MASTER IN MANAGEMENT OF TOURISM DESTINATIONS

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REDUCING SEASONALITY IN COSTA DAURADA THROUGH EMISSOR MARKET DEVELOPMENT, Case Study: Scandinavian Tourists

FINAL MASTER PROJECT

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1 INTRODUCTION

Success of a tourist destination depends on a large variety of factors. In the past, the main goal was clearly to bring increasing tourist flows to the destination and build revenue on volumes. This strategy has in some cases led into tourist destinations that are saturated with masses and causing an uncomfortable and unsustainable situation for the residents as well as to the environment. Even the tourist experience can be negatively affected by a massified presence of other tourists in the destination. Most often, a tourist does not want to feel like a tourist but wants to live like a local.

Therefore, the approach to the destination management is changing. Stakeholders tend to be more conscious about social and environmental sustainability, especially because the consumers are demanding it. It has become more important than ever to strive for well-planned and implemented management of tourist destinations.

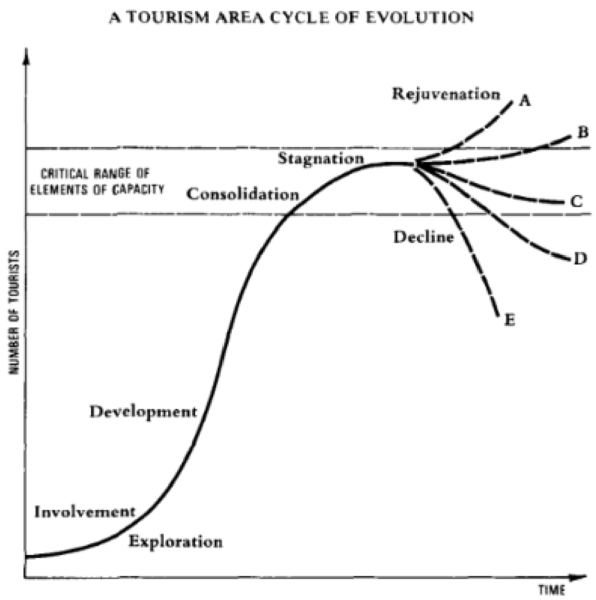


FIGURE 1. Hypothetical evolution of a tourist area. (For explanation of A–E see 'Implications.')

Source: Butler, 2008. P. 7

In 2008 Richard Butler suggested a model for the evolution of a tourism area. If we look at a destination that is stagnated, the touristic demand of the destination starts to diminish because capacity limits are reached or exceeded. It becomes necessary for the destination to be revitalised. Today, the sustainable and ecological aspects are crucial in reinventing the destination. (Butler, 2008. P. 7)

We can identify a few topics that are of outmost importance as comes to the sustainable development. Deseasonalisation and decentralisation of tourism are key concepts for the rejuvenation of a destination. These concepts have been studied intensively during the last few years academically as well as in the business world. This paper will focus on reducing seasonality, specifically through the development of a specific emissor target market.

1.1 Objectives

The objective of this study is to demonstrate that choosing and developing a specific emissor target market, is one of the key strategies in reducing seasonality.

The case study will look deeper into reducing seasonality in Costa Daurada through the development of incoming tourism from Nordic countries. The objective is to show why Nordic market is especially interesting for reducing seasonality, as well as how the market should be built so that the result would be the expected, that is, not just increasing the number of tourists but to actually reduce seasonality.

First of all, this study aims at providing an overview of the current theoretical understanding of reducing seasonality in literature. The emphasis is on the part of target market identification and analysis. Secondly, a closer look into the tourism and seasonality in Costa Daurada will be performed. Then, Scandinavian tourists and their potential in Costa Daurada will be analysed, that is segments of Scandinavian tourists and products of Costa Daurada for Scandinavian tourists, their potential and the SWOT. The study will finish with and action plan of how to build the Scandinavian market on Costa Daurada to reduce seasonality.

1.2 Methodology

The theoretical understanding is based on a literature and press review concerning seasonality. An overview on theory, causes and impacts on seasonality are provided, after which the emissor market research and segmentation are studied. In the theoretical framework, the protocole of Espinet Rius to reduce seasonality has been used as a framework to study the specific target market. Based on prevailing theories, a selection of attributes was chosen to analyse the target market (offer, demand; natural, institutional.) These attributes are used in a qualitative analysis based on literature and interviews, as well as in a quantitative survey.

Face-to-face qualitative interviews have been carried out with Scandinavian tour operators, the receptive tour operator in Costa Daurada, Association of Finnish tour operators, hotel and resort management on Costa Daurada, and the Catalan tourism office for Scandinavian countries, based in Helsinki. The information of these interviews has been incorporated in the qualitative part of the study. A quantitative survey was made among Nordic (mainly Finnish) consumers, focusing on respondents that have already visited Costa Daurada. The results of the survey are presented in this study. The quantitative study was done through Google Forms.

Analysing the results a SWOT analysis has been made and the dualistic model of Senbeto has been used. The study finishes in an action plan with a proposition of local, regional and public sector measures.

2 SEASONALITY

2.1 What is seasonality?

Seasonality is present in many areas of economic activity like agriculture or selling products. Different plants are cultivated during specific time of the year. Fans and ventilators face more demand during heat waves than in the cold periods. Also, tourism, and especially the product sun and beach, is a highly seasonalized industry.

As stated earlier, tourism seasonality has been extensively studied and commented both in the literature as well as in the business world. There are several definitions of this concept, but one of the most accepted is from Butler (p. 332, 1994): *"A temporal imbalance in the phenomenon of tourism, and may be expressed in terms of dimensions of such elements as numbers of visitors, expenditure of visitors, traffic on highways and other forms of transportation, employment, and admissions to attractions."*

Seasonality results in repeating patterns in the volumes of tourist flows by determined seasons or dates of the year. These dates could be months, as the most visited Summer months in sun and beach destinations, weeks like Easter, or days such as bank holidays or weekends. (Junta de Andalucía, p. 4) Therefore, there can be destinations with one peak, two peaks or even distribution of tourism depending on the nature of the destination and the tourism it receives. In general terms, we can say that reducing seasonality means bringing more tourists into the destination in the off-peak season. A secondary goal can be to redistribute the touristic demand during the 12 months of the year.

2.2 Concepts and theory

Seasonality has been studied and referred to extensively in the literature. However, it is still missing accepted theories and concepts. Also, in this study we will base the findings on a case study, and will choose the attributes on the emissor market research to cover the key factors that repeatedly are referred to in the literature.

There are many ways to classify the factors that cause seasonality. First of all, there are both demand and offer related factors that cause seasonality, and this is a concept well accepted in the seasonality related literature.

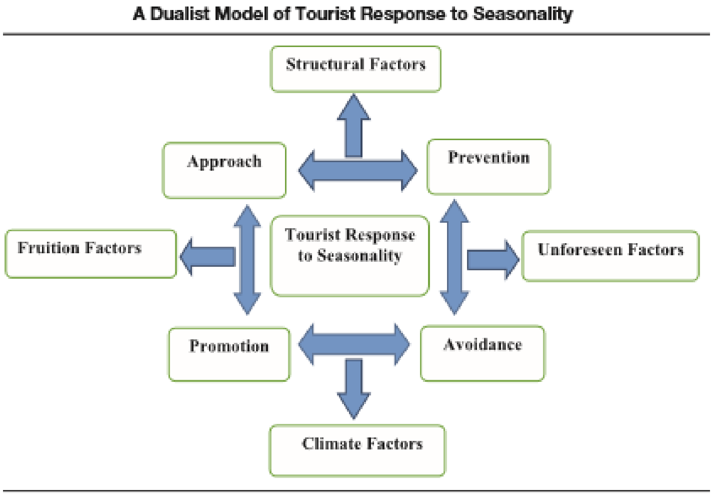
If we look into the demand related factors, the most common reasons of seasonality are work holidays and calendar, school holidays, festivities and events, cause of travel, inertia and tradition, social pressure, fashion and taste, as well as cost level and exchange rate of destination. On the other hand, the offer related factors can be summarised as climatic conditions, celebration of events, lodging capacity, opening period of touristic attractions, labour availability, accessibility to the destination and complementary activities. (Espinet Rius, 2015 pp. 189-192) Each of these factors can be further studied and explained in more detail.

On the other hand, there are natural and institutional factors that are determining seasonality. Among the natural factors the most important is probably the climate. It affects tourism focused on sun and beach, and also for example winter sports like skiing and other snow related sports. The climate related tourism is strongly looking into climate change, and it is an important part of the investigation today to see how huge the impact will be on the tourism flows, both in geographic as well as in seasonal terms. Also, the institutional factors are important, such as school and work holidays, social, cultural and religious events, opening of different businesses like accommodation and inertia as well as traditions. (Junta de Andalucía, 2014 p. 4)

It has also been said that to some extent seasonality is a feature that is characteristic to tourism due to the nature of some of the originating factors, such as climate. However, this does not mean that seasonality could not be reduced. For example, even if the climate is a determining factor for some activities, other types of activities and products can be developed that are suitable for different climates. (AC Consultores, 2019)

Seasonality is often quantified with a Gini index. Seasonality means that in certain times of the year there are different numbers of tourist arrivals or nights spent. The validity is based on the condition Pigon-Dalton, indicating that transferring tourists from a month with a higher occupation to a month with lower occupation will reduce the coefficient, that is reduce seasonality. The value of Gini index is between 0 and 1, meaning that if all tourists of the year came in one month, the value of that month would be 1. (Ramón et al, 1995. p. 50) Another main indicator to study seasonality is the general index of seasonal variation. This is a variation in a time series within one year that is repeated rather regularly. Seasonal variation can be calculated for different variables like weather patterns, holidays or seasons. Seasonality indicator is one in the month, if the distribution is exactly homogeneous throughout the year. (Dórhallsdottir et al., 2017) In this study, these indexes are presented through a calculation in a study of Junta de Andalucía.

In 2019 Senbeto and Hon suggested a dualistic model of tourist response to seasonality. They base their thinking on the approach-avoidance theory, where human behaviour approaches and seeks pleasure and avoids pain, as well as regulatory focus theory, which explains how a person’s self-regulation responds to positive or negative impulses. Both of these theories are based on human motivation and intention. When translating these theories into tourism seasonality, Senbeto and Hon suggest that prevention and avoidance result in unforeseen factors, promotion and avoidance can be summarized as climate factors, promotion and approach result in fruition factors and approach and prevention in structural factors. (Senbeto and Hon 2019, pp. 6-10)



Source: Senbeto, L. Hon, A. 2019.

2.3 Impacts of seasonality

The impacts of seasonality are complex, and even in the literature there is no consensus about the classification of the impacts. We can see efforts in reducing seasonality in tourism, yet it should be recognised that we are not looking into a phenomenon, that is purely negative or undesired. Seasonality has both negative and positive impacts, which both should be evaluated when managing a tourist destination and the timing of the incoming tourist flows.

Seasonality has strong impacts on the local economy. Espinet Rius has categorised the negative and the positive impacts relating to management and profitability, labour market, image, ecological aspects, public goods and services and sociocultural issues. For example, if we look at management and profitability, then the investments are less profitable due to the low rates of occupancy in the low seasons, and entrepreneurs need to generate the yearly profits in a short period of time, even if fixed costs are unchanged during the year. On the positive side, the companies have time for maintenance during the low season, as well as dedicating themselves to other businesses and increasing profitability. (Espinet Rius, 2015 p. 192-194)

The report of the Junta de Andalucía confirms that many times literature tends to focus more on the negative impacts such as loosing profitability and an inefficient use of resources, impacts on labour, ecological impacts such as damage on the environment resulting from mass tourism, and sociocultural effects like damage on the local culture. However, it is noted that also here that some studies bring out positive aspects, such as ecological and sociocultural recovery of the destination during the low season, the maintenance period, and the introduction of young people to the labour market through seasonal work. (Junta de Andalucía, p. 4)

2.4 How to reduce seasonality?

Even if the nature of tourism in many destinations is causing seasonality, there are many things that can be done to reduce it. For example, Espinet Rius proposes a protocol for action plans to reduce seasonality with the following steps:

1. Definition of objectives
2. Knowledge and analysis of markets and segments
3. Identification of existing experiences and their impact
4. Suggesting actions, with the analysis of their economic and social impact
5. Approving and implementing the actions
6. Follow up and analysis of the obtained results

Also, he states that it is of crucial importance to have a positive and dynamic attitude, that sees reducing the seasonality as an opportunity. Collaboration is needed between all the stakeholders, both private and public. The offer of the destination should be differentiated, and information management should be efficient on individual, local, regional and national level to enable the emerging ideas. (Espinet Rius, 2015 pp. 196-197)

3 ROLE OF EMISSOR MARKET IN REDUCING SEASONALITY

In this study we will use the protocol suggested by Espinet Rius, but we will use this protocol focusing on a specific target market. That is, we will focus on the role of the emissor market in reducing seasonality.

3.1 Definition of objectives

The objective is to reduce seasonality, increase the number of visitors during off-peak season and maintain or even lower the number of tourists in the high season, focusing on the development of a specific target market.

As it was seen earlier, the demand related factors are one side of what is causing seasonality. Yet, the offer related factors also have a different impact on different emissor markets. Therefore, it was necessary to analyse both demand and offer related factors. Present study demonstrates that developing a tourism strategy for the specific and selected emissor market could have a strong impact on the seasonality of a destination.

