



# 2021–2023 Sustainability Strategy

# Table of contents

---

**02** Our commitment

---

**03** The challenges of sustainability in tourism

---

**04** Climate change

---

**05** Global pandemic

---

**06** Changes in tourists' attitudes

---

**07** Overcrowding

---

**08** The role of the DMO: destination marketing organisation vs destination management organisation

---

**09** The 2021–2023 sustainability strategy

---

**10** The SDGs and the sustainability strategy

---

**11** Areas of action of the strategy

---

**12** Phases of the strategy

---

**14** Implementation of actions by phase

---

**15** Summary of the action plan

---

# Our commitment



In 2017, the Catalan Tourist Board (CTB) made a formal commitment to sustainable development with its 2017-2019 Sustainability Strategy, a declaration of intent to improve the management of the organisation’s impact and contribute favourably to the industry’s ecosystem.

As part of the Government of Catalonia, the CTB aims to promote Catalonia as a benchmark tourist destination, based on quality and social and economic profitability, in conjunction with the private sector. The first sustainability strategy arose from the desire to continue promoting Catalonia as a tourist destination in line with current sustainability challenges facing the industry. With

this goal in mind, the proclamation of 2017 as the “International Year of Sustainable Tourism for Development” provided a suitable context for the project.

Currently, tourism as an industry sector is still highly exposed to numerous environmental, social and economic factors that make it vulnerable to unexpected shocks. The current health crisis caused by the COVID-19 pandemic has highlighted intersections between tourism, society and the environment as never before. Nevertheless, this critical situation has led to widespread calls to use the forced halt in activity and the slowdown in the tourism industry to introduce structural changes

that accelerate the transition towards a more sustainable model of tourism.

This context of global crisis has coincided with the CTB’s work on defining a new Sustainability Strategy for the period 2021–2023, in which a revision of the 2018-2022 Marketing Plan is already under way, with the aim of reorienting its strategic actions to match the current critical context.

In this respect, the CTB’s 2021–2023 Sustainability Strategy, together with the Marketing Plan, will establish the organisation’s framework for action to promote a sustainable model for tourism and tourism marketing in the coming years.



# The challenges of sustainability in tourism

Tourism faces major challenges and threats and is one of the economic activities most vulnerable to unexpected shocks, as shown by the health crisis that started in late 2019, which repercussions is having socio-economic impact at a global and local level.

Broadly speaking, there are currently four drivers for potential risks and increased vulnerability in the sector, the response to which also offers opportunities and generates new trends:

- CLIMATE CHANGE
- THE PANDEMIC AND GLOBAL HEALTH CRISIS
- CHANGES IN ATTITUDES AMONG TOURISTS AND VISITORS
- THE CONSEQUENCES OF OVERCROWDING.

# Climate change



## Implications and risks

- Sector and destinations highly exposed to the direct physical effects of climate change, which can produce:
  - Changes in the length and quality of climate-dependent tourism seasons.
  - Damage to infrastructure.
  - Less attractive destinations.
  - Changes in tourism demand and choice of destination.
- Sector and destinations exposed to indirect risks and impacts derived from climate change, such as:
  - Effects on natural assets.
  - Changes in operating costs and the capacity of tourism businesses to operate sustainably.
  - Indirect impacts from adaptation policies in other sectors, which could affect transport cost structures and options in forms of transport and their destinations.
  - Changes to tourism flows due to price rises or alterations to airline routes, among other factors.
- CO<sub>2</sub> emissions from the tourism sector are expected to continue rising.

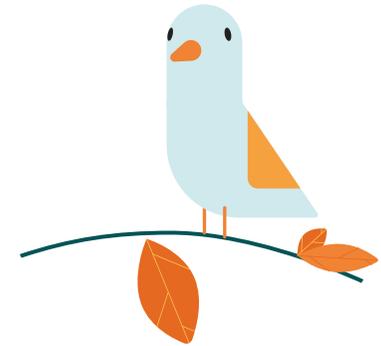


## Trends and opportunities

- Decarbonisation of the sector: establishing commitments and agreements and fostering climate action initiatives.
- The European Travel Commission (ETC) argues that decarbonisation should be seen as a long-term investment in sustainable tourism growth, which will require joint action by policy-makers, governments, the tourism industry and experts.
- Emission monitoring and control systems.
- Circular economy.



