



**2013-2015**  
**CATALONIA**  
**TOURISM**  
**MARKETING**  
**PLAN**  
**EXECUTIVE SUMMARY**





2013-2015  
CATALONIA  
TOURISM  
MARKETING  
PLAN

EXECUTIVE SUMMARY





A MARKETING PLAN  
AIMING TO STRENGTHEN  
THE CATALONIA BRAND  
AND BOOST PROFITABILITY  
OF TOURISM VISITING  
OUR COUNTRY



Catalonia is a leading tourist destination. This ranking is linked to the quality of the cultural offer, landscape, climate, prices, beaches, etc. But in a changing world, the Catalan tourism sector and Catalonia as a destination should be prepared to harness the great future opportunities that will emerge.

We must adapt to changing consumer needs – increasingly sophisticated and demanding. Otherwise, this environment could become a threat that could hamper our competitiveness. The Catalonia Tourism Marketing Plan is the tool that will allow us to provide answers and guidelines for the coming years and it is the result of in-depth strategic thinking that has reframed the key elements of the Catalan tourism business.

This marketing plan outlines new ways to create value and compete in global markets, always bearing in mind the regional balance and the need to enhance the professionalism of our companies.

We aim to identify opportunities in order to develop new products for new tourist segments. We want to help the industry reinvent itself and borrow best practices from other industries. The plan aims at generating business and identifying the type of tourists whom we wish to attract, how to attract them and how to retain them.

Modern marketing increasingly seeks to forge personal and emotional relationships with consumers. In this sense brand strategy plays a very important role and requires appropriate management. The goal is clear: to build a more powerful Catalonia brand.

From now on, the Catalan Tourism Board will link its marketing initiatives to the action items listed in this plan, in collaboration and coordination with both the public and private industry.

Xavier Espasa i Añoveros  
Director of the Catalan Tourism Board

 Government of Catalonia  
**Catalan Tourism Board**

## A PLAN DRAFTED WITH THE INVOLVEMENT OF MOST OF THE CATALAN TOURISM INDUSTRY

This publication is the first tourism marketing plan for Catalonia, part of the 2020 Tourism Strategy.

The 2013-2015 Catalonia Tourism Marketing Plan has been prepared with the participation of key stakeholders in the Catalan tourism industry: the Catalan Tourism Board (CTB) has consulted with representatives from all territorial boards in Catalonia, official heads of tourism marketing in the country, more than 1,000 highly representative industry companies (SMEs and large enterprises), more than 300 key retailers (both offline and online) with presence in the top 25 source markets for Catalonia, and over 18,000 potential consumers from 40 countries worldwide. The 11 Tourism Promotion Offices of the Catalan Tourism Board and the Department of Tourism of the Government of Catalonia have also actively participated in the creation of this tool, which includes contributions from all stakeholders consulted.

The development work has included extensive research work which has been carried out in seven research areas:

- Identifying opportunities for Catalonia related to tourism products sold by source markets, in the opinion of the retailers themselves.
- Identifying the profile of foreign tourists in Catalonia and their consumption behaviours.
- Determining the potential of six specific products in the Catalan market.
- Determining the volume of tourists interested in Catalonia for each of the surveyed source markets and for every tourist product on offer.
- Identifying key success factors for tourism products, lifestyles, traveller experience profiles and most effective impacts of communication tools when it comes to choosing a destination.
- Assessing the impact of the crisis on tourist behaviour.
- Reviewing research projects into the Catalonia tourism brand and online opinions, among other secondary sources.

The plan has also included strategic contributions from tourism promotion offices on the source markets and from public Catalan tourism marketing officials and the Catalan marketing priorities identified by the country's tourism sector, as well as contributions from key industry players concerning six products.

The preparation of the plan has included extensive research work, carried out in seven different research lines.

# CONTENTS

## 1

-12-

### MARKETING GOALS AND CHANGE AGENDA



-13-

A stronger Catalonia brand  
and more profitable tourism

-14-

A rigorous «change  
agenda»

## 2

-22-

### MARKET STRATEGIES



-23-

2.1. Brand:  
differentiation based  
on emotional benefits  
and recognised icons

-32-

2.2. Portfolio:  
six product categories

-36-

2.3. The target group:  
sophisticated and  
cosmopolitan travellers

-36-

2.4. Six priority source  
markets

## 3

-40-

### MARKETING STRATEGIES AND TACTICS



-41-

8 strategies and 34 tactics  
to be implemented over  
3 years

-42-

The 8 strategies

-56-

Annual planning and budget

## 4

- 58-

### THE NEW ROLE OF THE CATALAN TOURISM BOARD



-59-

The mission of the  
Catalan Tourism Board



# MARKETING GOALS AND CHANGE AGENDA

A stronger  
Catalonia brand



and more  
profitable tourism

Broadly speaking, the plan seeks to strengthen the Catalonia brand and boost the profitability from tourists visiting our country.

To evaluate the success of our plan, the Catalan Tourism Board has established four measurable indicators: tourist revenues, visitors' daily spending, reduction of seasonality and brand strength. Based on these parameters, the plan establishes four goals:

- 15% increase in tourism revenue.\*
- 15% increase in average daily visitor spending.\*
- 15% reduction in seasonality.\*\*  
Measured based on the volume of tourist revenue in low and mid season.
- 15% increase in brand strength.  
It will be measured with the brand equity methodology.

\* Cumulative growth since 2012, including inflation and excluding transport.

\*\* From September to June (inclusive).

THE PLAN SEEKS  
TO STRENGTHEN  
THE CATALONIA BRAND  
AND BOOST THE  
PROFITABILITY  
OF TOURISM VISITING  
OUR COUNTRY.

WE MUST ABANDON THE CURRENT CONFUSING NETWORK OF DESTINATION AND PRODUCT BRANDS AND ESTABLISH A CONSISTENT ARCHITECTURE OF BRANDS UNDER THE UMBRELLA OF A POWERFUL CATALONIA BRAND.

## A rigorous «change agenda»

In order to achieve the goals set, we should previously consider a number of key issues related both to the increase in the value of the supply and to marketing management, and apply a stringent change agenda in each case.

The plan identifies ten key issues that must be addressed, in four different lines of work:

### a. Value design

#### 1. Catalonia brand.

How can we boost the value of the Catalonia brand? We must abandon the current confusing network of destination and product brands and establish a consistent architecture of brands under the umbrella of a powerful Catalonia brand.

#### 2. Differentiated offer.

How can we support Catalonia's tourism offer and win market share by offering greater differentiation? We need to steer away from our current undifferentiated commodities offer (easily replaceable by other destinations) towards a more differentiated portfolio of offers in a state of constant innovation.

#### 3. Services to tourists.

How can more value be brought to tourists during the entire cycle of their travels, both online and offline? We would do well to provide services before, during and after the trip, integrated in a single online point of access, instead of offering only basic services during the trip.

### b. Communication of value

#### 4. Communication.

How can we leverage online or mobile media to achieve a more efficient and segmented communication? The current communication strategy is scattered and mostly uses traditional tools. We must switch to a 360°, eminently emotional communication that uses innovative tools.