3.2 Knowledge and analysis of market and segments

A deep analysis should be carried out to understand the emissor market and its segments. This is the fundamental part in this study as we will focus on the role of a specific emissor market. The tourist profile should be identified, on basis of which a SWOT analysis be carried out.

Market segmentation is a key element in marketing. It helps to identify different groups of customers, so that their needs, wants and desires can be met more precisely than in mass marketing. In destination management, we can study what are the actual and the potential segments, and in which period are these segments travelling or interested to travel? Which products are they interested in? How do these products affect seasonality? Is there an emphasis on promoting tourist products that tend to decrease seasonality? Segmentation leads into targeting, that is choosing specific targets, and results in positioning the destination, so that the marketing provides the best possible value proposition to the selected target(s). (Tsiotsou, R. 2012, p.2-4)

Also, in this part it is important to know the offer related factors. It is crucial to know when do accommodations, tourist attractions and other service providers, relevant to the emissor market, open in the destination. The characteristics of the destination can be very different in high season versus low season. If we look at Senbeto's dualistic model, it emphasises that the motives of the tourists should be analysed for the right measures. Therefore, the decision makers should look at the structural, fruition based, unforeseen and climate-based factors having an impact on tourist motivation, and to base their low season activating measures on these factors. (Senbeto A.H. et al., 2019. p. 13)

In the case study, and based on the existing literature, we will focus on the following attributes:

- Emissor market tourist profile
- Emissor market awareness and perception of destination
- Emissor segments and matching destination products
- Emissor holiday calendar
- Climate comparison
- Emissor travel timing pattern
- Accessibility

3.3 Identification of existing experiences and their impact

It can be very fruitful to study what has been done in different destinations, and what kind of results have been obtained by these actions. Especially, if this information can be obtained regarding similar destinations. Some of these measures can then be imitated or copied.

3.4 Suggesting actions with the analysis of their social and economic impact

Butler suggests that there are actions like extending the season, offering different actions out of season, revamping the destination, making the destination unique and prestigious, adding a second main season and adding non-conventional tourist attractions. (Butler, 2014. Pp. 7-10) The actions to be taken are planned for short, medium and long term.

Espinet Rius classifies the actions in private, local-regional and public sector. I will bring out here the most important actions considering a specific target market development.

In the private sector actions it is important to segment the clients and to specialise in niche marketing tends to reduce seasonality. In the segmentation it is interesting to look into new markets and especially to those markets which spend more than average during their stay. New segments can also be defined by age, or by thematic and sociocultural interests. Private sector actions also include price strategy, positioning and upgrading the establishments to best fit the needs of the chosen customers, opening dates, communication plan, specific actions to capture different segments, customer loyalty plan, upselling strategies, training of personnel. In the local and regional actions it is suggested to promote new attracting products in the destination (related to segmentation), event calendar for cultural, sports, religious, local, food and business events, communication plan, finding investors, dressing the destination with needed equipment and attractions, implementing environmental measures. Last, also the public sector is needed for infrastructure and connections, creating a good business and investment climate, implementation of physical measures to boost tourism industry to open outside the high season, redistributing school and work holidays. (Espinet Rius 2015, pp. 198-202)

One of the most important measures the public sector can take is to create platforms of cooperation and communication for all stakeholders with the objective of reducing seasonality in the area.

3.5 Implementation, follow up and analysis of the obtained results

As important as the planning and research, is of course the implementation and the follow up of the plan. If there are undesired effects and results, it is necessary to take action to correct these. Also, it is important to study the results from different perspectives, including the opinions and involvement of the residents as well as the satisfaction level of local businesses. Macroeconomic indicators do normally not show these indicators.

4 COSTA DAURADA TOURISM AND SEASONALITY

4.1 Costa Daurada tourism and marketing plan

Costa Daurada provides abundant possibilities for tourism. It is located at a distance of 100 kilometres South of Barcelona, and consists of the Salou, Cambrils, Vila-Seca (including Portaventura amusement park) and La Pineda. Costa Daurada has a great variety of touristic subproducts in a compact area.

Source: Google Maps

The marketing efforts of the public sector prioritise promoting Costa Daurada as a family destination. This has been the chosen image of the destination, promoting primarily the product Sun & Beach. In the new promotion strategy, however, there is a new focus on the non-massified tourist, and with a large potential in the area. The new promotional strategy uses the slogan "Costa Daurada, capture the moment", and there is more focus than before on sub products like golf, wine tourism, cycling and business, however keeping an important weight on the family and beach tourism, which is considered essential for the Costa Daurada brand. (Indicador, September 2018, p. 8)

Of the yearly promotion strategy budget for 2019 is EUR 900.000. 30% of this goes to consolidating and promoting national familiar tourism. 20% is allocated for the French market. Ireland, Germany and BENELUX countries are also mentioned as key markets. In addition, the search of new markets is considered important, especially Poland (offering direct flights to Reus and with 3-digit growth figures) and Nordic countries. 85% of the efforts are directed to intermediate sector, that is tour operators and travel agencies. (Dirai més digital, 15.2.2019)

New focus segments, adding to families, are seniors, couples and athletes. The aim of this new strategy is to reduce seasonality, and to maintain the destination active during the more months than in the past. It is interesting that the area continues to push the family brand as the primary image, even though it tends to increase seasonality. However, the new diversification policy is a step to reduce this trend.

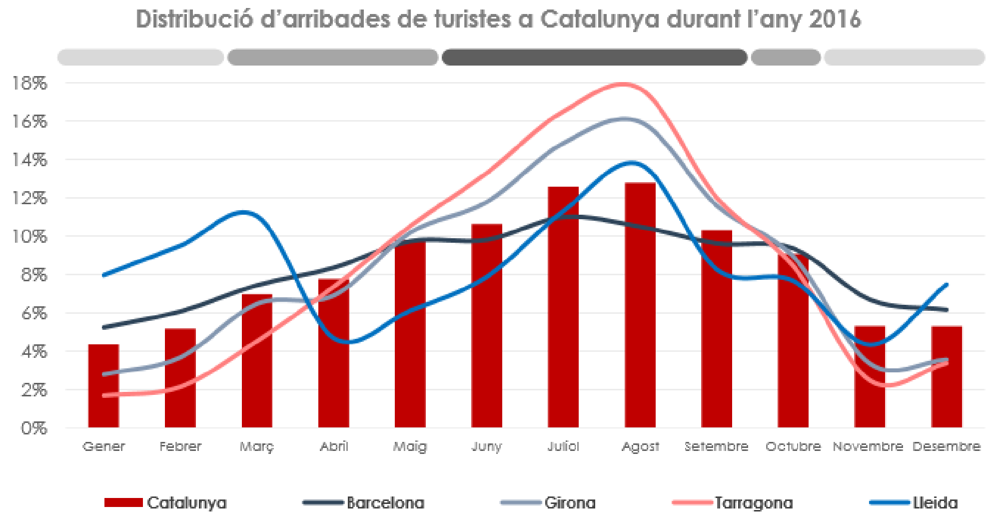
The tourism strategy of whole Catalunya focuses on the objective of becoming one of the best Mediterranean destinations, and it has four strategic pillars to be reached by the year 2022:

1.Increment daily expenditure by tourist.
2.Reduce seasonality so that 37% of tourists visit the area during March, April, May and October.
3. Increment the number of tourists visiting the interior up to 10% of all incoming tourists.
4. Manage in an intelligent manner the growth, aiming at 21 international tourists. (Agència Catalana de Turisme. Pla Estratègic de Turisme de Catalunya 2018-2022, p. 4)

As we can see, reducing seasonality is among the most important topics in the whole Catalan tourism strategy. Also, there is a big effort to quantify tourism more in the expenditure than in arrivals. Therefore, it can be said, that the ideal tourist would be a wealthy and respectful person, coming outside of high season, spending more than average during the holiday and not necessarily staying for a very long time.

4.2 Seasonality in Costa Daurada tourism

High season (temporada alta) consists in Catalunya of the months of June, July, August and September. The rest of the months are considered as medium season (temporada mitja) and low season (temporada baixa). We can see that peak in the tourism arrivals in high season in Tarragona province (Costa Daurada) is higher than for rest of Catalunya. Also, Girona (Costa Brava) has a strong peak but now as much as Tarragona. The peak focuses on the months of July and August. It could be argued that the evaluation of pre-high season, especially June and September, could be interesting.



	Catalunya	Barcelona	Girona	Tarragona	Lleida
Temporada Alta	**46,3%**	*40,9%*	*54,1%*	*59,5%*	*41,2%*
Temporada Mitja	**33,6%**	*34,9%*	*32,5%*	*30,8%*	*29,5%*
Temporada Baixa	**20,1%**	*24,2%*	***13,4%***	***9,7%***	*29,3%*

Font: EOH de l'INE

Source: Agència Catalana de Turisme. Pla Estratègic de Turisme de Catalunya 2018-2022

In the below chart we can see the variations of the occupancy rate per room for Costa Daurada, including Alt Camp, Baix Camp, Baix Penedès, Conca de Barberà, Priorat and Tarragonès. This indicator is the percentage relationship between the daily median of occupied rooms in the month and the total number of available rooms. The occupancy rates in July and August are approximately 90%, and it seems clear that any possible growth in tourist flows should occur during the rest of the year.

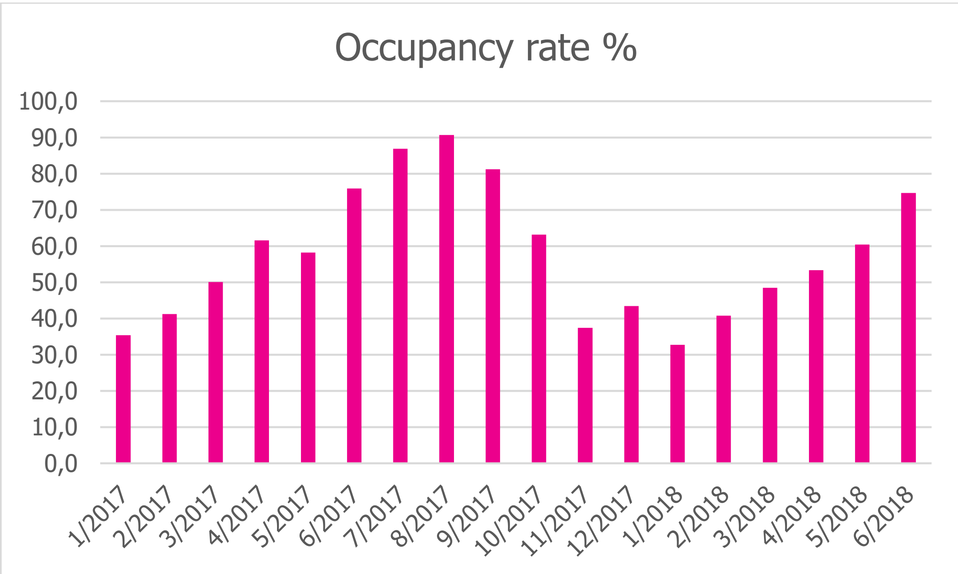
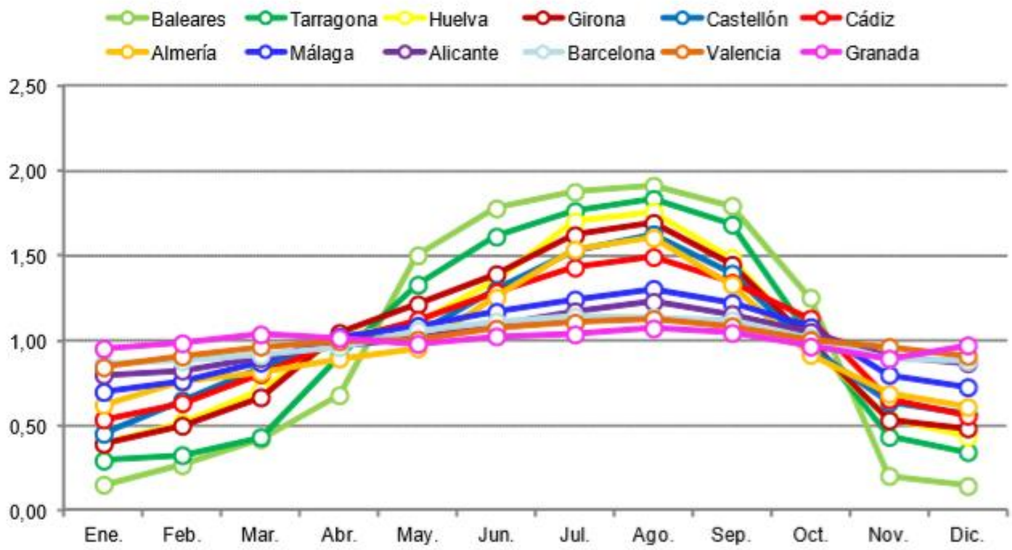


Chart: Occupancy rate by room in Costa Daurada. Data from Statistical Institute of Catalonia.

It became clear in the interviews with hotel and resort management of the season, that one strong component of the seasonality in Costa Daurada is the offer related factors. The area has adapted to seasonality, and most of the hotels remain closed in the mid and low season. This is a limiting factor to extend the season or to create peaks in low season. For example, the golf tourism is in need of all year opening accommodation possibilities.

