The integration of sustainability in tourism policies of major European cities
The integration of sustainability in tourism policies of major European cities.

Policy report

Date: Novembre 2018

Developed by:
eco-union
c/Palau 4
08002 Barcelona, Spain
www.ecounion.eu

Main Authors:
Alejandro González Domingo (eco-union)
Jérémie Fosse (eco-union)
Raquel Santos Lacueva (Universitat Rovira i Virgili)

With the contribution:
Patricia Baena (eco-union)
Rayan Chebbi-Giovanetti (eco-union)
Jacobo Martín Coloma (eco-union)

This report has been co-funded by Barcelona City Council.

The views and propositions expressed herein are those of eco-union and do not necessarily represent the view of the Barcelona City Council or any other organisation mentioned in this paper.

This report should be cited as:


Edited by: eco-union


Phone number: +34 935535840
www.ecounion.eu
info@ecounion.eu
<table>
<thead>
<tr>
<th>INDEX</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ABSTRACT</strong></td>
<td>6</td>
</tr>
<tr>
<td>1. Introduction, methodology and research purpose</td>
<td>6</td>
</tr>
<tr>
<td>1.1. Introduction</td>
<td>6</td>
</tr>
<tr>
<td>1.2 Purpose of research</td>
<td>7</td>
</tr>
<tr>
<td>1.3. Research methodology</td>
<td>7</td>
</tr>
<tr>
<td>1.4. Identification of benchmarked cities</td>
<td>7</td>
</tr>
<tr>
<td>1.5. Comparative analysis of urban tourism strategies</td>
<td>9</td>
</tr>
<tr>
<td>1.6. In-depth analysis of Barcelona, Lisbon and Paris</td>
<td>9</td>
</tr>
<tr>
<td>2. Urban tourism trends</td>
<td>10</td>
</tr>
<tr>
<td>2.1. Contribution to Gross Domestic Product (GDP)</td>
<td>11</td>
</tr>
<tr>
<td>2.2. Visitor arrivals and bed-nights</td>
<td>11</td>
</tr>
<tr>
<td>2.3. Increase of tourism intensity and density</td>
<td>11</td>
</tr>
<tr>
<td>2.4. Accommodation capacity</td>
<td>12</td>
</tr>
<tr>
<td>3. Comparative analysis of urban tourism strategies</td>
<td>13</td>
</tr>
<tr>
<td>3.1. Sustainability challenges of urban tourism strategies</td>
<td>14</td>
</tr>
<tr>
<td>3.2. The integration of sustainability into tourism policies</td>
<td>15</td>
</tr>
<tr>
<td>3.3. Governance of urban tourism</td>
<td>18</td>
</tr>
<tr>
<td>3.4. Key policy insights from benchmarked cities</td>
<td>20</td>
</tr>
<tr>
<td>4. In-depth analysis of Barcelona, Lisbon and Paris</td>
<td>21</td>
</tr>
<tr>
<td>4.1. Sustainability challenges related to urban tourism</td>
<td>22</td>
</tr>
<tr>
<td>4.2. The integration of sustainability into tourism policies</td>
<td>25</td>
</tr>
<tr>
<td>5. Recommendations for sustainable urban tourism policies</td>
<td>29</td>
</tr>
<tr>
<td>5.1. Manage overcrowding and gentrification</td>
<td>30</td>
</tr>
<tr>
<td>5.2 Increase knowledge sharing, assessment and monitoring</td>
<td>30</td>
</tr>
<tr>
<td>5.3. Guarantee social return in the destination</td>
<td>30</td>
</tr>
<tr>
<td>5.4. Promote inclusive governance and transversal management</td>
<td>31</td>
</tr>
<tr>
<td>5.5. Reduction of environmental impacts and resources consumption</td>
<td>31</td>
</tr>
<tr>
<td>6. Conclusions</td>
<td>33</td>
</tr>
<tr>
<td>7. Research limitations</td>
<td>34</td>
</tr>
<tr>
<td>8. References</td>
<td>36</td>
</tr>
<tr>
<td>8.1. Footnotes</td>
<td>36</td>
</tr>
<tr>
<td>8.2. Methodology and references</td>
<td>38</td>
</tr>
<tr>
<td>8.3. Policy documents</td>
<td>39</td>
</tr>
</tbody>
</table>
9. ANNEX: City case studies

AMSTERDAM 43
BARCELONA 45
BERLIN 48
BRUSSELS 50
COPENHAGEN 52
DUBLIN 54
LISBOA 56
LONDON 58
PARIS 60
REYKJAVÍK 62
VIENNA 64

10. ANNEX II: Stakeholder survey 66
Abstract

In the last decade, most of the European cities have experienced an extraordinary tourism growth, either in mature capitals like London or Paris or in emerging destinations such as Lisbon or Reykjavík. This consolidated trend is greatly increasing the pressure on cities to manage the urban transformations derived from touristification and gentrification and, other negative impacts of urban tourism such as, precarious hospitality working conditions or natural resources misuse, among others.