WE MUST PROVIDE SERVICE BEFORE, DURING AND AFTER THE TRIP, INTEGRATED IN A SINGLE ONLINE POINT OF ACCESS.

### c. Value selling

#### 5. Selling system.

How can the Catalan tourism offer be made easily accessible to consumers? The Catalan offer must be available 100% online, and the offer currently online should be improved in terms of quality and accessibility.

#### 6. Business development.

How can we determine the right online intermediation and increase turnover for the Catalonia brand? We need to go from a sales model aimed mainly at mass customers to another one geared toward a mix of mass and selective customers.

#### 7. Loyalty.

How can we build relationships with customers to encourage them to recommend and come back to Catalonia? Our current marketing is based on customer acquisition and must evolve into an optimal acquisition/retention relationship.

### d. Marketing management

#### 8. Intelligence.

How can we identify the best business opportunities and monitor Catalonia's tourism development? Marketing decisions must be based on "scientific" parameters and not only on opinions.

#### 9. Industry services.

How can we become a leader in tourism marketing for the sector and boost competitiveness? The Catalan Tourism Board, which currently provides basic services to part of the Catalan tourism sector, has to become the tourism marketing benchmark for the entire industry.

#### 10. Cooperation and coordination.

How can we optimise the results of Catalonia tourism marketing through better public and public-private cooperation and coordination? Low participation and coordination within the industry has to give way to an optimal model of co-management and co-financing of Catalonia's tourism marketing.



# CHANGE AGENDA: THE DEVELOPMENT OF MARKETING IN CATALONIA

## FROM... ..TO



**Value design:** A set of activities aimed at increasing value for travellers both in the destination and the entire life cycle of the trip. We will work with innovative methods and develop a customer retention programme.



**Value communication:** A set of actions that serve to communicate the value of the destination in question. We will work with a primarily online focus.



**Value selling:** Tactics for increasing the presence of Catalan tourism offers in the most relevant booking channels for the target audience.



**Industry support services:** Implementation of an effective system to help the sector provide better marketing for its companies and products.

**Organisation and management of marketing/marketing infrastructure:** Marketing activities supporting design, communication and value distribution and boosting effectiveness. We will optimise the involvement and coordination with the Catalan tourism industry.

1. CATALONIA BRAND	Complex and confusing network of destination and product brands.	Coherent brand architecture with a powerful Catalonia brand.
2. DIFFERENTIATED OFFER	Poorly differentiated product offer (commodities).	Differentiated and constantly innovative offer.
3. TOURIST SERVICES	Basic services focused on travel.	Services before, during and after the trip, integrated in a single online point of access.
4. COMMUNICATION	Poorly integrated, traditional tools and communication strategies.	360°, emotional communication that uses innovative tools.
5. SALES SYSTEM	Low accessibility of Catalan offer on the Internet.	Catalan offer 100% online.
6. BUSINESS DEVELOPMENT	Sale very focused on mass customers (B2B).	Mix of mass/selective clients.
7. LOYALTY	Acquisition-based communication.	Optimal customer acquisition/retention mix.
8. INTELLIGENCE	Low knowledge of customers and markets.	Marketing decisions based on objective data.
9. INDUSTRY SERVICES	The CTB provides value-added services to a limited part of the Catalan industry.	The CTB is the leader agency in tourism marketing for the entire sector.
10. COOPERATION AND COORDINATION	Insufficient coordination between industry actors.	Optimal model of co-management and co-financing of tourism marketing.





Sant Climent de Taüll



## Five principles for marketing Catalonia

The change agenda directs action towards five inspiring principles that should govern Catalonia marketing from now on:

### 1. Focus.

Focus on brands, markets, products, segments, marketing tools, and defining responsibilities of the CTB and regional bodies.

### 2. Online marketing.

Preference given to an online focus, in all aspects of the travel cycle, communication and relationship with the customer, sales, etc.

### 3. Innovation.

Commitment to innovation in the areas of segmentation, tourist offer, communication tools, CTB services, marketing management model, etc.

### 4. Results-oriented (not activity-oriented) marketing activities.

Decision making driven by results, where the cost/benefit paradigm will prevail. To this end, based on previous strategic and tactical planning, quantitative and qualitative targets will be set, as well as monitoring indicators.

### 5. Public/private marketing (not only public).

The industry will gradually join the decision-making and financing phases of Catalonia marketing through methods such as co-marketing in the private sector, defining strategic partners and including high-profile managers and marketing specialists on the CTB board.

---

WITH THE AIM OF STRENGTHENING  
THE CATALONIA BRAND  
AND INCREASING  
THE PROFITABILITY OF TOURISM  
IN CATALONIA, THIS PLAN IDENTIFIES  
KEY ISSUES RELATED  
BOTH TO BOOSTING THE VALUE  
OF THE OFFER  
AND TO MARKETING MANAGEMENT,  
AND DEFINES A RIGOROUS  
CHANGE AGENDA  
THAT SETS THE FIVE PRINCIPLES  
THAT SHOULD STEER CATALONIA  
BRAND MARKETING FROM NOW ON.

---





## MARKET STRATEGIES

### 2.1 The brand: differentiation based on emotional benefits and recognised icons

The power of the Catalonia brand is medium-weak, as is clear from the analysis of various field studies,\* which conclude that it does not stand out well enough from other tourist brands and has limited relevance. However, the brand earns remarkable appreciation, even though potential travellers are not familiar enough with it, i.e. they are not aware of it beforehand.

### How can we differentiate ourselves?

To achieve the desired differentiation for the Catalonia brand, the plan proposes targeting the sophisticated and cosmopolitan traveller segment seeking to enjoy rewarding experiences related to both leisure and business, offering them emotional benefits and recognised icons.

