



CRUISE ACTIVITY IN BARCELONA

Impact on the Catalan economy and
socioeconomic profile of cruise passengers
(2014)



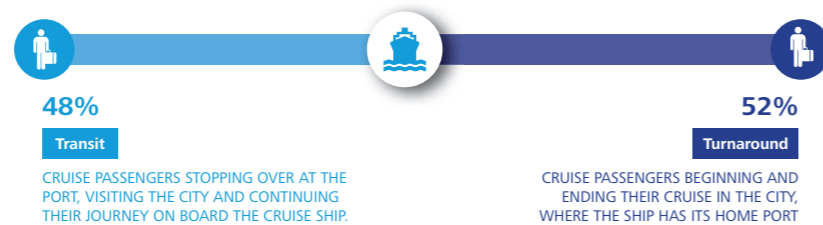
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1. Introduction

1.1 Context

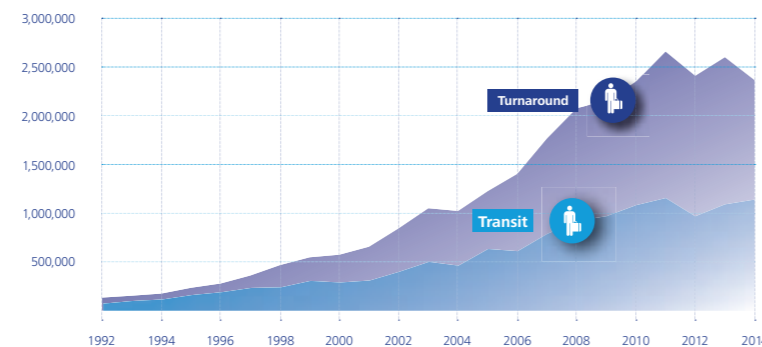
Cruise activity is a dynamic element for tourism and for the economy of cities like Barcelona. With 2.5 million cruise passengers per year, Barcelona has become the leading cruise port in Europe and the Mediterranean and the fourth cruise port worldwide. Barcelona stands out for its role as a turnaround port (the site where all the operations for the start and end of the cruise take place).

TYPE ACCORDING TO CRUISE OPERATIONS AT THE PORT OF BARCELONA (2014)



The cruise sector has expanded greatly in our city over the last 20 years. The 1992 Olympic Games placed Barcelona on the global tourist map, leading to the arrival of the first cruise ships in the city. However, the great boost to cruise activity in the city came in 2001.

PROGRESSION OF CRUISER TRAFFIC AT THE PORT OF BARCELONA (1992-2014)



1.2 Purpose of the study

The study, commissioned by the Port of Barcelona and Turisme de Barcelona, consists of two parts. The first, conducted by the University of Barcelona, sets out to analyse the impact of the cruise activity generated by the Port of Barcelona in the city and throughout Catalonia, using 2014 data. The report calculates the economic impact of the cruise sector through its contribution to Gross Domestic Product (GDP), employment, labour income and tax income. It also assesses the catalytic effects on the economy.

The second, conducted by the Instituto DYM, focuses on the study on cruise passenger profiles and analyses the demographic characteristics of cruise passengers, types of cruise and their relationship with the city in general. The study was drawn up on the basis of surveys made with cruise passengers in the Port of Barcelona itself.