This report reveals that tourism policies in major European cities are mainly oriented to increase economic benefits, attract profitable visitors and target tourism market share with limited environmental and social sustainability measures to mitigate negative tourism impacts.

The most common reaction against overcrowding and urban saturation is deconcentrating tourism flows in the outer edges of cities, using metropolization public schemes to spread-out tourism from the city centre to the hinterlands. This strategy varies among destinations and is usually based on alternative tourism promotion, new leisure infrastructures, public transport development and hotel capacity increase. However, its effectiveness to solve major sustainability issues of urban tourism lacks evidence.

Cities such as Amsterdam, Barcelona and Paris are trying to develop sustainable urban tourism policies based on land use planning, housing protection, retail regulation or mobility strategies. These cities are promoting new governance approaches by integrating urbanism, housing and mobility measures into their tourism strategies. However, economic growth remains in the front of the tourism agenda in Amsterdam and Paris, being Barcelona the only benchmarked city without visitors increase objectives.

Many questions arise then on how cities are going to manage this growth focus along with the pressing urban sustainability issues related to gentrification, social inequalities, climate change and the increasing residents’ criticisms.

Finally, those growth strategies must be reconsidered by the main European cites to avoid overspecialization and dependency on tourism while reducing negative impacts on the liveability of the cities. Moreover, it can be stated that the tourism strategies and related policies analysed do not take into account the need to decarbonize the tourism sector in line with the Paris Agreement. This will be a critical paradigm to break-down in the next decade, if cities want to contribute effectively to the Agenda 2030 and associate sustainable development goals.
1. Introduction, methodology and research purpose

1.1. Introduction

The dramatic growth of tourists and accommodation capacity in major European cities has led to an increase of tourism intensity, sharpening the pressure on urban (limited) resources, and challenging the cohabitation between residents and visitors. The way tourist cities have been planned and managed in the last decades has led to an upsurge of conflicts with local population as some researchers have recently pointed out.

This report shows that a sustainable tourism perspective in major European cities remains out of the current political agenda. The analysis of the current tourism policies in 11 major European urban destinations reveals that only few of them are tackling urban tourism conflicts and negative externalities. Tourism growth remains a priority for the leading European cities. Amsterdam and Barcelona come out as the only cities analysed where limits on tourism capacity have been integrated.

The role of sustainability in tourism development is very critical because tourism is a significant factor in resource use, global environmental and social change. The scale of tourism increase in the last decades and its forecast for growth raises concerns about the contribution of tourism to sustainable development. Tourism is currently becoming more energy, freshwater, land and food intense on a per trip/arrival/guest night basis. Dramatic changes in the tourism system would be required to reverse this trend. Therefore, the implementation of sustainable tourism policies remains the main task for the coming years.

The contemporary tourism system is characterised by massive growth, where fast and cheap travel as well as affordable accommodation facilitate this massive international and domestic tourism mobility. Investments’ increase, hotel constructions and technological innovations draw even more tourists to the cities. The European Union countries host 40% of the international tourism, mostly at the Mediterranean and Western Europe, and it is expected to growth from 448 million to 762 million by 2030.

In 2010, the European Commission adopted the Communication ‘Europe, the world’s No. 1 tourist destination – a new political framework for tourism in Europe’, where it promotes this path-dependency: technology, finance, security and transport at the service of tourism expansion around Europe. In this scenario, cities and industry have played a key role in expanding tourism among territories. Urban tourism policies are therefore becoming essentials on how cities are promoting or limiting the expansion of tourism oriented services (accommodation, retail and hospitality) within and around the city.

Tourists and residents share limited urban spaces, but “visitors’ usage of urban facilities is not necessarily built for visitors”. In this environment, the increasing number of tourists in cities and the seasonality of tourism can lead to stronger pressure on the local (environmental, cultural and social) environment.

A higher density of tourists is directly impacting on:

- Housing prices due to the increase of tourism-oriented flats/rooms and new hotels in specific urban areas;
- Hospitality, cultural and retail services for visitors, competing with and displacing resident-oriented services and facilities;
- Air quality (CO2, PM, NOx, SOx, etc.) due to tourists’ transport (coaches; private vans; cruises and aviation);
- Waste production (plastic, food, energy, water, etc.) by tourists and the industry;
- Access to water and energy resources;
- Pressure on public services (e.g. waste recollection, etc.) and infrastructure facilities (water, energy, telecommunication, public transport, public spaces).