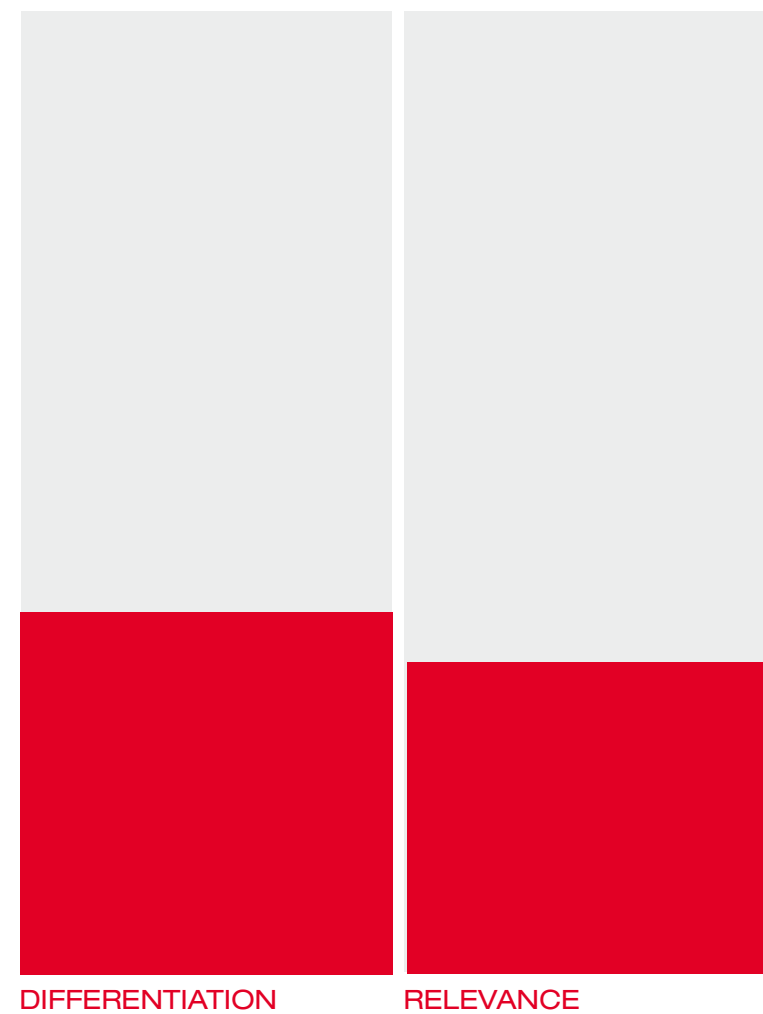
In this regard, we have identified a number of distinguishing features: small geographic area easy to travel and enjoyable at any time of the year, near the Mediterranean, with high quality of life, offering a combination of beaches, landscape, cuisine and unique cultural, artistic and architectural heritage, as well as an excellent infrastructure for receiving tourists.

There are various significant arguments that support this distinction and give it credibility. First, Catalonia is a land of cultural geniuses, features highly popular tourist icons and boasts great cultural wealth. In parallel, it offers beautiful and diverse landscapes within a short distance of each other and the opportunity to enjoy one of the most award-winning international cuisines, in addition to being well prepared to welcoming tourists.



## The power of the Catalonia brand and its positioning

### STRENGTH



### STATURE




---

CATALONIA OFFERS  
 POSITIVE EMOTIONAL EXPERIENCES  
 ALL YEAR ROUND IN A SMALL AREA  
 NEAR THE MEDITERRANEAN WHICH  
 CAN BE VERY EASILY EXPLORED,  
 WITH A GREAT QUALITY OF LIFE,  
 OFFERING A COMBINATION OF  
 BEACHES, LANDSCAPE, CUISINE  
 AND A GREAT CULTURAL,  
 ARTISTIC AND ARCHITECTURAL  
 HERITAGE, IN ADDITION TO BEING  
 WELL PREPARED TO  
 WELCOMING TOURISTS.

---

## A brand full of personality

The brand differentiation must rely on a strong personality that makes it easily identifiable. In the case of a territory, the personality must stem from the values intrinsic to the region itself and its people.

The personality of the Catalonia brand has to rely on these five key attributes:

**1. Modern and cosmopolitan, trendy.**

Catalonia is an avant-garde, ahead-of-the-curve region.

**2. Marked by geniuses throughout its history and in the present day.**

Catalan passion: cultural and artistic innovation and creativity, fashion, etc.

**3. Mediterranean, healthy, beautiful.**

Catalonia equals quality of life: Mediterranean climate and diet, life out in the open, natural and cultural landscapes, etc.

**4. Educated, sensible, peaceful.**

We have our own identity based on language, culture, history, traditions, good sense, etc.

**5. Dynamic, welcoming and friendly.**

A collective strength expressed in different ways: human tower building, Barça, the sardana dance, civic associations, etc.

## Catalonia brand values and personality





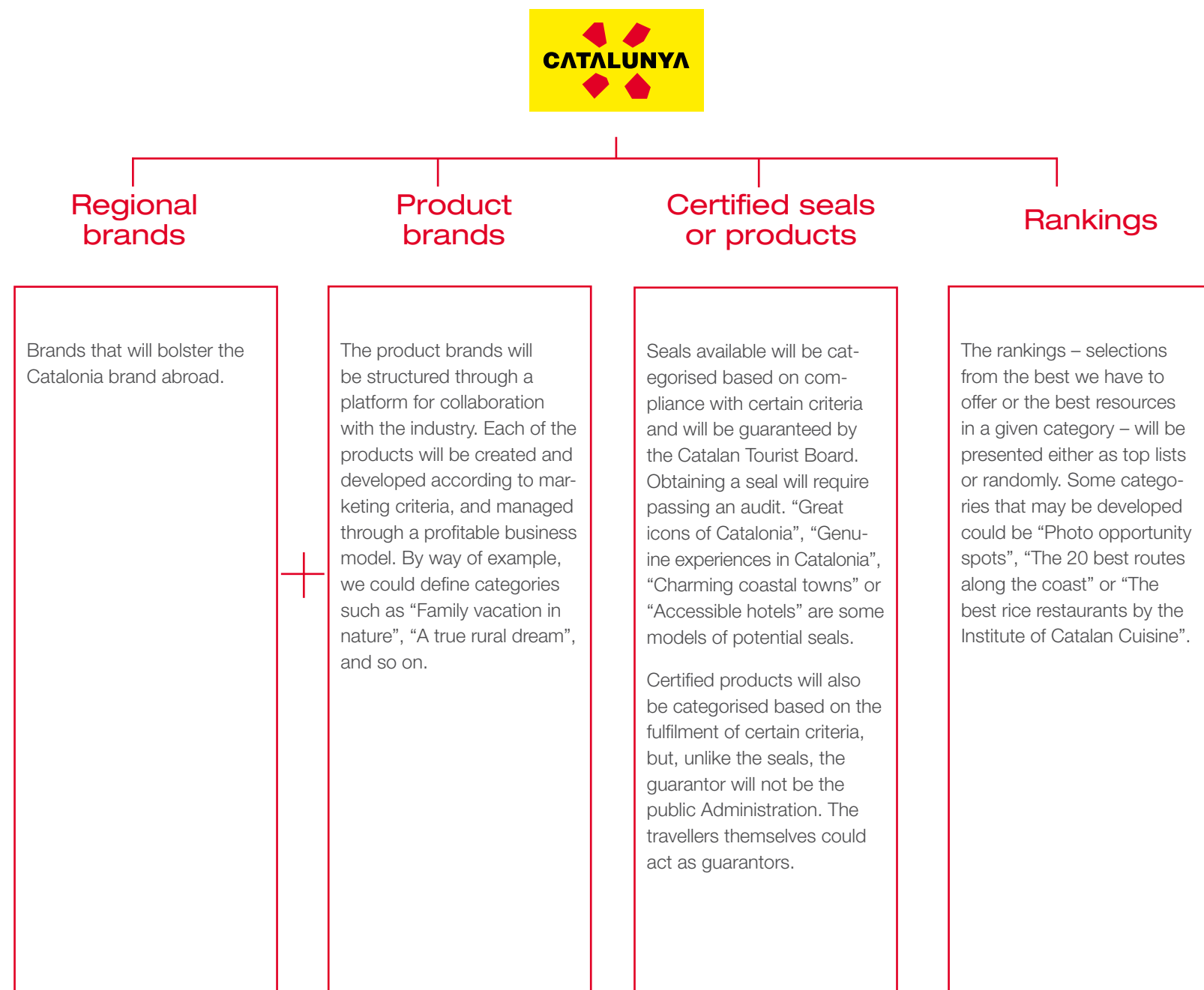
Calella de Palafrugell





## Strengthening the brand through consistent architecture

Catalonia should be the umbrella brand under which regional and product brands, seals, certified products and rankings are structured. This way, the Catalonia brand will boost its value, differentiate itself and become stronger, thereby encouraging the development of tourism products in line with the overall strategy.