This argument found in the qualitative interviews is confirmed by the statistics. Tarragona area is one of the areas in Spain with most seasonality in hotel employment. In the study of Junta de Andalucía the demand of hotel employees was converted into the index of Gini and a comparison was made of different touristic areas. According to this study, Baleares and Tarragona showed most seasonality in demand for hotel employment. (Junta de Andalucía, 2014. Pp. 48-49) It can be estimated that a bigger focus on different tourist products than sun and beach could offer a more balanced situation.



Fuente: Consejería de Turismo y Comercio a partir de datos EOH (INE)

5 SCANDINAVIAN TOURISM IN COSTA DAURADA AND REDUCING SEASONALITY

5.1 Definition of objectives

In this section we will look more closely into the profile of Scandinavian outbound tourism, its potential for Costa Daurada, and how can this target market be developed to reduce seasonality in the area. The input from the qualitative interviews with Scandinavian tour operators, local hotel and resort management and Catalan tourism office in Helsinki have been integrated in this chapter. The rest of the information comes from press, literature and internet review.

In the following chapter the quantitative survey tests these assumptions among Scandinavian consumers.

5.2 Profile

The Scandinavian market consists of five countries: Sweden, Norway, Denmark, Finland and Iceland. These countries together have a population of approximately 25 million. Actually, Scandinavia is the third-largest outbound travel market in Europe.

Country	Inhabitants	Area	Density
Denmark	5,806,014	42,933	135
Finland	5,520,535	338,424	16
Iceland	355,620	102,775	3½
Norway	5,323,933	385,203	16
Sweden	10,215,250	450,295	23

Source: https://www.uv.es/capelo/mapa_escandinavia.jpg

The income level is high, and results in higher than average spending on international holidays. Scandinavians are among the top holiday spenders in the world. This can also be observed in the statistics of Nordic tourists in Catalunya. (Appendix 2) It is worth to note that the Catalan tourism strategy emphasises the importance of increasing the daily expenditure of the tourists.

The climate is relatively cool, and especially the winter period is long and cold, which is probably one of the key reasons why Scandinavians travel frequently to international destinations with a warm climate. However, Scandinavians are also interested in cultural and authentic experiences. They appreciate active holidays, gastronomy, and good shopping opportunities. (www.remarkabledestinations.se)

The Nordic tour-operator Tjäreborg has produced a holiday report 2019 about the trends and tendencies among Nordic tourists travelling with a package. Even if the majority of Scandinavians coming to Catalunya do not use a package option, the trends give a good picture of what is found interesting and what less among the Scandinavian tourists right now, when booking a holiday.

What do Scandinavians look for on their holiday in 2019?

1.IMPORTANCE OF THE HOTEL RESTAURANT INCREASES
Affects choice of hotel in 7 cases out of 10.

2. GO VEGO!
More vegetarians and veganos.

3. TURKISH DELIGHTS
Turkey recovers as destination

4. DESIGN HOTELS UPDATE DESTINATIONS
The importance of the hotel increases.

5. MEDIUM-LONG FLIGHTS IN WINTER
Destinations close to Nordics become more important in the winter. Canary Islands is still #1, but Cape Verde and Gambia go up. Egypt is coming back.

6. "HEALING NOT PEELING"
– Soul and content
It is not enough to travel and get a sun tan. Tourists look for interesting activities and content. New experiences are important as well as wellbeing and relfextions about own life.

7. REDUCING ENVIRONMENTAL IMPACT
Very important for Scandinavians. For example, certificate Travelife is important in the hotels. (https://travelifestaybetter.com/es/the-travelife-standard/)

What is less interesting for Scandinavians on their holiday in 2019?

1.GOOD BYE PLASTIC
#trashtag is used in social media.

2. NO MORE ALL-NIGHT-LONG PARTIES
Less alcohol is consumed and the focus is on quality.

3. ZOOS ARE NOT AS INTERESTING AS BEFORE
Wellbeing of animals is important.

4. "NO THANK YOU" TO SWEETS FOR CHILDREN
46% of Scandinavians want their children to eat and drink healthier opitons.

5. SUNTAN IS NOT FASHIONABLE
Hot weather and Sun continue to be important but it is not fashionable to get a strong suntan. Especially the age group 18 to 35 is careful with theSun.

6. THEME AND WATER PARKS ARE NOT AS INTERESTING AS BEFORE
7 out of ten are less interested in a theme park visit than five years ago. 67% expresses interest in experiences that relate to local life, as in "LIVING LIKE A LOCAL". Nature and wildlife are found interesting.

Source: Tjäreborg Holidayreport 2019

5.3 Products and segments

In the information about the products and segments, as much information as possible has been integrated from the qualitative interviews carried out with the Scandinavian tour operators and the hotel and resort management of the area. The rest of the information comes from press and literature as well as different internet sources.

5.3.1 Sun & Beach

In Costa Daurada there is a coastline of 20 kilometres, 14 sandy beaches and 5 small bays. The exceptionally long beach also offers possibilities to walk or to cycle by the Sea. The beaches are much more accessible than those found on Costa Brava, for example. The product Sun & Beach is always interesting to the Nordic tourist, but it is very difficult for the destinations to differentiate.

Nordic tourists are very interested in the ecological and sustainable management of tourist destinations, and this is even more important for young tourists. An advantage for Costa Daurada is having seven Blue Flag certified beaches. The Blue Flag is an international eco-label certification, and the qualifying beaches meet a set of environmental, educational, safety and accessibility criteria. The beaches with Blue Flag certification in Costa Daurada are in Vila-seca (La Pineda), Salou (Llevant, Capellans), Cambrils (Vilafortuny, La Llosa, Cavet, Prat d'en Forés-Regueral). (Blue Flag, 2019)

Sun & Beach promoted in a traditional way is a product that is more likely to increase seasonality than to decrease it. However, as the Nordic people enjoy sports and wellbeing, this product could be promoted as active Sun & Beach or alternatively winter Sun, with walking and cycling, the most interesting months being not the high season.

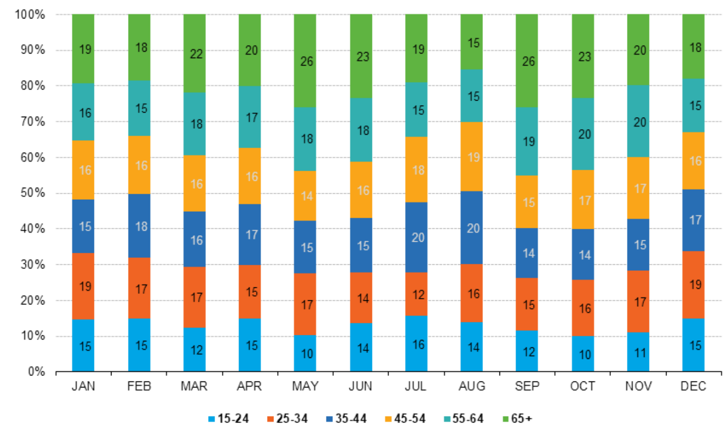
Also, as we will see in the holiday calendar, it is interesting to look at the specific month of June. Nordic school children start their Summer holidays in June, and especially the first two weeks of June show lower occupation rates than the rest of the high season.

5.3.2 Golf

Golf offers great opportunities for reducing seasonality, and for decentralising the tourism of Barcelona, as for instance all the Nordic tourists coming to Catalunya fly to Barcelona. This activity takes place mainly from March until October, emphasising the months in the low season.

Nordic golf tourists are most often over 55 years old, travelling without children and flexible with their calendar. All and all the age group of 65+ travels a lot during the so called "shoulder months" (April to June, September to November). The percentage of this age group is more than 20% of all the EU travels carried out in this period. (Eurostat, May 2019) They have higher spending capacity than average.

Share of EU residents' nights spent by age group per month of departure, EU-28, 2017 (%)



Notes: EU-28 aggregate estimated for this publication including 2013 data for the United Kingdom. Trips which started in 2016 and ended in 2017, are included in the corresponding month of departure of 2017 (f.i. a trip that started in November 2016 and ended in January 2017 is included in November 2017).

Source: Eurostat (online data code: tour_dem_tnage)

eurostat

The golf tourist is normally interested in playing in as many golf courses as possible, and in the Costa Daurada there are five golf resorts. Golf used to represent only 1% of Costa Daurada's tourism but it has lately become very important. There is a lot of potential in the Nordic market because the area is pacific, authentic and offers other subproducts to complement a golf holiday. Due to the current successful situation, Costa Daurada has also started an active promotion campaign with a big focus on Nordic countries.

Example 1: *Lumine in Costa Daurada is a luxurious golf resort. Around 55% of the customers come from Nordic countries, especially Sweden and Finland. All of the customers normally play golf during their stay. Lumine has its own DMC destination management company, which makes it a unique player on Costa Daurada. Lumine has hosted an international event of golf in the area, which brought a lot of visibility to the destination among the golf players.*

Example 2: *Sol Port Meliá hosts a 10 day golf tournament in February for a school of young professionals. Therefore, even if most of the golf players tend to be senior, this is not always the case. In this particular hotel, which is one of the only ones opening all year around, the Nordic customers are the biggest group during the low season. This is due to the importance of golf.*

There were two major improvement areas expressed by the golf resort management, which would be needed in the area to further improve the success of golf. More hotels should open in the low season, and the public transport should be improved.

5.3.3 Sports and wellbeing

There is a boom in football camps and other training camps from Nordic countries to Salou. At this point the camps are mainly managed by Football Salou, and lodging is arranged at Cambrils Park both for the players as well as their support team. The camps are directed both to children as well as first division players. Salou has favourable climate conditions with a long season, good sports and lodging installations, natural, artificial and hybrid football courts. This product is working well as there is a real need, and also there are loyal partners in the Nordic countries, some of which are working with exclusivity for their own country. Some of the teams also decide to stay in local hotels but most of the business goes to Football Salou and Cambrils Park.

Sol Port Meliá: *"Many football teams come to train in Salou. Most of them find accommodation at the camping but some come and stay with us."*

There are abundant sports and wellbeing possibilities in the area. However, the low awareness of the area and the lack of clear sports products for Nordic people are result in low volumes. Yet, it can be estimated that products like mountain biking, road biking, cycling by the sea, hiking, horseback riding, nautical sports and sailing, wellbeing and mindfulness could be very successful and also further reduce seasonality. Most of these activities are carried out by young and active adults. The price of the activities is often much lower than in the Nordic countries, and the climate is perfect – especially in the low season.

Some of the hotels are offering sports related services. There are bike stations managed by external companies, that rent and fix bikes, they offer guides and routes. Mallorca is a benchmark cycling destination, but it is saturated, and cyclists are looking for new destinations.

5.3.4 Gastronomy and wine tourism

Gastronomy and wine tourism have abundant potential for the Nordic tourists. Most of the restaurants are rather traditional but the offering is of high quality and very good prices, especially in Cambrils. The prices of food, and especially wine, are high in Nordic countries. The Scandinavian tourists normally appreciate the authenticity and a good price quality ratio that can be found in the restaurants and the wine houses of the area.

Local hotel management: *"There has been gastronomy days around a specific product in Cambrils, but these initiatives work best with the local consumer. It would be important to think what a tourist is looking for, make it easy and create a comfortable atmosphere. Also, it would be important to receive service in English."*

"The potential of the area has not been fully used. For instance, if we look at the offer in gastronomy. Sweden is a very expensive country. Here the prices are moderate, and the quality price ratio is excellent. This is a "cheap zone", it is not only exclusive. The prices of wine are very moderate. This is an incredible advantage. We have areas like Priorat and Montsant that are marvellous. However, there is no clear idea of what to offer to the tourist. For example, it is difficult to find a wine-tasting in English."

Scandinavian tour operator: *"When taking some distance to the tourist centres, it is possible to find true treasures. The prices are very moderate. Clearly the Italian and the French kitchen are more well known. The Spanish kitchen has the same elements with a local twist. It could be very popular, but it is not as famous."*

"Are there olive trees? In Alicante there are millennial olive trees, this could be interesting. Offering tastings of olive oils to tourists. Getting to know where the oil comes from and its origins."

"Why should you go all the way to Costa Daurada, if there are wine yards closer to Barcelona? Perhaps you can find something more authentic and less commercial."

5.3.5 Family activities including Portaventura

Continental Spain or Catalunya are not well known as family destinations in the Nordic countries, except for the coastal destinations in the South and in the Alicante. In addition to these, the islands are popular among Nordic families. The Nordic families appreciate safe child-friendly destinations. The families often look for experiences to be shared in the family. The hotel choice tends to be four or five star, “better than home”.

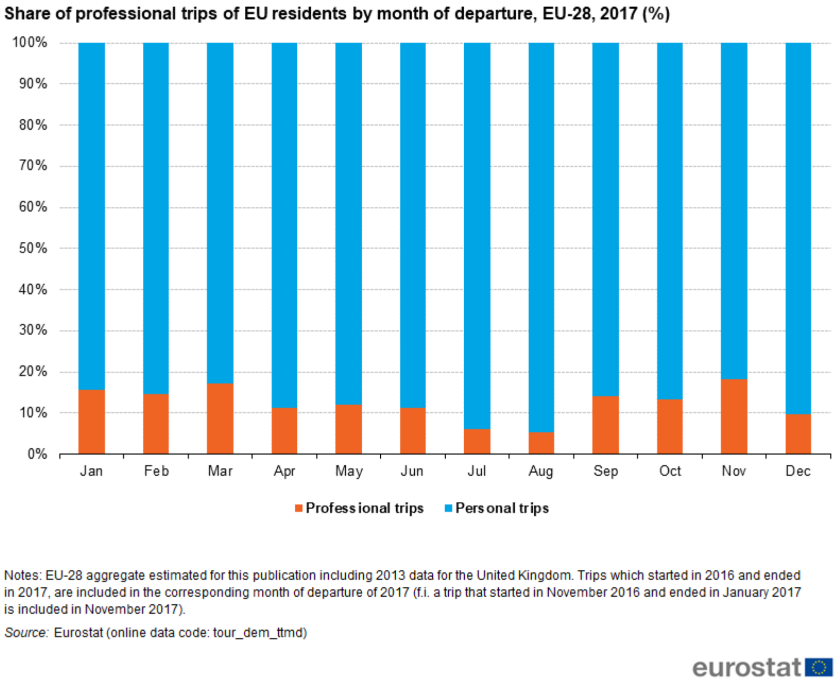
Even Portaventura, which is one of the most important theme parks in Europe, is not very well known in the Nordics. Tjäreborg states in its trend report for package holidays in 2019, that theme parks are losing importance but for example Euro Disney is frequently visited by Nordic families. Portaventura is a great resource for the area, and in can be considered very interesting to enhance the cooperation and the promotion in the Nordic countries.