Those collateral impacts of urban tourism are, in many cases, contributing to the negative perception of residents against tourism development. In fact, tourism has become a contested phenomenon in popular cities around the world, where urban changes oriented to tourism attractiveness and high-skilled migration, have created negative externalities to local communities.
1.2 Purpose of research

The chosen approach was to analyse existing urban tourism policy frameworks in European cities and the role that environmental and social sustainability plays in it. All in all, the report intends to better understand how cities are managing current tourism negative externalities and the kind of sustainability strategies implemented to govern urban destinations.

Objectives:

- Identify the main governmental actors responsible for the design and implementation of urban tourism policies related to environmental and social sustainability.
- Analyse the integration of [environmental and social] sustainability into tourism strategies and the impact of growth tourism trends on policy priorities.
- Analyse stakeholder’s perceptions about the role of sustainability in urban tourism policies;
- Identify innovative strategies and policy instruments dealing with sustainable issues of tourism in major European cities.
- Propose a set of recommendations to advance policy making and good governance for sustainable tourism in large European cities.

1.3. Research methodology

The research combines two levels of analysis:

1. Comparative analysis of tourism plans and strategies in major European destinations.
2. In-depth analysis of stakeholders’ perceptions in combination with tourism policy analysis for a selection of cities with more data access.

The sample consists of eleven cities from the European Union (EU28) chosen through three main selection criteria:

1. Major city destination per EU28 country in terms of tourist arrivals.
2. Availability of tourism strategy plan (currently operative).
3. Language accessibility for the research team (English, French, Italian, German, Portuguese, Spanish and Dutch).

A sub-sample of three European destinations (Barcelona, Lisbon and Paris) was used to conduct an in-depth analysis considering stakeholders’ perception. The objective was to understand, from multiple perspectives, different tourism strategies to manage sustainability in urban destinations.

1.4. Identification of benchmarked cities

The benchmarked cities have been selected if tourism policy documents were in force, updated and published in institutional websites. There was a second search throughout direct contact with the tourism departments of the major city destinations to identify if there were any alternative policy documents related to tourism and sustainability issues or relevant unpublished tourism policy documents. The objective of this second contact was to collect all possible information on tourism policies and other plans related to direct/indirectly with tourism from the benchmarked cities. The table below shows the major touristic cities in the EU-28 and whether they have a city tourism strategy, in force and published on the website. It should be noticed that twelve major tourist cities from EU-28 have not (yet) published a city/metropolitan tourism strategy or plan.
### Table 1: Tourism strategic plans of major European cities

<table>
<thead>
<tr>
<th>City</th>
<th>City Tourism Strategy Plan</th>
<th>City</th>
<th>City Tourism Strategy Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amsterdam</td>
<td>Yes</td>
<td>London</td>
<td>Yes</td>
</tr>
<tr>
<td>Athens</td>
<td>Not found</td>
<td>Ljubljana</td>
<td>Yes</td>
</tr>
<tr>
<td>Barcelona</td>
<td>Yes</td>
<td>Nicosia</td>
<td>Not found</td>
</tr>
<tr>
<td>Berlin</td>
<td>Yes</td>
<td>Paris</td>
<td>Yes</td>
</tr>
<tr>
<td>Bratislava</td>
<td>Not found</td>
<td>Prague</td>
<td>Not found</td>
</tr>
<tr>
<td>Brussels</td>
<td>Yes</td>
<td>Reykjavik</td>
<td>Yes</td>
</tr>
<tr>
<td>Bucharest</td>
<td>Not found</td>
<td>Riga</td>
<td>Not found</td>
</tr>
<tr>
<td>Budapest</td>
<td>Not found</td>
<td>Rome</td>
<td>Not found</td>
</tr>
<tr>
<td>Copenhagen</td>
<td>Yes</td>
<td>Stockholm</td>
<td>Not found</td>
</tr>
<tr>
<td>Krakow</td>
<td>Yes</td>
<td>Tallinn</td>
<td>Yes</td>
</tr>
<tr>
<td>Dublin</td>
<td>Yes</td>
<td>Vaduz</td>
<td>Not found</td>
</tr>
<tr>
<td>Dubrovnik</td>
<td>Yes</td>
<td>Valetta</td>
<td>Not found</td>
</tr>
<tr>
<td>Helsinki</td>
<td>Not found</td>
<td>Vienna</td>
<td>Yes</td>
</tr>
<tr>
<td>Lisbon</td>
<td>Yes</td>
<td>Vilnius</td>
<td>Not found</td>
</tr>
</tbody>
</table>

Source: own analysis (eco-union, 2018)