©Catalan Tourist Board. Author: P. E. Borràs.



## Why is it relevant to the Catalan tourism system?

- The Mediterranean basin, ground zero for the climate crisis.
- Catalonia's favourable climate makes it attractive to visitors. International tourists travel mainly for leisure and holidays.
- Adverse weather conditions in Catalonia and a more favourable climate at higher latitudes could reduce the attractiveness of the destination and alter the flow of tourists travelling to Catalonia.
- Highly seasonal industry.
- The main tourism brands in Catalonia (Barcelona, Costa Brava, Costa Daurada, Pirineus, Val d'Aran, Terres de l'Ebre) are associated with sub-sectors at risk from climate change: nature tourism, urban tourism, beach and coastal tourism.

# Global pandemic



## Implications and risks

- Industry and destinations exposed to the effects of the health crisis and its management, which include:
  - The halt to tourism activity due to legal restrictions.
  - Restrictions on leisure and cultural business and activities, which may reduce the attractiveness of destinations.



- Restrictions to the international mobility affecting visitor arrivals.
- Changes to tourism demand and choice of destination.
- Unprecedented socio-economic effects.
- Constant context of uncertainty and difficulty in making realistic forecasts.



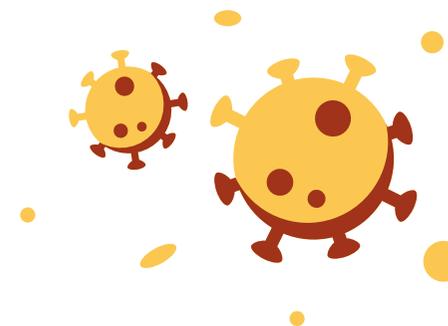
## Trends and opportunities

- “Sustainability is the new normal” (UNWTO), driving far-reaching structural changes in the sector, based on reflections regarding its sustainability.
- Sustainability, together with innovation, represents one of the seven priorities set by the UNWTO for the revival of tourism.
- A vision of responsible recovery from the COVID-19 crisis in the tourism industry. Six lines of action for tourism recovery: public health, social inclusion, conservation of biodiversity, climate action, circular economy, governance and financing.
- Tourism products and destinations resilient to future pandemics.



## Why is it relevant to the Catalan tourism system?

- High dependence on international markets.
- Air travel is the main form of transport for international tourists arriving in Catalonia.
- Importance of tourism to the Catalan economy.
- Vulnerability and exposure to economic stress arising from the health crisis (unexpected shock).
- Forecast 60% drop in tourism from the previous year.
- Plans for assistance from European (EU) pandemic funds.



“Sustainability is the new normal”

(UNWTO)

# Changes in tourists' attitudes



## Implications and risks

- Responsible choices with regard to consumption, goods and services that generate positive environmental and social impact.
- The reputation of overcrowded and run-down destinations (overtourism) may deter type of tourist who would have a better impact on them.
- Interest in other destinations that are better positioned in terms of sustainable tourism.



## Trends and opportunities

- Conscious consumers: the transformational traveller.
- Opportunity to attract responsible types of tourist by providing a tourism offer that is coherent with their needs and expectations.
- Other forms of tourism: “slow tourism”.

The economic importance of the tourism industry in Catalonia, its social and environmental relevance, strengthens the need to shape effective strategies to overcome the challenges the sector is facing



©Catalan Tourist Board. Author: Cablepress.



