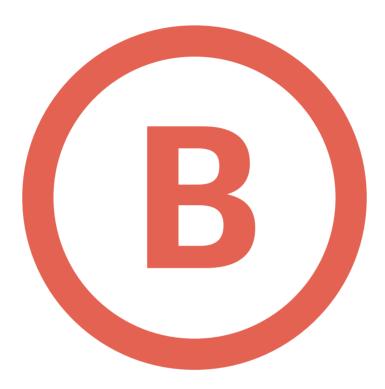
## **Barcelona Global International Council**

Perception Survey December 2018



## We want to make **Barcelona** one of the **world's best cities** for talent and economic activity.

Barcelona Global International Council is a network of 90 professionals established around the world with a shared commitment to Barcelona: through the identification of opportunities for investment and business for our city, they seek to promote the image and prestige of Barcelona internationally. The members of the International Council, from their respective cities of residence and professional areas, help us to detect the challenges confronting our city.



## International Council Perception Survey

8th Edition December 2018

At Barcelona Global we benefit from the more detached view of the International Council members, who tell us how they perceive the city in terms of business-friendliness, talent, quality of life and brand, and help us to understand the image Barcelona conveys to the rest of the world. The survey consists of 24 questions, all of them relating to Barcelona Global's objectives.

#### About the International Council Perception Survey

We introduce to you the seventh edition of the International Council Perception Survey. This opinion poll aims to follow the progression of various measurements related to Barcelona's image over time in order to increase its competitiveness and further Barcelona Global's mission.

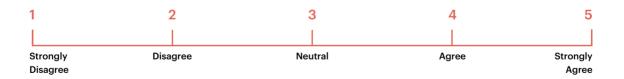
Rather than basing our analysis on statistics or data, we asked members of the International Council to give their instinctual reaction to each of the prompts. In this way, the true perception of Barcelona in the eyes of those living abroad is captured through a combination of objective facts (coming from their experience living in or conducting business in Barcelona) and subjective opinion (stemming inherently from geographical distance). Ideally, these intuitive responses represent more accurately the perceptions of different professionals with the similar detached, distant perspective that comes from living outside of Barcelona.

The data represented comes from the average scores of 62 respondents from the International Council, out of 85 total members. This time, the report comprises only the Monitor (fixed) section.

#### Methodology

The objective of this survey is to ask a set group of professionals with ties to Barcelona, living in different cities around the world, how the economic competitiveness of Barcelona, among other characteristics, is perceived.

In total, the Barcelona Global International Council Perception Survey consists of 24 prompts, 19 of which were measured on a scale of 1 to 5 to gauge the degree of agreement or disagreement pertaining to various topics related to Barcelona Global's goals. One is an open-ended multiple choice question, 3 are Net Promoter Score questions and one is an open-ended text response question.



#### **Overview**

Between November and December, **we carried out the International Council Perception Survey for the seventh consecutive year**. The survey has been sent to the 85 members of the International Council.

For members abroad, Barcelona is still a great brand (4.74), which after a considerable loss in its valuation in 2017, partially recovers its position.

58% of those surveyed would recommend Barcelona to a friend as a city to live in at the moment, recovering in the "net promoter score" the indices of previous years.

The question about Barcelona as a city to study in, has been incorporated this year. Highlighting with 59% those who would fervently recommend the city as a destination to study an MBA or master's degree, and only 15% those who would not. **This is one of the pillars of Barcelona's positioning in the world.** 

In all editions carried out, Barcelona is perceived as standing out for its high quality of life (4.52), attractive for attracting talent, culturally dynamic (4.44) and with potential in the technological and digital hub.

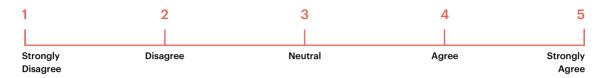
However, as in previous editions, Barcelona's brand is not associated with that of a business city (2.79), but as a creative (4.08) and global city (3.66), well below the potential they see Barcelona has in this field (4.3).

As for Barcelona's ability to attract talent, the magnetism and potential of the city (4.66) stands out once again. At the same time, Barcelona is perceived as a welcoming city (4.16), although it is detected with a 3.66 that it is not so easy to find qualified workers. In 2018, the potential as an entrepreneurial hub received the best rating with a 3.89.

