational base for Ryanair, Reus Airport underwent significant growth 10 years ago. The airport had previously had a substantial base of charter flight passengers, mainly in summer. Since 2015, these facilities have been following a positive trend and in 2019 it processed 1,046,062 passengers. Numerous general aviation and sports aircraft also operate in Reus.

Lleida – Alguaire

Located 15 km from the city of Lleida, it favours the promotion of Catalonia as a top winter and mountain tourism destination. With a customs service, the airport can handle flights from countries outside the Schengen area, such as Russia and the United Kingdom. Some regular flights are also operated, while the premises are further used for testing, numerous sports events and prototype development.

Andorra – La Seu d'Urgell

The Generalitat of Catalonia, the Government of Andorra and the Spanish Ministry of Public Works have developed the premises into a public infrastructure project that has now handled its first regular flights. The airport was reopened in June 2010 following conversion of the premises and the runway. It is designed to become the main Pyreneean airport and the gateway to Andorra. The installation of a customs service will enable flights to be operated from non- Schengen countries.

A-part from the five commercial airports in Catalonia, there are others worthy of consideration located in nearby regions and, consequently, in areas of influence for tourism in Catalonia such as Toulouse-Blagnac in France. Although there are others like Perpignan-Rivesaltes, Montpellier-Méditerranée or even Pau Pyrenees, they will not be taken into account due to their characteristics. In Spain, the airports in Valencia and

Zaragoza should be considered as influential airports for Catalonia.

Catalonia also has a wide network of aerial facilities formed by five aerodromes and dozens of heliports.

Ports

Along its 580 kilometres of coast, Catalonia has 52 ports and yacht clubs, in addition to the large seaports in Barcelona and Tarragona. Most of them have suitable facilities and services for tourist activities.

With regard to the area's tourist profile, Water Sports Resorts should also be highlighted when talking about ports and sea activities. A Water Sports Resort is a tourism and leisure zone designed to accommodate water sports tourism, i.e. active holidays in contact with the water and with the possibility of doing a variety of water- based leisure activities. This is complemented by different types of accommodation, and the chance to enjoy the surrounding natural tourist and recreational facilities. The Association of Water Sports Resorts in Catalonia, with six Water Sports Resorts, accommodation and restaurants can be booked along with water sports and complementary activities.

Cruise ships[9]

The cruise ship industry plays a key role in tourism and the Catalan economy, bringing vitality to ports of call and their areas of influence.

In total, Catalonia has six cruise ports with different features: Barcelona, Palamós, Roses, Sant Carles de la Ràpita, Tarragona and Vilanova i la Geltrú.

Once more, Barcelona is the leading cruise ship port not only in Catalonia but also in Europe, and has become a Mediterranean turnaround base. It welcomed 3.1 million cruise passengers in 2019. The port has ten terminals, seven of which are devoted solely to cruises. The port authority is modernising the existing terminals, building new ones and enlarging the port to the south. MSC Cruises has announced the construction of an exclusive terminal for its ships. There are also regular ferry lines to Rome, Livorno, Sardinia, Genoa, Tangier, Tunis and Algiers which are served from the three purpose-built terminals.

9. Source: Catalan Tourist Board. Press kit 2020.

Palamós. Palamós has consolidated its position as a stopover port for cruise ships, making it only second to Barcelona in Catalonia. This port operated 45 cruise lines in 2019, receiving more than 54,200 passengers, visiting the main attractions on the Costa Brava. The introduction of a customs service allows ships from outside the Schengen area to dock there.

Roses. Roses is making progress as a destination on the north of the Costa Brava and 2019 ended with five arrivals and more than 2,500 passengers. Together with Palamós, the port is marketed under the Costa Brava Cruise Ports brand, aimed at promoting cruise passenger traffic and developing the related tourist offer in the Costa Brava.

Sant Carles de la Ràpita. Located in Terres de l'Ebre, this port welcomes the Star Flyer in summer, a luxury four-masted sailing ship that berths six times during the season with almost a thousand passengers in total.

Tarragona. Tarragona, one of Southern Europe's main ports, is very well situated regarding the traffic of goods and boasts fine facilities and an attractive inland territory. Over 50 cruise ships of varying sizes with more than 100,000 passengers called here in 2018. Tarragona aims to establish itself as a home port as this will boost both the economy and the whole territory.

Vilanova i la Geltrú. Located 40 km from Barcelona, Vilanova i la Geltrú has suitable facilities, services and access for small cruise ships sailing through the Mediterranean.

These ports offer a top-quality service to cruise lines and allow cruise tourists to discover the Catalan coastline from the Costa Brava right down to the Delta de l'Ebre.

Network of roads

Roads are not only crossing points to move people and goods more and more quickly but also supportive elements for the region. This involves, more or less complete and coherent transport network, that communicates and interrelates all the communities within Catalonia.

The Catalan network of roads extends throughout the territory, covering more than 12,000 kilometres. With a high concentration of motorways and high-speed roads around Barcelona's metropolitan area and coastline, different types of roads communicate the capital with the inland areas.

European roads

The European network of roads covers the group of roads which cross the countries in the European Union. In Catalonia, there are three:

- E9 Connecting Barcelona and Orléans (France), crossing Catalonia inland.
- E15 Connecting Algeciras and Inverness (Scotland), passing Tarragona,
- Barcelona and La Jonquera.
- E90 Connecting Lisbon with the Turkish-Iraqi border, passing Lleida and Barcelona.

This road network also enables travel between any main European cities in less than 12 hours.

Railway network

KM'S OF ROAD BY TYPOLOGY IN CATALONIA (2017)

km of road	
Motorways and dual carriageways	1,461
Multi-lane highways	142
Single-lane highways	10,412
TOTAL	12,015

Source: IDESCAT

MAIN ROADS WHICH COMMUNICATE BARCELONA WITH THE INLAND

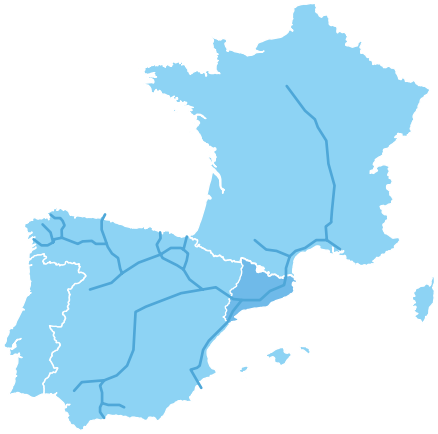
The railway network offers good communications, both within the region and abroad. In Catalonia there are three different railway networks:

- Suburban trains. The area around Barcelona is served by the RENFE network of suburban trains that operates frequently on five main lines. It links different cities and towns within Catalonia. The "Ferrocarrils de la Generalitat" (FGC) company also operates various local services around the provinces of Barcelona and Lleida.
- Interprovincial trains. The RENFE railway company operates numerous trains linking Catalan stations with destinations in the rest of Spain. The AVE high-speed rail link runs to Zaragoza, Madrid and Seville. The conventional train network also offers a wide range of prices and destinations to choose from.
- At an international level, the Catalan railway system connects with the French rail network at the stations of Portbou and Puigcerdà. Catalonia can be reached by train from other European destinations in France, Italy, Germany and Switzerland.

