

SALOU MUNICIPAL TOURIST BOARD

2014 ACTION PLAN

1. Presentation

During 2013, the Salou Municipal Tourist Board has developed an extremely important framework agreement between the companies in the tourist sector and the public administration.

After the entry into force of Law 5/2012, which establishes that 30% of the revenue generated by the tax on overnight stays must be transferred to the pertinent city council, from the initiative of local businesses with the decision to collaborate both by the Salou City Council and the Tourist Board, an understanding was reached to make all of these resources available to the Tourist Board in order to increase tourist promotion actions.

Thus, on 13 August the agreement was drafted between the Business Federation of Restaurants, Hotels and Tourism for the Province of Tarragona, as the leading example and unifying entity of tourist businesses, the Salou City Council and the Salou Municipal Tourist Board to allocate the full amount of 30% from the tourist tax collected in Salou to the budget of the Tourist Board, with an equal commitment of resources from the City Council to handle the majority of ordinary expenses for the Board's operations.

This new situation also entailed a new relationship and positioning of businesses in decision taking within the Tourist Board's governing bodies, and it carried out a renovation, restructuring and expansion of representation in this sector. This was also partly due to the change of representatives in some associations.

The Board of Directors is the highest governing body of the Salou Tourist Board, in which all political groups from the Salou City Council are represented, as well as representatives from the municipalities' and Port Aventura's tourist associations.

During 2013, the representatives of the Salou, Cambrils and La Pineda Hotel Association also changed and were expanded to two, due to Federation's change in chairman, which also occurred with the representative of the Travel Agency Association, whose representative was changed in the last elections. Port Aventura has appointed a new representative and has also added a representative from the city's commercial sector, an important element within the tourist offering.

With respect to the Promotion Committee, which was created previously, it has taken on great relevance in 2013 in monitoring the current tourism situation, providing support in decision taking... It has also incorporated some of these changes, primarily with regard to hotel and travel agency representatives and the establishment of the participation of the top representatives from Port Aventura, making its findings successful in materialising the current public-private understanding.

2. Diagnostic

DYNAMIC OF TOURISM GENERATING MARKETS OF SALOU, 2014 TRENDS

This document is a brief presentation of the current trends in the main markets generating tourism in Salou.

The data currently available for 2013 (accumulated to 31 October) are:

Distribution of overnight stays by nationalities

Period: January to October 2013

Spain: 36%

UK: 19%

Russia: 17%

France: 12%

Holland: 5%

Ireland: 2%

Belgium: 2%

Germany: 1%

Other: 3%

Spanish market

The Spanish market continues to be Salou's most important market, despite the significant year-on-year reduction (4%). A slight backslide was also seen in student tourism in the spring, and senior tourism.

Trends

- some tendency towards stabilisation
- great sensitivity to the PRICE factor
- market in which there is progressively less intermediation

United Kingdom and Irish market

The United Kingdom continues to be the foreign market that most visits Salou. Moreover, Salou continues to be the top destination for the Irish market, which is eminently family oriented.

With regard to these markets' flights to the Reus Airport, in summer season we have:

- Ryanair: 29 flights per week
- Thomson Airways: 17 flights per week
- Thomas Cook: 12 flights per week
- Jet2: 5 flights per week

We must also add that the Barcelona Airport is an important entry point for British tourism, which later comes to the Costa Daurada and Salou.

Trends

- slight increase in arrivals, primarily those coming from the United Kingdom
- increase in the number of holiday periods, with length of stays dropping, but an increase in the weekend getaway phenomenon
- Jet2Holidays plans to increase the number of flights to Reus and Barcelona for the upcoming 2014 season from Glasgow and Leeds

Russian market

Russian tourism in Salou has increased year-on-year (from 13% to 17%), placing it as the third generating market, with a year-on-year increase of 27%.

This market has important connections via charter companies and, more recently, flights with other formulas have also increased: from Russia: Vueling, Transaero, Urals; from the Ukraine: launch of Vueling; and from Byelorussia: launch of Vueling.

This market has a large amount of tour operators (80%).