Achieving this goal requires the close collaboration of the entire Catalan tourism sector, which should align to develop, in a coordinated manner, the various identifying elements according to the responsibilities of each entity.

In some cases, the Catalonia brand may be supported by other brands that act as reinforcements and bolster our image. This applies to internal, high-visibility place names and brands associated with new or existing brands linked to products that can help differentiate the offer.

Regional bodies (promotion agencies of the provincial councils and the Turisme de Barcelona Consortium), local authorities and the CTB will work together to ensure the proper implementation of the Catalonia Tourism Marketing Plan and, therefore, to add value to the Catalonia brand.






CATALONIA SHOULD BE THE UMBRELLA BRAND UNDER WHICH REGIONAL AND PRODUCT BRANDS, SEALS, CERTIFIED PRODUCTS AND RANKINGS ARE STRUCTURED.

OBTAINING A SEAL WILL REQUIRE PASSING AN AUDIT AND WILL BE BACKED BY THE CATALAN TOURISM BOARD.



## 2.2 Portfolio: six product categories

The plan lays out a portfolio of six product categories, established on the basis of six major tourism experiences in Catalonia. Each of these categories will include various product lines.

1.	2.	3.	4.	5.	6.
					
<b>Holidays to enjoy the Mediterranean lifestyle on the Catalan coast</b>	<b>Getaways in Catalonia</b>	<b>Routes for discovering a small country with a great culture</b>	<b>Visits to enjoy nature, adventure and the Catalan mountains and countryside</b>	<b>Opportunities for organising various meetings</b>	<b>Trips for pursuing special interests</b>
<p><b>Description:</b> Trips to the coast with the main objective of relaxing and enjoying the sun and the beach in a Catalan coast with multiple and very different attractions.</p> <p><b>Examples:</b></p> <ul style="list-style-type: none"> <li>· Charming coastal towns</li> <li>· Fishing villages</li> <li>· Main beach destinations</li> <li>· Etc.</li> </ul>	<p><b>Description:</b> Weekend and short getaways to discover a city, enjoy a major event or relax in the countryside or nature. The getaways can be themed.</p> <p><b>Examples:</b></p> <ul style="list-style-type: none"> <li>· Culture, cuisine and wine</li> <li>· Cities with character</li> <li>· Themed getaways</li> <li>· Etc.</li> </ul>	<p><b>Description:</b> Great trips to discover the most attractive highlights of a region, its culture, traditions, etc. Routes may be general or thematic.</p> <p><b>Examples:</b></p> <ul style="list-style-type: none"> <li>· Chief natural and cultural icons</li> <li>· The 5 great routes around Catalonia</li> <li>· Themed routes</li> <li>· Etc.</li> </ul>	<p><b>Description:</b> The “light” option includes walks, light hiking, horseback riding, etc. The “hard” option introduces tourists to the world of adventure sports.</p> <p><b>Examples:</b></p> <ul style="list-style-type: none"> <li>· Natural and rural experiences and areas</li> <li>· Active tourism and adventure experiences</li> <li>· 100% cycling and hiking</li> <li>· Etc.</li> </ul>	<p><b>Description:</b> Trips to meet with a large, medium or small group of people to exchange ideas, work, innovate, foster team-building, etc. It can also include incentive trips.</p> <p><b>Examples:</b></p> <ul style="list-style-type: none"> <li>· Conferences and events in Catalonia</li> <li>· Various mid-size meetings</li> <li>· Brainstorming meetings</li> <li>· Etc.</li> </ul>	<p><b>Description:</b> Trips to enjoy a hobby or activity that we like.</p> <p><b>Examples:</b></p> <ul style="list-style-type: none"> <li>· Sports stays in Catalonia</li> <li>· Golf in Catalonia</li> <li>· Cooking lessons in Catalonia</li> <li>· Etc.</li> </ul>







## 2.3 The target audience: respectful and interested travellers

These travellers are sophisticated and cosmopolitan. They have medium to high income levels, are willing to enjoy experiences and are active on the Internet. Within this group there are two distinct segments: adult travellers with no dependents, and families. An important amount of families meeting this description already visit Catalonia, so the objective of the plan should be essentially to retain them, while in the case of visitors with no dependents, the aim must be to implement strategies based on attracting new tourists.

## 2.4 Six preferred source markets

Catalonia focuses its marketing efforts especially in six source markets. Thus, two-thirds of the budget will be invested in markets considered strategic: Germany (15%), France (13%), rest of Spain (11%), UK (10%), Belgium-Netherlands-Luxembourg (8%) and Russia (9%). 22% will be distributed between markets defined as high priority: Catalonia (7%), Italy (6%), Nordic countries (4%), Switzerland (2%), Austria (1%) and the countries of the former Eastern Bloc (3%). Finally, the United States and China/Southeast Asia, two markets considered of selective priority, will receive 6% and 5% of the budget respectively.

Following the focus principle mentioned earlier, marketing in Catalonia will deploy the product portfolio with a totally results-oriented approach. To this end, we have proposed several strategic product category and source market combinations. According to these combinations, the maximum investment will focus on “Catalan coast” and “Getaway” products for Germany, France and the UK. The “Routes” and “Meetings” products will have a high priority for Germany, France, the UK and the rest of Spain. In countries like the United States and China we will focus, with a more limited budget, on promoting “Getaways”, “Routes”, “Meetings” and “Cruises”.

GERMANY, FRANCE, THE REST OF SPAIN, THE UK, BENELUX AND RUSSIA ARE THE SIX PRIORITY MARKETS AND WILL RECEIVE TWO-THIRDS OF THE ALLOCATED INVESTMENT.