High-speed trains

High-speed trains are run around Catalonia on four lines, linking Lleida, Camp de Tarragona, Barcelona, Girona and Figueres. To the west, the trains continue to Zaragoza and Madrid and to the north, they cross the Pyrenees to Perpignan.

Madrid, Spain's capital, can be reached in 2.5 hours from Barcelona and Andalusia, in southern Spain, in six. After completion of the high-speed line to France via Girona and Figueres, Paris can be reached in 6.15 hours, with further direct connections to Marseille, Lyon and Toulouse. Thus, Catalonia is very well communicated with other cities in Europe, making it the true hub of a vast Mediterranean Euroregion.

MAIN RAILWAY LINES IN CATALONIA	DIRECT CONNECTIONS OF TRAINS WHICH USE HIGH-SPEED LINES IN CATALONIA
	

Public transport

Bus is the public transport of choice when moving around Catalonia. The bus network is purpose-built to provide a service to the urban and suburban areas and to connect different regions and cities within Catalonia.

In Catalonia there are more than 300 urban public transport lines with a network spanning 3,500 kilometres.

In the Barcelona Metropolitan Region, the public transport network (metro, bus, train and tram) is fully integrated, meaning that one ticket can be used for up to three transfers.

2.3 Soft infrastructures

Catalonia is a large and geographically diverse region, whose environs have been, and are, the playground of residents and visitors. Consequently, there is a vast network of paths, trails, etc., which create a soft infrastructure that is also used to great effect for tourist purposes. It is worth focusing on three of these infrastructure systems:

- Footpath network
- Cycling trails
- Vies Braves (open water routes)

Hiking trails

The Catalan footpath network is linked to the European and Peninsular networks thanks to its almost 9,000 kilometres of signposted ways, more than half of which are long-distance footpaths (GR), the rest being short-distance (PR) and local routes (SL).

Based on this network, spread all over the region, different hiking routes have been developed and, in some cases, turned into tourism products.

In this respect, Catalonia is at the forefront of the Hiking Europe project created to foster rural development by creating a tourism product focusing on hiking routes.

Cycling trails

There are also plenty of ways to discover and enjoy Catalonia by bike. The Green Ways (Vies Verdes) are accessible paths along abandoned railway lines designed for open-air recreational purposes and aimed at by non-motorised vehicle users, walkers, cyclists and people with reduced mobility. Gradients are very smooth and these infrastructures provide an excellent way of getting to know Catalonia. The user can stop at any of the former train stations, now converted into restaurants or information offices, that they will find along the way.

There is also a network of cycle routes, all signposted and equipped to meet users' needs and expectations.

For mountain bikers, Catalonia has a complete network of mountain biking centres distributed throughout the region, a pioneering project set up in Spain seventeen years ago. Mountain biking centres in Catalonia are freely accessible areas with a minimum of 100 kilometres of signposted ways starting from a visitor centre with tourist information and cycling services. The 18 mountain biking centres composing the network offer more than 300 routes with over 6,400 kilometres of signposted ways and different degrees of difficulty.

Vies Braves – Open water routes

Vies Braves is the public network of marine and open water routes used for sporting, leisure and educational activities on the Costa Brava, Costa Barcelona, Barcelona city, Costa Daurada and, even, in the Pyrenees.

At a practical level, a "via brava" is a route marked with signs and buoys, providing a safe way of enjoying open water, and to combine activities such as swimming and snorkelling. There are almost 30 different routes all along the Catalan coast (with a

single exception which is located in a reservoir in the Pyrenees), representing up to 26 authorised kilometres.

is a globally unique pioneering project that promotes responsible and sustainable tourism in the areas with these kinds of facilities and generates a social impact on health, the environment, education and public awareness.

https://viesbraves.com/en/

2.4 Accessible information

Catalonia has a vast network of tourist information channels and, in fact, it is considered a ground-breaking destination when talking about tourist content creation and ways of communicating it.

As a case in point, in 2018, the Catalan government presented the first tourist campaign based on a virtual reality game aimed at promoting a destination. The game "Legends of Catalonia" can be freely downloaded from the Play Station online shop. The following webpage gives a better idea of what the game consists of: http://isyourhome.catalunya.com/legendsofcatalonia/en/.

The Catalan tourist information system differentiates information aimed at leisure visitors from that aimed at professionals working in the regional tourist sector.

Visitors coming to Catalonia have plenty of options to get information about the destination. Firstly, there is a traditional tourist website (www.catalunya.com), with all the information about the regional tourist offer (accommodation, resources, routes, maps, etc., including a special section with MICE information).

A-part from this webpage, there are two more: isyourhome.catalunya.com, containing information about specific needs-based experiences (family activities, winter attractions, cultural holidays, etc.), available in six languages; and experience.catalunya.com, where trips and experiences can be purchased. It is available in five languages.

Secondly, social networks play a main role in Catalonia's tourist information system. "Catalunya Experience" is the term used by the Catalan Tourist Board to promote Catalonia through these channels. Its purpose is to become a focal point for Catalans, giving them a place where they can share their knowledge and become local experts on the destination, and for visitors, offering them an opportunity to describe their experiences during their trips to Catalonia.

To this end, Catalonia has its own profile on the main platforms. For example, on Facebook (with almost 1.5 million followers), on Instagram (380,000 followers), on Twitter (70,000 followers), on Youtube (8,000 subscribers) and on Pinterest (almost 2,000 followers). Posts are in Catalan, Spanish and English.

