



BARCELONA
GLOBAL

a Citizens' Platform
for Ideas in Motion

International Council Perception Survey

Barcelona's Perception Across the Globe

Special report: Talent Attraction

Edition | April 2015



BARCELONA GLOBAL

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About Barcelona Global

Barcelona Global is a private, independent, non-profit association, made up of professionals and companies who care about Barcelona and its future.

The association's mission: **to actively contribute to making Barcelona one of the best cities in the world, to attract talent and develop economic activity.**

About the Barcelona Global International Council

Barcelona Global's esteemed International Council is a network of highly regarded professionals in various fields with ties to Barcelona, through birth or business, living outside of the city. The International Council is committed to promoting the image and prestige of Barcelona, and identifying investment and business opportunities for the city. Their unique position, combining inside knowledge with outside perspective, is tremendously valuable to Barcelona Global and its long-term goals.

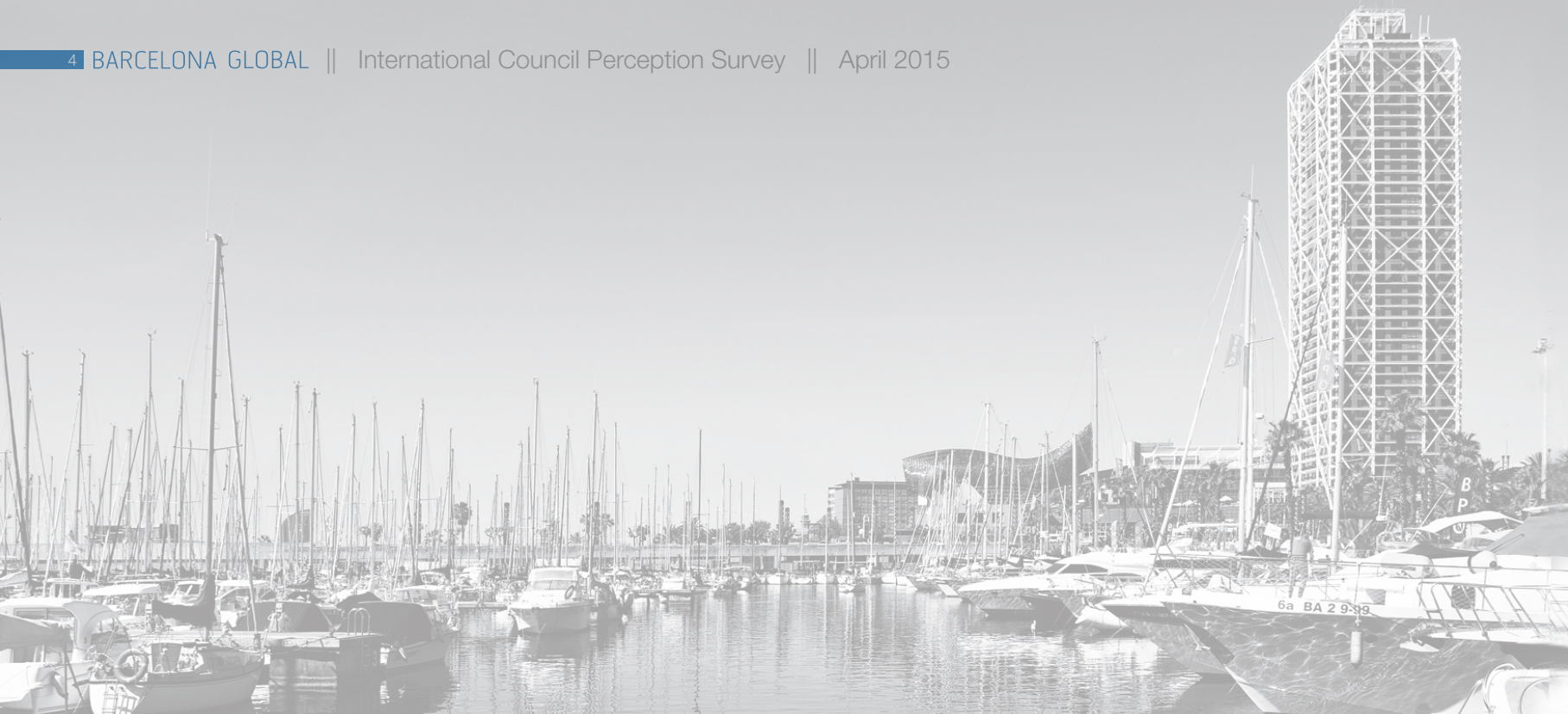
About the International Council Perception Survey

This is the third edition of the International Council Perception Survey. The survey aims to follow the progression over time of various measurements related to Barcelona's competitiveness and Barcelona Global's mission.

Rather than having answers based on statistics or data, members of the International Council 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 fact (coming from their experience living in or conducting business in Barcelona) and subjective opinion (stemming inherently from geographical distance). Ideally, these intuitive responses more accurately represent the perceptions of other professionals with the similar detached, distant perspective that comes from living outside of Barcelona.

The data represented comes from the average scores of 55 responses from the International Council, out of 64 members surveyed. The report is broken down into the Monitor (fixed) section and Special Report (mobile) section.