The final selection of cities and their main tourism policy to be analysed are the following:

### Table 2: Final selection of benchmarked cities

<table>
<thead>
<tr>
<th>City</th>
<th>Year of Publication</th>
<th>Title</th>
<th>Coordinating agency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amsterdam</td>
<td>2017</td>
<td>Strategische Agenda Toerisme in de MRA 2025</td>
<td>Metropoolregio Amsterdam Bureau</td>
</tr>
<tr>
<td>Barcelona</td>
<td>2017</td>
<td>Tourism Strategic Plan 2016-2020</td>
<td>Direcció de Turisme/Gerència d’Empresa i Turisme</td>
</tr>
<tr>
<td>Berlin</td>
<td>2011</td>
<td>Tourismuskonzept Berlin Handlungsrahmen 2011+</td>
<td>Senatsverwaltung für Wirtschaft, Technologie und Frauen</td>
</tr>
<tr>
<td>Copenhagen</td>
<td>2017</td>
<td>Strategy 2020</td>
<td>Wonderful Copenhagen</td>
</tr>
<tr>
<td>Dublin</td>
<td>2014</td>
<td>Tourism Strategy for Dublin City 2017-2020</td>
<td>Dublin City Council</td>
</tr>
<tr>
<td>Lisbon</td>
<td>2015</td>
<td>Strategic Tourism Plan for the Lisboa Region</td>
<td>Entidade Regional de Turismo da Região de Lisboa/VisitLisboa</td>
</tr>
<tr>
<td>London</td>
<td>2016</td>
<td>A Tourism Vision For London</td>
<td>London &amp; Partners</td>
</tr>
<tr>
<td>Paris</td>
<td>2016</td>
<td>Stratégie Tourisme 2022</td>
<td>Direction de l’attractivité et de l’emploi</td>
</tr>
<tr>
<td>Reykjavik</td>
<td>2011</td>
<td>Tourism Strategy for the City of Reykjavik 2011-2020</td>
<td>Visit Reykjavik</td>
</tr>
<tr>
<td>Vienna</td>
<td>2014</td>
<td>Tourism Strategy 2020</td>
<td>Vienna Tourist Board</td>
</tr>
</tbody>
</table>

Source: own analysis (eco-union, 2018)
1.5. Comparative analysis of urban tourism strategies

The analysis of tourism policies consists of carrying out a critical and interpretive analysis of the contents of the current programmatic instruments for tourism in the selected urban destinations. A systematic review of tourism plans allows us to observe how problems are interpreted and prioritised by public authorities and which solutions are contemplated to solve them. A comparison between tourism plans enables us to identify the different ways to understand and to manage issues that might put the sustainability of urban destinations into a question. This comparison is possible by synthesizing the analysis of plans with few indicators.15

Table 3: Indicators of policy analysis related to urban tourism sustainability

<table>
<thead>
<tr>
<th>Target content</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Strategic vision</td>
<td>How sustainability is included or otherwise in the vision of the plan.</td>
</tr>
<tr>
<td>2. Planning period</td>
<td>Whether the planning period is appropriate considering the long period of time required for sustainability implementation.</td>
</tr>
<tr>
<td>3. Strategic objectives</td>
<td>Whether sustainability appears in the main strategic lines, and if it does, in which sense.</td>
</tr>
<tr>
<td>4. Prioritization criteria</td>
<td>Whether the criteria for prioritization (if any) determine compliance with this strategic principle.</td>
</tr>
<tr>
<td>5. Coordination with other policy areas</td>
<td>Whether proposals related to political coordination between tourism and other departments are included, and if yes, which ones.</td>
</tr>
<tr>
<td>6. Frequency of keywords</td>
<td>Number of times that sustainable/sustainability appear by number of pages of the document. Determine when these mentions refer to: a) Sustainability in general; b) Environmental sustainability; c) Social sustainability; d) Economic sustainability.</td>
</tr>
<tr>
<td>7. Measures/Actions</td>
<td>Measure or instrument related to the sustainability of tourism, and their categorization.</td>
</tr>
<tr>
<td>8. Plan’s diagnosis</td>
<td>Problems or threats included that might affect the sustainability of tourism in the city.</td>
</tr>
</tbody>
</table>

Source: Adapted from Santos-Lacueva, Anton Clavé and Saladie (2017)

1.6. In-depth analysis of Barcelona, Lisbon and Paris

Stakeholders’ perception analysis

The influence of stakeholders on policy making is crucial. Considering their perceptions and ideas related to tourism phenomena at destinations contributes to a better understanding of the public action concerning tourism16. An online questionnaire makes it possible to engage stakeholders from different countries during the time scheduled for this study (November 2017–March 2018). The questionnaire includes both open and closed questions. Open questions allow us to incorporate complex reflections and issues involving tourism and sustainability subjects. Closed questions make the analysis and comparison of such complex subjects easier.