Other systems which allow visitors to get information about the destination are an App, available in six languages, giving general advice and ideas to help visitors enjoy their stay in Catalonia as well as offering more specific thematic proposals. There are more than 13,000 records, including monuments, routes, hotels, etc.;

and, finally, a geographic information system (GIS) for tourism. With the aim of raising Catalonia's profile and improving the knowledge DMOs have about tourist demands in the region, Catalonia's tourism resources and services GIS makes the government's main geo-referenced repository of tourism-related information available to the public, using a modern mobile geo-mapping app which can be consulted on the tourism promotion website: www.catalunya.com/mapa. This allows everyone to find out what tourism facilities are available near them and to obtain and combine detailed information on the main routes, accommodation and information offices in Catalonia, as well as the cultural heritage to be enjoyed there.

Some of these systems are partially replicated in the different countries around the world where the Catalan Tourist Board has its branch offices.

The professionals working in the Catalan tourist sector have their own channels, through which the published information is totally adapted to their needs. To this end, there is a specific section within the Catalan government website with information about the range of tourist accommodation, data about its categorisation, description and the documentation needed to get a quality or sustainable label, training courses, legal issues, information about taxes, etc.

In addition to that, in terms of social networks, there is a specific Twitter account, where the DMO of the destination publishes information about promotional events that are being held, new tourist publications, data which might be of interest, new airlines operating in Catalan airports, etc.

Thanks to this structure, Catalonia has a significant online presence, meeting all the requirements of travellers' purchasing process (from the moment of inspiration to the return home). The published information covers the whole region, making the whole of Catalonia available to the public through culture, gastronomy, local traditions, sports, landscapes, etc. as a unifying thread.

3. ENVIRONMENTAL PROFILE

3.1 General Overview

Catalonia is a region with an exceptional and very rich natural and biodiversity heritage. It contains examples of different types of European landscapes, albeit on a small scale. In an area of little more than 30,000km^2, there is a wide variety of substrates, soils, climates, orientations, altitudes and distances from the sea. Combined, these elements provide Catalonia with great ecological diversity and a remarkable wealth of landscapes, habitats and species. There are over 600 varieties of natural and semi-natural habitats and 65% of the territory maintains a plethora of natural features. However, it is very vulnerable because of the pressures it is subject to.

Aware of the existence of this treasure and the need to preserved it, the Catalan government has created the Directorate General for Environmental Policies and Nature aimed at promoting a sustainable development for Catalonia, boosting projects and R+D initiatives related to the environment, planning and legislation of the protected natural areas, among others. It is only an example of the commitment of the Generalitat of Catalonia regarding the environmental health of the region.

In terms of a legal framework, there is a complex legal system regulating all the issues related to the environment, the potential negative effects of any kind of activity that may be carried out and all the requirements and permissions needed depending on the activity or business to be undertaken. Tourism, as a cross-over sector within the economy, is not an exception. In this sense, there are several laws that can apply depending on the situation and activity carried out.

3.2 Protected Areas

During recent years, different projects related to environmental issues have been carried out in Catalonia. In 2018, the regional government published the "Natural Heritage and Biodiversity Strategy of Catalonia 2030", the framework document which will guide the Generalitat's nature conservation work until the year 2030. The ultimate objective is to halt natural heritage degradation and biodiversity loss in the region, while guaranteeing its sustainable use and ensuring provision of the ecosystem services upon which we depend.

The region has also worked out a "Catalan Strategy for Flora Conservation and Recuperation and Preservation plans", a law related to climate change, a Catalan biodiversity database and the "Green Infrastructure Programme of Catalonia", a strategically planned network of natural and semi-natural areas with other environmental features designed and managed to deliver a wide range of ecosystem services and protect the biodiversity of both rural and urban settings. In 2017, the Catalan Government started this project within the framework of the EU Biodiversity Strategy 2020 and the European Commission's communication "Enhancing Europe's Natural Capital".

The Xarxa de Custòdia del Territori (Land Stewardship Network) is a non profit organisation working to foster land stewardship as a conservation strategy for the natural, cultural and landscape resources and values of Catalonia and its environment. Established in 2003, it is a second-level organisation made up of over 150 associations, foundations, city councils, enterprises and people working in the land stewardship network.

Land stewardship is a strategy intended to generate accountability among owners and users for the conservation and proper use of natural, cultural and landscape resources and values. Land stewardship involves voluntary agreements between land-owners and managers, and land stewardship entities in order to maintain and recover the natural environment and lands- cape.

Source: www.custodiaterritori.org

Many other initiatives which have been promoted in Catalonia in terms of environmental issues could be mentioned, but, given the framework of the current project, current focus is on the "System of Protected Natural-Spaces of Catalonia".

Catalonia has an extensive network of protected areas, from the mountains to the coast, ranging from Euro-Siberian woodlands to semi-desert scrub and marine areas. The Plan for Spaces of Natural Interest (Pla d'Espais d'Interès Natural – PEIN), approved in 1.992, is a high-level planning tool, which is used to structure the Protected Spaces of Catalonia. Its main objectives are, on the one hand, to establish a System of Protected Natural-Spaces, representative of the landscapes and biologically diverse richness in Catalonia and, on the other, provide a basic protection for these areas. The system includes almost 190 natural areas distributed around Catalonia.

At the moment, the above-mentioned plan includes more than 31% of the surface of Catalonia and is basically aimed at preserving the most representative and best-conserved habitats and ecosystems as well as the geological heritage of the region.

The law provides for a second level of protection for some areas: Areas of Special Protection. These areas, also included in the previously mentioned plan, benefit from a specific management and protection regime. The different types of Areas of Special Protection are: national parks, natural settings of national interest, nature reserves and natural parks.

Catalonia has one National Park, 14 natural parks, 7 natural settings of national interest and almost 70 nature reserves.

MAP OF NATIONAL AND NATURAL PARKS IN CATALONIA

1. Aigüestortes i Estany de St. Maurici National Park
2. Aiguamolls de l'Empordà
3. Alt Pirineu
4. Cadí-Moixeró
5. Cap de Creus
6. Capçaleres del Ter i del Freser
7. Collserola
8. Delta de l'Ebre
9. Els Ports
10. El Montgrí, les Illes Medes i el Baix Ter
11. Montseny
12. Muntanya de Montserrat
13. Sant Llorenç del Munt i l'Obac
14. Serra de Montsant
15. Zona Volcànica de la Garrotxa

At a European level, the creation of the Natura2000 Network became an essential nature-preservation initiative. Natura2000 is a network of core breeding and resting sites for rare and threatened species, and some rare natural habitat types which are protected in their own right. It extends across all 27 EU countries, both on land and at sea. The aim of the network is to ensure the long-term survival of Europe's most valuable and threatened species and habitats, listed under both the Birds Directive and the Habitats Directive.[10] It has to be highlighted that the 95% of the Catalan surface included in this Plan for Spaces of Natural Interest is part of Natura2000 Network. Catalonia also has two UNESCO Global Geoparks: Central Catalonia and Orígens. UNESCO Global Geoparks are single, unified geographical areas where areas and landscapes of international geological significance are managed via a holistic concept of protection, education and sustainable development. At present, there are 147 UNESCO Global Geoparks in 41 countries, 13 of them in Spain.