Global category	Strategic priority						High priority						Selective priority	
	Germany	France	UK	Rest of Spain	Benelux	Russia	Catalonia	United States	Italy	Nordic countries	Switzerland and Austria	EURHP(*)	China	Southeast Asia
Percentage of the budget	15%	13%	10%	11%	8%	9%	7%	6%	6%	4%	3%	3%		5%
Global source market	●	●	●	◐	◐	◐	◐	◐	◐	◐	◐	◐	◐	◐
Catalan coast	●	●	●	◐	◐	◐	◐	○	◐	◐	◐	◐	○	○
Getaways	●	●	◐	◐	◐	◐	◐	◐	◐	◐	◐	◐	◐	◐
Routes	◐	◐	◐	◐	◐	◐	◐	◐	◐	◐	◐	○	◐	◐
Nature-adventure, mountains and countryside	◐	◐	◐	◐	◐	○	◐	○	◐	○	○	○	○	○
Meetings	◐	◐	◐	◐	◐	◐	◐	◐	◐	◐	◐	○	◐	◐
Special interest	◐	◐	◐	◐	◐	◐	◐	◐	○	○	○	○	◐	◐

Legend.  
Investment priority  
● +    ◐    ○ -

\* Countries of the former Eastern Bloc: Slovenia, Ukraine, Czech Republic, Slovakia, Hungary and Poland

CATALONIA MARKETING WILL BE AIMED AT  
SOPHISTICATED AND COSMOPOLITAN TRAVELLERS  
SEEKING TO ENJOY REWARDING EXPERIENCES LINKED  
BOTH TO LEISURE AND BUSINESS.

---

THE CATALONIA BRAND PERSONALITY IS UPHELD BY FIVE  
KEY ATTRIBUTES: MODERN AND COSMOPOLITAN;  
MARKED BY GENIUSES THROUGHOUT ITS HISTORY  
AND IN THE PRESENT DAY; MEDITERRANEAN, HEALTHY  
AND BEAUTIFUL; EDUCATED, SENSIBLE AND PEACEFUL;  
DYNAMIC, WELCOMING AND FRIENDLY.

---

THE CATALONIA BRAND INCLUDES REGIONAL  
AND PRODUCT BRANDS, SEALS, CERTIFIED  
PRODUCTS AND RANKINGS.

LOCAL AND REGIONAL BODIES AND THE CTB WILL  
WORK TOGETHER TO ENSURE THE DEVELOPMENT  
OF THE CATALONIA BRAND.

---

THE PLAN LAYS OUT A PORTFOLIO OF SIX PRODUCT  
CATEGORIES, ESTABLISHED ON THE BASIS OF SIX MAJOR  
TOURISM EXPERIENCES IN CATALONIA.

---

MARKETING EFFORTS WILL FOCUS ESPECIALLY  
IN SIX SOURCE MARKETS.



# 3

## MARKETING STRATEGIES AND TACTICS


8 strategies  
and 34 tactics  
to be implemented  
over 3 years

Based on the four established lines of work (value design, value communication, value selling and marketing management), the 2013-2015 Catalonia Tourism Marketing Plan defines 8 strategies that will be implemented through a total of 34 tactics.



## 8 strategies

### Internal strategies

Value design		Value communication	Value selling
1.	2.	3.	4.
			
Innovating in the field of value design	Boosting customer retention	Moving the bulk of communication to online media, with a segmented 360° strategy	Penetrating and boosting online sales channels (B2C/B2B)

### External strategies

Marketing management			
5.	6.	7.	8.
			
Increasing market knowledge	Increasing support for the industry to improve marketing	Significantly increasing cooperation with the industry and other organisations	Increasing the CTB's circle of influence through a senior management board



## Value design

### Strategy 1

#### Innovation in the field of value design

“CATALONIA ADVISORS” ARE TOURISTS WHO LOVE CATALONIA AND WHO WILL OFFER ADVICE AND MAKE RECOMMENDATIONS ON CATALONIA TO TRAVELLERS WHO REQUEST IT, ESPECIALLY IN THE RUN-UP TO THE TRIP.

#### Tactics:

##### 1. Experience Catalonia.

We will develop the conceptual universe of the tourist experiences that can be enjoyed in Catalonia from several perspectives: tourist product, destinations, icons, etc. The task includes identifying the resources and products with the highest added value, as well as the flagship experiences, which help to differentiate Catalonia as a destination.

##### 2. System of brands, seals, certified products and rankings.

We will work to highlight products and resources that contribute to differentiate Catalonia as a destination through models of collaboration with the Catalan tourism industry. These could take the form of brands, seals, guaranteed products and rankings.

##### 3. “Catalonia advisors”.

We will create a network of tourists who love Catalonia as a destination and who will offer advice and make recommendations to travellers who request it, especially in the run-up to the trip. The network will be managed through online channels.

##### 4. “Holiday manager” programme.

We will develop a set of tools and online resources to help tourists throughout the life cycle of their trip to Catalonia. The programme will focus especially in the stage of planning and organising the trip through the creation of online guides, an online travel planner and a team of support that can answer questions, among others.

##### 5. Promotion and support of destination management companies (DMC).

We will develop a programme to foster the creation of companies managing tourism experiences, preferably geared toward priority product categories for Catalonia. Some of the actions planned are benchmarking trips, marketing action support for source markets and access to funding.

### Strategy 2

#### Boosting customer retention

THE CRM PROGRAMME WILL HELP ESTABLISH DIRECT COMMUNICATION WITH TRAVELLERS AT A VERY LOW COST WITH THE AIM OF INCREASING THE NUMBER OF TRIPS AND CONSUMPTION AT THE DESTINATION.

#### Tactics:

##### 6. Satisfaction programme.

Programme aimed at boosting tourist satisfaction at key moments of the trip to Catalonia, while looking to generate an emotional bond. This programme will include direct communication with tourists (welcome and farewell posters at the airport, Wi-Fi in tourist areas, sponsored merchandising, etc.) and collaboration with the industry (hotel and restaurant staff training, e-training on customer care, etc.).

##### 7. CRM programme.

Through a CRM (customer relationship management) tool we will implement a customer relationship programme which will allow establishing direct and segmented communication with travellers at a very low cost. The result should be an increase in the number of trips to Catalonia and consumption upon arrival, as well as the establishment of long-term relationships.

## Value communication

### Strategy 3

#### Moving the bulk of communication to online media, with a segmented 360° strategy

#### Online communication tactics:

##### 8. Online advertising and viral marketing campaigns.

Communication will focus on the online sphere with a very segmented approach through the channels most used by the target audience, and preference will be given to the strategic product categories and source markets. This communication will take multiple formats (sponsored ads, banner ads, sponsored content, viral campaigns) and will be a permanent and across-the-board boost to other actions.

##### 9. Social network programme.

Catalonia social networks will be enhanced, mainly through attracting new followers on Facebook and Twitter, by including these channels within our communication campaigns. Users will be attracted, among other things, via online contests.