Criteria to select stakeholders

Stakeholders have been selected based on a two-step process. First, the questionnaire was sent to the members of the Tourism Council or to a similar a body, which, if possible, included public authorities, private sector companies and social groups. Secondly, this study was followed by a snowball process. Each member of the city council that responded to the questionnaire was asked to propose two more participants, taking into account their relevance for the tourism policy in the city. When the number of participants was reached, a third step to select stakeholders was planned. In this case, the questionnaire was sent on a third-round snowball process to the participants proposed during the second round.
2. Urban tourism trends

The benchmarked European cities are consolidated and well-recognized destinations leading the European tourism market. Apart from the world leading destinations like London and Paris, the rest of the European cities have experienced a dramatic growth in visitors/bed-nights, which has increased the intensity of tourism “functionality” of the cities. This chapter analyses key growth trends for the last decade in the benchmarked cities.
2.1. Contribution to Gross Domestic Product (GDP)

Most of cities analysed heavily rely on tourism, as evidenced by the share of tourism and travel in their GDP (between 2% and 6% for direct contribution) and by its growth over the 2006-2016 period (for Barcelona, Berlin, Brussels, Dublin and Lisbon).

2.2. Visitor arrivals and bed-nights

Two clusters are identified according to the growth rate of tourists’ arrivals between 2006 and 2016: (figure 1) city destinations with a lower growth rate such as London, Brussels and Paris, and (figure 2) emerging and consolidated city destinations with a higher growth rate such as Copenhagen, Lisbon, Reykjavik, Amsterdam, Barcelona, Berlin and Vienna.

This growth of tourism arrivals has a direct impact on the increase of bed-nights, where cities like Reykjavik and Berlin are leading this growth with 111% and 95% respectively, while other cities have increased more than 50% their bed-nights (figure 3).

2.3. Increase of tourism intensity and density

Cities with an intensity ratio higher than 10, such as Lisbon, Dublin, Amsterdam, Reykjavik, Barcelona and Copenhagen are showing more signs of tourism growth respect to residents. As it can be expected, large metropolitan areas like Greater Paris, Greater London and Greater Vienna perform better on this index, as they have a higher number of inhabitants distributed in larger geographic areas (figure 4).
When it comes to the number of tourists related to the local population (figure 5), cities like Amsterdam, Lisbon, Reykjavik or Barcelona have between 6 and 8 times more tourists than residents. More populated European cities such as Berlin, Vienna and Paris have (relatively) less pressure and 2 to 4 times more visitors than residents.

Considering the tourism density (fig. 6), cities like Dublin, Vienna and Amsterdam have the highest density of tourists. Geographically larger cities such as Berlin, Brussels and Lisbon perform (relatively) better.

### 2.4. Accommodation capacity

Most cities have less than 60,000 tourist beds, except for Barcelona city, and the metropolitan areas of Paris and Vienna. The length of stay is directly linked with tourism sustainability and it varies from city to city; while Vienna has three times more bed-nights than Brussels, it only has twice the number of beds; and while Lisbon and Amsterdam have about the same number of beds, Amsterdam has 42% more bed-nights; therefore, making a better use of its accommodation facilities (fig. 7).

Moreover, the recent increase of private house-sharing through online booking platforms has increased drastically the accommodation offer. Major European capitals such as Paris and London have become the first market for Airbnb (one of the major private booking platforms) as shown in the figure below (fig. 8).
3. Comparative analysis of urban tourism strategies

This chapter displays the main results from the comparative policy analysis among the 11 benchmarked European cities. It reveals a low level of integration of sustainable tourism policies, while the tourism growth objectives still prevail as a strategic priority, social and environmental sustainability have an ample room for improvement. However, the results also highlight new governance frameworks in some cities by integrating diverse urban policies to mitigate and prevent negative tourism impacts and conflicts. Cities like, Amsterdam, Barcelona and Paris, have developed different approaches in managing urban tourism conflicts with diverse priorities on tourism growth expectations.
3.1. Sustainability challenges of urban tourism strategies

Negative issues derived from tourism have been particularly identified in Amsterdam, Barcelona, Berlin and Paris in their respective plans’ diagnosis, with very different degrees on analysis (see table below). Barcelona is the city with a deeper assessment on sustainability issues. They recognize the need to tackle the problem of overcrowded areas and mass tourism.

Other identified challenges are not associated with environmental and social sustainability, such as the increasing competition from other destinations, the threat of terrorism or the marketing schemes related to the economic growth strategy.