Similarly, there are two UNESCO Biosphere reserves: Montseny and Terres de l'Ebre. Biosphere reserves are areas comprising terrestrial, marine and coastal ecosystems, each one promotion solutions to reconcile the conservation of biodiversity with its sustainable use. Currently, there are 701 biosphere reserves in 124 countries, 49 of them in Spain.

10. Source: https://ec.europa.eu/environment/nature/natura2000/index_en.htm

Another example of the good quality of the environment in Catalonia is the existence of two Starlight Tourist Destinations: Aigüestortes i Estany de Sant Maurici National Park and Serra del Montsec. According to the Starlight Foundation, the UNESCO-guaranteed organisation in charge of the certification process, "Starlight Tourist Destinations are locations with ideal conditions for observing the stars and where light pollution is controlled. This makes them logical destinations for tourism based on the appreciation of the sky as part of the natural world.

A Starlight Tourist Destination must not only prove the quality of its air, and the means to ensure its protection but they must also have appropriate tourism infrastructure (accommodation, means of observation available to visitors, trained staff for astronomical interpretation, etc.) and its integration into nocturnal nature. If the site does not have yet these facilities and activities, the Foundation evaluates the project to develop them in the future."

All these natural and geological areas also have a tourist use, becoming the ideal base from where to build and design tourism products. For example, in 2018 the Aigüestortes i Estany de Sant Maurici National Park received 552,000 visitors, establishing it as one of the main tourist resources in the Pyrenees. In total, more than 3.5 million people visited the different natural parks in Catalonia in 2018.

In order to regulate and control the pressure that tourism can put on this kind of fragile area, in 2015 the Catalan government presented the "Plan for the promotion of nature tourism in the protected natural areas of Catalonia". It is the tool which defines a strategy for boosting ecotourism in Catalonia, especially in protected natural spaces. Its vision is to establish Catalonia as a model in terms of nature tourism in the Mediterranean region in 2020, based on its evaluation and preservation of its natural, cultural and landscape resources as well as its contribution to local development11.

This is only one example of the importance that both environment and tourism have in Catalonia and the will of the DMO to anticipate any potential problems that may occur when combining these two fields.

4. DESTINATION STRATEGY AND MANAGEMENT

Catalonia is one of the main tourist destinations worldwide. Its capital, Barcelona, is one of the main attractions, and the region beats records in tourism each year, not only in numbers of foreign arrivals but also in the total expenditure these visitors make.

Catalonia is a very complete destination both in terms of attractive resources and also in services and infrastructures. The region is very well-connected and it has a large transport network, which makes the destination easily accessible. Once there, its wide range of available accommodation, its vast number of companies offering a wide variety of activities, its highly regarded gastronomy, its nature conservation and its multiple renowned attractions are the reasons which make Catalonia the place for a perfect tourist experience.

This idyllic scenario comes with some shadows which have already been identified by the organisations managing the destination. An increasing number of tourist arrivals, reaching the load limit of some specific areas and resources (specially in Barcelona), the high degree of seasonality, the high concentration of visitors in Barcelona city and in the coastal areas and the reliance on limited source markets are the main challenges Catalonia faces nowadays.

4.1 Tourism in Catalonia. Important numbers

Catalonia is a prime tourist destination offering many attractions to all sorts of visitors: culture, relaxation, nature, family activities, sports, business interests, etc. Its great capacity and excellent facilities place it among Europe's top tourist areas, with approximately 30 million tourists a year, more than half from abroad. Accounting for roughly 12% of its GDP, tourism is one of Catalonia's main sources of wealth and hence one of its strategic priorities.

GENERAL OVERVIEW OF CATALONIA AS A TOURIST DESTINATION

Tourism sector (2019)	12% of the total Catalan GDP 14% of the Catalan labour market
Foreign tourist arrivals (2019)	19.3 M (23.3% of foreign tourists in Spain)
Total foreign tourism expenditure (2019)	21,324 M € (23.1% of total foreign tourismexpenditure in Spain)
No. of beds (2020)	1M
Barcelona international airport (2019)	52.7 M passengers
Barcelona cruises port (2019)	3.1 M passengers (premier cruise port in the Mediterranean region)

In 2018[12] Catalonia received 37.8 million tourists: 49.6% were foreign arrivals, 12.4% came from the rest of Spain and the remaining 38% were domestic trips.

The current available official figures state that, in 2019, Catalonia received 27.7 million foreign visitors, 19.3 million of whom were tourists and 8.4 million day-trippers. It represents the 22.3% of total foreign arrivals in Spain. 85% of the arrivals gave leisure/ holidays as the main purpose for their visit, while 8% were there for professional reasons.