Family tourism normally has a strong impact enhancing seasonality as the families are highly dependent on the school calendar. 32% of tourism made with children in EU happens in the main school holiday months, July and August. (Eurostat, 2019.) However, in the case of Nordic tourists, holidays are more accentuated on June and July. Also, October Autumn break is an interesting possibility for many families with children.

Scandinavian tour operator: *Wake up Portaventura co-operation!*

5.3.6 Business and MICE

It could be a very interesting opportunity to promote the destination for MICE due to the excellent price and quality ratio, the climate and the good and economic flight tickets to Barcelona from Nordic countries. Business trips distribute differently than holidays trips during the year, and therefore are an important factor in reducing seasonality. (Eurostat, 2019)



5.4 Holiday calendar and flexibility

If we look at the travelling patterns of the EU residents, the concentration of tourism demand is clearly focused on the peak months July (12,3% of yearly trips) and August (11,4% of yearly trips). This is even more accentuated when observing the length of stay: the number of nights in the top month (July) was 3,7 times higher than the nights spent away in November. In Denmark, however, the peak month for travelling is May. (Appendix 1: Eurostat statistics on seasonality)

Work holidays in the Nordic countries are relatively long, the minimum totals six weeks. In the working life they tend to be rotational. July is the month of lowest activity in business, and in Finland and Sweden there is a lot of inertia to take a four-week Summer holiday in June to August period. Often this is also expected at work. Most often we can define July as high season to travel and two periods as medium season (from April to June and from August to October). Scandinavians also make short holiday breaks.

Also, the school holiday period is different than in many other European countries. Denmark has given up fixed holidays, and the government only locks the start of the Summer holiday. In the rest of the countries there are some regional differences as well as yearly modifications, but the pattern is similar. Normally Summer holidays start in Sweden and Finland already in the beginning of June (31st May to 10 June), in Norway around the 18 June, and in Denmark as late as 29 June. School restarts in August (approximately 8 to 19 August). All the countries have a "white week" in February or March, normally week 8, 9 or 10. Most often week 8 is the week of the capital cities. Easter holiday varies from 3 days to one week. Most of the Scandinavian children enjoy a week of Autumn break in October, usually during the period of weeks 41 to 43. (Opetushallitus, 24.5.2019., School holidays Europe, 2019)

Junta de Andalucía has made an interesting calculation based on the Gini index in order to evaluate the seasonality of different European emissor markets. In this chart they have used the number of trips abroad with a duration of more than four days in any type of accommodation, only for Spain the data is domestic. This data has been used to calculate the General Index of Seasonal Variation, meaning that the IGVE would be 1 if the distribution would have been exactly homogeneous throughout the year by month. In the last column, the Gini index has been calculated from the IGVE. (Junta de Andalucía, 2014)

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	Gini index
Spain	0,69	0,32	0,55	0,77	0,46	0,49	1,32	4,31	1,53	0,59	0,38	0,59	0,47
Italy	0,6	0,63	0,57	0,73	0,58	1,18	2,14	3,68	0,69	0,59	0,32	0,28	0,45
Belgium	0,53	0,47	0,66	0,86	0,87	1,2	3,49	1,6	1,01	0,54	0,3	0,48	0,41
Netherlands	0,47	0,56	0,43	0,76	1,38	1,26	2,86	1,66	0,95	0,85	0,33	0,49	0,38
Portugal	0,41	0,51	0,62	0,85	0,58	1,16	1,91	2,6	0,75	0,51	0,75	1,35	0,35
France	0,57	0,61	0,65	1,11	1	1,1	2,37	1,97	1,08	0,84	0,46	0,24	0,34
Luxemburg	0,58	0,71	0,73	0,72	0,77	0,84	1,89	2,73	1,02	0,56	0,43	1,03	0,32
Denmark	**0,47**	**0,74**	**0,58**	**0,8**	**0,82**	**1,04**	**3,1**	**1,31**	**1,04**	**0,9**	**0,45**	**0,75**	**0,32**
Norway	**0,57**	**0,73**	**0,85**	**0,79**	**0,78**	**1,2**	**3**	**1,14**	**0,96**	**0,88**	**0,51**	**0,6**	**0,29**
Germany	0,54	0,54	0,77	0,83	0,95	1,23	1,9	1,81	1,24	1,07	0,48	0,64	0,27
UK	0,87	0,68	0,75	0,97	0,92	1,06	1,2	1,81	1,59	0,93	0,66	0,54	0,21
Nordic countries	**0,74**	**0,78**	**0,87**	**0,86**	**0,89**	**1,11**	**2,39**	**1,26**	**0,9**	**0,86**	**0,65**	**0,68**	**0,21**
Finland	**1,2**	**0,91**	**1,05**	**0,94**	**0,78**	**1,46**	**1,6**	**0,99**	**0,81**	**0,97**	**0,73**	**0,56**	**0,17**
Sweden	**0,87**	**0,8**	**1**	**0,91**	**1,03**	**0,98**	**1,85**	**1,39**	**0,82**	**0,81**	**0,83**	**0,73**	**0,16**

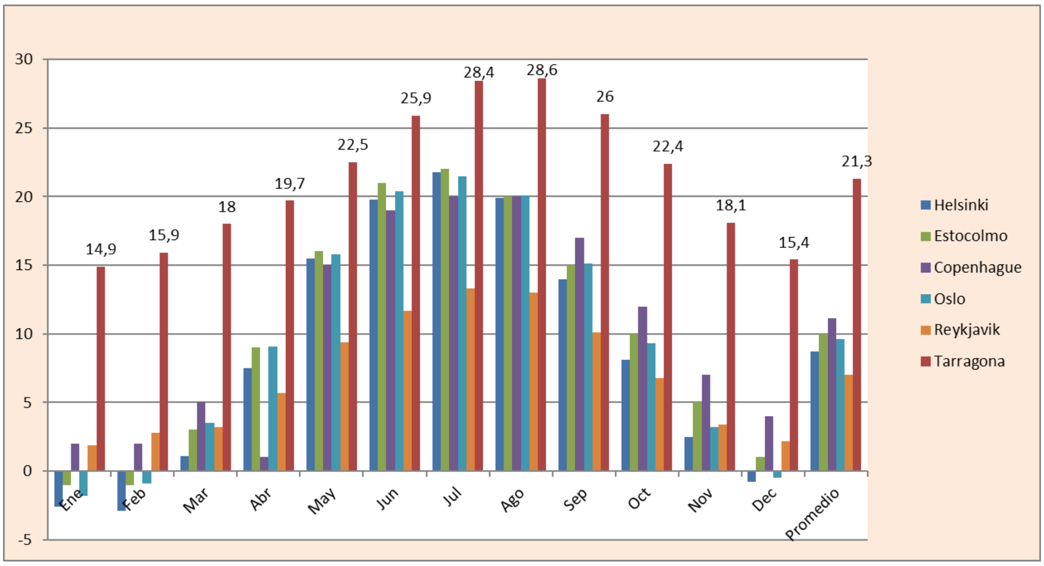
High Seasonality
Medium Seasonality
Low Seasonality

Source: Consejería de Turismo y Comercio de Andalucía on EUROSTAT data

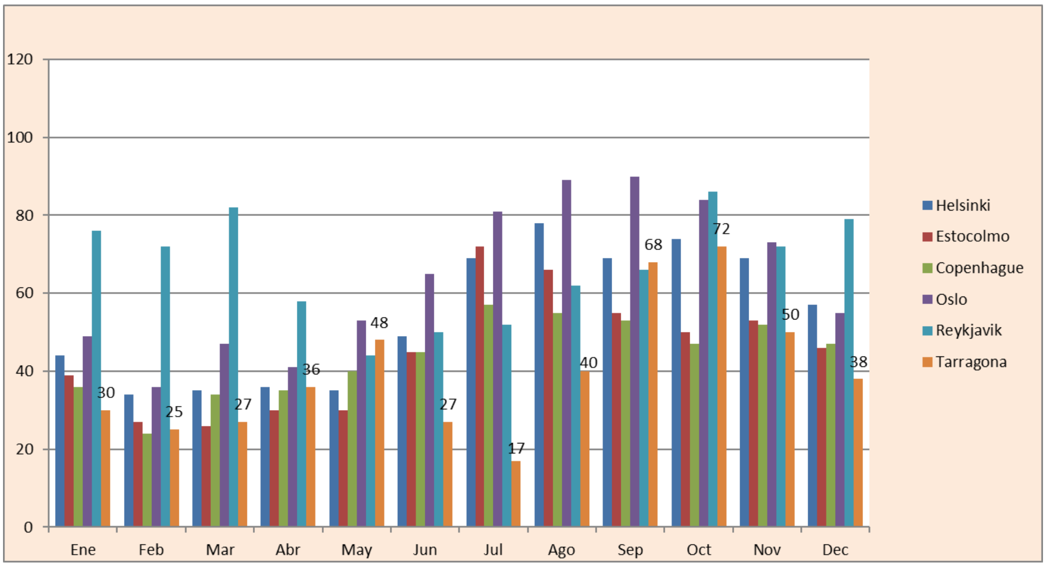
From the table it can be observed that the Nordic countries, of which especially so Finland and Sweden, have low seasonality. The national Spanish market, which is the most important focus group on Costa Daurada, shows extremely high seasonality. Therefore, we can conclude, that if a key objective of Costa Daurada is to reduce seasonality, choosing Scandinavian market as one of the key target markets should be an effective strategy.

5.5 Climate comparison

The Scandinavian climate is rather harsh, and especially the winters are cold and dark. Costa Daurada and the continental Northern Spain has an image of being relatively cold during the wintertime, compared to the Canary Islands and other further destinations. However, it seems that the Baleares Islands are gaining a different image and they are situated very close to Costa Daurada. The area offers excellent possibilities for winter sun, sports and other types of tourism.



Monthly average temperatures. Source: Weather averages



mm Monthly rainfall. Source: Weather averages

If we look at the attached climate comparisons, it is very clear that there is a very favourable climate situation in Tarragona compared to all the Nordic countries during the off-peak season. The number of Sunny days with pleasant temperatures is high, and the amount of rain is much less than in the Nordics. An image and marketing campaign would help to bring this information to the Nordics in order to enhance the visits during the off-peak season.

The peak season can be considered very hot by Nordic tourists, even though this is a time of travel due to tradition, holiday calendar as well as secured hot weather in the destination.

The climate change will bring new scenarios and will most probably further heat the Costa Daurada weather and possibly reduce the willingness of Nordic tourists to leave their home country for Sun during the peak season.

5.6 Image and price level

The destination Costa Daurada is very little known in the Nordic countries. It is not very clear to most of the Scandinavians where the area is, or what tourist products it offers. There is no positive or negative image, it is simply not known.

However, the price quality ratio is considered very favourable by the Nordic tourists. The image perceived of the destination is medium, perhaps lacking exclusive luxury elements.

5.7 Awareness

As stated before, it became very clear in the qualitative interviews with Scandinavian tour operators, that Costa Daurada area is not known in the Nordic countries. They had no clear idea of where the area is located, and what are the products the area offers. None of the interviewed directors of the Scandinavian tour operators (except SEMBO/Stenalines) had actually visited the area. Salou was the best-known sub resort.