Trends

- Increase in online bookings, although very minority still
- The tourism is still eminently families, with an age range between 25 and 45
- New origins are opening up in different regions and republics, both in the Russian Federation and the Ukraine
- They are interested in the cultural, shopping and cuisine offerings

French market

The main characteristic of this fourth generating market for Salou, the French, is that it has very little intermediation. On the one hand, a significant percent of end consumers use shopping centres to book their holidays and, on the other, turn to online travel agencies instead of traditional ones. The internet is the top sales channel in France, and they end up comparing six or more websites or agencies before taking a decision.

On characteristic trait is that they frequently use their own transport to reach our territory. However, an increase in train transport is expected.

Trends

- Existence of a special intermediary type: in first place through hypermarkets and, at a distant second, company committees, mutual insurance firms, associations and gift packages
- The normal transport in high season and school holiday season continues to be with their own vehicles. For pensioner groups, transport tends to be by coach

Benelux market

In general, the Benelux market has very loyal tourists, who repeat their holidays in Salou. While Belgium tourists mainly stay in hotels, Dutch tourists prefer campgrounds and also apartment rentals.

In the last season there was a drop in the market, caused by consumer mistrust due to economic uncertainty.

For Dutch tourists, the internet is a source of information that is much more important than tour operators and travel agencies.

For Belgian tourists, using the internet is not such a priority. One of every three travellers look at catalogues before going on holiday.

Trends

- Last minute bookings caused by the uncertain economic situation
- General impression of the sector is that consumption will grow and, therefore, holidays as well

German market

Although Germany is a very minority market for Salou, it is a financially stable country with a large number of inhabitants that could take on importance. The majority of tourists travel by road.

The flights that currently land in Reus arrive from:

- Bremen
- Düsseldorf (Weeze)
- Frankfurt Hahn

Intermediation places Germany at 50% organised tours and 50% individual.

Trends

- Market for whom the quality-price ratio is important and that compares destinations
- They seek a combination of beach and activity: active tourism
- They plan their holidays in advance

Netherlands market

Very minority market for Salou, but which could be attracted through specialisations in our destination (golf, sport-based stays and events). The top golf customer in Salou is Scandinavian.

The countries of the Netherlands are almost unaffected by the economic recession and have a high spending level.

Internet portals and search engines gain weight when making bookings.

The majority transport is the airplane.

Trends

- There is a decentralisation of flights, which are distributed throughout the land, not only from the capitals
- A change is detected in bookings: bookings in low season are increasing, especially golf tourism

3. Strategic lines

The 2014 Action Plan draws inspiration from the strategic lines set by the Promotion Committee, which are specified in these core areas:

With respect to timing

- Make a special effort at the beginning and end of the season and increase the number of tourists as much as possible during the four months of high season.

With regard to collaboration

- Work with the private sector, especially Port Aventura, and with other administrations

With regard to markets

- Continue to be leaders in the Russian, Baltic countries, Byelorussia and the Ukraine. As an emerging market, we have a special interest in Kazakhstan. Continue promotion in the traditional markets: Spanish, British and French.
- Work to recover the German market.
- Design co-marketing actions with tour operators and opinion leaders.

With regard to products

- Strengthen Salou's leadership as a beach and sun tourism destination for families.
- Maximise the Sport Tourism Destination by promoting football, golf and nautical activities.
- Use cultural, historic, culinary, landscape and other resources we have in our surroundings to add them to our offering.
- Give value to the municipality's cultural heritage, such as Barenys, linking it to the activities in the Tarraco Viva Festival and the Roman cultural circuit.

With regard to communications

- Give support to the Salou brand within Spain and internationally, starting from a proper diagnostic of target markets and publics.
- Emphasise digital tools in communications actions to heed general market trends.
- Establish channels of communication with the end clients, particularly in generating markets.