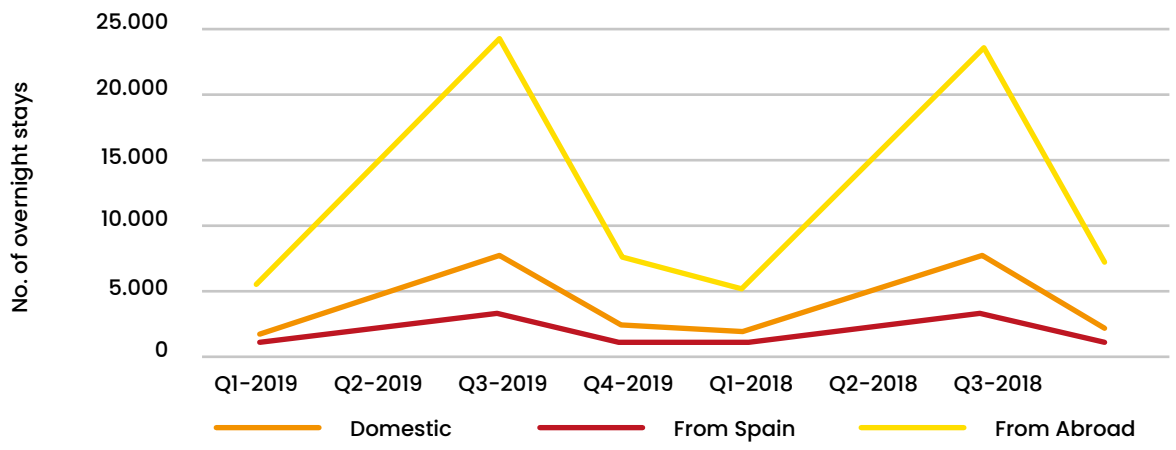
For this same period, the destination registered 76.6 million overnight stays[13] (2.2% more than in 2018), 67.7% of which were made by foreign visitors. This figure does not take into account the occupancy rate generated by those visitors staying, for example, in tourist-use flats (HUTs). In this regard and based on the data published by Barcelona city council, from January to August 2019, this kind of accommodation generated 7.5 million overnight stays in the city, which means that the total overnight stays figure was surely higher than 76.6 million.

"In 2019, Catalonia received 19.3 million foreign tourist generating almost 52 million overnight stays and 21.3 million euros in expenditure."

12. Last available data.
13. It includes Hotels, Campsites and Rural Tourism Accommodations.

These overnight stays are largely clustered in the third quarter of the year (July-September), causing a significant seasonal increase.

OVERNIGHT STAYS BY PERIOD



Source: Auth0r's data based on IDESCAT figures

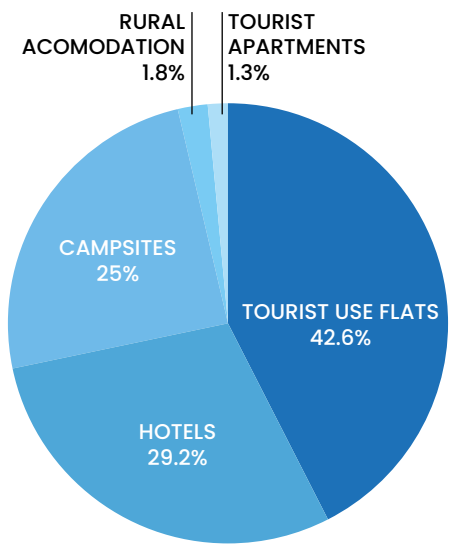
In terms of expenditure, in 2019 foreign visitors generated a total of 21.3 million euros with an average expenditure per person of €1,101.6 and an average daily expenditure of almost €200 per visitor, representing 23% of the total expenditure generated by foreign arrivals in the whole Spain.

In order to be able to meet the needs and expectations of all visitors to Catalonia, the destination offers a total of 90,276 accommodation units, containing as many as a million beds.

In 2017, Catalonia had 113,950 companies which worked in fields related to the tourist sector (transport, accommodation, tour operators, incoming agencies, MICE, etc.).

These figures show the importance of the tourist sector - one of the main economic activities in the region - in the Catalan economy.

NUMBER OF BEDS BY TYPE OF ACCOMODATION



Source: Author's data based on figures published by Generalitat of Catalonia

4.2 The destination management system

Catalonia as a tourist destination has a clearly defined management system, which allows the different organisations with legal authority on tourism, at all territorial levels to understand exactly what their competencies and areas of work are. This structure also defines the way in which they have to interact.

Directorate General of Tourism

The Directorate General of Tourism is the department within the Catalan government responsible for the management of Catalonia as a tourist destination.

Its main functions are to design, coordinate and execute policies aimed at boosting the competitiveness of the Catalan tourist sector, as well as to oversee the innovation and quality of tourism products in Catalonia; to elaborate planning tools in order to create well-balanced and sustainable tourist activity; to coordinate all these actions with reference to the analysis, study, knowledge, research and definition of strategies for the tourist sector; to design and coordinate the support of the local tourist organisations; and to act as the legal authority for all regulated tourist companies.

The Catalan Tourist Board (CTB)

Dependent on the Directorate General of Tourism, The Catalan Tourist Board is the official body of the Generalitat of Catalonia in charge of promoting and supporting the marketing of Catalonia's tourist resources, both in the rest of Spain and abroad. Its purpose is to consolidate the image of the country as a diverse world-class tourist destination. A strategic goal of the CTB is to work out an economically, socially and environmentally sustainable tourism model for Catalonia.

It is formed by the Government of Catalonia and the General Council of Catalonia's Chambers of Commerce representing the private sector. Among the territorial bodies, the boards of Barcelona, Lleida, Girona and Tarragona Councils are also members, as well as Turisme de Barcelona, a semi-public organisation aimed at promoting tourism in the capital.

The Catalan Tourist Board carries out more than 400 promotional activities annually with the objective of promoting Catalonia at international level. Its total budget in 2018 was €24.3M and its workforce consists of around 80 people. It is headquarted in Barcelona and has twelve offices located around the world, from where the promotion of Catalonia at international level is reinforced. It works with the private sector through membership programmes.

In addition, following the Tourist Marketing Plan guidelines, the CTB is currently working to develop new products and proposals contributing to adding value and differentiating Catalonia's tourist offer through systematic cooperation with the Catalan tourist industry. The aim is to create a brand scheme generating attractive, segmented top-end proposals based on specific standards.

Each brand designates a homogeneous marketable offer. Fulfilment of the requirements is supervised. The brands created so far are Family-friendly beach holidays, Family-friendly adventure holidays, Family Attractions, Cycling in Catalonia, Active & Adventure, Sports Tourism, Golf in Catalonia, Wine Tourism, Gastronomic Experiences, Gastronomic Hotels, Arts & Culture, Maritime Towns and Districts, Cities and Towns with Character, Charming Villages, Premium Catalonia, Barcelona Medical Destination, as well as Catalunya Convention Bureau.[14]

Provincial Council Tourist Boards

At territorial level, each province has its own destination management organisation. These are members of the regional entities and closely collaborate with each other but have their own budgets, strategies and promotional action plans.

Provincial Council Tourist Boards have direct contact with the private sector of their destinations and a deep knowledge of the current situation of their tourist sector. They carry out promotional activities not only at regional level but also nationally and internationally and oversee the competitiveness of the tourist sector in their destinations by organising workshops, meetings, conferences, etc. with their tourism entrepreneurs.