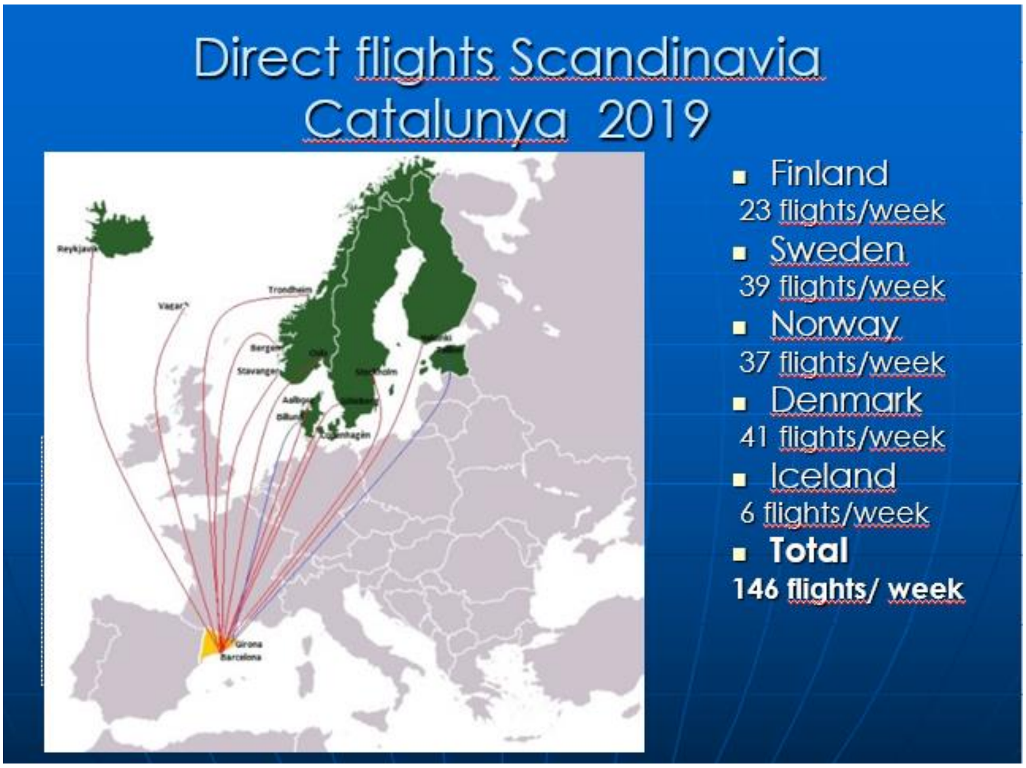
Opinion of hotel director if Costa Daurada: *"Even the tour operators don't know the area, and they are sending some tourists to the hotels. It would be important to know it personally."*

Opinion of a tour operator: *"Instead of speaking about Costa Daurada, it would be good to differentiate the sub resorts and focus in their differences instead of their similarities."*

In reducing seasonality, the low awareness can be considered both positive and negative. It is positive as building the destination image will start nearly from scratch and it is easier to build a more diverse image than the traditional sun & beach destination. However, the awareness has to be built and a well-planned marketing strategy has to be built for the area, in order to reach the Scandinavian tourists.

5.8. Accessibility

Costa Daurada is approximately one hour or 100 kilometers away from the Barcelona Prat airport. Scandinavians have frequent and relatively economic flight connections to Barcelona. There are no direct flights to Reus. In the below chart the numbers of weekly flights can be observed between Catalunya and the Nordic countries. In the Appendix 3 there is more detailed information about the flight connections.



Source: Agencia catalana de turisme, Helsinki

However, it costs money and time to travel to the destination from Barcelona. The tourist needs a motivation to make the trip, as well as good instructions and a means of transport. They way of arriving in Costa Daurada depends on the type of the tourist. Passengers flying in with tour operators can normally book the transport to the destination when booking the trip. This transport is normally carried out by bus, minibus or a private taxi. An independent tourist normally rents a car, or takes public transport, that is train or bus.

Scandinavian tour operator*: "The Nordic people travel to Barcelona 12 months a year. If it was clear to them how and why to travel to Costa Daurada, they would not have any problems – even though there are no direct flights to Reus. Close to Barcelona there is a lot of offering, and if the tourist comes to Barcelona, the product has to be very interesting to bring the tourist to Costa Daurada.* "

Direct flights to Reus would increment the number of Nordic people in the area, because they would most likely stay in the destination. However, the low awareness of the area would make it very difficult to fill the flights to Reus.

It would be essential to improve the service of public transport. Currently it is difficult to find bus or train timetables on the internet, especially in English. The service from the airport is not very frequent, and if the plane arrives late, there are often no public transport options. With the train it is necessary to change trains in Barcelona. The bus comes all the way to the destination, but it takes very long time, for instance only 1 hour to Tarragona and then 2,2 hours to Cambrils.

Another issue is the taxi service. More taxis are needed and perhaps an application on the smart phone, which can be used in English. The telephone number of the taxis should be well communicated, and the service should also be given in English.

Golf tourists would need a shuttle from the airport to the hotel. They have a lot of baggage, and they tend to seek comfortable choices. Also, it would be necessary to have a shuttle in the area (Cambrils, Salou, hotel).

5.9 Existing experiences and competitor destinations

Alicante is one of the most popular tourist destinations among Nordic people. The success is based on Alicante being one of the first charter destinations for Scandinavians in Spain. It is also a result of a mix of residential tourism, real estate market, good connection, international school, Nordic community and a Nordic business park. The Nordic tourist in Alicante follows a relative seasonal pattern, the peak season being in July, and two mid-seasons (April to June and August to October). There is a tendency to reduce travels in August and increase in April and in June. 24 Nordic Airports have direct flights to Alicante. Scandinavians travel in with regular flights (98%), without package (96%) and for leisure (95%). (Generalitat Valenciana, 2015)

Alicante shows impressive growth figures for Nordic tourists, and is now focusing in addition to the Sun & Beach, on the promotion of golf, nautical, gastronomic or City Break, MICE with events, expositions and meetings, which are essential to the desired brand image of Alicante, and especially interesting to the Nordic market. (Benito, F.J. 2.4.2018, Information) These products in main terms tend to have a balancing impact on seasonality.

Aragón has made a big effort in studying the seasonality, and the most important tasks have been identified in segmentation of the offer to satisfy the expectations of the tourists, anticipate tendencies, find tourists in emerging markets, identify the strong points of each zone of Aragón and to work in a coordinated manner between all sectors and institutions. Aragón has a very different profile from a beach destination, but many of these measures are valid also for beach destination especially in the off-peak season.

A key element is to create innovating and different products to attract tourists. Aragón would focus on sustainable tourism, experiential tourism, emotional tourism, creative tourism and cultural tourism. Practical measures are for example, identifying each area with a defined tourist experience, finding niche markets, implementing a calendar of cultural events with touristic interest in cities and towns. Also, introducing touristic products in the electronic selling platforms, implementing quality certificates, promoting associations and trying to attract groups of younger people as well as senior travellers during the off season. (Europa Press, 27.02.2019)

6 SURVEY FOR SCANDINAVIAN CONSUMERS

6.1 Survey and challenges

In order to get first-hand information about the potential of Scandinavian tourism in Costa Daurada as well as reducing seasonality with the development of this specific target market, a survey was carried out. The survey was done in Google Forms. At first the idea was to do this survey in cooperation with a tour operator asking for opinions of their Scandinavian customers. Due to the time limits and the reduced number of Scandinavian tour operators currently operating actively in the area, this was not possible. Therefore, the respondents were found through the social media (Facebook, Instagram) through direct and indirect contacts. In addition, the Association Finland Spain published the survey on their Facebook site and this added to the number of responses.

This could therefore partially be considered a sample of convenience, but the relevance of each question is analysed and commented. All and all there were 70 responses, of which 32 responses were from people that had personally visited the area. Therefore, the sample of convenience is justified because the number of Scandinavians that have visited Costa Daurada or are familiar with it, is so limited that it was easier to find more respondents from own networks.

However, it will not be possible to evaluate the questions "Are you familiar with Costa Daurada?" because the percentage can be expected to be much higher than for Scandinavians in general. Also, the answers to the reason of visiting Costa Daurada are left out of the study to avoid the overproportionate percentage of "visiting friends".

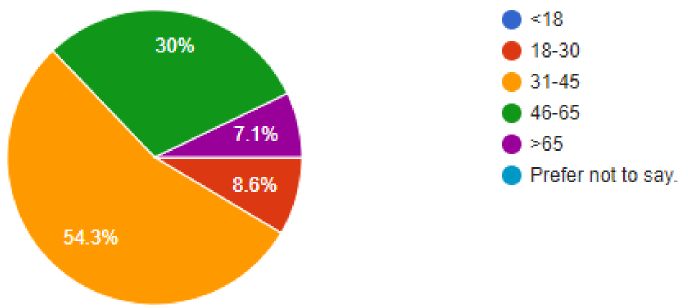
6.2 Respondents background

Most of the respondents (54,3%) are from the age group 31 to 45 years old, but other age groups are well presented. Women have answered more than men (81,4%). It is clear that the great majority of replies come from Finland (94.3%). However, these replies can be considered fairly representative of all Scandinavian countries.

In this response group 74,3% informed that they mainly travel together with their children, be it with or without the partner. Therefore, families with children were really the predominant response group, which is coherent with the age group.

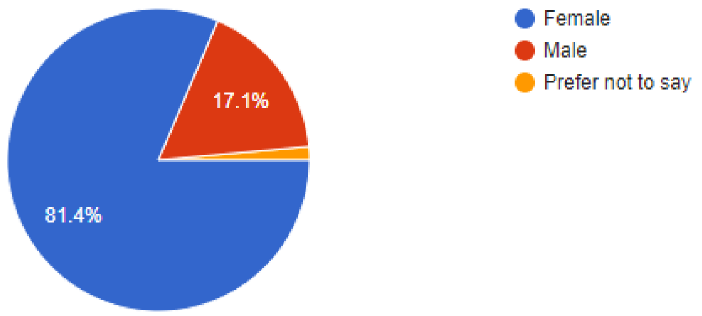
What is your age?

70 responses



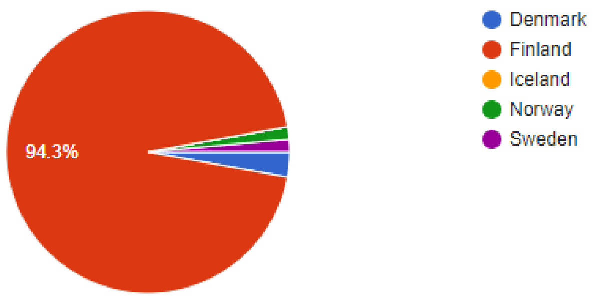
What is your gender?

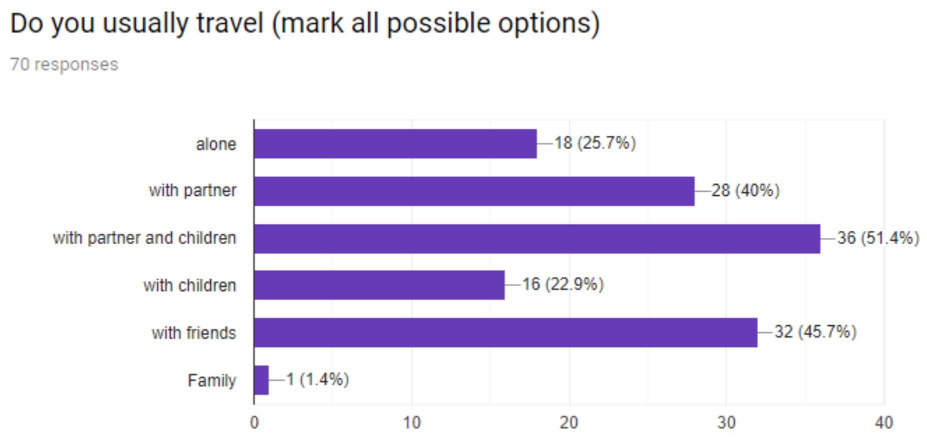
70 responses



Where do you come from?

70 responses



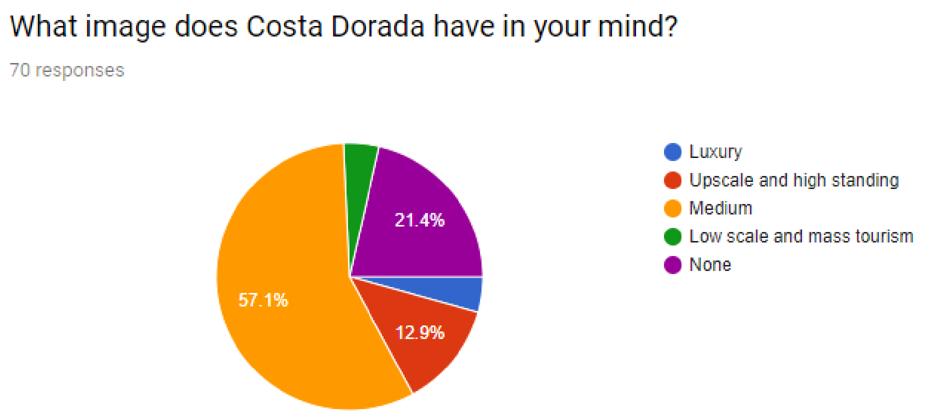


This question reveals that it is very common among the respondents to travel with children. This is partially due to the fact that most of the respondents were from age group 31-45, and age where families often have small children. It is common for family tourism follows school holiday patterns. However, with small children that have not yet started school the holiday pattern is more flexible. In Scandinavian countries school starts later than in many other European countries, and it gives more flexibility for parents to choose their holiday time.

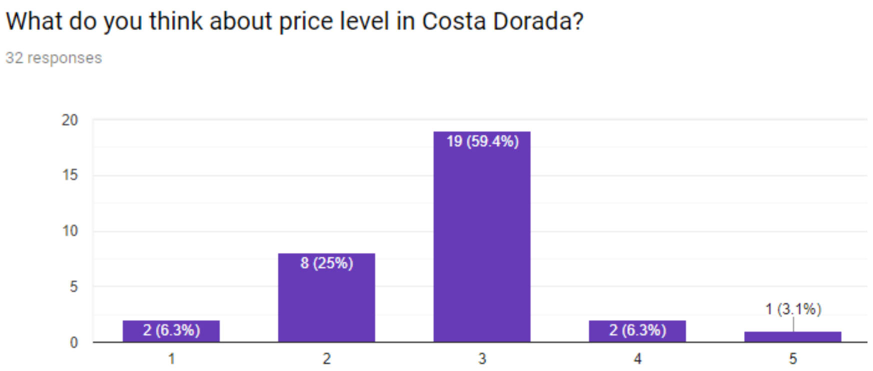
Also, the number of solo travellers is considerable – 25% of all respondents informed they often travel alone. Solo travellers are an interesting segment, as there is more flexibility on the time than when travelling together with more people with different constraints.

