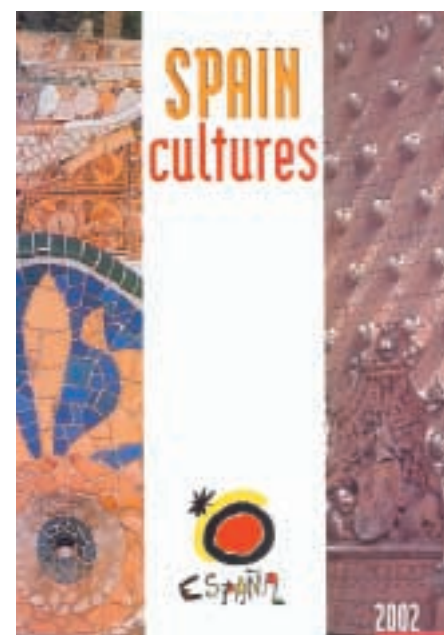
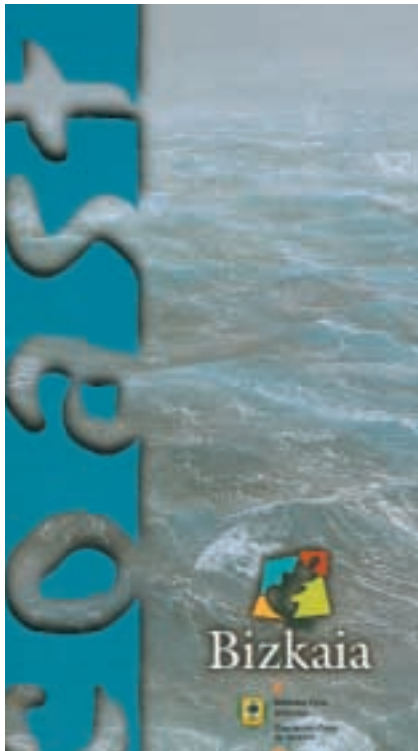


More than just 'fun in the sun'?

The marketing of Catalunya and Euskadi

According to the World Tourism Organisation, Spain is the third most visited country in the world. Traditionally, Spain's tourism offer has been seen, rather simplistically, as 'sun, sand and sangria'. It is now looking to move this image forward by improving the quality of its tourism product and promotion, at both the regional and national level. Locum consultant **Maria Fernandez Sabau** investigates the marketing of two Spanish regions, Euskadi (the Basque Country) and Catalunya (Catalonia), and the relationship of their promotional bodies with Spain's national tourism marketing agency, Tourspain. Are regional brands good for Spain? What are they promoting? And can tourists cope with multiple marketing messages?





The Spanish tourism industry has gone through significant changes in recent decades. Tourism promotion has traditionally been the responsibility of Tourspain, a department of the Ministry of Economy. However, with the establishment of Spain's 17 autonomous regions in 1978, domestic tourism responsibilities have gradually been transferred to the regions. These regions are further divided into provinces, which, while having no official mandate to promote tourism, are getting in on the act. Furthermore, at a local level, town halls retain the right to carry out tourism promotion for their own localities.

The roles and relationships between Tourspain, the regions, their provinces and local town halls are not clear, and there would appear to be a considerable amount of duplication of tourism marketing effort across the country. While Tourspain is still leading the country's overseas marketing, the regional authorities make strenuous efforts to promote their brand or brands independently (both domestically and, in some cases, overseas), and many provinces and local town halls are also promoting their own brands. This has the danger of creating considerable confusion in the market place. This paper examines the approach to tourism marketing being taken by two of Spain's most important tourism regions, and explores how their marketing meshes with both local and national activity.

Catalunya (Catalonia) and Euskadi (the Basque Country) are two historically and culturally significant regions within Spain. Both have their own official language as well as Spanish, and both are endowed with powerful political and social histories, which make them important players on the contemporary Spanish tourism scene.

Euskadi (Basque Country)

Euskadi is promoting itself as a complete regional destination with a broad and attractive tourism offer. Tourism promotion focuses on the region's strong scenic, rural and cultural offer, also highlighting Euskadi's well-deserved reputation for gastronomy, fiestas and traditions.

The Departamento de Industria, Comercio y Turismo del Gobierno Vasco (Basque Country Department for Industry, Commerce and Tourism) is responsible for the development of the regional tourism strategy, branding and promotion. It has taken a relatively traditional approach to tourism branding and marketing by dividing its offer geographically according to its provincial political boundaries - Alava, Vizcaya and Guipuzcoa - in its main promotional brochure.

However, although the individual provinces have some distinguishing features, there is, in fact, little to differentiate them in terms of their tourism offer - they all have an attractive mix of culture, heritage, and urban and rural offers. Furthermore, tourists are not typically interested in political boundaries, but are more interested in tourism activities and themes that cut across political boundaries, such as nature, heritage, culture, and food and drink.