There are a total of four Provincial Councils Tourist Boards.

At a lower territorial level, counties also carry out their tourist activities while maintaining a very close link with these Provincial Council Tourist Boards.

Tourist brands in Catalonia

Catalonia is made up of nine tourist brands gathered under and promoted by Tourist Boards.

Each one of the abovementioned Tourist Boards manages a minimum of one tourist brand, corresponding to its territory. Depending on its internal tourist promotion strategy, this territory may be split into more than one single destination and, therefore, promoted under more than one tourist brand. Each one of them has its own promotion plans.

14. Source: Catalan Tourist Board. Press kit 2020.

MAP OF THE TOURIST BRANDS IN CATALONIA

4.3 Catalonia's tourism strategy

The current Strategic Tourism Plan and the Marketing Tourism Plan of Catalonia, both valid for the period 2018-2022, clearly define the position to be reached by Catalonia in terms of tourism. The main objective of the Catalan Government is:

To establish Catalonia as one of the best tourist destinations worldwide and to consolidate it as one of the three main destinations in the Mediterranean, implementing a sustainable and responsible growth strategy; and to help the Catalan tourist sector carry out a highly efficient marketing.

To achieve this vision, these plans determines which strategies have to be followed and which actions have to be implemented. With this in mind, the following strategic lines are significant:

- Decentralise. Move visitors to areas away from Barcelona city and the coastline.
- Remove seasonality. Distribute the tourist demand in a more balanced way throughout the year. Increase visitors' arrivals in March, April, May and October.
- Increase expenditure. Increase the average daily expenditure per tourist by offering high quality products and attracting visitors with higher purchasing power.
- Diversify. Broaden the range of tourist products on offer by developing new business opportunities and reducing the current reliance on "sun and beach".

Catalonia seeks to carry out an intelligent and sustainable growth, reaching a balanced relationship between visitors, the local community, companies and investors and the natural and cultural local environment. The DMOs know that without a well-balanced situation in these four areas a responsible growth is not possible and have, accordingly, included it as a strategic point to be taken into consideration.

Finally, apart from having a clear vision of the position Catalonia should occupy as a tourist destination in the near future, the challenges it will face to achieve this and how to do it, the Strategic Tourism Plan also defines the competitive advantage of Catalonia in terms of tourism.

The unique selling point for Catalonia as a tourist destination is that visitors will "enjoy an exceptional tourist experience which will provide them with happy moments and positive memories". It is based on five variables, which give Catalonia a competitive advantage:

- A large diversity of attractive resources extending throughout the whole territory, with a high potential capacity to be turned into unforgettable experiences in terms of culture, gastronomy, nature, etc.
- A high-quality service offer and uniqueness experiences to attract higher quality visitors.
- A deep-rooted culture of its own that differentiates it from standard tourism products and destinations.
- High levels of hospitality and safety.
- Excellent connections and infrastructure systems to support the increase in the number of tourist arrivals.

By applying the abovementioned strategic lines and actions, Catalonia will, in 2025, be able to reach its vision of being one of the three main destinations in the Mediterranean while supporting the forecasted almost 27 million tourist arrivals with a responsible and sustainable tourist system.

Also, the current Marketing Tourism Plan of Catalonia clearly defines which markets and products have to be prioritised to achieve the established vision.

Regarding target markets for Catalonia,

those are: France, Germany, Central Europe, UK, Russia/ Countries in the East and Rest of Spain and Italy. In a second level, the Netherlands, Switzerland, Belgium, Portugal, USA and the Scandinavian countries.

In terms of products, the plan defines Holidays on the coast, Routes, City breaks and MICE Trips as top priorities, whereas Active and Nature, Wine and Food and Sport Tourism stays in a second promotional level.

4.4 Sustainable tourism policies

In 2010, the Generalitat of Catalonia presented the project "Strategy for the Sustainable Development of Catalonia 2026" aimed at promoting the change towards sustainable development for the whole region, consolidating the main strategic lines and objectives in order to guarantee the transition of Catalonia towards a safe, eco-efficient and low carbon-emitting economic strategy, based on minimising the consumption of resources (especially non-renewable ones) and the negative impacts on health and environment in Catalonia and around the world. The Generalitat is committed to the implementation of a sustainable and responsible model, encompassing all the economic sectors in Catalonia.

Tourism is not an exception. The Marketing Tourism Plan 2013-2015 and the Strategic Tourism Plan of Catalonia 2013-2016 have already defined a tourist model based on sustainable competitiveness criteria: guiding the tourist policies for the whole sector, private and public; watching over the well-balanced relationship between quantity and quality of tourism; prioritising the increase in tourism revenue; improving awareness of tourism demands, etc. In short, for many years, Catalonia has been implementing a strategy aimed at assuring the destination's future by working on its economic, environmental, cultural and social sustainability. The current Catalan tourist strategy as well as the promotional activities already implemented incorporate the idea of sustainable tourism development as a fundamental concept.

"For many years, Catalonia has been implementing a strategy aimed at assuring the destination's future by working its economic, environmental, cultural and social sustainability."

There is different evidence to support the idea of Catalonia being a leading destination when talking about sustainable tourism policies. In 2013, Barcelona held the Seventh International Conference on Responsible Tourism, the first to be held in Europe. The final result of this event was the so-called "Barcelona

Declaration"[15], which called for greater emphasis on managing the impact of tourism, reducing seasonality and increasing revenue, and a more equitable distribution of its positive and negative effects.

It stresses that the control and management of environmental impacts is crucial, not only for the preservation of the environment but also for the subsistence of tourism itself. The Barcelona Declaration urged all those involved in tourism in Catalonia to focus their efforts on 'first improving the quality of life of the residents as 'better places for people to live in are better places for people to visit'.

In 2015, Catalonia was awarded the Biosphere Responsible Tourism certification, from the Institute of Responsible Tourism, a member of the World Tourism Organisation associated with the Global Sustainable Tourism Council, making it the first full-scale tourist destination beyond specific cities or destinations to obtain this all-inclusive certification that guarantees visitors a sustainable experience. This certification takes into account not only issues related to quality or environment but also social responsibility, preservation of cultural heritage, satisfaction of visitors' expectations, improvement of local citizens' quality of life, etc. This label is an international recognition to the work done by both public and private individuals and companies in the Catalan tourist industry to foster a sustainable tourism scheme. Since then, different destinations as well as countless organisations, agencies and tourist businesses within Catalonia have been awarded with this same label.