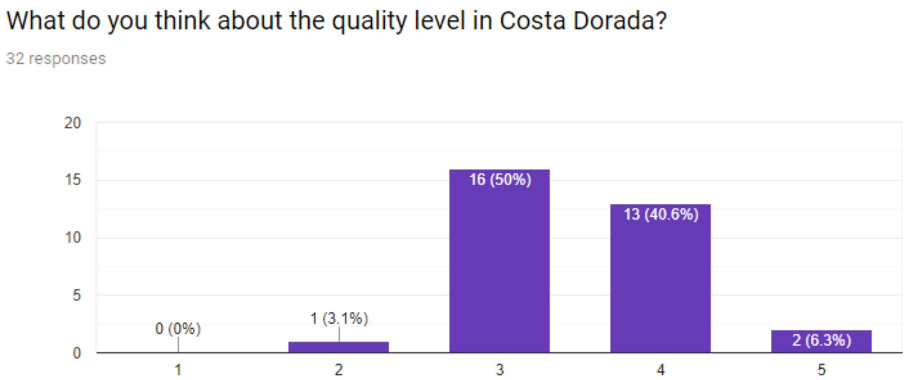
6.3 Image and price level

The perceived image of Costa Daurada for the Scandinavians is clearly medium, which was stated by 57.1% of the respondents. This image includes the answers of all participants, not just those who had visited the area. As a result, more than 20% indicated they have no quality perception over the area.



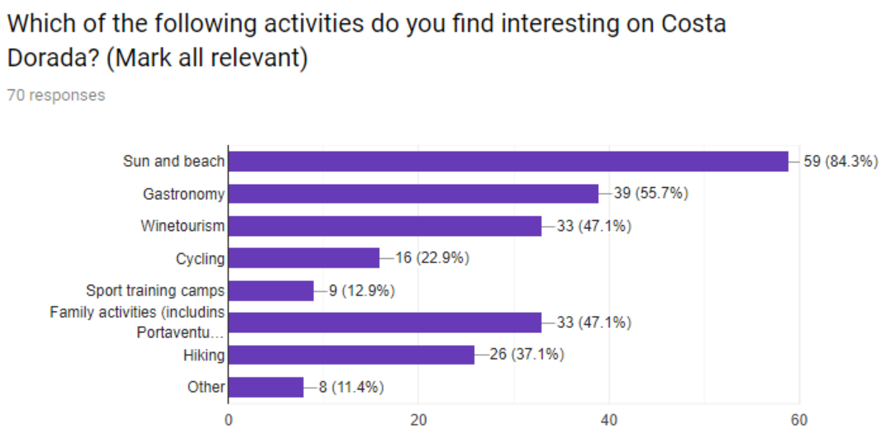
The respondents, who had actually visited the area, were asked, what do they think about price level in Costa Daurada (1=very cheap, 5=very expensive), and what do they think of the quality level in Costa Daurada (1=very low, 5=very high). When we look at the price quality ratio, the results indicate clearly that the prices are medium/medium-low and the quality is medium-medium high. Therefore, the price quality ratio can be considered a clear advantage for the area. However, as we have seen before, many Nordic tourists are now looking for upscale luxury experiences, and it seems like Costa Daurada is not considered very exclusive in its offering.





6.4 Products

First it was asked among all respondents, which products they find interesting on Costa Daurada.



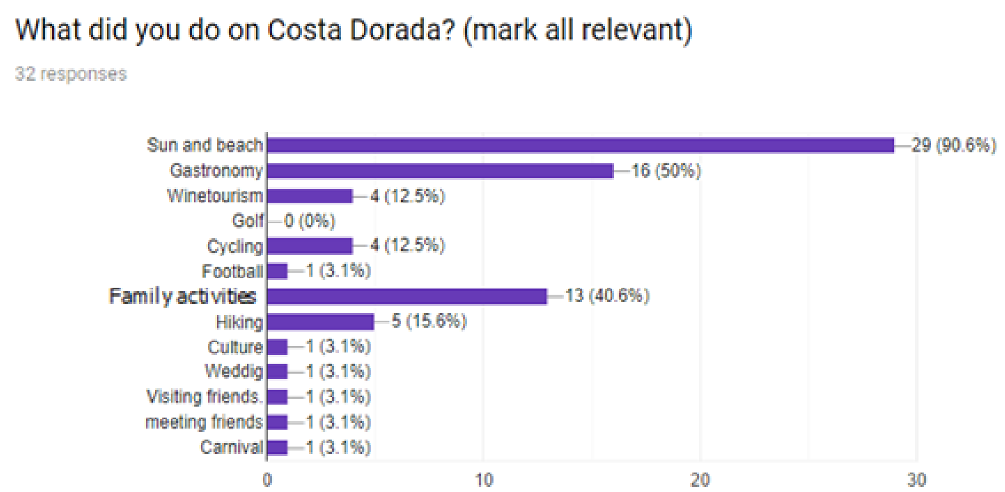
It is not a surprise that sun and beach was mentioned by more than 84% of the respondents. Clearly, this is the typical image of the destination, and what many tourists come to look for especially during the high season. However, winter sun or active Sun & Becah were not differentiated as a specifc product.

Very interestingly, gastronomy and winetourism were ranked among the most interesting products. This is a very important finding because gastronomy and winetourism give great possibilities for prolonging the season.

Family activities including Portaventura were also ranked high. This is partially due to the fact that such a big part of the respondents to this survey had expressed they usually travel with children.

Sports activities were also getting positive answers but this respondent group was not big enough to give a big emphasis on any specific sports activity. Also, if the resondents had been from a different age group (more seniors) we can expect that golf tourism would have showed more positive response.

Next, it was asked from respondents who had actually visited the area, which activities were they engaged in. Again, almost all the participants had enjoyed of sun and beach. Gastronomy ranked high but winetourism perhaps lower than expected, only 12%. 40% of the participants did participate in family activities, like going to Portaventura.



The respondents that had actually visited the area, could further specify in their own words, what they had especially liked.

1. Beach (10)
2. Food (8)
3. Weather (7)
4. Atmosphere (4)
5. ..nature, clean, hiking route Salou to light house, Cambrils

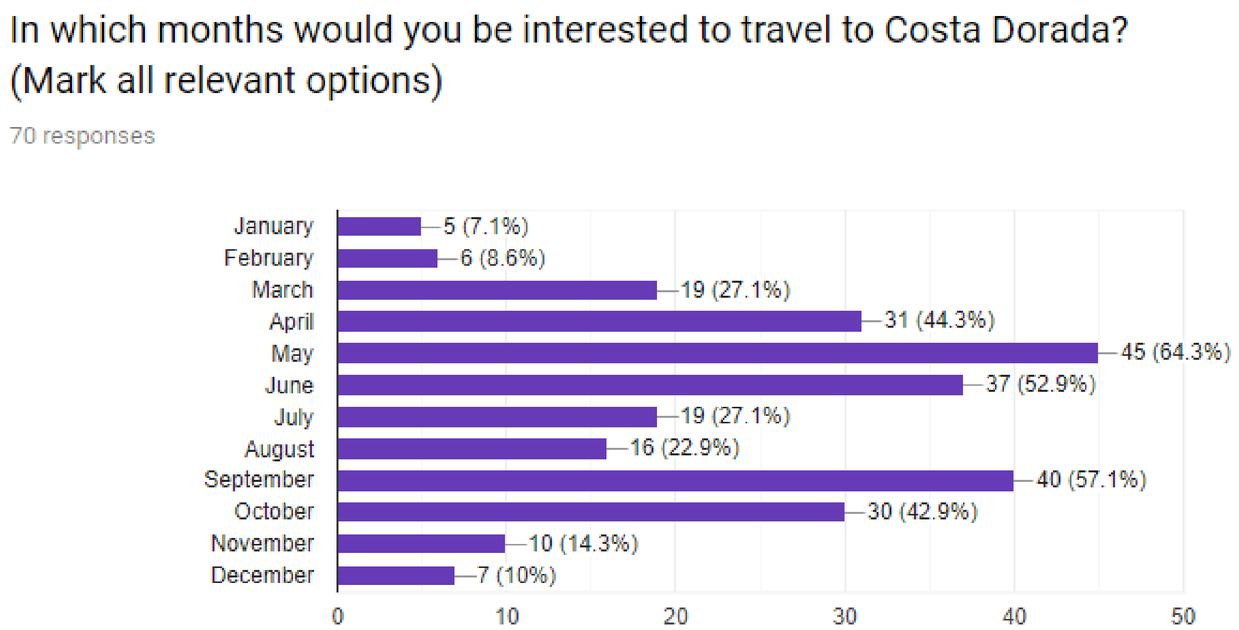
On the other hand, the improvement comments were far less and more dispersed. Still we can see that there is need to improve public transport connections, as well as the service level in English.

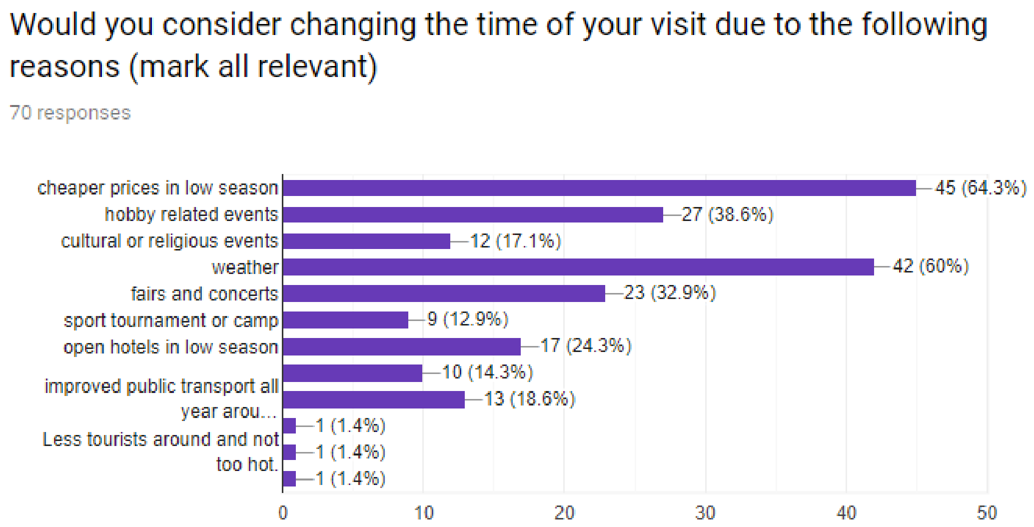
What would you improve?

1. Public transport (connections to Airport, BCN, Sitges, more regular, easier, taxis) (6)
2. More info in English (2)
3. ….plastic waste, too many tourists, traffic, poor food in touristic restaurants

6.5 Travelling time

In order to find out if there is potential to reduce seasonality in Costa Daurada through Scandinavian tourists, the respondents were asked in which months would they be interested to travel to Costa Daurada. It is very interesting to observe that the most interesting months among the respondents are May and September – both months being clearly outside of the high season. The next most interesting months among the respondents are June, April and October – very much in line with the focus months of the region in order to reduce seasonality.





In order to further understand the motivation behind the desired travel dates, it was asked from the respondents in their own words, why would they visit the destination in the earlier defined months. The results were interesting and pointing to the climate factors: shoulder months are warmer than in Scandinavia but not too hot. Masses of tourism were not considered attractive, and sports and outdoor activities are more interesting when the weather is sunny but not too hot. Also, cheaper prices where mentioned as a reason to choose mid-season holidays.

Why would you visit Costa Daurada in the defined months?

- *Weather (warmer than Scandinavia but not too hot), Sun (31)*
- *Holiday season (9)*
- *Not masses of tourists, July and August are packed with people (8)*
- *Spring is perfect for outdoor activities (2)*
- *Cheap prices*
- *Festivities*
- *Northern Spain is cold, so the best time is to in the Summer*
- *All around the year is interesting*

6.6 Results

This study confirms the fact that Costa Daurada is still very little known in the Nordic countries. In general terms, those who have visited the area have had a positive experience. This encourages the idea that more awareness would lead to an increased number of satisfied tourists.

The price quality ratio of the destination is considered very favourable by those who actually visited the area. This offers room for product development both in gastronomy and wine tourism as well as in other sub products. The image of the destination is perceived as medium. Upgrading of hotels is an ongoing process and matches well the desire of Scandinavians to find upscale accommodation.

It could be said that the most interesting finding of the survey is that the Scandinavian people show a high interest in travelling to the area during the Off-Peak season or Mid-Season. The workers' holiday calendar is more flexible than in many other countries. Also, school holidays have a different footprint than rest of Europe.

There were only few improvement points that came out of the survey. The most important issues were public transport and lack of services in English.

The most attractive part of the destination for the respondents who had actually visited the area was the long coastline. There is a risk that despite the desire to travel during the low season, the Scandinavians would still end up booking their travels in July. Different policies like pricing, product development and targeted events could affect their behaviour.