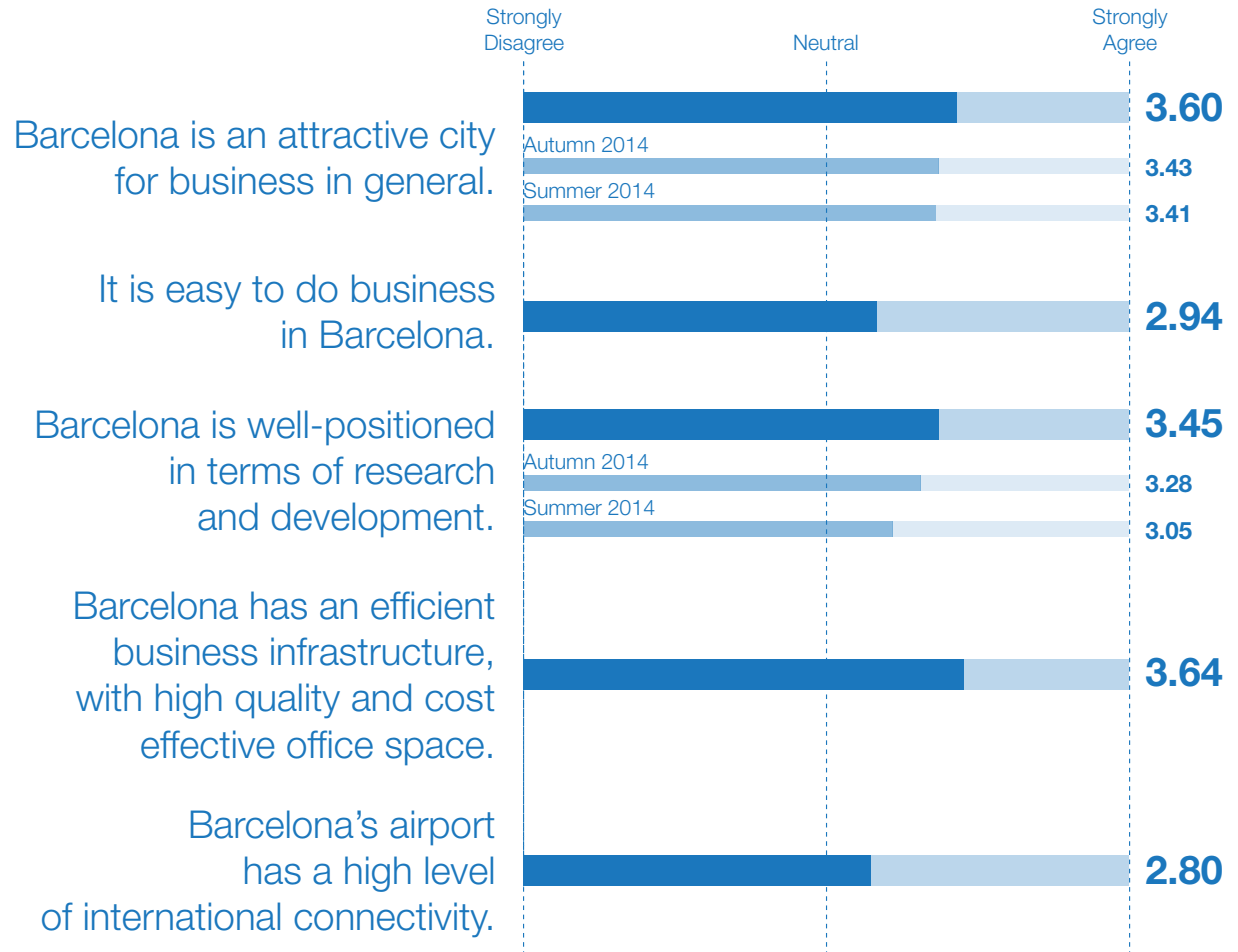




Monitor

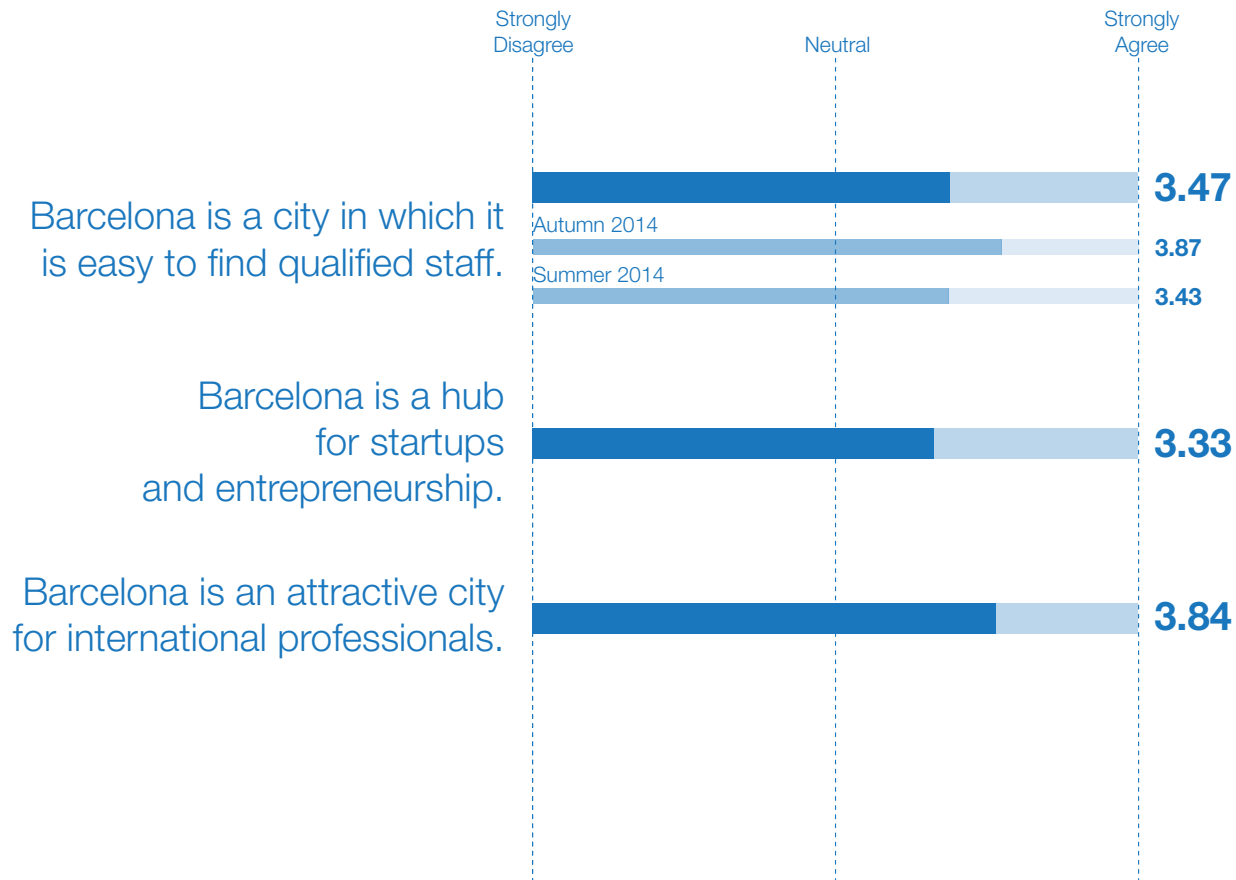
Section 1: Perception of Business Attractiveness

Rate your level of agreement with each statement from 1 through 5.