By the same token, Catalonia also holds the Green Destinations Certification. Three Catalan destinations were included in the Top 100 Green Destinations worldwide: the Berguedà, Terres de l'Ebre and Torroella de Montgrí-l'Estartit. This award certifies and promote sustainable tourist destinations based on environmental, socioeconomical and cultural criteria.

The European Charter for Sustainable Tourism in Protected Areas is an initiative promoted by Europarc Federation, aimed at validating and awarding those protected areas committed to implement sustainable tourism principles. In fact, it is a practical management tool that enables Protected Areas to develop tourism sustainably. In Catalonia, there are four natural parks that are associated members: Delta de l'Ebre, Garrotxa Volcanic Area, Montgrí, Illes Medes i Baix Ter and Serra de Montsant. What' more, in 2017, the Network of Protected Natural Areas accredited with the European Charter for Sustainable Tourism of Catalonia was created. It encompasses those natural areas that are already part of this programme, those in process of accreditation and those interested in having this certification. In total, this network has 9 members.

Furthermore, Catalonia was one of the three founder regions of the European

15. The complete title of the document is "The Catalunya 2020 Vision for Responsible Tourism: Barcelona Declaration".

network NECSTouR on sustainable and competitive tourism, representative before the European Commission and the European Parliament. When 2017 was declared the International Year of Sustainable Tourism for Development by the WTO, the United Nations and the European Commission, the different organisations responsible for destination management in Catalonia worked on sustainability as a cross-over value within the Catalan tourism model, emphasising ecotourism, nature tourism and accessible tourism, among others. During 2017, different tourist promotional activities were carried out by the Catalan government in order to promote this kind of tourism: awareness campaigns to strengthen the European Charter for Sustainable Tourism for protected areas, which is currently implemented in a significant number of areas in Catalonia.

DMOs in Catalonia work closely with the private sector in order to capillaritise the sustainable tourist strategy to all levels. To do this, they organise specialised courses and workshops and thematic conferences, giving participants the opportunity to participate in promotional activities related to sustainability, to win prizes and to benefit economically (free fees, etc.) if following sustainable criteria.

After many years of intense work, Catalonia is now established as one of the leading destinations in the Mediterranean region with regard to sustainable tourism policies.

4.5 Main attractions

Catalonia is a Mediterranean destination with a millennial history, its own culture and language and a rich historical and natural heritage. It offers a great scenic variety,[16] boasting:

- 580 kilometres of Mediterranean coastline covering the Costa Brava, Costa Barcelona, Barcelona, Costa Daurada and Terres de l'Ebre.
- The Catalan Pyrenees with their 3000 metre peaks dominating the northern area of the country. Especially interesting is Val d'Aran, a valley draining into the Atlantic Ocean that has preserved its own culture, language (Aranese) and government bodies.
- Both the capital of Catalonia, Barcelona, as well as the three provincial capitals, Girona, Tarragona and Lleida, feature a great variety of interest. In the rest of Catalonia, numerous towns with a distinct character boast some noteworthy heritage: handsome old quarters, buildings from Romanesque to Art Nouveau and a wide range of museums are worth a visit.

16. Source: Catalonia press pack 2019, Catalan Tourist Board.

MAIN ATTRACTIONS IN CATALONIA

Cultural and historical heritage	6 monument sites declared World Heritage by UNESCO	A vast number of summer music festivals	Sanctuaries and monasteries
	4 intangible assets declared World Heritage by UNESCO	+400 museums and art centres	
Natural attractions	Good weather	350 coves and beaches	
	1 National Park and 14 Natural Parks	580 km of coast	
Health and Wellness	20 spas with medicinal mineral waters open to the public		
Large facilities	20 theme and water parks	18 MTB centres	
	37 golf courses	16 ski resorts	
Sports	11 destinations awarded with the Sports Tourism label (by the CTB)	6,400 km of MTB signposted ways	
	+5,000 km of signposted long- distance footpaths (GR)	150 km of accessible greenways and paths	
Wine and gastronomy	65 stars in the Michelin Guide	47 gastronomic hotels	+300 wine cellars
Accommodation	2,900 hotel accommodation units	350 campsites	2,400 rural tourism accommodation businesses

5. ANNEX

Location		Overview	
Description	**Distance from the national capital city (km)**	**Main types of tourism and most popular activities**	**Top five most popular tourist attractions (including environmental and cultural attractions). (Data from 2017 by volume of visitors)**
Catalonia is an autonomous region located in the north-eastern Spain. It takes up, approximately, 32.000 km² and is bordered by France and Andorra to the north and the Mediterranean Sea to the East, along 580 kilometres. This strategic location has boosted a very strong link with other territories in the Mediterranean basin. It is administratively organised into four provinces (Barcelona, Girona, Lleida and Tarragona), being Barcelona its main capital. With its own linguistic and cultural identity, Catalonia is a popular tourist destination and economic powerhouse.	625 km	• Sun and beach • Urban tourism - with Barcelona as a main • Cultural tourism: visits to historical buildings, museums, guided tours, etc. • Nature and active tourism, including snow activities: hiking, biking, etc. • To a lesser extent: wine and gastronomy. destination.	1. La Roca Village (4,600,000) 2. Sagrada Família (4,527,427) 3. Park Güell (3,120,733) 4. Montserrat Monastery (2,727,537) 5. Viladecans The Style Outlets (2,600,000)

Geography		Weather pattern	
Approximate size of the destination (in km²) and principle physical characteristics (rivers, hills, bays, etc)	**Dominant habitats (glace an X against all that apply)**	**Level of biodiversity (the range of different plant and animal species)**	**Average sunshine hours, rainfall (precipitation) and seasonal temperatures (Data from Barcelona)**
• Size: 32,108 km². • High geographic diversity: 580 km of coast, high mountain barrier in the north (the Pyrenees), coastal mountains and a Central Depression (very flat area). • Some rivers which cross the region. The main ones: Segre (265 km), Ter (208 km), Llobregat (170 km) and Ebre, which flows into the Mediterranean creating a 500 km² delta. • Mainly a Mediterranean climate. However, due to its wide ranging topography, there is a significant diversity of climates. • Different natural protected areas distributed around the region. Almost 35% of Catalonia's surface is protected.	Urban: x Sand/shingle beach: x Moor/ heathland: _____ Farmland: _____ Forest/ Woodland: x Alpine:_____ Scrubland: x Desert:_____ Wetland: _____ Other (please describe): ____	• LOW biodiversity (small range of species present): _____ • MEDIUM biodiversity: _____ • HIGH biodiversity (many different plan and animal species present): x • Catalonia has +600 types of natural and seminatural habitats. A well-defined network of programs which annually follows up the state of flora and fauna. • However, the trend follows a negative line. 75% of the flora and fauna is in danger, being the coast habitats the weakest.	The weather in Catalonia can vary a lot depending on the territory. Sunshine: Provide # hours per season. Summer: 256.5 h monthly. Winter: 171.25 monthly. Precipitation: Provide mm per season. Summer: 42.5. Winter: 45.8. Temperature: Provide day and night temperatures per season. Summer: 26.6 °C. Day: NA. / Night: NA. Winter: 12,7 °C. Day: NA. / Night: NA.