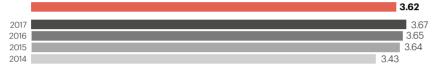
In terms of economic areas, Barcelona's people around the world perceive Barcelona's economy as an economy very focused on tourism, sports and architecture. **Moreover, technology emerges as a sector to be taken into account.** 

As challenges to be addressed, political instability remains one of the most important issues to deal with. Bureaucracy, the level of English in administration and taxation are other challenges to overcome, which are even more worrying than in the previous Survey.

## **1.** Perception of Business Attractiveness



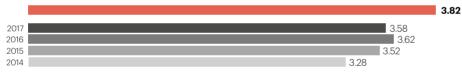
#### Barcelona is an alluring city for business in general.



#### It is easy to do business in Barcelona.

	3.20
2017	3.09
2016	3.03
2015	2.98

#### Barcelona is well-positioned in terms of research and development.



#### Barcelona has an efficient business infrastructure, with high quality and cost-effective office space.

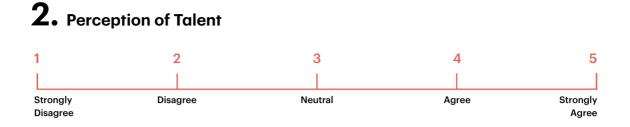
		3.75
2017		3.68
2017 2016	3.41	
2015		3.65

Barcelona's airport has a high level of international connectivity.

# 3.33 2017 3.43 2016 3.24 2015 3.25

#### Barcelona has the potential to be a major business hub.





3.89

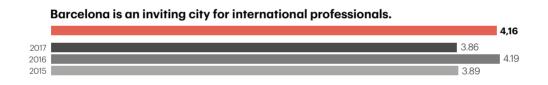
4 66

Barcelona is a city where it is easy to find qualified staff.



Barcelona is a hub for startups and entrepreneurship.

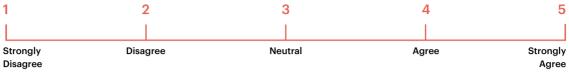
2017		3.68
2016		3.81
2015	3.29	



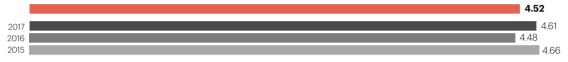
Barcelona has the potential to be a magnet for talent.

			4.00
2017		4.42	
2016		4.45	
2015	4.07		

## **3.** Perception of Quality of Life



#### Barcelona is a city with a high quality of life.



#### From an international point of view, Barcelona is a culturally attractive city.

		4.44
2017		4.47
2016	4.3	4
2015 2014	4.	36
2014		4.45

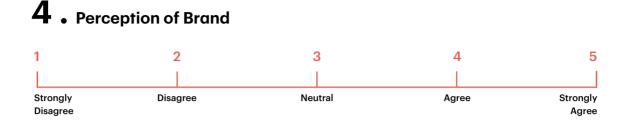
#### Barcelona is an environmentally sustainable city.

	3.54
2017	3.59
2016	3.54
2015	3.57

#### Barcelona has efficient transportation networks.

	3.71
2017	3.71
2016	3.71
2015	3.82

2015

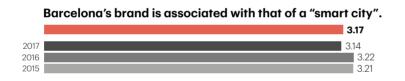


Barcelona is an internationally well-known brand.



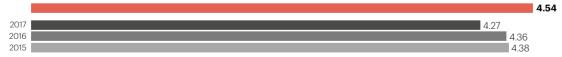
Barcelona's brand is currently associated with business.

		2.79
2017	2.62	
2016	2.59	
2015	2.62	
2014	2.53	





#### Barcelona has the potential to remake its brand/image.



3.98

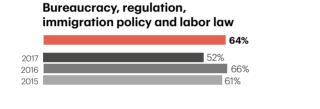
3.96

#### With which sectors or categories is Barcelona currently associated?



## 5. Challenges and NPS

Please select what you perceive as some of Barcelona's biggest challenges in terms of attracting new business, talent and investment.