<table>
<thead>
<tr>
<th>City</th>
<th>Sustainability issues identified</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amsterdam</td>
<td>Need for balance between residents and visitors</td>
</tr>
<tr>
<td>Barcelona</td>
<td>Tourism use of infrastructure and its externalities</td>
</tr>
<tr>
<td></td>
<td>Overcrowding</td>
</tr>
<tr>
<td></td>
<td>Gentrification and rising prices</td>
</tr>
<tr>
<td>Berlin</td>
<td>Overcrowdedness</td>
</tr>
<tr>
<td></td>
<td>Gentrification and price-related issues</td>
</tr>
<tr>
<td>Brussels</td>
<td>None</td>
</tr>
<tr>
<td>Copenhagen</td>
<td>Increase of the number of tourists at the expense of locals</td>
</tr>
<tr>
<td>Dublin</td>
<td>None</td>
</tr>
<tr>
<td>Dublin</td>
<td>None</td>
</tr>
<tr>
<td>Lisbon</td>
<td>None</td>
</tr>
<tr>
<td>London</td>
<td>None</td>
</tr>
<tr>
<td>Paris</td>
<td>Population density</td>
</tr>
<tr>
<td></td>
<td>Growth in (alternative) tourist accommodation</td>
</tr>
<tr>
<td>Reykjavik</td>
<td>None</td>
</tr>
<tr>
<td>Vienna</td>
<td>None</td>
</tr>
</tbody>
</table>
### 3.2. The integration of sustainability into tourism policies

The analysis of the integration of sustainability issues into tourism plans and strategies is displayed in the table below. Only Amsterdam, Barcelona and (to some extent) Paris refer to (some) sustainability challenges, related to housing, gentrification, mass tourism, and environmental pollution. Their sustainability policies are mainly based on housing regulation, land use planning for accommodation, labels for responsible tourism, and promotional strategies to spread-out tourists outside the city. The remaining benchmarked cities have a very poor inclusion of sustainable issues.

<table>
<thead>
<tr>
<th>Type of instrument</th>
<th>Description of the instrument</th>
<th>Issues linked to the instrument</th>
<th>What cities use them? (Examples)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Regulatory (1): land-use planning and housing spatial planning</strong></td>
<td>Reorganize urban space by identifying areas to change.</td>
<td>Accommodation supply imbalances between different urban areas</td>
<td>Amsterdam Hotel Plan(^{17}); Barcelona: Special Tourism Accommodation Plan(^{18}).</td>
</tr>
<tr>
<td><strong>Fiscal policies</strong></td>
<td>Charge urban use, compensate environmental impacts.</td>
<td>Tourism taxes, parking fees, etc.</td>
<td>Barcelona reinvest 50% of tourist tax in the city. Amsterdam: high tourist tax on city centre, parking fee according to congestion level.</td>
</tr>
<tr>
<td><strong>Monitoring and knowledge sharing</strong></td>
<td>Foster knowledge and promote evidence-based policies.</td>
<td>Hard sustainability assessment; monitoring impacts and conflicts.</td>
<td>Barcelona: destination Barcelona Observatory(^{23}); Tourism Observatory (Sustainable Tourism Indicators).(^{24}).</td>
</tr>
<tr>
<td><strong>Certifications, incentives and subsidies</strong></td>
<td>Influence the behaviour of economic actors and consumers</td>
<td>Lack of awareness on negative externalities of the industry and tourists.</td>
<td>Barcelona Biosphere certification(^ {25}); Brussels (Eco-dynamics label).(^ {26}).</td>
</tr>
<tr>
<td><strong>Relation and coordination with (internal and external) stakeholders</strong></td>
<td>Improve the relationship between city departments and external tourism stakeholders.</td>
<td>Lack of cooperation between/within public administrations/agencies; unbalanced social participation and equity.</td>
<td>Barcelona Tourism and City Council.(^ {27}); Amsterdam: “City in Balance” project coordinates different city departments(^ {28}).</td>
</tr>
<tr>
<td><strong>Investment mechanisms and resources support</strong></td>
<td>Improvement/development of infrastructures/facilities; human resources; public funding; etc.</td>
<td>Overcrowded urban spaces and oversaturated public services, including transport; lack of control and monitoring.</td>
<td>Amsterdam: looking beyond city limits(^ {29}); Several cities: promotion of responsible entrepreneurship in tourism. Several cities: non-licence accommodation inspections Barcelona: tourism mobility plan.</td>
</tr>
<tr>
<td><strong>Communication and promotion</strong></td>
<td>Influence the behaviour of economic actors and consumers.</td>
<td>Overcrowdedness; vacation renting issues</td>
<td>Barcelona (illegal vacation rental campaign) <a href="http://www.fairtourism.barcelona">www.fairtourism.barcelona</a></td>
</tr>
</tbody>
</table>
However, noticeable differences can be seen when analysing every city strategic plan. In fact, they do not share the same approach and differ in scope. Therefore, the different tourism policies can be divided into two main categories according to how they approach urban tourism and implement sustainability strategies:

-Cities which tourism plans prioritize economic growth and their main priorities and objectives are oriented towards market-oriented objectives. This first cluster includes Berlin, Copenhagen, Brussels, Lisbon, London, Reykjavik, Vienna and Dublin, and it focuses mainly on attracting more tourists and/or increasing the economic size/benefits of this sector.

-Cities whose tourism plans are based on a more comprehensive management of tourism sustainability issues, integrating urban planning, environmental conservation and transport & mobility perspectives, among others urban policy areas. In this second cluster, cities like Paris (to some extent), Barcelona and Amsterdam have started putting in place transversal policy instruments dealing (at least partially) with negative impacts of tourism.

Tourism sustainability in Paris

The city of Paris, through its Tourism Strategy 2022 Plan, aims to foster (economic) growth, but it also recognises negative externalities of tourism. Consequently, it proposes (some) sustainability policies oriented to clean mobility (public transport, bike use, etc.), environmental protection (climate mitigation, food waste, etc.), regulation (taxing) of sharing accommodation, as well as promotion of social/cooperative businesses. At the metropolitan level the land-use plan for hotels aims at increasing the accommodation capacity by 25,000 beds, without clear sustainability perspective.
Tourism sustainability in Amsterdam

The city of Amsterdam manages tourism through a set of different coordinated plans. The Strategic Agenda for Tourism in the Metropolitan Region of Amsterdam 2025 aims to structure the sector at the metropolitan level and redistribute tourism growth outside the city of Amsterdam. In addition, City in Balance project aims at integrating all the urban policies concerning tourism management. The Amsterdam Hotel Policy develops a spatial planning at the Metropolitan level to organise the accommodation supply according to strict criteria for new hotels. The policy of no hotel, unless..., is limiting the number of new hotels, forbidden in most of the city centre, and integrating sustainability criteria when giving new licences to hotels.

Image 2: Area Map of Overnight Policy, Municipality of Amsterdam

Tourism sustainability in Barcelona

The city of Barcelona conceives sustainable tourism governance as a shared, open and crosscutting political issue. The recently approved Tourism Strategic Plan incorporates other plans working on diverse sustainability issues such as the Tourism Mobility Plan and Special Tourism Accommodation Plan. It also coordinates actions at the metropolitan level in knowledge sharing and tourism marketing. This plan does not set growth objectives and aspires to integrate tourism management through different urban policies. Its accommodation plan includes a zoning system to organize the accommodation supply according to local objectives: de-growth, no-growth or controlled growth areas.

Image 3: Barcelona tourist accommodation plan and tourist night tax (IAAC, 2017)
3.3. Governance of urban tourism

A noticeable shift in urban tourism governance is coming from the planning and management processes of the strategic plans, but also the integration of other city departments, metropolitan administrations and private stakeholders. The involvement of urbanism, housing, transport and environment issues into tourism policies is an emerging practice.

We distinguish three areas where governance systems have evolved or expanded, not necessarily as part of a sustainability strategy, but as a logic to reinforce public management and better represent stakeholders' interests.

**Participation of stakeholders**

Tourism strategic plans now also include private actors who participate in the drafting process and take part in the deliberations as stakeholders. Involving these actors in the plans allow them to be more comprehensive and to ensure closer cooperation between the public, social actors and the private sector, as a diversity of actors is essential to understand the (non-economic) needs and constraints of the city.

- **Planning stage**: Paris has created Destination Paris, a group that unites 400 professionals from the tourism industry and social agents from the city to participate in drafting the current strategy plan. Similarly, other destinations have engaged diverse stakeholders during the planning and implementation stages.

- **Implementation stage**: Barcelona has launched the City and tourism Council, a multi-stakeholders committee to discuss and monitor the city's tourism plan. The novelty of this instrument is that civil society groups are predominant.

**Crosscutting coordination**

Some cities have also structured internal coordination processes integrating different municipal departments to design more comprehensive policies dealing with complex issues like housing use or gentrification. This is the case of Barcelona’s Mobility Tourism Plan, the accessibility strategy of Paris, the land-use planning of Amsterdam, Barcelona and Paris.

**Metropolization of tourism**

The metropolization of tourism in European cities is already happening as an institutional process to develop tourism beyond the city limits. 5 major European cities (Barcelona, Paris, Amsterdam, Lisbon and London) include elements that involve the whole metropolitan area, but only Amsterdam and Lisbon have metropolitan tourism strategy.