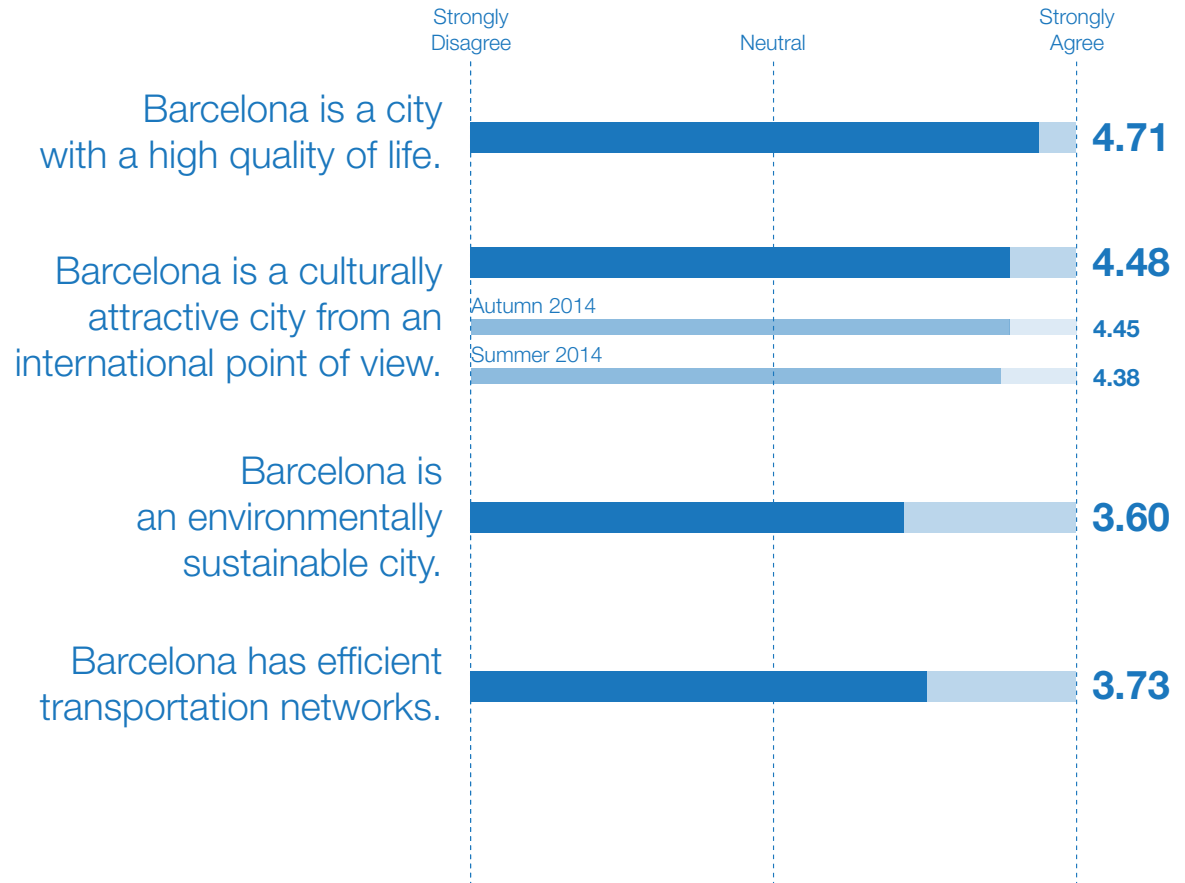
Section 2: Perception of Talent

Rate your level of agreement with each statement from 1 through 5.



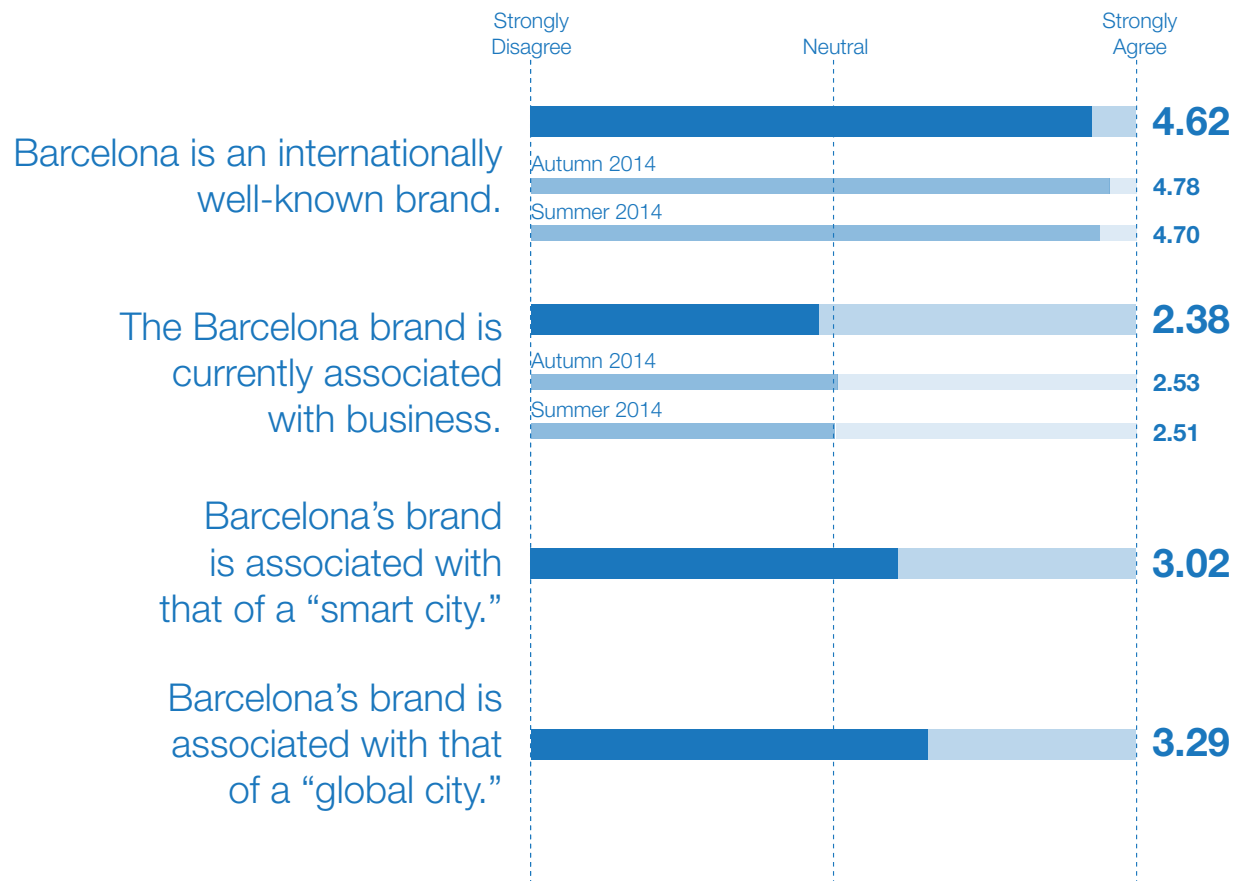
Section 3: Perception of Quality of Life