4. Description of actions

- Do actions to promote low season primarily at the beginning and end of the high season.
- Develop the Trade Fair Plan established by national, state and international markets.
- Develop the Promotion Activity Plan.
- Develop the established marketing and communication agreements, and attend the fairs and promotions agreed with the Tourism Board of the Tarragona Regional Council, the Catalan Tourist Agency, the tourist board of the 'alliance', Port Aventura, the business sector and its associations.
- Collaborate on the initiatives and actions of the Salou business sector and its associations.
- Establish agreements with marketing, retail and wholesale channels to propagate the tourist destination and its products, according to the market and its customers' profiles, primarily in priority markets.
- Develop a dissemination campaign via online and offline advertising.
- Produce an image and brand campaign for the destination for the 2014 promotion, which is adapted to different needs.
- Define a valuation project for Barenys, linking it to the Tarraco Viva Festival.
- Strengthen the dissemination of the *Salou, Europe's Beach* brand at national, state and European levels.
- Consolidate and develop the certification as Sport Tourism Destination (STP).
- Participate and promote GOLF product actions, such as the PGA and other initiatives.
- Develop actions to provide incentives for the GETAWAY product in the proximity market.
- Maximise visits by tourist professionals (fan, press and blog trips) to the destination, and product materials they will be interested in.
- Participate in promotional actions during the stays in Salou of groups with special interests, primarily the receiving companies at the destination.

- Participate in promoting the Reus Airport via the agreement in force for 2014, by doing comprehensive follow-through.
- Support the Costa Daurada Tourist Observatory.
- Support the Costa Daurada Nautical Station.
- Publicise the activities and actions carried out at the destination.
- Participate in the holding of the Rally RACC Costa Daurada and in actions projected to have great interest for Salou.
- Publish a book on Salou to show the city as a sun and beach destination to opinion leaders and prestigious photographers.
- Manage and participate in quality systems and certifications of interest, approaching our commitment to quality.
- Comply with the implementation and operation phases of the new Salou tourist portal.
- Activate the operation and consolidate the profiles for the destination on online social networks and 2.0 environment established.
- Explore new digital applications and/or online marketing products.
- Produce the technical materials for promotion and information needed to carry out these promotion actions.
- Modernise the Board's advertising mediums, information totems and spaces and the Trenet (little tourist train) infrastructure.
- Do actions to increase loyalty.
- Attend to requests for information and carry out tourist guidance tasks.

Appendix I

2014 TRADE FAIR PLAN

JANUARY

VAKANTIEBEURS - Utrecht (Holland) from 8 to 11 January

- Professional and general public fair
- Participation at the Costa Daurada display
- Special Salou brochure with the Solmar tour operator

HOLIDAY WORLD - Belfast (Northern Ireland) from 17 to 19 January

- Professional and general public fair
- Participation with display shared with Port Aventura

HOLIDAY WORLD - Dublin (Ireland) from 25 to 27 January

- Professional and general public fair
- Participation with display shared with Cambrils, at the stand of the *Spanish Tourism Office*

FITUR - Madrid (Spain) from 22 January to 26 February

- Professional and general public fair
- Participation in shared space with: Cambrils, Reus, Vila-seca/La Pineda and Port Aventura (at the stand of the Catalan Tourist Agency)

FEBRUARY

HOLIDAY FAIR – Brussels (Belgium) from 6 to 10 February

- Fair open to the general public
- Participation with display shared with: Cambrils, at the stand of the *Spanish Tourism Office*

NAVARTUR - Pamplona (Spain) from 21 to 23 February

- Fair open to the general public
- Participation with joint display shared with the Costa Daurada Tourist Board, as part of the promotion agreement

MARCH

ITB - Berlin (Germany) from 5 to 9 March

- Professional fair open to the general public
- Participation with joint display shared with the Costa Daurada Tourist Board, as part of the promotion agreement

SEVATUR - San Sebastian (Spain) from 15 to 17 March

- Fair open to the general public
- Participation with joint display shared with the Costa Daurada Tourist Board, as part of the promotion agreement

INTOURMARKET - Moscow (Russia) from 15 to 18 March

- Professional fair open to the general public
- Participation with joint display shared with Cambrils and Vila-Seca/La Pineda, and possibly with the tourist sector

Collaboration of the Tourist Promotion Centre of Catalonia in Russia

MITT - Moscow (Russia) from 19 to 22 March

- Professional fair open to the general public
 - Participation with joint display shared with the Costa Daurada Tourist Board, as part of the promotion agreement
- UITT - Kiev (Ukraine) from 26 to 28 March**
- Professional fair open to the general public
 - Pending specifying with whom we will participate
 - There will be a display at the stand of the Catalan Tourist Agency

APRIL

SUMMER 2014 - Yakaterinburg (Russia) from 4 to 5 April

- Professional fair open to the general public

SITT TOURSIB - Novosibirsk (Russia) from 10 to 12 April

- Professional fair open to the general public
- Pending specifying with whom we will participate