The region has prepared a number of marketing promotions which focus on region-wide themes rather than geographic boundaries, including 'Natural Areas and Active Tourism' and 'Gastronomy'. Interestingly, however, even these

Table 2: Tourist promotion budget for Euskadi, 2002		euros
Publicity and Media Strategy		2,650,000
Fairs, workshops and fam-trips		1,100,000
Brochures and product promotion		220,000
Marketing and commercialisation support within the sector		1,300,000
Promotional activities in collaboration with other institutions		450,000
Support to modernisation and investment in tourist enterprises		3,575,000
TOTAL		9,295,000

Source: Departamento de Promocion Turistica, Euskadi, 2002

themes are presented on a province-by-province basis. The region would appear to be finding it difficult to promote itself on a truly integrated regional basis to the outside world.

This is not surprising given that, in parallel with the regional marketing promotion, the three provinces are promoting their own areas and individual characteristics independently. Each province prepares its own tourism promotion literature and has its own brand style and identity. There is no reference to the regional brand on any of the provincial marketing materials and conversely, there is also no reference to the individual provincial brand identities in the region's material. It would appear that there is little coordination between the provinces and the region, and overseas visitors to Euskadi in particular are likely to find this confusing.

This year, the region's Departamento de Industria, Comercio y Turismo has launched a quarterly tourism bulletin as part of a strategy to pull together the tourist industry in the region as a whole. The bulletin covers news in the industry, updated information about the key media and marketing campaigns being run, promotional fairs, the overall strategic tourism agenda, and helpful publications. It remains to be seen if the region and provinces will begin to work together more closely and take a more 'joined-up' approach to their tourism marketing and promotion.

Catalunya (Catalonia)

Catalunya as a region has taken an interesting approach to its tourism offer. It has attempted to move away from the traditional geographical division of the area according to political boundaries. Catalunya has four provinces, one of which is Barcelona, but the tourism offer for the region as a whole is divided into eight geographic sub-brands for purposes of tourism promotion. These eight sub-brands are:

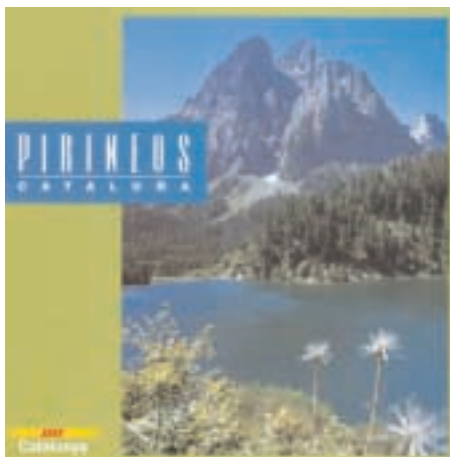
- Catalunya Central,
- Costa del Maresme,
- Costa de Garraf,
- Pirineo y prePirineo,
- Costa Brava,
- Costa Daurada,
- Barcelona,
- Tierras de Lleida.

Table 1: Turisme de Catalunya expenditure (euros)

	1999	2000	% change
Marketing	3,163,728	4,140,973	30.89
Marketing & promotion - Catalunya brand only	601	18,030	2900.00
Publications	601,012	733,235	22.00
Publicity / Advertising	1,147,933	1,760,965	53.40
Public relations	36,061	48,081	33.33
Themed product promotion (sports, culture, etc.)	825,791	949,599	14.99
Market research	384,648	390,658	1.56
Support	167,682	240,405	43.37
Commercialisation	3,095,212	3,437,789	11.07
Fairs	1,021,721	1,166,564	14.18
Workshops/ familiarisation-trips	141,238	90,152	-36.17
Tourism Promotion Centres	1,481,495	1,781,400	20.24
Promotion to foreign markets	216,364	150,253	-30.56
Support	234,395	249,420	6.41
Competitiveness	677,942	1,256,115	85.28
Marketing and commercialisation support	270,455	318,536	17.78
Competitiveness promotion	407,486	937,579	130.09
TOTAL	6,936,882	8,834,878	27.36

Source: Turisme de Catalunya, 2000





Interestingly, brands such as Pirineo y prePirineo cross more than one province. Some provinces have more than one brand, as in the case of the province of Girona, which contains Costa Brava and part of the Pirineo y prePirineo brand. Each of these sub-brands are managed by a 'Patronato', organisations set up specifically by Turisme de Catalunya, the regional government department responsible for promoting the whole of the Catalan region within Spain.

The four provinces within the region have signed up to these regional sub-brands and do not carry out their own independent tourism promotion. This has led to a much more understandable communications strategy and little duplication of marketing effort, making for a more cost-effective and cost-efficient approach.

Interestingly, however, the overarching regional brand appears to have been lost in the creation of these eight sub-brands. In recent months, Turisme de Catalunya has been rethinking its tourism role and has identified a new overarching brand for the region as a whole in support of its eight sub-brands. In April 2002, Catalunya's new regional brand and logo was launched (see page 23). Special activities are being developed by its departments of marketing, promotion and media relations. As well as running campaigns, producing publications, staging trade fairs and organising familiarisation trips for tour operators, a new website will be on-line in the near future, which will provide information about the region's tourism products and brands, and facilitate access to the sub-brands' websites. Turisme de Catalunya is also developing new holiday packages for sports enthusiasts, and promoting family travel and rural tourism.