Rate your level of agreement with each statement from 1 through 5.



Section 4: Perception of Brand

Rate your level of agreement with each statement from 1 through 5.



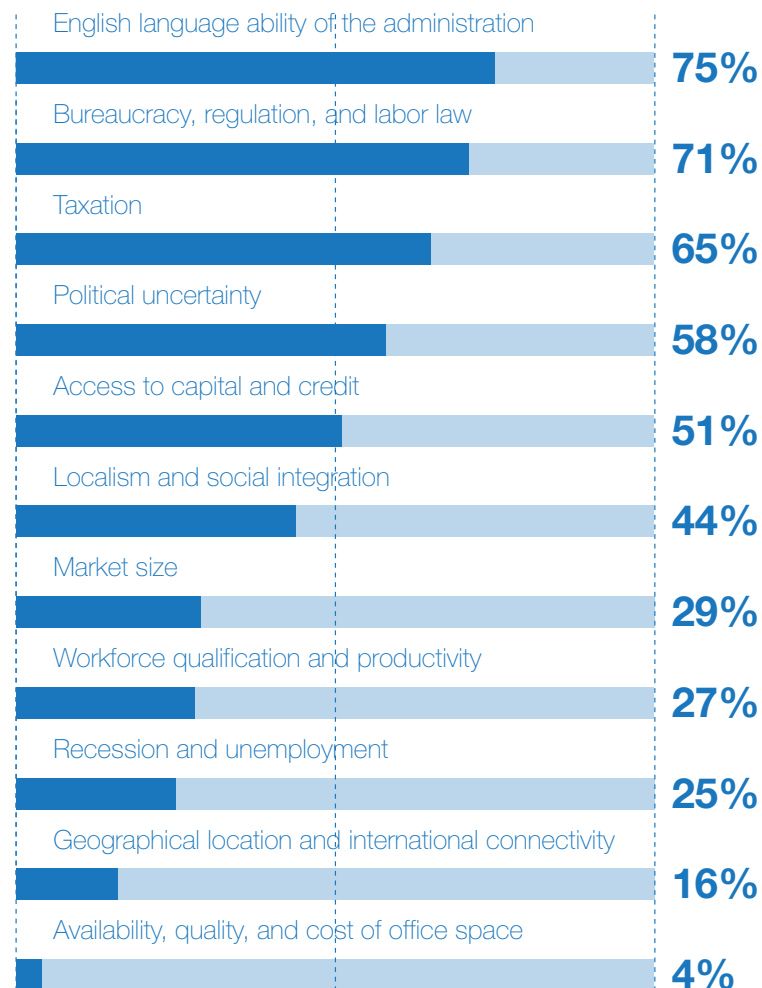
With which sectors or categories
is Barcelona currently associated?



Section 5: Challenges and NPS

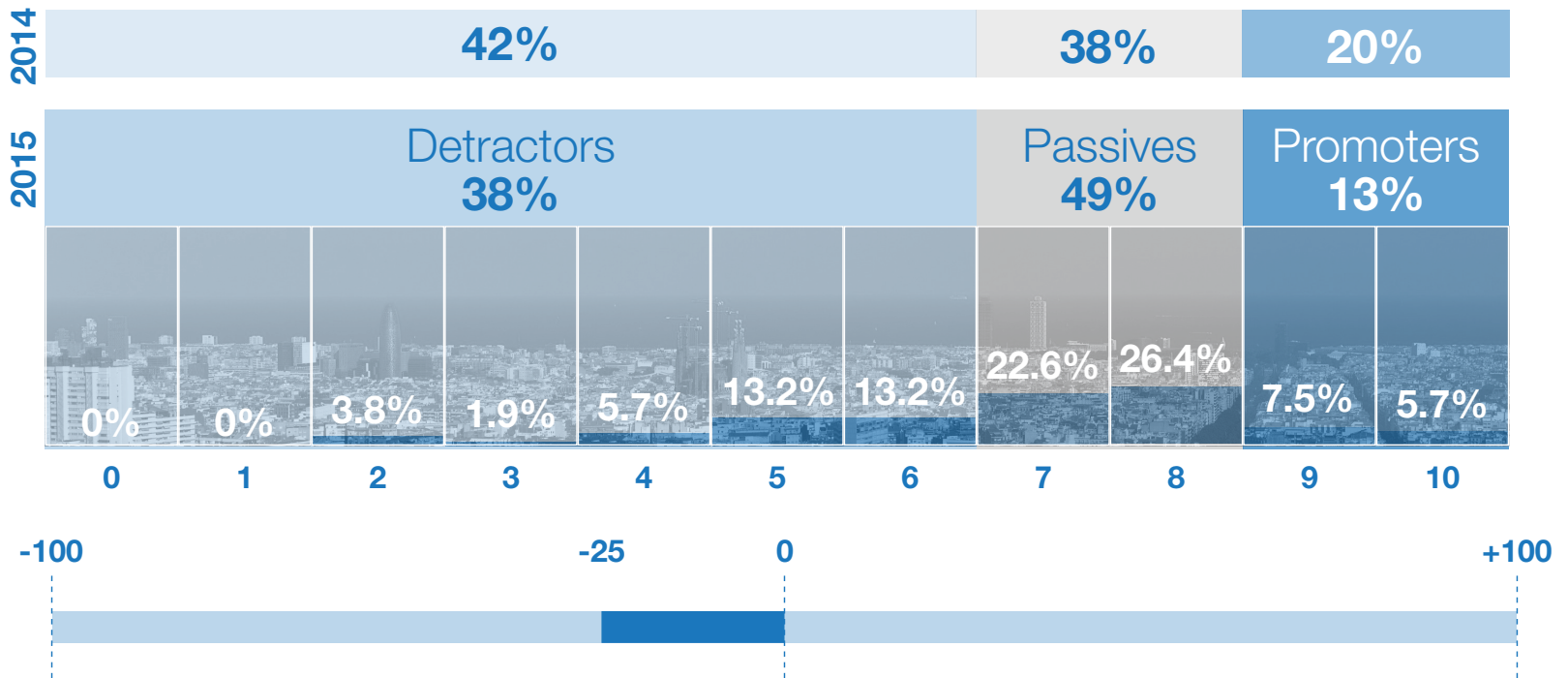
Please select what you perceive as some of Barcelona's biggest challenges in terms of attracting new business, talent, and investment.

