

## EXTENDED ABSTRACT

### FROM THE FIRST TO THE SECOND STRATEGIC TOURISM PLAN IN CATALONIA

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Given the high tourism profile shown by Catalonia, there is a clear need to rely on organisations dedicated to the promotion of the tourism image, in order to ensure correct and proper management of tourism flows and activities in the territory. These actions are assigned to the Department of Enterprise and Knowledge, which governs the Directorate General of Tourism of the Generalitat de Catalunya that draws up strategic tourism plans. The first Strategic Tourism Plan (2005-2010) was intended to be an instrument of coordination and governance for the Government of the Generalitat, in order to face a sector that was already showing signs of maturity and regression. In 2013, the 2013-2016 Catalan Strategic Tourism Plan was approved. It defined a medium-term tourism model and guided the tourism policy that should be implemented by the Generalitat, as well as by public and private agents over the next few years.

In this context, our study reviews the advances and new tourism trends that occurred from the approval of the first Strategic Tourism Plan to the second plan, which is still in force and close to being renewed, in order to guide and make proposals for future tourism planning. Specifically, the purpose of our assessment is threefold, namely: (a) to obtain a diagnosis on the planning of the tourism sector; (b) to determine the degree of achievement of the objectives posed by the two strategic tourism plans; and (c) to offer guidance to be taken into account in the next strategic tourism plan. The scope of these objectives is based on the public policy analysis approach. The process used for the analysis was based on external evaluation. The function of this evaluation was formative, aimed at obtaining information and making proposals to be included in the following strategic tourism plan. This assessment was performed after the validity periods of the two plans had expired.

a) Diagnosis of tourism according to the two strategic plans

The first plan (2005–2010) indicated that, despite the long tourist experience that Catalonia had, the sector should face the challenges of the international context, the changes in consumption habits, and the emergence of new competing destinations. It was understood that tourism should offer quality attractions, and that it was necessary to achieve adequate coordination and cooperation between the multiple public and private sectors involved in tourism. Tourism had become one of the strategic priorities in this community.

For its part, the Second Tourism Plan (2013–2016) stated that Catalonia was a destination in which the large dimension reached by the tourism sector no longer allowed to renounce a model based on quantity. A strong impulse was necessary to improve quality by means of commitment to tourism of greater added value in economic, cultural, and environmental terms. The second plan, unlike the first, highlighted the importance of internal factors, such as sustainability and quality, not with the aim of increasing the number of tourists, but the income they generated.

In order to determine the extent achieved by this reorientation, the position of Catalonia in the indicators of tourism competitiveness by autonomous communities was analysed. The data indicated that it occupied the first position in the ranking according to tourism competitiveness indicators analysed in a global manner. However, it is worth noting the loss of position in relevant aspects such as planning and competitive constraints of the tourism sector. The strong increase in foreign demand—14.6 million in 2005 to more than 19 million in 2017—has favoured this negative situation related to environmental factors and spatial planning. It has been observed that, every year, more tourists arrive, and problems in managing load capacity arise. This fact has generated a debate on the limits of tourism and its sustainability.

Some progress has been observed between the first and the second plan, such as references to aggressive urbanism, non-regularised tourist housing, and tourism capacity to favour a change in the economic situation, as well as the introduction of the concept tourism ‘experiences’.

b) Objectives and action programs of the two strategic plans

The first Strategic Tourism Plan proposed ten objectives for the period 2005–2010, whereas the second Strategic Tourism Plan posed five challenges that the sector should face.

In order to achieve these objectives, the first plan established ten programs, which affected all the agents of the tourism sector (Generalitat, State and local administrations, private sector, universities, training and research centres, and civil society) that were responsible for forty-eight actions.

The following actions can be highlighted among the those carried out during this first plan: the study on European experiences of sustainable tourism applicable to Catalonia; the first School of Tourism was created at the University of Girona; the Plan of Tourism Development (PLADETUR) was approved, providing the different public and private sector agents with a set of incentive programmes to encourage companies and tourist destinations to improve their competitiveness; the Atlas of Tourism in Catalonia - National Map of Tourism Products Offering was published; the Catalan Agency of