BARCELONA IS THE LEADING CRUISE PORT IN EUROPE AND THE MEDITERRANEAN AND THE FOURTH CRUISE PORT WORLDWIDE

BARCELONA RECEIVES ABOUT 800 STOPOVERS PER YEAR AND ITS CRUISE PASSENGERS REPRESENT 31% OF THE TOTAL FOR SPAIN

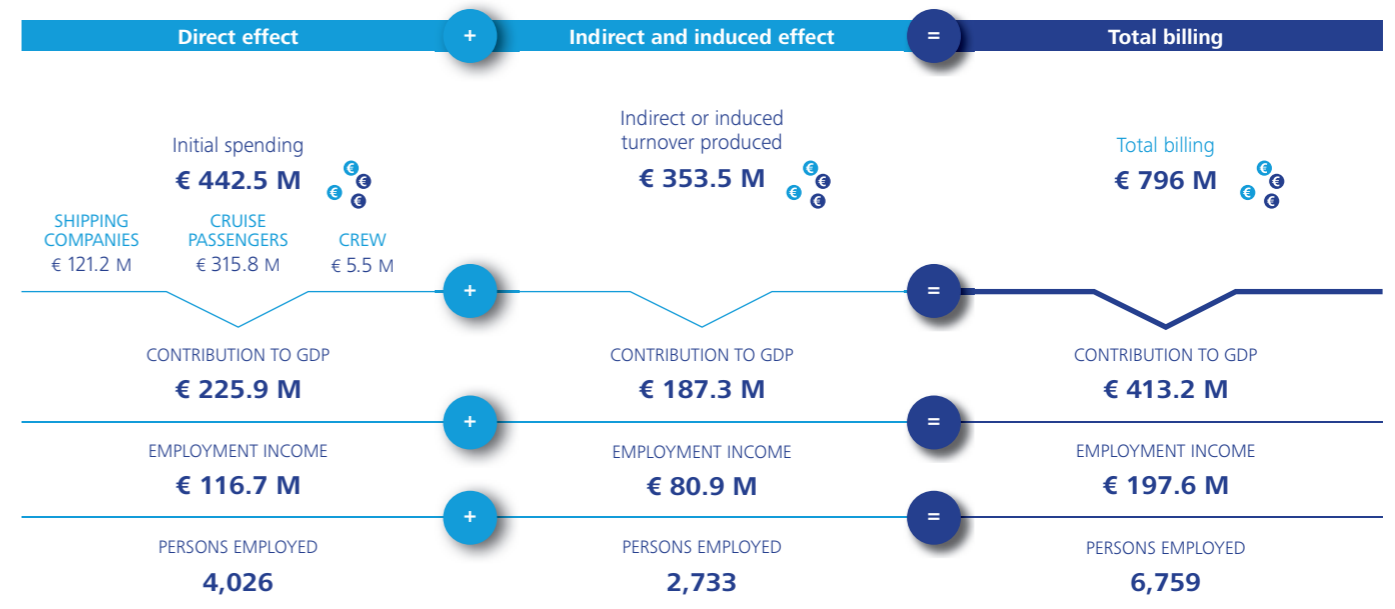
2. Economic impact of cruise activity at the Port of Barcelona

2.1 Overall results

The study by the University of Barcelona shows that cruise activity in Barcelona generates total turnover of € 796 million, contributes € 413.2 million a year to Catalonia's Gross Domestic Product (GDP) and helps to maintain 6,759 jobs.

Direct expenditure arising from cruise activities amounts to € 442.5 million a year, split between three main spending agents: shipping companies (121.2 million), cruise passengers (315.8 million) and crews (5.5 million). This initial expenditure generates an indirect and induced turnover of € 353.5 million, which puts the total turnover of the cruise activity at € 796 million. It also generates income of € 152 million in State and regional taxes and tourist tax.

ECONOMIC IMPACT OF CRUISE ACTIVITY AT THE PORT OF BARCELONA: OVERALL RESULTS



CRUISE ACTIVITY AT THE PORT OF BARCELONA CONTRIBUTES € 413.2 MILLION TO CATALUNYA'S GDP AND PROVIDES 6,759 JOBS

Tax revenue generated
STATE AND REGIONAL TAXES
€ 150.8 M
TOURISM TAX
€ 844,643

2.2 Impact on the city of Barcelona

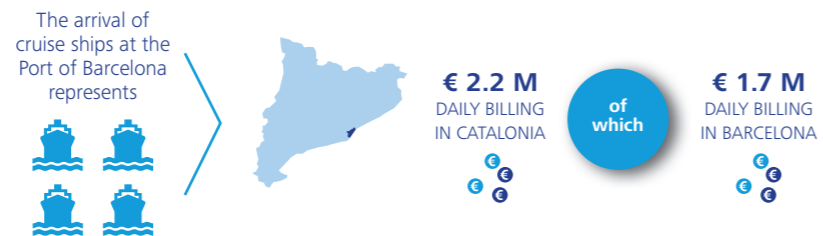
WHAT STAYS IN BARCELONA?