Choose as many as you would like.



Net Promoter Score

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

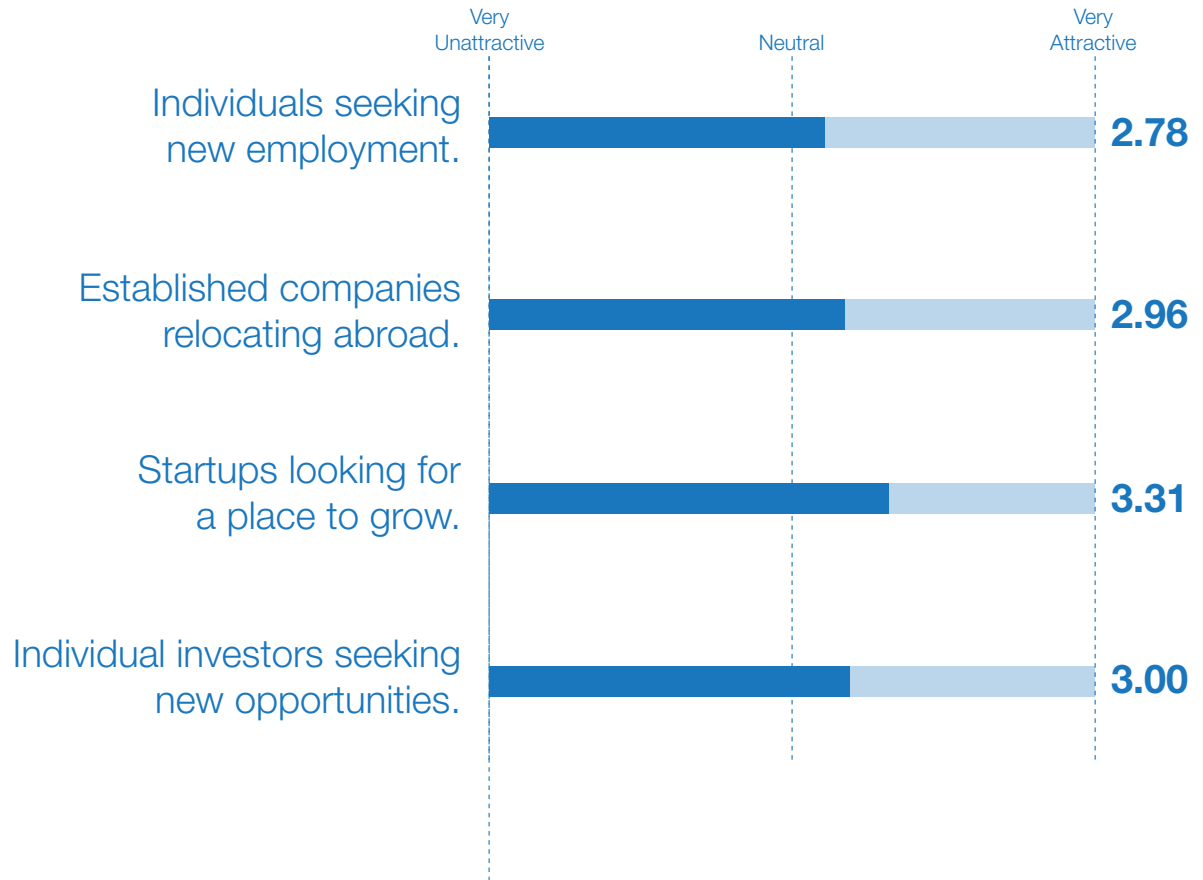


Net Promoter Score = Promoters - Detractors



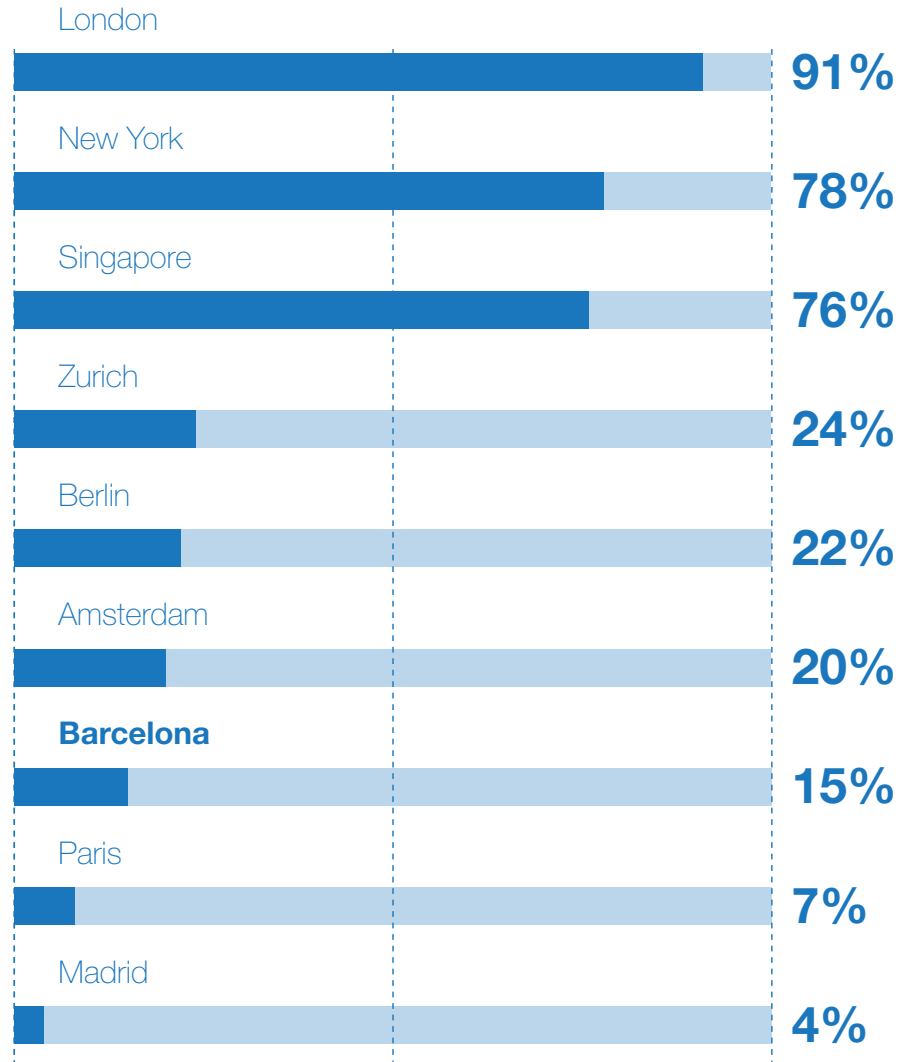
Special Report: Talent Attraction

1. Please rate your perception of how attractive Barcelona is to each of the following groups of people.



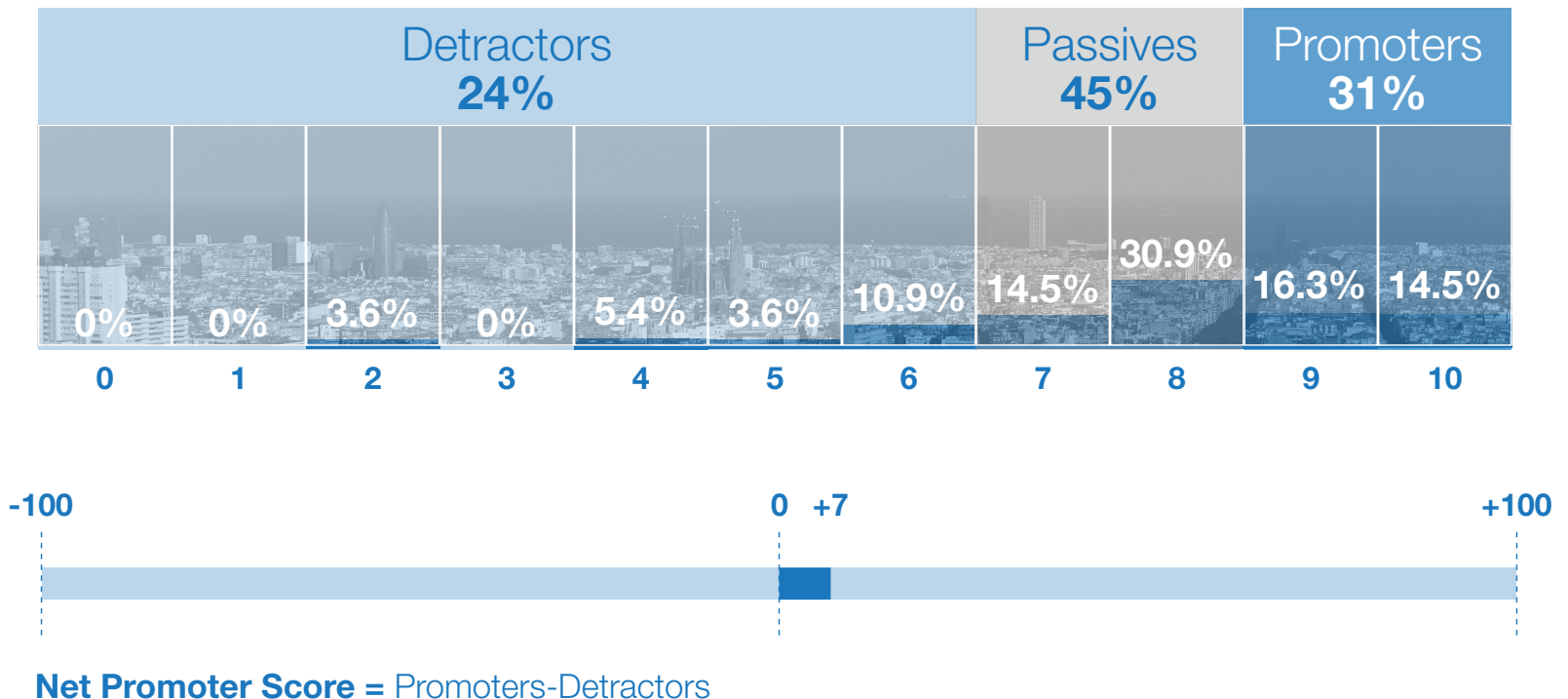
2. Choose the cities from this list that are the most well-positioned to attract foreign talent.

Choose as many as you would like.



Net Promoter Score

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





Special Report: Talent Attraction - Qualitative Results

Qualitative Results

Question: What should be done in Barcelona to improve its attractiveness to international talent?

114 total topics mentioned

19
mentions

**Education and use
of English language**

"Drastic renewal of old-fashioned management of universities."