Objectives - Strategic Tourism Plan (2005-2010)	Challenges - Strategic Tourism Plan (2013-2016)
<p>To improve the integral management of tourism and public-private collaboration to consolidate tourism positioning and <i>increase the income per tourist</i>.</p> <p><i>To organise tourism development</i> according to the capacities, potentialities, and planning of the territory.</p> <p><i>To increase the competitiveness</i> of the tourism sector through the improvement of <i>quality and technological innovation</i>.</p> <p><i>To increase the quality and diversity of the tourist offering</i> with the aim of achieving <i>greater economic, social, and cultural sustainability</i>.</p> <p>To position Catalonia as <i>a recognised and valued tourist brand</i>.</p> <p><i>To enhance the quality of specialised training</i> and its adaptation to the reality of the market, promoting <i>job quality</i> in the sector.</p> <p><i>To promote</i> an environmentally sustainable <i>tourism model</i>.</p> <p><i>To promote awareness that tourism</i> is a factor that contributes to the organisation of the territory, and <i>benefits</i> the resident population and complementary sectors.</p> <p><i>To generate new formulas</i> to meet the <i>financing</i> needs of tourist destinations.</p> <p><i>To adapt the regulatory framework</i> to the current and future needs of the sector in order to ensure its efficiency.</p>	<p><b>Challenge of governance.</b> The approach should be in line with the entrepreneurial spirit and facilitate the development of business activities and employment in the sector with a focus on international markets.</p> <p><b>Challenge of sustainable development.</b> The destinations or companies that base their models on unsustainable criteria should be identified, in order to influence a process of transformation towards sustainable models.</p> <p><b>Challenge of creating new tourism products.</b> Development of tourism products and experiences, in which the time available, the combination of different resources, and the new communication technologies are key factors.</p> <p><b>Challenge of knowledge and intelligence.</b> Current sources and possibilities of obtaining information are very broad and scattered. A unit of knowledge should be strengthened to make information available to the entire tourism sector.</p> <p><b>Challenge of excellence.</b> Advanced use of new information and communication technologies, knowledge of languages, training, talent attraction, management of innovation, entrepreneurial attitude, or service quality are still unresolved subjects in the tourism sector.</p>

Tourism was created as a public-private body in charge of carrying out tourism promotion policies; the Interdepartmental Tourism Commission was created; Decree 183/2010 of 23rd November, for tourist accommodation establishments, and Decree 164/2010 of 9th November, for regulation of holiday dwellings, were approved; the Tourism Board of Catalonia was created with the aim of being a platform for dialogue with the sector; Decree 158/2012 was approved for the structuring of the Catalan tourism quality system; Resolution EMO/1263/2012 was approved for access to the tourism guide qualification; the Tourist Reception Centres of Catalonia (CAT's) were created; routes were designed to promote the natural, historical or cultural heritage; and the book about the 116 iconographic symbols of the Catalan identity was published. The implementation of the actions determined by the first Strategic Tourism Plan lost strength with the 2008 crisis and changes that occurred in the government.

In the second Strategic Tourism Plan, five programmes were established, which, in turn, consisted of sixteen subprograms and thirty-seven projects. Fourteen of the planned programmes were completed by 2015; eleven were in the implementation phase; seven were in the planning phase; two had yet to be carried out, and the rest were in the reorientation process. Among the actions, it is worth mentioning the implementation of the first Tourism Marketing Plan (2013-2015), which after its completion reached an implementation degree of 60%.

Budget cuts can be observed in the two plans. They were due to the restrictive policy implemented during the economic crisis that affected the public budgets from 2011. Since 2012, this lower budgetary allocation has been partially compensated with the re-collection of the tax on the stays in tourist establishments of Catalonia. Despite the reluctance and reservations that the rate initially generated, the first years of its application were satisfactory.

c) Tourism policy guidelines for a future strategic plan

It should be noted that, on the one hand, many of the planned actions are still unresolved subjects in Catalonia. On the other hand, there have been new tendencies in the field of tourism that were not observed, or were located in an embryonic phase, in the period when the second Strategic Tourism Plan was prepared. These tendencies should be the focus in the next strategic tourism plan. One of them is the overflowing and irregular growth of the supply of tourist homes distributed by platforms. This fact generates problems relating to safety and coexistence, increased underground economy, violation of consumer rights, degradation of the image of the tourist destination, and the withdrawal of homes located in areas of special tourist attraction from the rental market. This way, there is a process of gentrification, due to the fact that the arrival of tourists displaces the traditional population.

The new business models that emerge from the collaborative economy have a significant impact on tourism activities, such as transportation, catering, or commerce. In some cases, it means that the available and accessible tourism offer provided through the platforms substitute a good part of the traditional offer. This fact is interpreted by traditional companies as certain permissiveness towards new platforms that do not take the same work, safety, or fiscal responsibilities.

The new technologies provide resources that will impulse the development of tourism in the coming years. The Strategy for the Smart Specialisation of Catalonia (RIS3CAT) allowed considering tourism as one of the leader sectors among services and creative and cultural industries. Another challenge that the next strategic plan should face will be adapting the arrival of tourists to the carrying capacity of tourist destinations to avoid seasonal tourist saturation and 'tourismphobia', above all in Barcelona, where there is great tourist saturation. However, the emergence of this phenomenon is not only due to having exceeded the load capacity, other aspects are also relevant.

There has been a reduction in tourism activities. This decrease was more pronounced in the city of Barcelona, although it has also been observed in other destinations. Among the aspects that explain this situation, there are internal factors and the recovery of the competing markets of the eastern Mediterranean. In view of this new situation, the future Strategic Tourism Plan should adopt well-oriented measures to consolidate the good tourism image that the Barcelona brand has had up to now. The two plans refer to the need

to promote specialised and continuous training as a tool to achieve higher quality jobs in the sector. However, the improvement of quality jobs is not always accompanied by better remuneration. The data show that commerce and catering are the activities that have created most employment opportunities since 2014. At the same time, these activities have obtained the lowest annual labour costs.

These aspects, which affect tourist destinations and also tourism agents, should be taken into consideration in future tourism plans to alleviate the negative effects generated by tourism, given that the market is not able to correct them on its own.