7 RESULTS AND ACTION PLAN

On the basis of the qualitative interviews, the quantitative survey as well as literature review, a SWOT analysis has been carried out to analyse strengths, weaknesses, opportunities and threats of Costa Daurada as a destination for Nordic tourists, especially outside of the high season July and August. This is followed by analysing the dualistic model. In the end, an action plan is presented.

7.1 SWOT

STRENGTHS	**WEAKNESSES**
▪ Great combination of sub products for different segments in compact area. Unique combination Salou, Cambrils, Portaventura, La Pineda (with nearby areas Tarragona, Reus and Priorat) ▪ Great climate in low season ▪ Close to and with good flight connections to Barcelona ▪ Unique and blue flag beaches ▪ High quality gastronomy ▪ Moderate prices for Nordic people ▪ "Authentic Spain/Catalunya"	• Brand Costa Daurada and surroundings have low awareness in Nordics • Public transport room for improvement • Low level of services in English • Little touristic activities, services and infrastructure during low season • Salou mass tourism image • Area is often promoted and operated as separate destinations, not fully using potential of compact area with many sub products • Nordics look for 4 or 5 star hotels • No direct flights to Reus • Improvements needed in beach facilities
OPPORTUNITIES	**THREATS**
▪ Winter Sun and active beach are very interesting products for Scandinavians ▪ Reus airport and charter flights would bring tourists directly to destination ▪ Brand Costa Daurada is not known but has a lot of potential ▪ Richness of the area as in different tourist products. Tarragona is an attractive city, Portaventura is a popular theme park ▪ Stronger cooperation between different stakeholders in the destination (private and public) ▪ Hotels are upgrading ▪ New and more diverse promotion strategy ▪ School and holiday calendar in Scandinavia would balance seasonality ▪ Business trips and MICE could be interesting	▪ Scandinavians seek for more holiday luxury than before, and Costa Daurada's positioning is perceived as medium level ▪ Girona Airport could convert into the extension of BCN airport el Prat ▪ Competing destinations like Turkey, Tunis and Egypt are recovering ▪ Norwegian and Thomas Cook are facing financial problems ▪ Burocracy

7.2 Dualistic model

As our goal is to reduce seasonality through developing the Nordic market, we need to define the motivations of the Nordic tourists that have an impact on their seasonal behaviour. To do this, we can use for example the dualistic model proposed by Senbeto et al. (2081, p. 9-10), which has briefly been introduced earlier.

Structural factors: The higher than average disposable makes it possible for Scandinavians to make even short trips throughout the year. Especially the senior segment has more income and a more flexible time pattern due to reduced career commitments. For reducing seasonality, this is a top segment for promoting the area in the Scandinavian countries. Families with children tend to travel during school holidays. Well targeted campaigns for Summer holiday starters in the beginning of June or during October break could however have a balancing impact on seasonality.

Fruition factors: The motivation to travel can be created through different sub products and there is a great variety of them in Costa Daurada. Products that are interesting senior segment vary from golf, wellbeing, sun & beach to winter sun, gastronomy and wine tourism. For families with school children, for example an increasing number of camps such as sports camps, horse riding camps and language courses can be interesting either during the school year or the shorter holiday breaks outside of the high season. Also, increased awareness of Portaventura could bring more out of season activities for families – if the park remains open. For couples, gastronomy, wine tourism and different sports activities can be highly attractive.

Climate based factors: It became very clear in the survey that even though many Nordic tourists travel during the high season, climatewise they would be very interested to travel during the shoulder months. Climate also has a different effect depending on the product as well as the segment we are looking into. Cultural tourism and sports are more interesting during the off-peak season.

Unforeseen factors: Even if there was a terrorist attack in 2018 in Cambrils, the area is considered safe. However, some strikes and political incidents can have an impact on the willingness to travel. It is hard to see that the Catalan situation would escalate so much that it would have an impact on Nordic tourists. However, heat waves in the Summer can make Nordic tourists avoid the hottest season.

7.3 Action plan

Costa Daurada should offer a positive and attractive image to the targeted segments in the Nordics from the moment they start looking for information on the internet until finishing their journey and returning home. The experiences should be unique and stay in the long-term memory. Destination managers have to make sure that the promise made in marketing will come to life in all the encounters with the destination, before, during and after the stay. (Morgan et al., 2010. P. xxv)

If we look at private actions, the most important is to further build the experiences to suit the chosen segments. Contacts to the Nordic market are needed and concrete co-operations established in order to provide matching experiences and services. Nordic market is flexible in travelling times and spends more than average, making it an attractive target for the area. The pricing strategies could clearly focus on lower season, the positioning should be thought of carefully, and the chosen establishment should keep in mind the desire of "better than home" of the Nordic customers. The establishments need to reconsider their opening seasons depending on the development of the low season demand.

In the local-regional actions, the attracting products of the area should be promoted, an effort that is currently being done for the golf segment. Costa Daurada has an interesting event calendar, but it is more directed to locals. Some of these events like Foc de Nit in Cambrils, Cos Blanc in Salou, gastronomy efforts etc. could be chosen and conceptualised to be accessible for Nordic tourists. There is a great direction in sustainable development of tourism, which can be observed for example in the number of Blue Flag certified beaches.

The public sector should provide for a more functional public transport system from Barcelona airport to the destination as well as internal connections in Costa Daurada. It should be secured that there are well working connections with the flights as well as easily accessible information about the schedules. Also, public sector could boost the private sector to expand opening calendars outside the season.

All and all, one of the key issues are co-operation, communication and contacts. Private, regional and public stakeholders should co-operate and make a common effort in order to increase the awareness and the attractiveness of Costa Daurada in the Nordic market. This needs active promotion and investments in marketing. A good PR agency is essential to assure the visibility of Costa Daurada in Nordic press and especially social media. Co-marketing with tour operators is needed, and this also enforces the partnerships and contacts through common investments. Famtrips, presstrips, blogtrips and co-operation of public entities and private companies. Hotels can for instance be interested in offering accommodation. As the Scandinavian tourist is usually looking for experiences, it would be important to have a regional smart phone application, before and during the stay, in English or in proper language for the tourist. This application could be distributed through all information points of the tourist offices as well as in the accommodation establishments.

The focus of the promotion strategy should be on different products and segments, such as golf. It is important to establish contacts in the Nordic countries among tour operators but also leaders of each product that is chosen for this market. A good example mentioned in this study is golf, which has become highly successful in great part due to the contact network and systematic promotion of the destination among golf professionals in the Nordics. Even fair participation continues to be important – mainly for establishing contacts. It could be interesting to accommodate Nordic reality shows in the destination.

8. CONCLUSIONS

Management of tourist destinations has changed. Today some of the key challenges are sustainability as well as reducing seasonality and centralisation of tourism. The goal of this study has been to investigate how to reduce seasonality in a destination through the development of a specific target market.

This study has given an overview of the current theoretical understanding of seasonality in literature. Demand and offer related factors, as well as natural and institutional factors influence seasonality. A dualistic model has been developed to see the motivations of the tourist and how this influences seasonality. Seasonality is often quantified with the Gini index. The emphasis of this paper has been on the part of target market identification and analysis.

The case study has provided a deeper look on reducing seasonality in Costa Daurada through the development of incoming tourism from Nordic countries. The objective is to show why Nordic market is especially interesting for reducing seasonality, as well as how the market should be built so that the result would be the expected, that is, not just increasing the number of tourists but to actually reduce seasonality.

Scandinavia is an especially interesting emissor market in reducing seasonality. The income level is high, holiday calendar is more flexible than in many other countries, and school holidays are differently accentuated. Weather conditions favour off-peak travelling to the destination. However, the awareness of Costa Daurada is very low in the Nordics.

In order to increase the number of Nordic tourists, it is crucial to make a portfolio of interesting tourist products for chosen segments in Nordics and to promote the destination – especially through the products and experiences. A market specific strategy for increasing awareness should be carefully planned.

Scandinavian tourists need services in English. They look for authentic and local experiences. Scandinavians also want more luxury on the holidays than in the past. In order to enhance the tourism in off peak months the local hotels, attractions and other services should reconsider opening during the whole year or more months than at the moment. This is a structural change that has both positive as well as challenging aspects. A clear improvement point is to improve public transport in the destination.

If reducing seasonality is a top priority for Costa Daurada, it may become essential to reconsider the current brand image of a family destination. Possibly, more focus should be given to different markets, products and segments that further reduce seasonality. We can see that a strategy, research, and specific actions can help to reach this objective. Investments are needed, and it is important to evaluate carefully, if reducing the seasonality is a desirable goal for all stakeholders in the destination. Key words are co-operation, communication and contacts.

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APPENDIX 1: EUROSTAT STATISTICS SEASONALITY 2017

Distribution over the year of trips of at least one overnight stay of EU residents, 2017

	Number of trips (thousand)	Distribution per month(1) (%)											
		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
EU-28(2)	1 255 347	5.3	6.6	7.7	8.3	8.3	9.7	11.4	12.3	8.6	7.3	5.9	8.6
Belgium	15 202	3.9	5.9	5.8	9.9	7.3	7.4	18.5	13.0	8.0	7.3	5.5	7.5
Bulgaria	5 464	3.8	3.6	7.3	4.8	7.5	9.7	9.2	22.8	7.2	4.8	4.5	15.0
Czechia	35 815	4.2	6.4	6.9	8.0	9.8	9.8	14.2	13.5	8.5	6.3	5.2	7.0
Denmark	26 516	9.4	10.0	8.1	10.5	11.3	9.6	10.6	7.0	6.2	6.4	5.8	5.3
Germany	243 577	5.0	6.1	11.4	6.5	8.4	11.8	8.2	9.5	10.4	7.6	5.6	9.4
Estonia	4 556	6.6	5.7	7.1	7.2	7.4	7.7	12.1	12.1	8.5	7.1	6.6	11.9
Ireland	14 556	6.0	6.7	7.1	9.0	7.7	10.0	11.1	10.5	7.2	9.5	7.2	7.9
Greece	6 210	2.0	3.4	3.6	9.6	3.4	7.2	17.6	30.2	5.8	5.6	4.0	7.6
Spain	152 708	5.7	6.5	7.2	9.9	7.2	9.1	11.3	12.7	8.7	7.4	5.9	8.3
France	220 775	4.8	7.4	6.1	9.9	9.1	8.3	12.2	11.9	7.6	8.0	5.4	9.4
Croatia	4 900	6.3	6.7	8.1	7.0	8.6	13.1	10.1	15.2	6.7	5.7	4.9	7.6
Italy	56 421	5.7	5.4	5.4	10.7	5.7	7.9	13.2	20.0	6.6	4.7	5.0	9.7
Cyprus	2 799	6.3	6.9	6.6	7.9	7.0	8.7	11.2	13.3	8.8	8.5	6.5	8.4
Latvia	4 208	4.8	5.5	9.0	6.6	8.9	10.7	13.6	11.5	10.2	6.8	5.0	7.5
Lithuania	4 560	7.9	4.7	5.9	8.1	9.4	9.9	10.8	12.4	10.2	6.8	7.9	6.0
Luxembourg	1 834	3.7	6.4	8.8	6.5	6.7	11.8	9.6	12.8	10.6	5.5	5.8	12.0
Hungary	18 608	6.0	6.4	8.7	6.8	8.3	11.7	10.6	13.7	7.1	6.3	5.9	8.5
Malta	807	5.0	8.4	8.6	7.4	5.1	8.3	10.4	10.8	11.8	6.4	6.9	11.0
Netherlands	45 070	4.9	6.5	8.2	6.5	9.2	11.0	11.4	11.0	10.2	6.2	5.1	9.8
Austria	23 085	5.6	6.8	7.0	7.1	8.4	9.4	12.1	13.5	9.1	7.9	5.7	7.2
Poland	57 910	5.3	7.0	6.8	4.7	7.3	9.8	16.8	16.8	6.3	6.9	3.8	8.4
Portugal	17 474	6.2	6.6	6.9	8.5	6.2	7.5	11.2	15.7	8.9	6.2	5.5	10.6
Romania	17 902	9.2	6.8	5.7	7.0	10.7	7.8	8.4	16.1	4.9	5.3	7.4	10.6
Slovenia	4 825	5.6	6.9	6.2	7.4	7.3	8.6	19.0	14.6	7.6	7.0	4.3	5.6
Slovakia	10 970	5.8	7.2	5.4	9.3	9.2	10.0	6.1	9.9	6.6	12.3	7.5	10.7
Finland	39 534	5.3	7.1	7.6	8.5	8.0	10.7	12.2	9.0	8.3	7.7	7.6	8.0
Sweden	59 648	5.2	6.3	7.5	8.9	8.1	9.5	14.9	12.1	8.1	6.5	6.6	6.3
United Kingdom(3)	159 414	5.3	6.0	6.6	8.0	9.0	9.4	10.2	12.5	9.8	8.0	7.6	7.5
Norway	23 268	6.1	7.2	8.0	8.6	8.0	9.6	13.5	9.0	8.4	8.5	6.5	6.7
Switzerland	22 113	4.4	7.7	5.4	9.0	8.8	7.8	14.8	9.7	9.2	9.4	4.7	9.3

(1) Trips which started in 2016 and ended in 2017, are included in the corresponding month of departure of 2017 (f.i. a trip that started in November 2016 and ended in January 2017 is included in November 2017).
(2) EU-28 aggregate estimated for this publication, including 2013 data for the United Kingdom.
(3) 2013 data.
Note: Due to rounding, deviation can occur between total and subtotals.