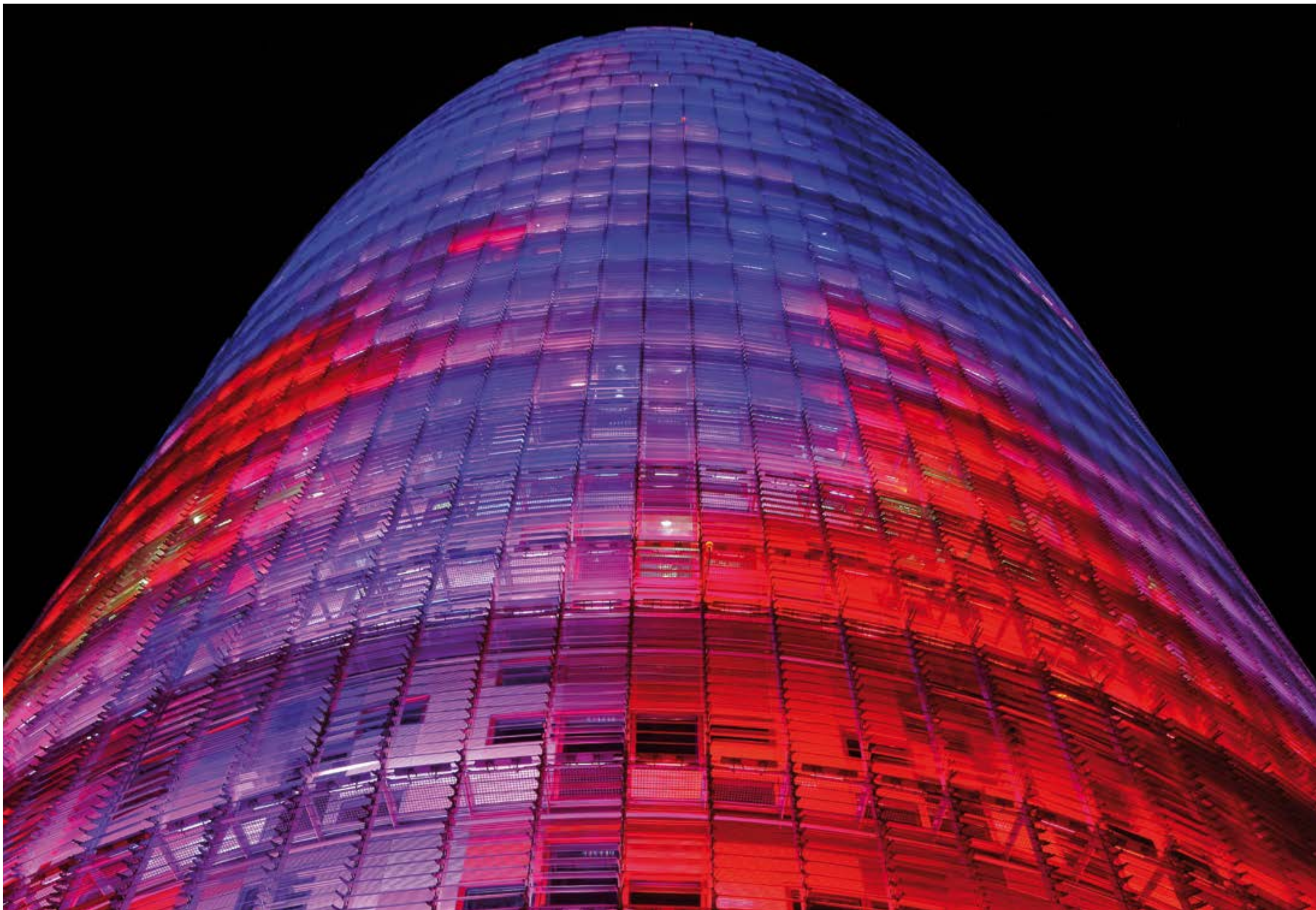
##### 10. Managing the catalunya.com site.

The site needs to become more interactive and include highly attractive elements that make users very interested in visiting. The site should also address the entire life cycle of people's visit to Catalonia, either directly on the website itself or through links to other websites.

##### 11. Mobile marketing campaigns and applications.

We will develop a mobile application that helps tourists plan their travel, find information and spend upon arrival, and that allows making bookings on the spot. Content should be geo-referenced (geo-located using a coordinate system).





Agbar Tower (Barcelona)



ONLINE COMMUNICATION WILL BE THE MAIN PILLAR FOR BOOSTING CATALONIA BRAND POWER. MOBILE APPLICATIONS WILL BE DEVELOPED TO HELP TOURISTS PLAN THEIR TRIP, FIND INFORMATION AND SPEND UPON ARRIVAL.

WE WILL PUT TOGETHER A LARGE DATABASE OF MULTIMEDIA CONTENT THAT REFLECTS MULTIPLE TRAVEL OPTIONS IN CATALONIA. CONVENTIONAL ADVERTISING SHALL BE LIMITED TO THE PRODUCT CATEGORIES AND THE TARGET AUDIENCE WHERE THE EXPECTED RETURN IS SUBSTANTIALLY HIGHER THAN IN ONLINE MEDIA.

### Offline communication tactics:

#### 12. Public relations programme.

An agreement will be established with a benchmark public relations agency, especially at European level, to gain access to and ensure the participation of major opinion leaders and influencers, both offline and online.

#### 13. Publications.

We will rationalise publications through two channels: digital distribution of content and the reduction of needs arising from the decline in participation in events such as trade shows, seminars and courtesy trips.

#### 14. Selective offline advertising.

Advertising in offline media should be more selective and confined only to product categories and the target public where such actions represent an investment opportunity and the expected return is significantly higher than in online media.

### Tactics for communication infrastructure:

#### 15. Multimedia repository.

The multimedia repository will be enriched with high-quality content that generates a desire to visit Catalonia and which can be used for online channels via different media: web, catalogues, online guides, etc

#### 16. Content.

A large database of multimedia content will be developed to complement the multimedia repository and reflect the many possibilities for travelling to Catalonia, highlighting resources and products with the greatest potential for differentiation.

#### 17. Visual guide and manual for using the Catalonia brand.

A new image of the Catalonia brand will be created to convey the values, attributes and features defined in the brand strategy, while also projecting an experiential perception. The new visual guide is complemented by a manual for using and applying the brand.

#### 18. Overarching message.

We will develop a permanent message and 5-6 key messages to position Catalonia, complemented with tangible aspects that generate credibility. This permanent message will act as an umbrella for all Catalonia-related communication.

## Value selling

### Strategy 4

#### Penetrating and boosting online sales channels (B2B and B2C)

AN ONLINE BOOKING TOOL FEATURING A DIFFERENTIAL AND QUALITY OFFER WILL BE DEPLOYED.

### Tactics:

#### 19. Business development.

We will deploy a large-scale commercial programme and partnerships in source markets, geared at generating business for Catalonia cutting across the market and aiming at a product category or at specific actions. This programme should include collaborations with all parties interested in building business together (creators of supply, intermediaries, airlines, influencers, etc.).

#### 20. Online sales system.

We will implement an online booking marketplace hosted on the catalunya.com website and linked to the offers on the website's various sections. Its content will consist of a differentiated and quality offer, thus avoiding direct competition with the major online retailers.

#### 21. Physical sales system.

We will establish physical points of sale for activities in key tourist areas, starting with those where a venue is already set up. The network will be extensible to other key tourist points through the opening of new spaces and the closing of agreements with collaborating organisations.