– Human Resources, Europe

"Stronger connections amongst universities, research centers, and the enterprise world, and the availability of prestigious English-speaking international schools to attract executives with families."

– Consulting/Advisory, Asia

34
mentions

**Taxation, politics,
and bureaucracy**

"Short circuit the impact of the political cycle on economic life."

– Finance/Professional Services, Europe

"Barcelona's image is very much damaged due to inefficiencies in the legal system and corruption."

– Finance/Professional Services, Europe

14
mentions

Culture of Barcelona

"Increase the level of collective citizen responsibility."

– Law, Europe

"Talking too much about regional concerns truly demotivates international talent."

– Consulting/Advisory, USA

8
mentions

**Financial situation and
economic opportunity**

"Stop financing regional activities with minimal return to the city."

– Human Resources, Europe

"Increase productivity of staff, not through salaries but through higher working standards and efficiency."

– Retail/Manufacturing, Europe

These are some of the most significant qualitative answers provided by International Council members, organized by themes. The quotes are shown in accordance with the survey's confidentiality policy.

Question: Have you observed any best practices in your city or country related to attracting foreign talent or retaining local talent?

97 total topics mentioned

20
mentions

**Financial and
economic opportunity**

"Shanghai has attracted international talent by mainly offering high wages and a highly dynamic business environment."

– Education, Asia

"Have a pool of multi-national corporations that can offer people the chance to grow internally. The problem with Barcelona is that it has too many small and medium enterprises and too few truly "global" businesses."

– Finance/Professional Services, Europe

18
mentions

**Social integration, outreach,
and networking**

"To empower the return of those Chinese who went abroad years ago, got their education at international universities, and gained substantial work experience at top-notch global companies. These individuals are the ones expected to take the Chinese economy to its next step. It is known here as "inner-internationalization" of talent."

– Education, Asia

"The Ministry of Japan has a program called Cool Japan in which it provides specific venues and incentives to Japanese businesses to set up investments abroad which in return has created an interest in investing in Japan. It is thinking in reverse, supporting Barcelona investments abroad to in turn create interest in investing in Barcelona."

– Food, Asia

13
mentions

Cultural aspects

"Miami has leveraged its unique geographical and cultural position as the US door to Latin America."

– Marketing, USA

8
mentions

**Education, universities, and
use of English language**

"Boston is a hotbed of University-private sector partnership."

– Law, USA

"Grants and financial support to study Masters degrees abroad, as with the American model."

– Public Services, Latin America



Methodology and Respondent's Demographic Profile

Methodology

The objective of this survey is to create a stable group of professionals with ties to Barcelona, living in different cities around the world, to ask of them how the economic competitiveness of Barcelona is perceived.

In total, the Barcelona Global International Council Perception Survey consists of 24 prompts, 17 of which measure on a scale of 1 to 5 the degree of agreement or disagreement with prompts pertaining to various topics related to Barcelona Global's goals. 3 are open-ended multiple choice questions, 2 are Net Promoter Score questions, and 2 are open-ended text response questions.

The survey consists of two parts, one fixed and one mobile. The fixed section – the Monitor section – lets us observe the evolution over time of the perception of business in Barcelona. The mobile section – the Special Report section – allows us to focus our analysis in greater detail on a specific matter of interest for the city, combining quantitative with qualitative questions.

Monitor

The Monitor's objective is to constantly analyze over time the evolution of the exterior perception of Barcelona and various aspects related to the economic competitiveness of the city. With this objective in mind, the fixed part of the survey is divided into five distinct sections: 1. Perception of Business Attractiveness 2. Perception of Talent 3. Perception of Quality of Life 4. Perception of Brand 5. Challenges and NPS.

The analysis of these five elements allows us to paint a complete picture of the economic competitiveness of Barcelona.

1. Perception of Business Attractiveness

This section measures the perception of Barcelona as a city of business in a general sense. The perception of the economic and business attractiveness of a city is a key factor in the attraction of investments and the generation of an image that fosters economic development. This section measures the ease of conducting business in Barcelona, the positioning of Barcelona in terms of research and development, and the effectiveness of the business infrastructure and international connectivity of the city.

2. Perception of Talent

This section measures the perception of Barcelona as a city made up of talented professionals. A city known to have many qualified professionals will be attractive to both new businesses and established businesses looking to move abroad. This section particularly measures the capacity of Barcelona to attract new international professionals, especially entrepreneurs looking for new opportunities.

3. Perception of Quality of Life

This section's objective is to measure the perception of Barcelona as an attractive city for its lifestyle. The quality of life of a city is an important factor in creating an environment that attracts new businesses and foreign talent. It is also a very important factor for local industries, such as tourism. In this section, we measure the perception of Barcelona's quality of life, cultural offerings, natural environment, and transportation networks.

Methodology

4. Perception of Brand

In this section, we aim to measure the perception of Barcelona's brand. Various factors, economic and otherwise, contribute to the creation of a city brand. There is a very fluid relationship between perception of a city and that city's brand. The known brand of a city effects its international perception, while in turn, the international perception of a city changes its brand. A city brand combines feelings for, information known about, and abstract opinion of the city. In this section we analyze the perception of familiarity with Barcelona's brand and the city's capacity to be identified as a city of business, as a "smart" city, or as a global city, in addition to asking with which economic sectors the Barcelona brand is associated.

5. Challenges and Net Promoter Score

This section of the Monitor asks about the greatest perceived challenges for Barcelona as a city of business and also introduces a Net Promoter Score question. A Net Promoter Score, mostly utilized in retail settings, serves to measure the customer loyalty of a business, based on the recommendations given for a brand or product. For our survey, we have carried out a methodological change. Barcelona, as a business center in which to invest, is the product to recommend. The members of the Barcelona Global International Council are the clients asked about their experience as a consumer of the product – living or conducting business in Barcelona.