## Why is it relevant to the Catalan tourism system?

- Danger of having a negative impact on tourists' choice of destination due to a poor reputation of overcrowded destinations that are “dying from their own success” (Barcelona).
- Opportunities for attracting visitors who contribute to improving the impact of tourism on destinations.



# Overcrowding



## Implications and risks

- Negative economic, environmental and social impacts on destinations, such as:
  - Overdependence on tourism revenues and vulnerability to economic stress from unexpected shocks.
  - Deterioration and overuse of infrastructure.
  - Erosion of sensitive natural and historical heritage.
  - Alienation of local communities and tourism-phobia.
  - Creation of seasonal and low-quality jobs.
  - Loss of authenticity and degradation of cultural heritage.
- Worsening of the experience for both visitors and local residents.
- Social unrest and adverse local atmosphere (tourism-phobia) can spoil the tourism experience and deter future visitors, while posing a risk to sustaining tourist demand in the long term, especially during cyclical economic downturns.
- “The hidden impact of tourism”: unaccounted costs of tourism.



## Trends and opportunities

- New ways of measuring tourism success and its contribution to sustainable growth: measuring the environmental, social and economic impacts of tourism.
- “Better measurement for better management”: more effective decision-making and determining the desired and appropriate type and scale of tourism for each destination.



## Why is it relevant to the Catalan tourism system?

- High concentration in the city of Barcelona and coastal destinations.
- The capacity of the main Catalan destinations, Barcelona, Costa Brava, Costa Daurada, is overstretched.
- Social unrest and tourism-phobia in the main Catalan tourist destinations (Barcelona, Costa Brava, Costa Daurada).
- Few metrics to measure the regional economic, social and environmental impact of tourism.



# The role of the DMO: destination marketing organisation vs destination management organisation

## Redirecting the actions of DMOs to transform the tourism model and contribute to achieving the sustainable development goals.

With the industry facing numerous challenges and paradigm shifts, such as digital transformation and managing growth in visitor numbers, among others, and a greater awareness of the need to improve competitiveness and sustainability in destinations, many destination marketing organisations are broadening their scope to adopt a more active role as **destination management organisations (DMOs)**.

The trend among DMOs is **to become pioneering organisations** with a broader range of tasks,

including strategic planning and optimal destination management, thus ensuring that authorities, stakeholders, professionals and local communities are coordinated under a collective **strategy and vision with a common goal: the competitiveness and sustainability of the destination.**

As the leading bodies in destinations, DMOs play a crucial role in **promoting greater commitment to tourism development from the industry**, tourism suppliers and professionals and policy-makers.



©Catalan Tourist Board. Author: N. Puentes.

# The 2021–2023 sustainability strategy

The CTB's 2021–2023 Sustainability Strategy provides a conceptual framework and roadmap for action to guide the commitment to improving the organisation's performance and goal of impacting on the sustainable development of the Catalan tourism system in the coming years.

Thus, the strategic actions are defined on the basis of the following principles and considerations:



## ALIGNMENT AND COORDINATION FOR SUSTAINABILITY

Ensuring alignment with the United Nations Sustainable Development Goals (SDGs) and the 2030 Agenda for Catalonia in developing and implementing the strategy. In particular, coordination with the Directorate-General for Tourism (DGT) must be guaranteed throughout the CTB's 2021–2023 Sustainability Strategy implementation process, to ensure coherence with the Sustainable Tourism Strategy for Catalonia.



## A STRATEGY RECOGNISED BY ALL CTB STAKEHOLDERS

Ensuring that everyone in the organisation is familiar with the strategy and understands how they will be involved, both individually and collectively, in its implementation and success.



## AN UNCERTAIN CONTEXT

Realising that the uncertainty of the current context represents a present and future challenge and that adaptations will be required in response to changing circumstances at any given moment, without losing sight of the overall objective. For this reason, ensuring proper monitoring and assessment of the strategy throughout its implementation will be crucial.