## Marketing management

### Strategy 5

#### Increasing market knowledge

### Tactics:

#### 22. Market intelligence.

We will develop a market intelligence system with multiple analysis perspectives (product, market, motivations, brand monitoring, satisfaction, destinations, degree of plan fulfilment, etc.), providing real-time, exhaustive information, and allowing quick decision making. This system will not be limited to internal use. It will also be targeted to the industry, which will be offered market intelligence services, both generic and ad hoc. To this end, a fee schedule will be defined.

## Strategy 6

### Increasing support for the industry to improve marketing

THE CTB WILL DEVELOP A RANGE OF ADVISORY SERVICES FOR THE CATALAN TOURISM SECTOR IN ORDER TO ENHANCE ITS KNOWLEDGE FOR MAKING DECISIONS AND BOOST THE RESULTS OF ITS MARKETING EFFORTS.

#### Tactics:

##### 23. Consultancy to the sector.

Advisory services to the Catalan tourism sector will be implemented so that stakeholders can increase their knowledge for making decisions. The priority areas for assessment will be those related to knowledge of the product, the source markets, management of experiences and promotion of entrepreneurship. This assessment will be included in the list of services that must be provided.

##### 24. Courtesy trips, seminars and fairs.

These efforts will be streamlined, especially participation in fairs, where the budget will be cut back by 50% in 3 years and will focus on the fairs aimed at industry professionals.

##### 25. "Equip tecnologi@" programme.

We will create a team of specialists in online marketing tools aimed at increasing the competitiveness of the industry in this area. The team will provide advisory services in the areas of website design and aesthetics, company content structure and implementation of new technologies and innovations, among others.

THE BEST INITIATIVES IN THE CATALAN TOURISM SECTOR WILL BE IDENTIFIED AND REWARDED.

##### 26. Professional training.

With the same aim of increasing industry competitiveness through the implementation of better marketing, tourism marketing training courses will be organised for 200-300 executives in industry companies.

##### 27. Awards programme for the industry.

The best Catalan tourism initiatives will be identified and awarded recognitions according to various criteria: innovation, originality, satisfaction, best campaigns, campaigns with most impact, etc. This programme seeks to increase industry competitiveness via incentives that encourage improvement.

##### 28. Catalonia National Conference on Tourism Marketing.

This annual event will bring together Catalonia's leading specialists in tourism marketing. Its primary aims will be to exchange experiences, share knowledge and anticipate trends. It will also stimulate networking within the Catalan tourism industry and serve as a platform for reporting CTB and Department of Tourism actions.

## Strategy 7

### Significantly increasing cooperation with the industry and other organisations

THE CTB WILL BE RESTRUCTURED TO OPTIMISE ITS OPERATION AND ENABLE IT TO PUT THE PLAN INTO PRACTICE ACCORDING TO THE ESTABLISHED ROADMAP.

#### Tactics:

##### 29. Model for central-regional coordination and with other departments.

We will define and agree on a model for sharing marketing responsibilities between the various departments and public bodies of the Administration in order to optimise the overall management of marketing in Catalonia.

##### 30. New organisation of the CTB.

The CTB will be reorganised to enable it to put the plan into practice according to the established roadmap and thus optimise its operation. The restructuring will be complemented by the identification of skills gaps and proper sizing of each unit.

##### 31. Attracting strategic partners.

The existing partnership programme will be maintained so that it will continue attracting strategic partners for tourism in Catalonia, who will act as brand ambassadors, provide monetary or in kind economic benefits, while improving the visibility and image of the CTB among the Catalan tourism sector.

THE EXISTING PARTNERSHIP PROGRAMME WILL ALLOW US TO CONTINUE ATTRACTING STRATEGIC PARTNERS FOR CATALONIA TOURISM, WHO WILL ACT AS BRAND AMBASSADORS.

##### 32. CTB marketing in the industry.

We will develop a communication plan in the Catalan tourism industry that will help to position CTB at the head of tourism in Catalonia. This plan should ensure the communication of the marketing plan milestones and of the results and benefits obtained in due course.

##### 33. Databases of professionals and companies.

We must significantly increase the database of stakeholder contacts, both in Catalonia and our main source markets, in order to involve them in activities and supplement our business association with information that might interest them. This database will be managed through the CRM (see tactic 7), so the entire organisation will have access to this information across the board.



## Strategy 8

Increasing the CTB's circle of influence through a senior management board

### Tactic:

#### 34. Implementation of a high-level CTB management board.

We will include in the CTB Board of Directors any leaders of large companies which directly or indirectly are interested in boosting tourism in Catalonia, in order for them to contribute a complementary business perspective which can be leveraged in different areas: knowledge, experience, networking, new ideas, etc..

THE 8 STRATEGIES DEFINED BY THE PLAN SEEK TO ADD MORE VALUE TO THE CATALONIA BRAND AND THUS GENERATE MORE BUSINESS. THEY WILL ALSO OPTIMISE THE MANAGEMENT OF TOURISM MARKETING IN ORDER TO ENHANCE ITS EFFECTIVENESS.

WITH THIS IN MIND, THE PLAN STIPULATES THE INTEGRATION OF ALL MARKETING TOOLS AROUND THE DEFINED GOALS AND THE TRANSFER OF COMMUNICATION TOWARD THE ONLINE CHANNEL. ONLINE AND OFFLINE ADVERTISING, MANAGEMENT OF THE CATALUNYA.COM WEBSITE, MOBILE MARKETING APPLICATIONS, PR PROGRAMMES, PUBLICATIONS AND CONTENT GENERATION (AMONG OTHER AREAS) WILL BE MANAGED IN AN INTEGRATED MANNER WITH A 360° VISION.

INTERNALLY, CTB MANAGEMENT WILL FOCUS MAINLY ON INCREASING MARKET KNOWLEDGE IN ORDER TO ALLOW BETTER DECISION-MAKING, INCREASED SUPPORT FOR THE INDUSTRY SO THAT IT CAN DEVELOP BETTER MARKETING PLANS AND FOSTERING COOPERATION WITH THE INDUSTRY.





Landscape in Terres de l'Ebre



## Annual planning and budget

The 34 tactics defined in the plan will be dealt with in segments as annuities, and their order of implementation will be in keeping with pre-established goals for each year. Thus, the actions planned for 2013 will be aimed at internal preparation and value design and 2014 actions will focus on the relaunch of the Catalonia brand. The plan will culminate in 2015 with the full implementation of the portfolio of industry services.

In line with the plan's goals, online communication and value design are granted an elevated budget allocation, receiving 28% and 14% of the budget respectively in all three years. The contribution to these two items will increase gradually and reach 32% and 19% of the budget respectively by 2015.

Support services to the industry are the other major budget item, which will receive a quarter of plan resources.



2013 IS THE YEAR OF PREPARATION, 2014 IS THE YEAR FOR GAINING KNOWLEDGE OF THE MARKETS AND CONSUMERS, AND STRENGTHENING THE BRAND, AND 2015 IS THE YEAR FOR CONSOLIDATING WORK PROPOSALS WITH THE INDUSTRY AND THE NEW SYSTEM OF CATALAN TOURISM MARKETING.