Transport links			
Distance from nearest local and international airport (in km) - Distances from Barcelona city	**Details on any air carriers and/or cruise lines bringing visitors to the destination?**	**Main types of tourism and most popular activities**	**Top five most popular tourist attractions (including environmental and cultural attractions). (Data from 2017 by volume of visitors)**
Catalonia has 5 commercial airports: * Barcelona - El Prat Josep Terradellas (18 km). * Girona - Costa Brava (94 km). * Lleida Alguaire (175 km). * Reus (107 km). * Andorra - La Seu d'Urgell (188km).	Airlines: Catalan airports work with many air carriers. There are almost 90 airline companies operating in Bcn-El Prat Airport. Bcn-El Prat: http://www.aena.es/en/airlines/list-airlines.html Girona: http://www.aena.es/en/airlines/list-airlines.html Lleida: Air Nostrum, Neilson, Quality Travel, Jet2.com, Fly Reus: http://www.aena.es/en/airlines/list-airlines.html Andorra-La Seu: airtaxi companies and air training schools Cruise operators: Many cruise lines work with the Catalan ports. Barcelona 2020 cruises forecast: https://contentv5.portdebarcelona.cat/cntmng/gd/d/workspace/SpacesStore/8f2ceb14-295f-483a-9142-fdf199be3e91/2020_creuers_ca.pdf Some companies operating in smaller ports: Azamara Cruises, Club Med Croisières, Costa Cruceros, Croisières de France, Cristal Cruises, Hebridean International Cruises, MSC Cruises, Paul Gaugin Cruises, Ponant, Sea Cloud Cruises, Seabourn Cruise Lines, Seadream Yatch Club, Star Clippers, The World, TUI Cruises	• Train: x. • Underground/metro: x. • Tram: x. • Coach: x. • Bus: x. • Taxi: x. • Ferry: x. • Other (please describe): car rental.	Many visitors choose to rent a car to move around the region.

Population			
Number of permanent residents	**Population density**	**Summer/winter ratio of residents to tourists (foreign visitors)**	**Percentage of population employed in tourism related jobs?**
No. of permanent residents: 7,619,494	Population density: 237.31 per km²	• Summer (June-September): 1.57 • Winter (Dec-March): 0.86	14%

Tourists			
Annual visitor numbers, as a total and broken down by principal market (foreign visitors)	**Annual arrivals by type of transportation (foreign visitors)**	**Average tourist expenditure (per person/per day)**	**Average length of stay**
Total annual visitors: 27.758.800 Total annual day visitors: 8.400.600 Total annual domestic visitors (2018): 19.544.400 Primary Source Markets: rail (by country and no. of visitors i.e. Germany - 40.000): - 1. France (4.063.900) - 2. Rest of the world (2.402.800) - 3. Rest of Europe (2.210.300) - 4. UK (2.007.200) - 5. USA (1.504.300) - 6. Germany (1.433.500)	Air: 72,6% Sea/rail: 5,2% Private car (road): 22,3% Other	196.9	5.6 days

Tourism amenities				
Approximate number of hotels (by star rating), and rooms in the destination (2018)		**Other types of accommodation available (and approximate numbers) (2018)**	**Approximate number of restaurants (food and beverage establishments. It may include bars. 2017)**	**Approximate number of bars (nightclubs, pubs etc.)**
Rating / N° Hotels	N° Beds.			
1 *.306	14.900	Villas:_____ Apartments: 263 - 14.623 beds Hostels (ans pensions): 1.050 Campsites: 354 - 270.840 beds Other (please describe): rural accommodations: 2.483 - 19.816 beds / tourist-use flats (HUTs): 84.109 - 462.600 beds	47.929	5.6 days
2 *.343	21.766			
3 *.644	85.140			
4 *.532	122.012			
4 *SUP. 95	27.628			
5*. 44	8.756			
GL. 26	7.420			

Stategies & Policie		
The destination has an organisation (eg. DMO) dedicated to its overall management.	Yes	If yes, please name: Directorate General of Tourism - Catalan Tourist Board
The destination has a current sustainable tourism strategy/action plan with an agreed monitoring and evaluation process.	Yes	
The destination has a current sustainable communication strategy or plan.	Yes	
The destination has a current policy or plan to protect cultural heritage.	Yes	
The destination has a current climate change adaptation strategy or plan.	Yes	
The destination has a current biodiversity management and monitoring plan.	Yes	
The destination has policies in place that require tourism enterprises to minimise light and noise pollution.	Yes	Basically, restaurants and bars in big cities or mature tourist destinations within Catalonia.
Percentage of the destination (area in km²) that is recognised as a protected area.	34.6%	

Any additional information relevant to your destination that you feel has not been covered in the sections above:

You may want to consider including a map clarifying the boundaries of your destination here.

RESOURCES

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- Ramon Llull University. Facultat de Turisme i Direcció Hotelera Sant Ignasi. Gender equality and generational diversity. https://www.htsi.url.edu/ca/igualtat-genere-turisme/
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ACRONYMS

CTB	Catalan Tourist Board
DMO	Destination Management Organisation
EU	European Union
GDP	Gross Domestic Product
GIS	Geographic Information System
GVA	Gross Value Added
IDESCAT	Institut d'Estadística de Catalunya Statistical Institute of Catalonia)
MICE	Meetings, Incentives, Conventions and Exhibitions
MTB	Mountain Bike
OECD	Organisation for Economic Co-operation and Development
PPP	Public Private Partnership
R+D	Research and Development
UN	United Nations
UNESCO	United Nations Educational, Scientific and Cultural Organisation
UNWTO	United Nations World Tourism Organisation