## KEEP ON DOING WHAT WE DO WELL

Maintaining the course and intention to continue promoting those actions and initiatives by which the organisation contributes to sustainable development and which represent strengths to be enhanced while implementing the sustainability strategy.



## A 4D MODEL FOR SUSTAINABILITY

Identifying potential and desirable economic, environmental and social impacts from the 4D Model so it can be used to convey the message of sustainability.

### 13

Responding locally and globally to climate change, implementing actions to favour the decarbonisation of tourism and reducing the carbon footprint, especially in the case of transport and accommodation.

### 11

Promoting the role of tourism in improving accessibility to infrastructure, regenerating and preserving the cultural and natural heritage and assets on which tourism depends and promoting smarter and greener cities and communities for residents and tourists.

### 17

Enhancing the cross-sector nature of tourism and strengthening public-private partnerships and the involvement of all tourism stakeholders in achieving the SDGs and other shared milestones.

### 8

Promoting decent, equal working conditions and decent job opportunities, particularly for young people and women, and promoting further diversification of tourism activity to increase the positive socio-economic impacts of tourism.

### 14

Ensuring development of coastal and maritime tourism that helps conserve and preserve ecosystems and contributes to the sustainable use of marine resources.

### 12

Promoting the adoption of more sustainable forms of consumption and production that speeds up change towards sustainability in tourism, accompanied by tools to measure the impacts of sustainable tourism development.



### 15

Involving tourism in the sustainable management of land ecosystems, preserving and conserving biodiversity and natural heritage.

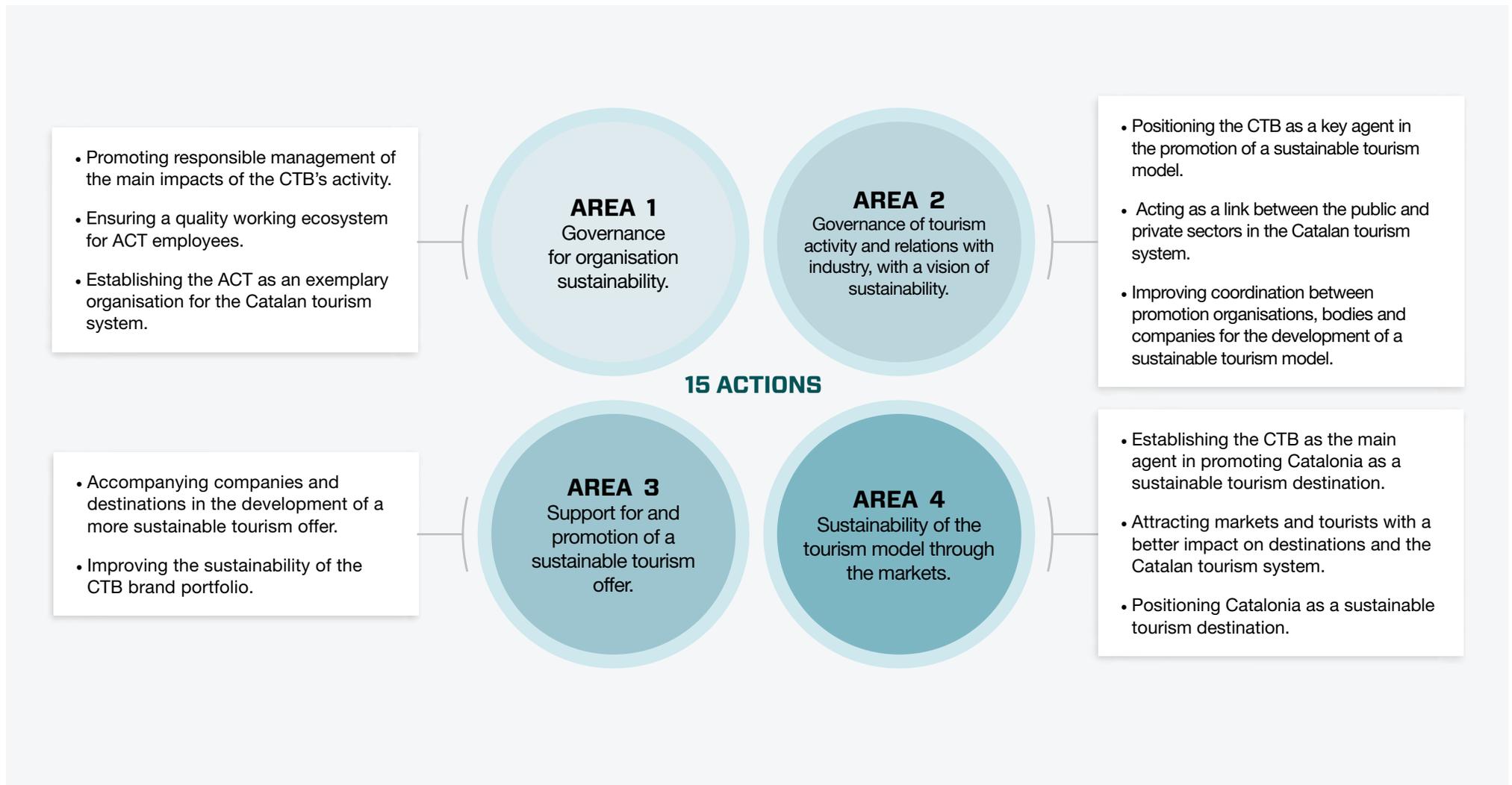
## The SDGs and the sustainability strategy