Strategies	Sets of tactics	Budgetary allocation			
		2013	2014	2015	2013 2015
Strategy 1. Innovating in the field of value design	Value design	11%	11%	19%	14%
Strategy 2. Boosting customer retention					
Strategy 3. Moving the bulk of communication to online media, with a segmented 360° strategy	Online communication	15%	36%	32%	28%
	Offline communication	7%	10%	7%	8%
	Communication infrastructure	10%	2%	2%	4%
Strategy 4. Penetrating and boosting online sales channels (B2C/B2B)	Value selling	8%	7%	8%	8%
Strategy 5. Increasing market awareness	Industry support services	32%	20%	20%	24%
Strategy 6. Increasing support for the industry to improve marketing.					
Strategy 7. Significantly increasing cooperation with the industry and other organisations	Marketing organisation and management	17%	14%	12%	14%
Strategy 8. Increasing the CTB's circle of influence through a senior management board					
		100%	100%	100%	100%

\* Budget from Government allocations and contributions from CTB Board members. Structure excluded.





## THE NEW ROLE OF THE CATALAN TOURISM BOARD

### The mission of the Catalan Tourism Board

The CTB has redefined its mission and vision in order to lead Catalonia's marketing and achieve the goals of increasing tourist revenues, the average daily expenditure of visitors, the reduction of seasonality and the strength of the Catalonia brand.

#### Mission

To contribute to the prosperity of Catalonia and its tourism industry, becoming its voice abroad by focusing on the acquisition and satisfaction of more added-value tourism.

#### Vision

To become, before 2016, the marketing leader for the Catalan tourism industry, collaborators and tourists, as well as an international benchmark.



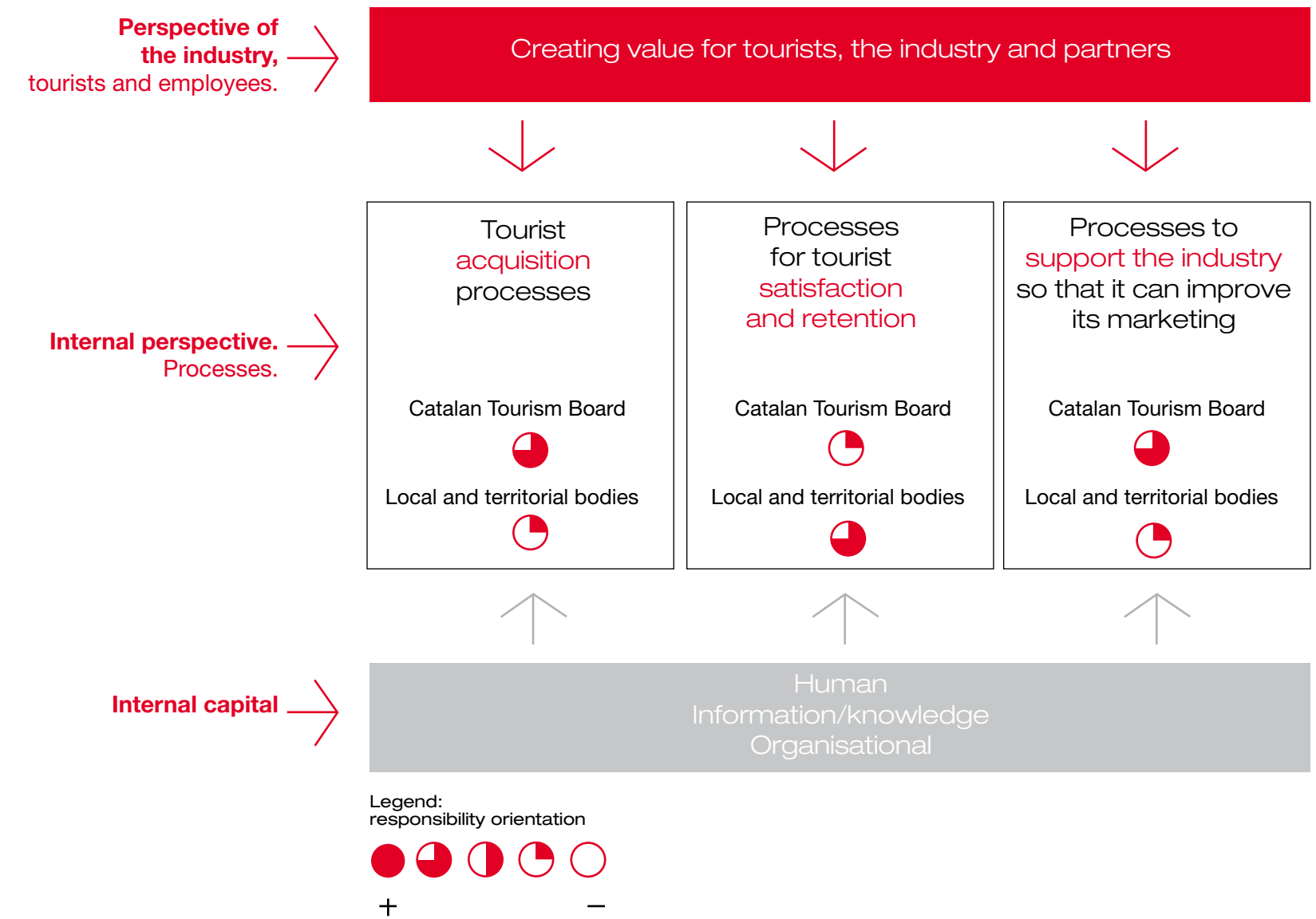
The need to implement a new tourism marketing system is CTB's major challenge for the upcoming three years. And for this purpose, it is essential to redefine the roles of all public bodies involved. In its new role, the CTB will focus on creating value in order to improve the competitiveness of the Catalan tourism offer and will aim at marketing in the major source markets and coordinating promotional bodies.

The CTB will also take on ultimate responsibility in attracting tourists and supporting the industry to improve overall marketing. For their part, local bodies, which have a closer relationship with travellers, will be focused on competitiveness and will aim at increasing the satisfaction and retention of tourists. The regional bodies, as intermediate organisations, will play a versatile role and will take on tasks related to attracting tourists and supporting the industry, and will also support local authorities to increase traveller satisfaction and retention. This structure of responsibilities will be based on the human, information/knowledge and organisational assets which the CTB will provide the industry.

The close collaboration with the industry will unfold in three areas: the CTB's portfolio of services, the co-marketing between the public and private sectors and joint actions with strategic partners, in which local and regional bodies will act as catalysts to achieve the desired development of Catalonia's tourism marketing towards a coordinated, effective structure focused on tangible results.

**The role of the main actors in Catalonia tourism marketing.**

Creating value both for tourists and for the industry, with which they will collaborate closely to improve the competitiveness of the Catalan tourism offer and its marketing, relying on regional and local bodies as key agents.











**2013-2015**  
**CATALONIA**  
**TOURISM**  
**MARKETING**  
**PLAN**  
**EXECUTIVE SUMMARY**