Special Report

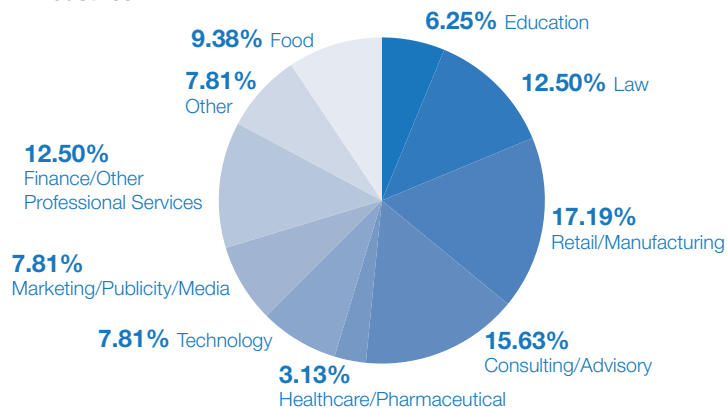
The Special Report section allows us to carry out detailed analysis on a concrete topic related to the economic competitiveness of Barcelona. This edition of the Special Report is specifically about talent attraction, keeping in mind the necessary attributes for Barcelona to be an attractive city for international professionals. It is made up of fixed and variable questions, in order to identify on one hand how currently attractive Barcelona is to various groups of professionals, and on the other hand to understand the best practices related to the attraction and retention of talent identified by members of the International Council in their respective foreign cities.

Respondent's demographic profile

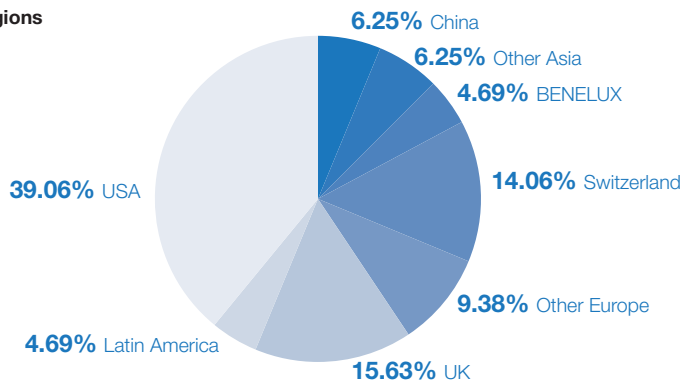
Total respondents: 55/64 85.9%

International Council Members (64 total)

Industries

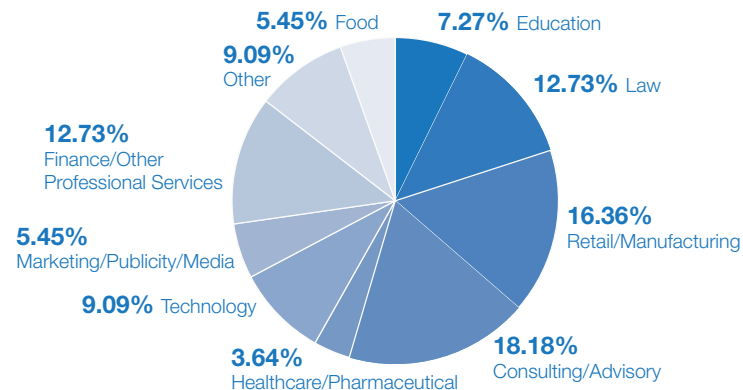


Regions

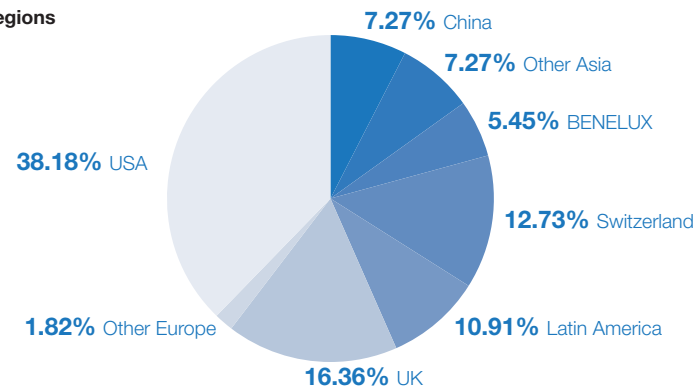


Respondents (55 total)

Industries



Regions



About the Barcelona Global International Council leader



Luis Conde founded Seeliger y Conde in 1990. He specializes in the succession processes of large corporations. He was President of Amrop from 2003 to 2006, and currently chairs its Advisory Board.

Luis started his professional career as Director of the International Division of Corporate Banking of Banca Más-Sardá in Barcelona. He was subsequently member of the Board and Executive Vice-President of Banco Consolidado de Venezuela, as well as Chairman of the Consolidado International Bank in New York. Currently, he chairs the Salón Náutico Int. de Barcelona, and is member of the Board of the Banco de

Inversiones Lazard, member of Grupo Godó, member of the Board of Directors of Fira de Barcelona, and member of the Advisory Board of Altair.

Luis is the leader of the Barcelona Global International Council and member of the Barcelona Global Executive Committee and Board.

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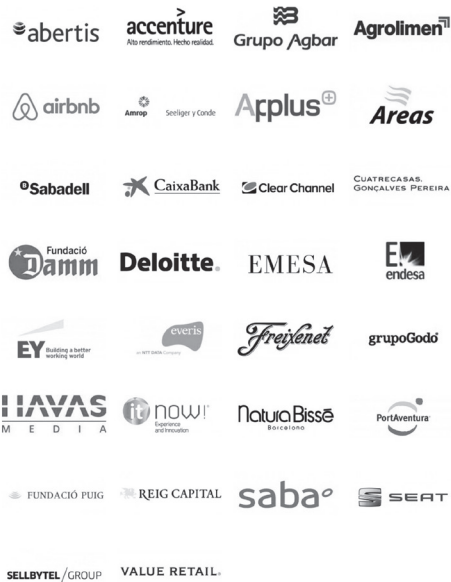
Los Angeles
Mattel

BARCELONA GLOBAL

*More than 300 professionals
committed to Barcelona*

Corporate Partners April 2015

Protective Corporate Partners



Corporate Partners

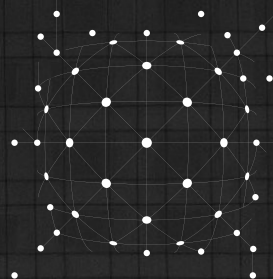




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