Within the framework of the Sustainability Strategy, the CTB recognises commitment to achieving the SDGs and has initiated a reflection process to determine which SDGs to prioritise. In addition to

the SDGs identified by the organisation itself, those identified in the National Plan for the 2030 Agenda and which include specific goals related to tourism in Catalonia are included in the framework.

 **CTBs PRIORITY SDGs**

 **CATALONIA'S 2030 AGENDA**



## Areas of action of the strategy

The CTB 2021–2023 Sustainability Strategy consists of **15 strategic actions** framed in **4**

**areas of action**, which will be implemented in **5** activation phases.

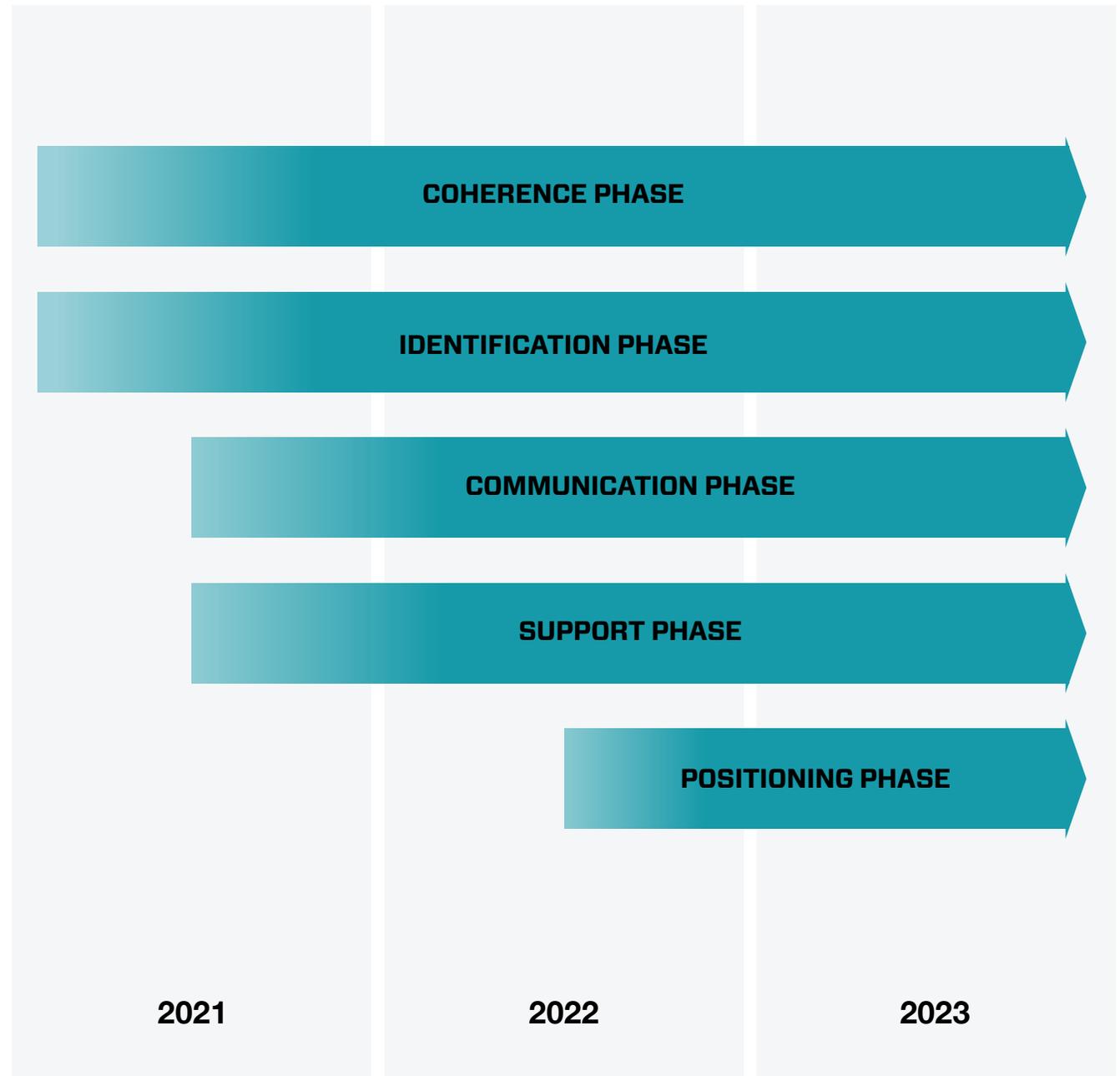
# Phases of the strategy

## I. COHERENCE

We will encourage all areas of the organisation to align with the CTB's sustainability vision and mission as we define them and will ensure we have the appropriate and necessary expertise to make them a reality. We want to make sure we share a common starting point and, through our internal actions, ensure coherence with what we defend, promote and aim to achieve.

## II. IDENTIFICATION

We will carry out actions to help us better understand the aspects in which we can exert our influence to improve the sustainability of the tourism model through our activity. We will therefore analyse the degree of sustainability in our brand portfolio, but also continue to keep abreast of trends in sustainable tourism and gather information to help us identify the relevance of sustainability in visitor expectations, as we aim to attract a type of responsible tourist that provides greater added value and generates a positive impact in Catalonia. We will ensure that the relevant information reaches the industry and will also continue to promote spaces for networking so we can detect needs and strengthen relations among stakeholders in the Catalan tourism ecosystem.



### III. COMMUNICATION

We will increase the volume of communication regarding our actions and progress in order to improve both as an organisation and in achieving the objectives we set ourselves to promote a sustainable tourism model. We will strengthen our capacity to publicise the key initiatives which we participate in and support and those that are particularly significant, in order to externalise our vision of sustainability in the industry.

### IV. SUPPORT

We will become a benchmark organisation for our members and clients on the road to sustainability, offering specific, targeted training for their activities, but also acting as a conduit for them to learn about and benefit from existing resources. We will ensure we have a brand portfolio consisting of companies and destinations that make Catalonia a truly sustainable destination. We will be an active agent in the transformation towards this more sustainable tourism model, supporting and helping our clients to improve. We will increase the visibility of those who integrate responsibility and sustainability in their activities and who contribute to making Catalonia a sustainable destination.