#### English language ability of the administration



#### Taxation



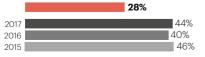
#### Political uncertainty



### Access to capital and credit

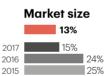
2017	26%	
2016	2070	41%
2015	3	6%

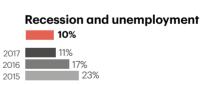
#### Localism and social integration



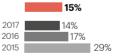
## Geographical location and international connectivity







#### Workforce qualification and productivity



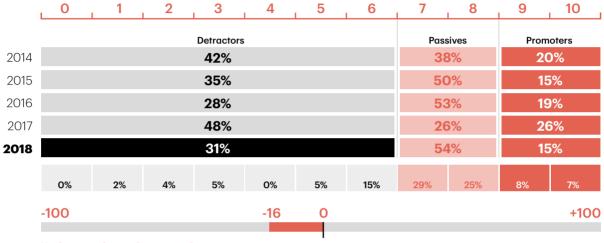
#### Availability, quality and cost of office space







How likely is it that you would recommend Barcelona to a friend or colleague as a city to do business or invest in right now?



Net Promoter Score = Promoters - Detractors

## How likely is it that you would recommend Barcelona to a friend or colleague as a city to live in right now?

	0	1	2	3	4	5	6	7	8	9	10
				Detractors	5			Pas	sives	Pron	noters
2015				12%				32	2%	5	6%
2016				2%				29	9%	6	9%
2017				28%				23	3%	4	9%
2018				16%				26	5%	5	8%
	2%	0%	0%	0%	7%	5%	3%	8%	18%	36%	21%
	-100					0		4	1		+100

Net Promoter Score = Promoters - Detractors

## How likely is it that you would recommend Barcelona to a friend or colleague as a city to study a master degree or MBA?

	0	1	2	3	4	5	6	7	8	9	10
				Detractors	i.			Pass	sives	Prom	noters
2018				15%				26	5%	59	9%
	2%	2%	0%	2%	3%	3%	3%	8%	18%	18%	41%
	-100					0			44		+100
	Net Dreve et										

Net Promoter Score = Promoters - Detractors

REGIONS

**Top 5 Cities** 

London

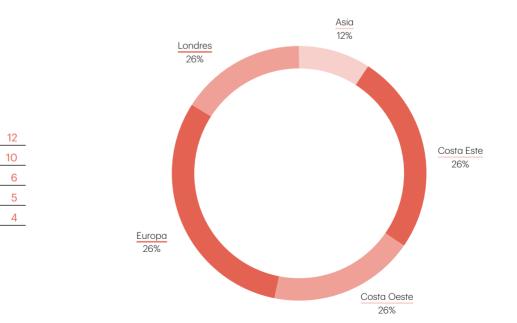
Miami

Zurich

Los Angeles New York

#### International Council: Member's profile

Total members of the International Council	85
Answers at Perception Survey	63
Rate of answers	74%

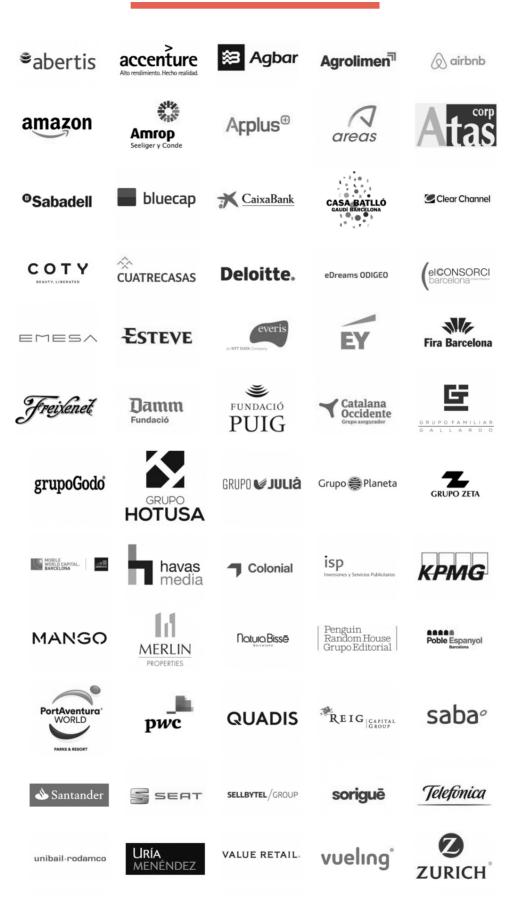


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### Socios corporativos

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#### Socios corporativos protectores



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Make it happen!