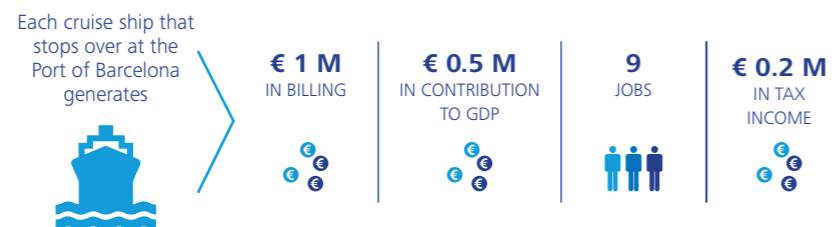
75% OF THE TOTAL EFFECT OF CRUISE ACTIVITY STAYS IN THE CITY OF BARCELONA

2.3 Key figures

ECONOMIC IMPACT PER DAY

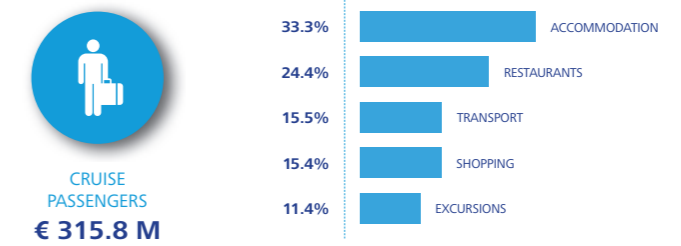


ECONOMIC IMPACT PER CRUISE SHIP

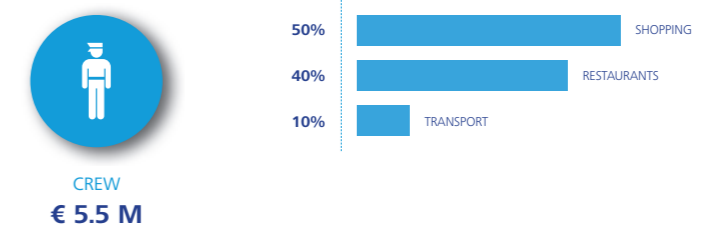
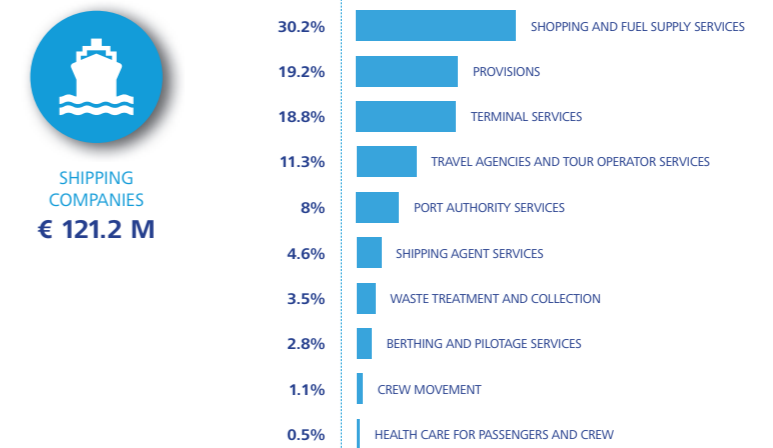


CRUISES REPRESENT A DAILY BILLING IN CATALUNYA OF € 2.2 MILLION

2.4 Distribution of initial spending from cruise activity (by spending agent)



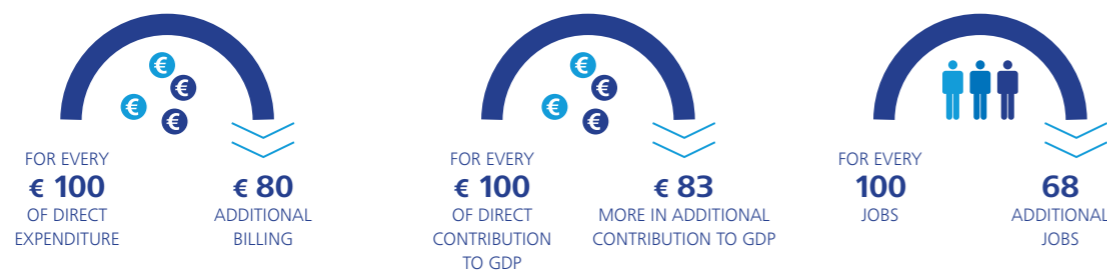
CRUISE PASSENGERS, SHIPPING COMPANIES AND CREWS ARE THE MAIN SPENDING AGENTS OF CRUISE ACTIVITY



2.5 Multiplier effects

The multiplier effects arising from cruise activity almost double the economic impact attributed to the three main spending agents. € 80 are generated in additional indirect and induced turnover for every € 100 of direct expenditure; every € 100 of GDP generated directly creates an additional € 83 of GDP; there are 68 more jobs created for every 100 direct employees.

MULTIPLIER EFFECTS OF CRUISE ACTIVITY AT THE PORT OF BARCELONA



CRUISES DO NOT ONLY BENEFIT THE TOURISM SECTOR

The cruise sector does not benefit only typical tourist activities, but also generates significant positive effects for other sectors. This can be seen in the distribution of jobs and billing activity caused by cruise activity.

CROSS-CUTTING EFFECTS OF CRUISE ACTIVITY: JOB CREATION AND BILLING BY SECTOR



Effects on tourism sectors

Accommodation services | Catering services | Retail | Passenger land transport | Travel agencies and tour operators



Effects on other sectors (non-tourism)

Storage and transport-related activities | Manufacture of food products | Metalworking industry | Waste management and sanitation services | Medical services | Other sectors



OF THE JOBS CREATED, 2,764 ARE IN OTHER SECTORS SUCH AS LOGISTICS, FOOD OR CHEMICALS

CRUISE ACTIVITY IS CRUCIAL FOR CREATING AND MAINTAINING INTERNATIONAL AIR ROUTES

80% OF EMBARKING PASSENGERS USE THE AIRPORT

2.6 Catalyst effects

• DYNAMISING EFFECT FOR BARCELONA-EL PRAT AIRPORT

The cruise traffic has increased Barcelona Airport's intercontinental connections. The importance of Barcelona as a home port and the fact that 80% of embarking passengers arrive by plane has been crucial for the establishment and maintenance of international routes. Air Canada, American Airlines and Delta Air Lines are some of the cruise market-oriented companies that have consolidated their presence in Barcelona Airport.