Catalunya is the only Spanish region that has developed a network of Tourism Promotion Centres (TPCs) overseas, in the UK, France, the Nordic countries, Benelux and Eastern Europe. These TPCs provide a permanent presence for the region in its main source markets. They enable Turisme de Catalunya to gather detailed market intelligence, communicate Catalunya's branded offer to potential visitors, and deliver customer service on the ground to those planning to visit the region.

Within the Catalan region it is also worth noting the special case of Barcelona. The city of Barcelona is one of Catalunya's most prominent and popular destination brands. In order to help manage visitor inflows, it has its own dedicated marketing organism called Turisme de Barcelona. Barcelona has already become a well-known destination, attracting more than 3 million visitors in 2001. Having succeeded in attracting leisure visitors, the city is now focusing on cultural and business tourism. In the year 2000, Turisme de Barcelona and the Institut de Cultura (the culture department within the city hall) developed a long-term cultural tourism strategy for the city. The objective is to build on Barcelona's popularity and transform it into a European cultural centre. 2000 was the Year of the Contemporary Art, 2002 is the Year of Gaudi, 2003 will be the Year of Design and in 2004, Barcelona will host the Universal Forum of Cultures.

Turisme de Barcelona not only promotes the city of Barcelona overseas, but is also making a special effort to improve promotion of the city to Spanish citizens. In 2002, familiarity trips have been made to operators in other Spanish regions such as Galicia, Canarias and Euskadi.

Tourspain

Tourspain is the national tourism marketing body for Spain as a whole. Its role is to promote Spain overseas despite increasing individual efforts of the Spanish regions, some of which, like Catalunya, are carrying out their own overseas marketing. Tourspain has traditionally tried to position Spain as a country of many interesting contrasts: 'Everything under the sun'.

In recent times the role of Tourspain has become unclear due to the increasing tourism activities of the regions. As noted above, the Catalunya

region has started to market itself strongly overseas independently of Tourspain. At the same time, Tourspain has traditionally prepared promotional materials for each province in Spain, which may also be promoting themselves individually like those in Euskadi. There would appear to be duplication of effort between the centre, regions and provinces.

From January 2002, coinciding with Salamanca 2002, European Capital of Culture, and Spain's presidency of the EU, the emphasis for Tourspain has been placed more on cultural tourism. There is a concerted attempt to depict Spain as a country rich in history, tradition and culture in a two-year programme, until 2004. After all, it is home to some of the world's most impressive art museums (Museo del Prado and Museo Thyssen-Bornemisza), hosts international art collections (Guggenheim), has produced some of the most important artists of the twentieth century (Dali, Picasso) and has world-famous architects (Calatrava, Moneo), musicians and fashion designers.

In line with this new strategy and in collaboration with the Ministerio de Asuntos Exteriores (Spanish Foreign Office), the Spanish Embassies overseas are busy developing cultural agendas. Their objective is to change the image of Spain in foreign visitors' minds before they embark upon holidays to Spain. The Spanish Embassy in London, for example, is hosting a series of modern art exhibitions, modern dance events, and music concerts featuring works by nineteenth-century Spanish composers. Next year's programme of events at the Embassy includes exhibitions on modern Spanish design and El Greco. How this national campaign to promote the cultural offer of Spain will filter down to regional and more local tourism promotion is yet to be seen.

Tourspain has also launched a new and impressive website, in an attempt to build its international marketing strategy. This long-awaited tool has been designed to help anyone planning to visit Spain, be they first-time or regular visitors. It includes an extensive database describing the main cities, towns and small hidden villages in Spain, and provides information on places of interest, accommodation and transport. Tourspain has added direct links to the regions' own websites, which should lead to a productive relationship between national and regional tourism marketing.

Spain:	www.tourspain.es
Euskadi:	www.euskadi.net
Catalunya:	www.cbava.es
	www.costadaurada.org
	www.barcelonturisme.com
	www.lleidatur.es
	www.aran.org
	www.ccgarraf.es
	www.ccmargesme.es/turisme

It is apparent that the introduction of Spain's autonomous regions in the late 1970s had an enormous impact on the country's tourism marketing. At national level, Tourspain has yet to establish a coherent partnership strategy with the regions and the provinces where each element is effectively integrated and avoids duplication of effort and costs. The regions, meanwhile, have to articulate their marketing efforts with Tourspain and their constituent provinces and town halls. At a more local level, Tourspain and the individual provinces have to avoid the duplication that exists when provinces wish to promote their own offer.

Tourspain's new website perhaps reflects the realisation of the need for effective integration. It will be interesting to see how one of the world's great tourism brands will be delivered for the future.