### V. POSITIONING

We will publicise Catalonia as a responsible and sustainable tourist destination, because our



©Catalan Tourist Board. Author: Cons. Prom. Tur. Alt Penedès.

companies and destinations will increasingly become truly sustainable. We will create the message that will help us position Catalonia and we will encourage coordinated actions in promoting the destinations.



# Implementation of actions by phase

## ACTIONS IN THE COHERENCE PHASE

- ACCIÓ 1.** Defining the CTB's sustainability vision and mission.
- ACCIÓ 2.** Drawing up the CTB's Code of Ethics.
- ACCIÓ 3.** Conducting internal training on sustainability and sustainable tourism.
- ACCIÓ 4.** Improving the inclusion of sustainability criteria in the procurement of goods and services.
- ACCIÓ 5.** Reviewing CTB brand portfolio sustainability criteria.

## ACTIONS IN THE IDENTIFICATION PHASE

- ACCIÓ 6.** Analysing the degree of sustainability among CTB's products.
- ACCIÓ 7.** Identifying the relevance of sustainability and sustainable tourism in generating markets.
- ACCIÓ 8.** Promoting networking spaces between and with the public and private tourism sectors.
- ACCIÓ 9.** Incorporating sustainability as a key vector in the tourism marketing think-tank.

## ACTIONS IN THE COMMUNICATION PHASE

- ACCIÓ 10.** Drawing up the Communication Plan for the CTB's sustainability actions.
- ACCIÓ 11.** Disseminating the economic, social and environmental impact of tourism in Catalonia.

## ACTIONS IN THE SUPPORT PHASE

- ACCIÓ 12.** Designing a training and support plan to improve the sustainability of clients and members.
- ACCIÓ 13.** Increasing the promotion and visibility of sustainable tourism companies and destinations.

## ACTIONS IN THE POSITIONING PHASE

- ACCIÓ 14.** Creating the message that positions Catalonia as a sustainable tourism destination.
- ACCIÓ 15.** Running campaigns to promote sustainable tourism destinations jointly with regional promotion bodies.

# Summary of the action plan

	I. COHERENCE	II. IDENTIFICATION	III. COMMUNICATION	IV. SUPPORT	V. POSITIONING
<b>AREA 1</b> Governance for organisation sustainability	<b>ACTION 1.</b> Defining the CTB's sustainability vision and mission. <b>ACTION 2.</b> Drawing up the CTB's Code of Ethics. <b>ACTION 3.</b> Internal training on sustainability and sustainable tourism. <b>ACTION 4.</b> Improving the inclusion of sustainability criteria in the procurement of goods and services.		<b>ACTION 10.</b> Communication Plan for the CTB's sustainability actions.		
<b>AREA 2</b> Governance of tourism activity and relations with the industry, with a vision of sustainability		<b>ACTION 8.</b> Promoting networking spaces between and with the public and private tourism sectors. <b>ACTION 9.</b> Incorporating sustainability as a key vector in the tourism marketing think-tank.	<b>ACTION 11.</b> Disseminating the economic, social and environmental impact of tourism in Catalonia.		<b>ACTION 15.</b> Running campaigns to promote sustainable tourism destinations jointly with regional promotion bodies.
<b>AREA 3</b> Support for and promotion of a sustainable tourism offer	<b>ACTION 5.</b> Reviewing sustainability criteria in CTB products.	<b>ACTION 6.</b> Analysing the degree of sustainability in CTB products.		<b>ACTION 12.</b> Training and support plan to improve sustainability among CTB's clients and members. <b>ACTION 13.</b> Increasing the promotion and visibility of sustainable tourism companies and destinations.	
<b>AREA 4</b> Sustainability of the tourism model through the markets		<b>ACTION 7.</b> Identifying the relevance of sustainability and sustainable tourism in generating markets.			<b>ACTION 14.</b> Creating the message that positions Catalonia as a sustainable tourism destination.

CTB associates during 2021

---



Partners during 2021

---



Main sponsors during 2021

---