In 2014 cruises generated revenue of € 21.8 million directly at Barcelona Airport, contributing € 9.5 million directly to GDP at and generating 80 direct jobs. This direct effect causes multiplier effects throughout the economy, which translate into € 39.1 million of total billing, a total GDP contribution of € 18 million and 198 jobs in Catalonia.¹

IMPACT OF CRUISE ACTIVITY AT BARCELONA AIRPORT



• EFFECTS ON LAND TRANSPORT

The cruise business also has important effects on the land transport of passengers, since it represents a stable and continuous demand throughout the year for all branches of the sector (taxi, bus, car hire, etc.) and makes it possible to sustain the activity and jobs of small companies in the sector.

IMPACT OF CRUISE ACTIVITY ON PASSENGER LAND TRANSPORT



¹ DOES NOT INCLUDE ECONOMIC ACTIVITY RELATED TO EXTERNAL COMPANIES LINKED TO AIRPORT SERVICES (AIRLINES, SHOPS, PARKING, CAR RENTAL, ETC.).

• GENERATION OF NEW INVESTMENTS

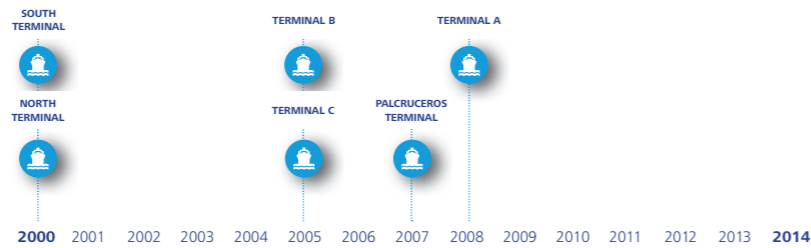
Between 2000 and 2014 the Port of Barcelona directly invested € 109 million in infrastructure for cruise ships. 86% of this investment is private. The Port has six cruise terminals, with a seventh coming on stream in 2018, which represents an investment of € 30 million.

The importance of Barcelona as a turnaround port has led several shipping companies and other businesses in the sector to locate their head offices in the city.

The stability and good prospects for cruise activity at the Port of Barcelona generate and consolidate new businesses and attract new investments.

THE ROLE OF BARCELONA AS A TURNAROUND PORT ENCOURAGES INTERNATIONAL AIRPORT CONNECTIONS AND ATTRACTS INVESTMENTS

CRUISE INFRASTRUCTURE INVESTMENTS IN THE PORT OF BARCELONA (2000-2014)



THE STABILITY AND GOOD PROSPECTS FOR CRUISE ACTIVITY GENERATE AND CONSOLIDATE NEW BUSINESS

3. Socioeconomic profile of cruise passengers

3.1 Socio-demographic characteristics of cruise passengers

Data from the Instituto DYM study show that cruise passengers arriving in Barcelona usually travel with their partner and their average age is 50. This type of visitor has a high purchasing power.

GENDER

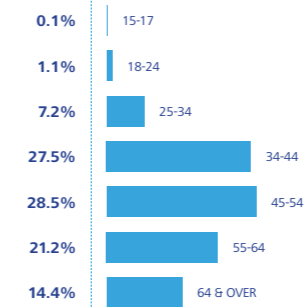


56.4% MEN



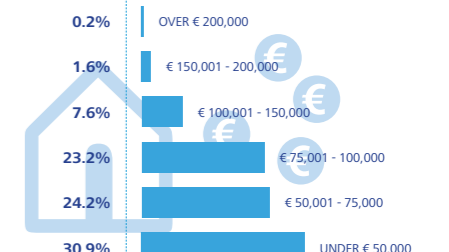
43.6% WOMEN

AGE



AVERAGE AGE
50

ANNUAL HOUSEHOLD INCOME

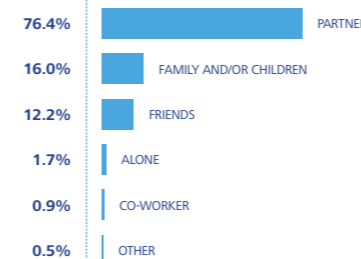


AVERAGE INCOME
€ 70,634
Approximate average calculated from the midpoint of each range. Excludes DK/NA

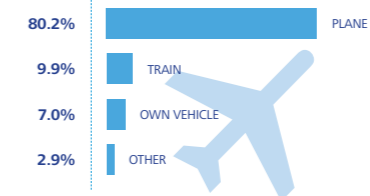
3.2 Cruise passengers and cruises

One of the main reasons for choosing a cruise is the itinerary or destinations that it includes. Most cruise passengers embarking in Barcelona arrive in the city by plane (80.2%). There are several types of cruise, depending on price and service: standard, premium or luxury.