SITC - Barcelona (Catalonia) from 19 to 21 April

- Professional fair open to the general public
- Participation with joint display shared with the Costa Daurada Tourist Board, as part of the promotion agreement

KITF - Almaty (Kazakhstan) from 23 to 25 April

- Professional fair open to the general public
- Participation with a display at the stand of the Catalan Tourist Agency

MAY

BEBES & MAMAS - Barcelona (Catalonia) from 10 to 11 May

- Fair open to the general public
- Participation with display shared with Cambrils and Vila-Seca/La Pineda, at the stand of the Catalan Tourist Agency

SEPTEMBER

OTDYKH LEISURE - Moscow (Russia) from 16 to 19 September

- Professional fair
- Participation at a stand, with better conditions than last year

OCTOBER

TOUR & SALON – Poznan (Poland) from 23 to 25 October

- Professional and general public fair
- Stand with the Spanish Tourism Office in Warsaw

NOVEMBER

WTM – London (United Kingdom) in November, dates TBD

- Professional fair open to the general public
- Participation with joint display shared with the Costa Daurada Tourist Board, as part of the promotion agreement

ATTENDANCE AT 2014 FAIRS

SENIORS FAIR – Paris (France) from 3 to 6 April

- Fair open to the general public

RDA – Cologne (Germany) from 29 to 31 July

- Professional fair

EUROBIKE - Friedrichshafen (Germany) from 27 to 30 August

- Fair on cycling

Appendix II

PROMOTION EVENTS PLAN

PRESENTATION TO TOUR OPERATORS & TRAVEL AGENTS in Belfast (Northern Ireland) on 16 January

- Professional action aimed at tour operators and travel agents
- Organised by: Spanish Tourist Office in London, with collaboration from the Salou Tourist Board

ROADSHOW NECKERMAN/THOMAS COOK in the cities of Friedrichshafen, Lorrach/Fischingen and Offenburg/Ottersweier (Germany) from 28 to 30 January

- Action addressed to professionals with participation from Salou tourist businesses

ROADSHOW TEZ TOUR in eight cities in Russia, Byelorussia, the Baltic states and the Ukraine in

February

- Salou promotion action addressed to travel agents, which lasts for 11 days
- Costa Daurada and local tourism businesses participate there

CORAL TOUR OPERATOR ROADSHOW in four cities: N. Novgorod, Moscow, Voronezh and Krasnodar (Russia) from 29 January to 6 February

- Salou promotional action addressed to Coral salespersons, at which the Costa Daurada and local tourist businesses participate

PROMOTION IN LYON, France, dates TBD

- Promotion to end consumer, 'street' action
- Action conducted by the Catalan Tourist Agency with collaboration from the Council Tourist Board

PRESENTATION FOR TOUR OPERATORS AND TRAVEL AGENTS in Cologne (Germany) on 28 July

- Professional action shared with the Salou and Port Aventura tourist sector

SUMMER CLASS EVENT 2015 – TOUR OPERATORS. Jetair; Brussels (Belgium) at end of October

- Action for professionals, sellers of Jetair tour operators
- Salou participates with local businesses

SNEAK PREVIEW 2015, Eindhoven (Holland) at end of November

- Promotional action by Solmar Tour Operators
- Presentation of Salou to professionals
- For the general public

PROMOTION AT DESTINATION

PGA TOURNAMENT, GOLF in last week of January and first week of February

- European professional golf tournament with some 350 participants

EL PRIORAT FAIR IN SALOU in May

- Fair for the general public with collaboration from Economic Promotion

CALENDAR OF CHILDREN'S ACTIVITIES, season TBD

- Leisure activities and shows for children

COLLABORATION IN ACTIVITY CALENDAR of other councils, including Culture and Festivals, to publicise the activities that take place in the municipality and that are also of tourist interest.

UNOST FESTIVAL in the first week of October

- For young artists and their families

- Collaboration with NT incoming tour operators

CLASSIC CAR EXHIBITION in October

XVI SPANISH OPEN; BALLROOM DANCING in the first week of December

RALLY CATALUNYA-COSTA DAURADA from 24 to 26 October