Source: Eurostat (online data code: tour_dem_ttmd)

Average length of stay of trips of EU residents by month of departure of the trip, 2017 (nights)

	All trips	Month of departure(1)											
		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
EU-28(2)	5.1	4.4	4.1	4.0	4.7	4.5	5.0	7.3	6.6	5.1	4.5	3.9	4.4
Belgium	6.5	6.7	5.0	4.8	5.7	5.6	6.3	9.9	6.8	5.8	5.3	5.4	5.2
Bulgaria	4.1	3.2	3.4	2.8	3.1	2.9	4.0	4.9	5.7	4.2	3.8	2.9	3.9
Czechia	4.1	3.3	3.2	2.9	2.9	3.2	4.2	6.5	5.7	3.6	2.9	2.8	3.6
Denmark	3.8	3.0	3.6	2.8	3.2	2.8	3.4	5.8	5.7	4.4	4.2	3.6	4.0
Germany	5.5	4.9	4.6	4.2	6.3	5.5	5.5	7.9	6.6	6.0	5.5	4.4	4.8
Estonia	3.3	2.9	3.3	3.3	3.1	2.8	4.0	3.7	3.9	2.9	4.3	2.8	2.6
Ireland	4.6	3.9	3.7	3.3	3.9	5.0	6.2	5.9	5.0	5.0	4.0	4.0	4.0
Greece	9.9	7.1	4.8	5.5	6.7	9.1	20.6	14.4	10.2	5.3	5.6	6.0	6.8
Spain	4.1	2.8	2.4	2.8	3.5	3.0	3.9	7.3	6.6	3.5	3.2	2.9	3.8
France	5.1	3.6	4.2	4.0	4.4	4.2	5.0	8.1	7.4	4.7	4.3	3.7	4.0
Croatia	6.4	5.9	4.0	5.2	5.2	4.3	8.0	11.7	7.2	4.2	6.1	5.2	5.4
Italy	5.6	3.9	3.7	3.5	3.2	4.1	5.7	8.1	8.4	5.0	3.3	3.5	5.4
Cyprus	6.4	7.0	5.6	8.3	5.8	3.8	6.9	8.4	7.2	7.4	4.0	3.5	7.1
Latvia	3.3	2.5	3.2	2.3	3.4	2.2	3.1	4.1	4.7	3.2	3.0	3.7	3.0
Lithuania	4.4	3.5	4.6	4.2	3.9	4.3	4.1	4.9	4.8	5.0	4.9	4.2	4.6
Luxembourg	7.1	6.5	5.2	4.8	6.4	6.2	5.4	11.5	10.6	7.3	5.4	5.3	6.8
Hungary	3.6	3.4	3.0	2.8	3.3	3.4	3.9	4.5	4.3	3.6	3.4	3.0	3.3
Malta	4.9	5.6	3.5	3.9	4.5	3.7	4.4	6.6	5.3	5.9	4.4	4.7	5.4
Netherlands	6.5	6.3	4.9	3.7	7.3	6.8	5.8	11.5	8.1	6.1	6.2	4.8	3.6
Austria	4.9	4.5	4.0	3.9	4.7	4.1	4.3	7.4	6.0	4.6	4.4	3.8	3.9
Poland	5.8	6.0	5.1	4.1	5.5	4.8	5.4	7.9	6.2	5.1	5.6	4.9	4.7
Portugal	4.0	3.0	2.6	2.5	3.1	2.8	4.4	5.9	6.8	3.6	3.0	2.9	3.3
Romania	3.9	3.7	3.3	2.8	3.5	3.5	3.7	5.1	5.2	3.8	3.7	3.1	3.4
Slovenia	4.3	3.6	3.5	2.4	3.5	3.4	4.5	6.2	5.1	3.9	3.6	3.3	3.0
Slovakia	4.0	3.3	2.8	3.3	5.1	4.8	4.9	5.5	4.6	3.9	3.3	3.0	3.4
Finland	3.4	3.2	3.0	3.1	3.3	2.9	3.8	4.1	3.3	3.2	4.2	3.0	3.7
Sweden	5.2	6.6	5.0	6.9	4.5	4.8	5.3	6.0	4.7	4.5	4.1	4.1	6.1
United Kingdom(3)	5.5	6.0	4.8	5.0	5.6	5.1	5.4	5.9	6.8	6.6	5.0	4.4	4.7
Norway	4.9	4.1	3.8	3.8	5.2	3.6	5.4	8.4	4.7	4.5	4.6	3.5	4.4
Switzerland	6.7	7.0	5.5	4.8	5.7	5.7	7.5	9.8	6.5	6.7	5.9	6.0	6.4

(1) Trips which started in 2016 and ended in 2017, are included in the corresponding month of departure of 2017 (f.i. a trip that started in November 2016 and ended in January 2017 is included in November 2017).

(2) EU-28 aggregate estimated for this publication, including 2013 data for the United Kingdom.
(3) 2013 data.
Note: Due to rounding, deviation can occur between total and subtotals.

Source: Eurostat (online data code: tour_dem_ttmd, tour_dem_tnmd)

APPENDIX 2: STATISTICS ON INCOMING TOURISTS TO CATALUNYA

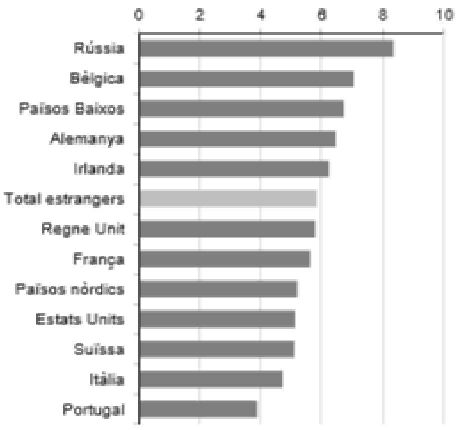
3. Situació actual. Turisme estranger dels mercats emissors principals o d'interès amb destinació principal Catalunya

Any 2018

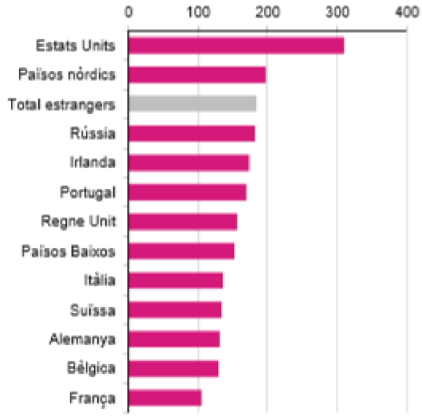
Mercat emissor	Turistes			Despesa total [1]			Despesa mitjana turista (€) [1]	Despesa mitjana diària turista (€) [1]	Estada mitjana (dies)
	Milers	Quota mercat	A l'estiu (2018)	Milions €	Quota mercat	A l'estiu (2018)			
Total estrangers	**19.123,2**	**100,0%**	**46,6%**	**20.606,2**	**100,0%**	**49,8%**	**1.077,5**	**185,0**	**5,8**
Europa	14.385,3	75,2%	48,1%	11.667,4	56,6%	50,9%	828,6	141,8	5,8
Països tradicionals [2]	10.646,0	55,7%	47,7%	8.151,5	39,6%	53,5%	764,0	132,5	5,8
Alemanya	1.412,4	7,4%	46,8%	1.207,1	5,9%	50,9%	854,7	131,6	6,5
Bèlgica	402,1	2,1%	51,0%	427,2	2,1%	53,4%	912,3	129,6	7,0
Canadà	217,7	1,1%	41,5%	n.d.	-	-	n.d.	n.d.	n.d.
Estats Units	1.358,0	7,1%	45,6%	2.402,0	11,7%	46,9%	1.586,8	310,0	5,1
França	4.101,1	21,4%	46,9%	2.418,0	11,7%	53,6%	589,6	105,1	5,6
Irlanda	312,2	1,6%	57,7%	547,6	2,7%	70,4%	1.083,2	173,5	6,2
Itàlia	1.197,4	6,3%	41,2%	770,3	3,7%	45,9%	643,4	136,4	4,7
Japó	296,9	1,6%	30,3%	n.d.	-	-	n.d.	n.d.	n.d.
Països Baixos	737,4	3,9%	55,0%	712,1	3,5%	59,2%	1.025,8	152,6	6,7
Països nòrdics	709,0	3,7%	49,3%	728,7	3,5%	51,5%	1.027,7	197,7	5,2
Portugal	193,8	1,0%	51,9%	184,7	0,9%	57,3%	659,9	170,0	3,9
Regne Unit	2.086,5	10,9%	49,7%	1.888,1	9,2%	56,8%	904,9	156,5	5,8
Rússia	726,6	3,8%	62,2%	1.192,2	5,8%	64,2%	1.527,2	182,8	8,4
Suïssa	247,3	1,3%	40,6%	211,7	1,0%	38,2%	683,7	134,2	5,1

[1] A preus corrents.
[2] Alemanya, Bèlgica, França, Itàlia, Països Baixos, Països nòrdics i Regne Unit.
n.d. Dada no disponible.
- Dada no calculable.

G.3.3. Rànquing en estada mitjana (dies) (2018)



G.3.5. Rànquing en despesa mitj. diària turista (€) (2018)



Turisme

Indicadors bàsics de turisme estranger

Any 2018 (dades provisionals)
Data d'actualització: 06 de febrer de 2019

Observatori del Treball i Model Productiu

APPENDIX 3: FLIGHTS FROM NORDIC COUNTRIES TO CATALUNYA

VOLS DIRECTES DELS PAÏSOS NÒRDICS ESTIU 2019

Última actualització 23/3/2019

Vols Països Nòrdics – Catalunya, Estiu 2019

Països Nòrdics	Catalunya	Companyia aèria	Pàgina web	Freqüència setmanal segons cia aèria	Freqüència setmanal aeroport/país	% Vertical
FINLÀNDIA					**13-23**(27) **-14,81%**	**16%**
Hèlsinki HEL	Barcelona BCN	Finnair Norwegian Vueling	www.finnair.fi www.norwegian.com www.vueling.com	**7-14** (18) **4-7**(7) **2**(2)		
NORUEGA					**19-37**(46) **-19,56%**	**25%**
Oslo OSL	Barcelona BCN	Norwegian SAS Vueling	www.norwegian.com www.flysas.com www.vueling.com	**8-16**(15) **3-9**(14) **2-6**(6)	31	
Bergen BGO	Barcelona BCN	Norwegian	www.norwegian.com	**2**(2)	2	
Stavanger SVG	Barcelona BCN	Norwegian	www.norwegian.com	**2**(2)	2	
Trondheim TRD	Barcelona BCN	Norwegian	www.norwegian.com	**2**(2)	2	
SUÈCIA					**27-39**(40) **-2,50%**	**26%**
Estocolm ARN	Barcelona BCN	Norwegian Vueling *SAS	www.norwegian.com www.vueling.com www.flysas	**7-16**(17) **7** (8) **2-3**(3)	26	
Estocolm –Skavsta NYO	Barcelona BCN	Ryanair	www.ryanair.com	**2-4**(5)	4	
Göteborg GOT	Barcelona BCN	Norwegian Vueling *Ryanair	www.norwegian.com www.vueling.com www.ryanair.se	**3-4**(4) **2-3**(3) **3**(-)	10	

VOLS DIRECTES DELS PAÏSOS NÒRDICS ESTIU 2019

Última actualització 23/3/2019

DINAMARCA					**31-41**(45) **-8,88%**	**28%**
Copenhagen CPH	Barcelona BCN	Norwegian Vueling *SAS	www.norwegian.com www.vueling.com www.flysas.com	**12-16**(19) **10-15**(15) **1-2**(-)	33	
Billund BLL	Girona GRO Barcelona BCN	Ryanair Norwegian	www.ryanair.com www.norwegian.com	**3**(3) **2**(2)	5	
Aalborg AAL	Barcelona BCN	Vueling	www.vueling.com	**2**(2)	2	
Vágar FAE	Barcelona BCN	Atlantic Airways	www.atlantic.fo	**1**(1)	1	
ESTÒNIA					**2**(4) **-50%**	**1%**
Tallinn TLL	Girona GRO	Ryanair	www.ryanair.com	**2**(2)	2	
ISLÀNDIA					**5-6**(12) **-50%**	**4%**
Reykjavík KEF	Barcelona BCN	Vueling Norwegian	www.vueling.com www.norwegian.com	**3**(4) **2-3**(3)	6	
TOTAL vols regulars directes Països Nòrdics – Catalunya					**97-148**(174) **-14,94%**	**100%**

() Temporada estiu 2018

*Novetats

Companyies Aèries:

- Vueling

Ruta OSL-BCN augmenta només del 24 de juny al 31 de juliol
Ruta KEF-BCN a partir del 1 d'abril
Tanquen les rutes BGO-BCN, TLL-BCN

- Ryanair

Nova ruta GOT-BCN a partir del 2 d'abril

- SAS

Ruta ARN-BCN només abril, maig i juny de manera irregular
Ruta OSL-BCN de manera irregular
Ruta CPH-BCN de manera irregular

- WOW Air

Entra en bancarrota i desapareix 28/3/2019

TTOO:

- Aurinkomatkat (FI) Xarteja seients de Finnair i ofereix: Barcelona, Salou i Cambrils. Del 4 de maig al 5 d'octubre. 1 vol per setmana.
- TUI SE, NO i DK xarteja seients de Norwegian i TUI FI xarteja seients de Finnair.

Generalitat de Catalunya
Agència Catalana de Turisme