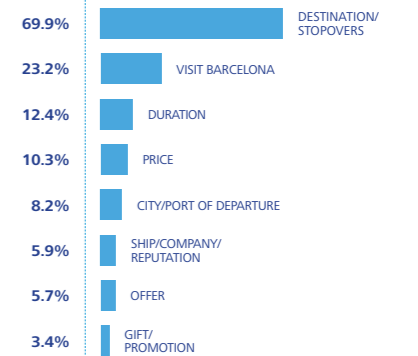
ACCOMPANYING PERSONS
Multiple choice



TRANSPORT USED TO GET TO BARCELONA
Data on embarking passengers



REASONS FOR CHOOSING A CRUISE
Data on cruise in turnaround



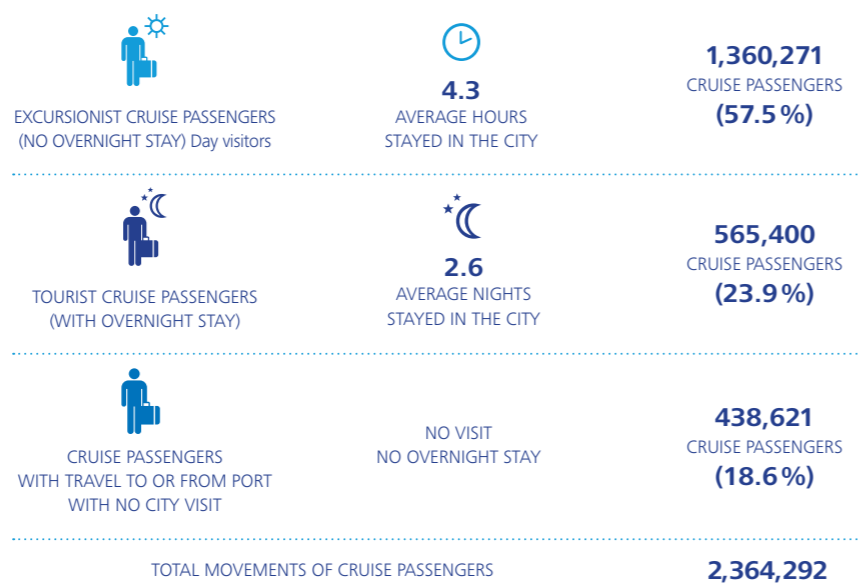
AVERAGE COST OF THE TOURISM/CRUISE PACKAGE



3.3 Cruise passengers and their relationship with the city

In 2014 the Port of Barcelona recorded 2,364,292 cruise passenger movements. Those who visit the city without an overnight stay spend an average of 4.3 hours in Barcelona and represent 57.5% of passenger movements (1,360,271 people). Passengers in turnaround (who start and end their itinerary in Barcelona) who stay the night in the city remain an average of 2.6 nights and account for 24% of cruise passenger movements (565,400 people). The remaining 18.6% corresponds to passengers that embark and/or disembark directly without an overnight stay and do not visit the city (438,621 people).

TYPE OF CRUISE PASSENGERS DEPENDING ON THEIR RELATIONSHIP WITH THE CITY



CRUISE PASSENGERS PROVIDE HIGH-SPENDING TOURISM IN THE CITY

HIGH-SPENDING TOURISM: DAILY LEVEL OF EXPENDITURE OF CRUISE PASSENGERS IN THE CITY



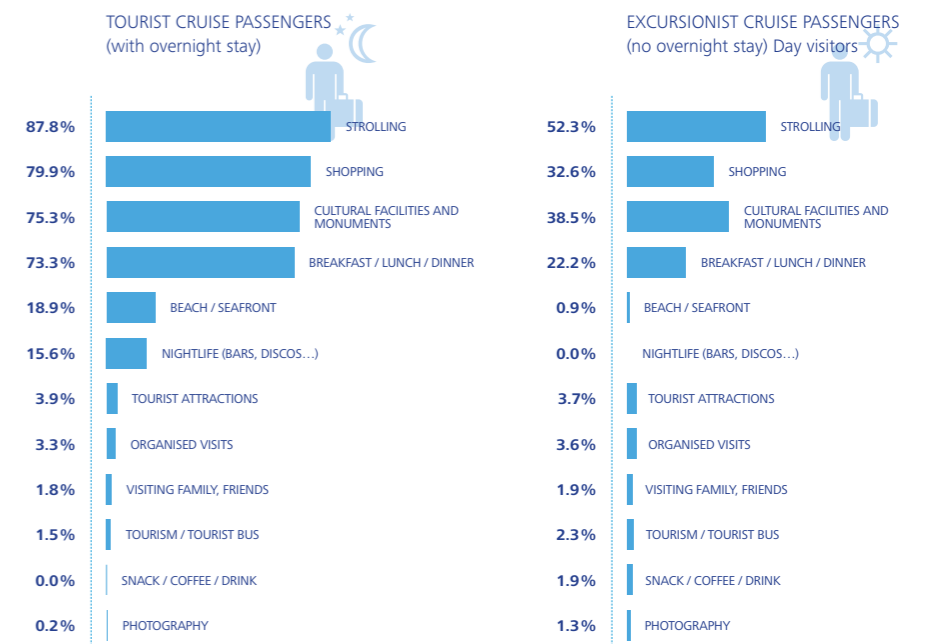
COMPARISON: CRUISE PASSENGERS AND CITY HOLIDAY TOURISTS
All costs include accommodation



BARCELONA'S CONSOLIDATION AS A TURNAROUND PORT HELPS TO ATTRACT CRUISE PASSENGERS WHO SPEND MORE TIME IN THE CITY AND SPEND MORE

Cruise passengers arriving in Barcelona want to get to know the city, go shopping, visit cultural sites and enjoy the food. The most visited sites are the Ramblas, the Gothic Quarter, Eixample and the seafront. Cruise passengers are good prescribers of Barcelona: more than 90% want to return and 99.7% recommend the city to friends and acquaintances.

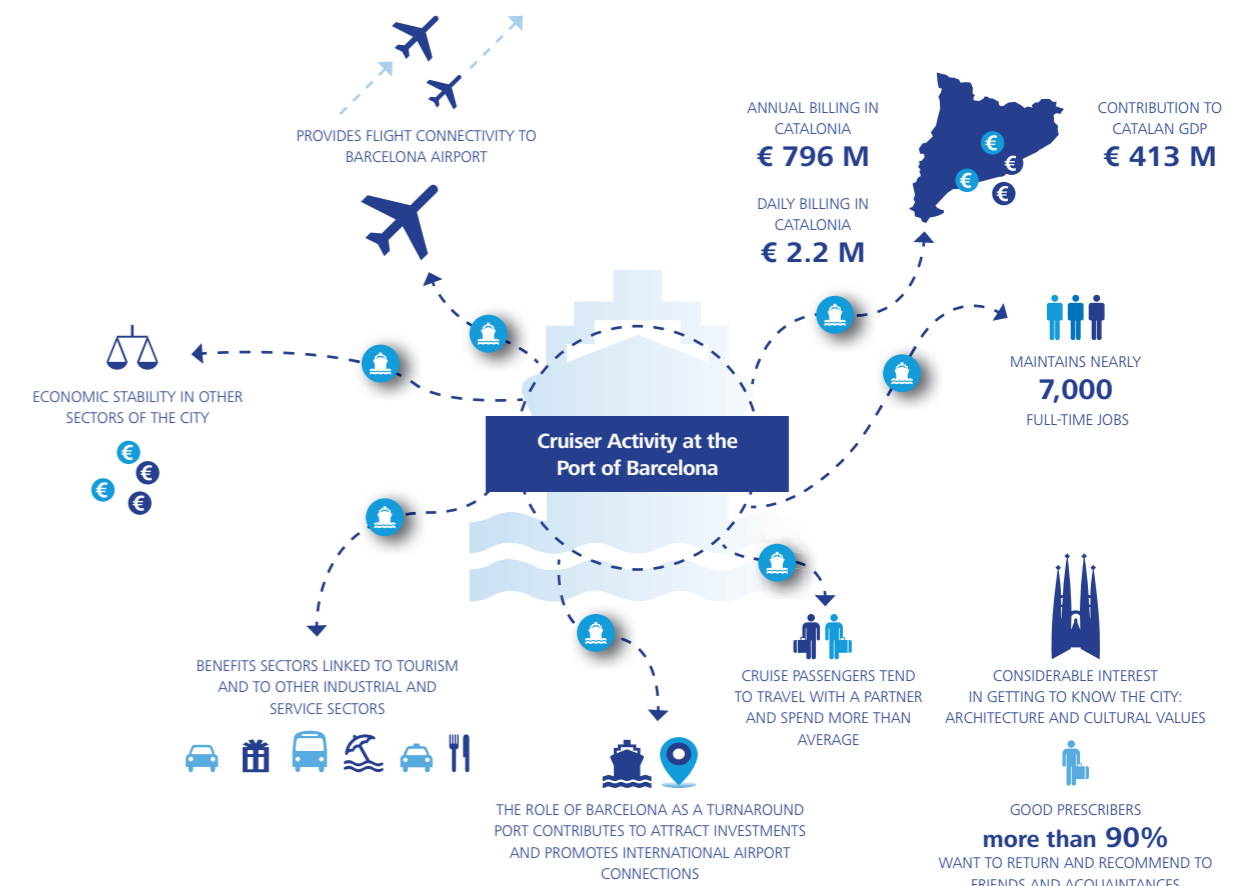
ACTIVITIES BY CRUISE PASSENGERS IN BARCELONA



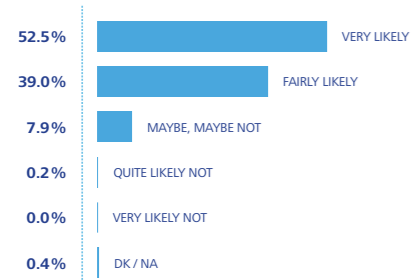
4. Main conclusions

Cruiser activity at the Port of Barcelona:

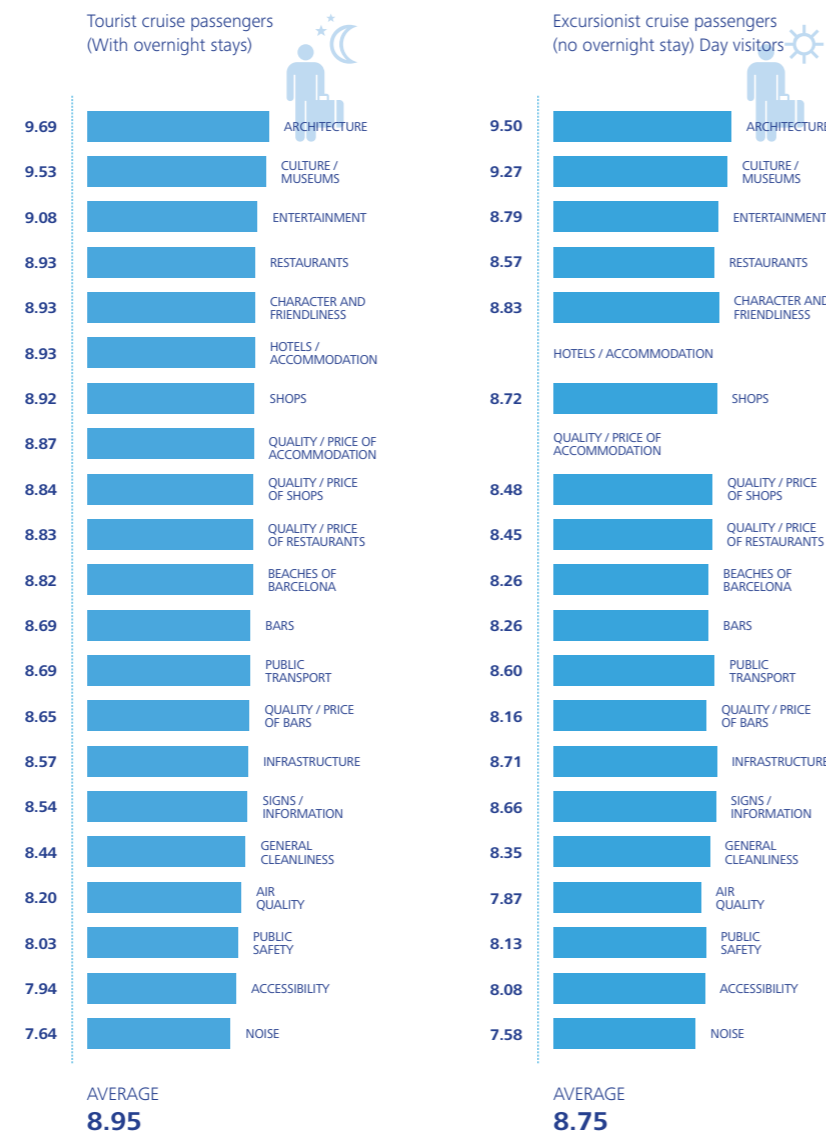
- Generates annual turnover of € 796 million in Catalonia (2.2 million each day).
- Contributes € 413 million to Catalonia's GDP.
- Generates € 152 million in tax revenue.
- Maintains nearly 7,000 full-time jobs.
- Provides flight connectivity to Barcelona airport.
- Generates economic stability and encourages new businesses in other sectors of the city.
- Benefits sectors linked to tourism and to other industrial and service sectors.
- Cruise-goers usually travel with a partner, are very interested in getting to know the city and are good prescribers (more than 90% want to return and recommend the city to friends and acquaintances).
- Cruise-goers that spend the night in Barcelona spend more money in the city than other holiday tourists and value the culture and architecture offered by the city.
- Barcelona's consolidation as a turnaround port increases the quantitative impact (higher spending by the various agents) and qualitative effects (investment attraction and catalyst effects).



INTEND TO RETURN TO BARCELONA ON HOLIDAY IN THE COMING YEARS



ASSESSMENT ASPECTS OF BARCELONA (SCALE FROM 1 TO 10)



91.5% OF CRUISE PASSENGERS INTENDS TO RETURN TO BARCELONA

CRUISE PASSENGERS ARE GOOD PRESCRIBERS OF THE CITY: 99.7% RECOMMEND BARCELONA AS A TOURIST DESTINATION

89% OF CRUISE PASSENGERS' EXPECTATIONS OF THE CITY WERE MET

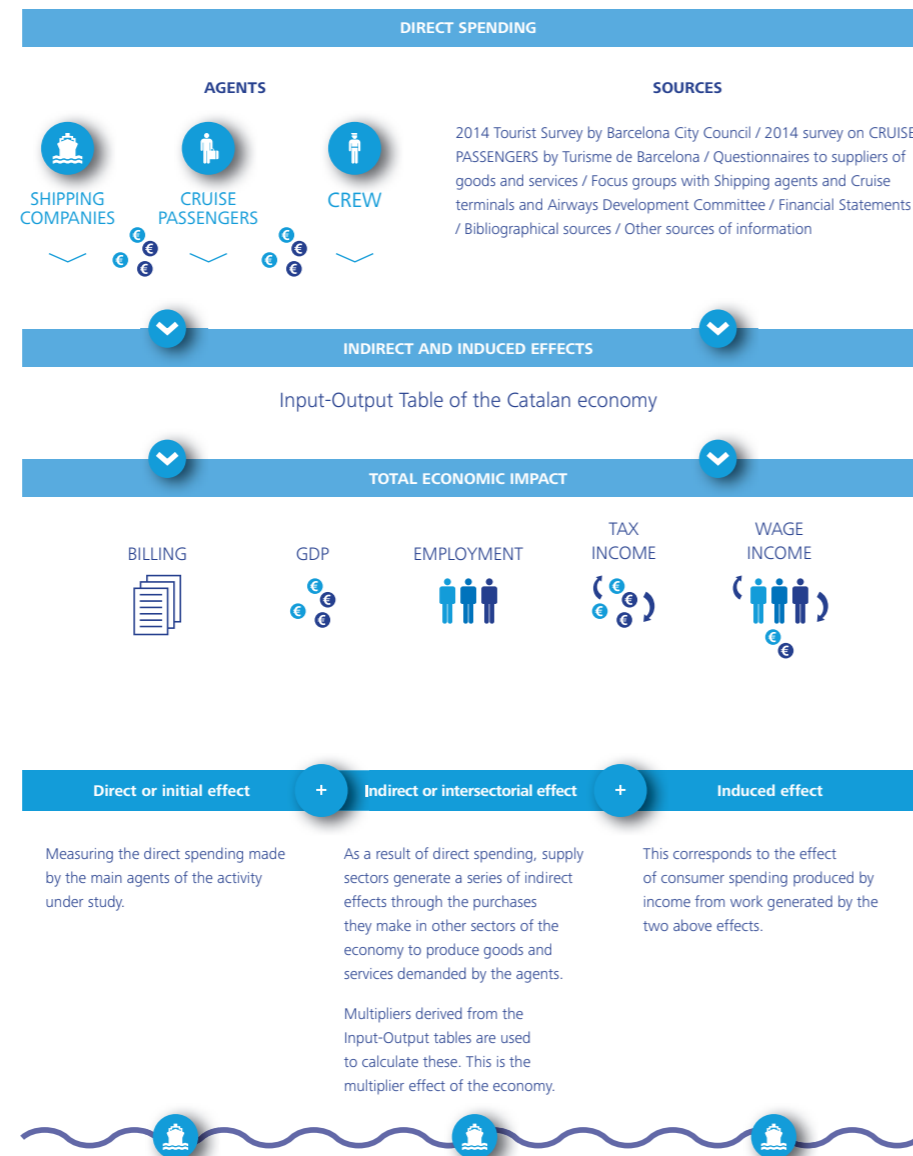
5. Methodology of the study on the impact of cruise activity

The study, prepared by the University of Barcelona, calculated the total economic impact generated by cruise activity of the Port of Barcelona from its direct, indirect and induced effects.

The calculation was based upon the quantification of spending generated by each of the main groups involved in cruise activity, compiled from information provided by shipping companies and their suppliers, cruise passengers, Barcelona airport and the various associations related to passenger transport.

Specific multipliers from the input-output tables of the Catalan economy, produced by Idescat, were used to translate this spending in terms of impact on GDP, employment and tax income.

CALCULATION OF TOTAL IMPACT OF THE PORT'S CRUISE ACTIVITY



6. Methodology of the study on the profile of cruise passengers

Study on the profile of cruise passengers analyses the demographic characteristics of cruise passengers, type of cruise and, generally speaking, their relationship with the city. The study was drawn up on the basis of surveys made on cruise passengers in the Port of Barcelona itself. Produced by the Instituto DYM and commissioned by Turisme de Barcelona.

UNIVERSE
Individuals of 15 or older, beginning or ending a cruise, or stopping over, at the Port of Barcelona
GEOGRAPHICAL AREA
Cruise Terminals of the Port of Barcelona (A, B, C, North, South) and Palacruceros (D)
SAMPLE
3,130 people
ASSOCIATED SAMPLING ERROR
+/- 1.79%
TYPE OF SAMPLE
Stratified according to type of cruise passengers depending on the type of stopover (embarking, disembarking and transit) and cruise category (standard, premium and luxury)
TYPE OF INTERVIEW
Computer-assisted personal interview, CAPI system
COMPLETION OF FIELD WORK
March - December 2014
DATA PROCESSING
The results are weighted and applied to the universe of cruise passengers at the Port of Barcelona in 2014 according to:
- Type of cruise passenger, according to type of stopover: embarking (615,377 cruise passengers, 26%), disembarking (607,110 cruise passengers, 25.7%) and in transit (1,141,805 cruise passengers, 48.3%)
- Category of the cruise, using 2014 cruise forecast provided by Turisme de Barcelona: standard (1,993,088, 84.3%), premium (291,501, 12.3%) and luxury (79,703, 3.4%)



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Studies made by AQR-Lab (University of Barcelona) and Instituto DYM






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