![Figure 9: Geographic scale of tourism plans and strategies of the selected cities](image)

Some cities have managed to extend the geographic scope of their plans to reach neighbouring cities or the metropolitan region. Cities like Lisbon and Amsterdam have planned tourism at the metropolitan scale, while others like Barcelona or Paris have developed initiatives at the Metropolitan scale. There are also different levels of metropolitan integration for tourism promotion, leisure infrastructure, facilities, knowledge-sharing or land use planning for accommodation. However, most of these instruments do not include significant actions to reduce oversupply and prevent negative externalities of tourism.
### Table 8: Overview of metropolitan tourism strategies from benchmarked cities

<table>
<thead>
<tr>
<th>Metropolitan strategies</th>
<th>Objectives</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marketing the metropolitan area</td>
<td>Spread-out tourism outside the city</td>
<td>I Love Amsterdam; Barcelona is much more Lisbon Tourism Strategic Plan</td>
</tr>
<tr>
<td>Improve knowledge</td>
<td>Integrate information and knowledge at the metropolitan level</td>
<td>Barcelona Tourism Observatory</td>
</tr>
<tr>
<td>Accommodation plans</td>
<td>Increase capacity outside the city; spatial organization of tourism accommodation</td>
<td>Amsterdam Hotel Plan; Paris Hotel Plan</td>
</tr>
<tr>
<td>Leisure infrastructure facilities, transports and tourism products</td>
<td>Spread-out tourism outside the city; improve tourism/leisure infrastructures</td>
<td>Amsterdam: Jump over the IJ – Barcelona Hola transport card</td>
</tr>
<tr>
<td>Tourism strategic plans</td>
<td>Organize and plan tourism strategy within the Metropolitan Area</td>
<td>Lisbon Tourism Strategy; Amsterdam Tourism Strategy</td>
</tr>
</tbody>
</table>
3.4. Key policy insights from benchmarked cities

**Lack of sustainability assessment**

All benchmarked cities have experienced growth in the last 10 years, and their tourism intensity/density has increased significantly. In line with this strategy, most plans are marketing-oriented, looking for a rise in the (economic) competitiveness of the destination and increasing bed-nights and tourists arrivals.

Actually most destinations do not undertake sustainability analysis. Only four destinations, *Amsterdam, Barcelona, Berlin and Paris*, assess—to some extent—sustainability issues considering negative externalities of tourism, along with other market issues. Consequently, (quantitative) growth objectives prevail and environmental and social sustainability issues are not really considered within most of the tourism plans. Cities integrating sustainability analysis are the ones introducing strategies on it.

**Weak sustainability integration**

Just three cities (out of 11) are using alternative urban policies and implementing new instruments to mitigate negative impacts on housing and reinforcing market control on accommodation development. *Barcelona’s Tourism Strategic Plan* is the only tourism policy where urban sustainability is the main priority, without visitor growth objectives. *Amsterdam* has two key policy documents, the *Strategische Agenda Toerisme 2025* aimed at increasing tourism in the metropolitan region; however, City in Balance project aims to work on tourism and urban sustainability. *Paris Tourism Strategy 2022* refers to sustainability in the main document, but it still aims for an increasing number of tourists and hotel capacity in the metropolitan area.

The short duration of tourism plans, limited to 4-5 years, makes it also very difficult to implement the structural changes that are needed to mitigate or prevent negative impacts from tourism.

In terms of prioritization of measures, tourism strategies analysed do not introduce any prioritization criteria, or any indicative budget for any programme or measure. Paris Tourism Strategy 2022 defines a calendar of actions, but without budget allocation necessary to assess prioritization. However, the objectives and vision are directly related with prioritization. In this regard, tourism growth come out as the most common priority of tourism policies, except for three cities whose strategy is also oriented to manage conflicts derived from tourism.

**Unbalanced governance of tourism**

We appreciate fragmented strategies in most of the cities with limited policies dealing with sustainability issues. In general they lack orientation to resident or diverse urban user’s perspective. Barcelona Tourism and City Council is a good experience about how to integrate multistakeholders in board to review the implementation of the tourism policy.

The coordination among municipal departments and their respective policies concerning tourism and sustainability issues remains poorly structured and weakly integrated in most of the cities analysed. *Amsterdam, Barcelona and Paris* are the only cities which tourism strategies include other plans and municipal departments to develop crosscutting
4. In-depth analysis of Barcelona, Lisbon and Paris

The objective of this in-depth analysis is to understand better the role of sustainability into the tourism policies of three major European cities. The methodology followed involved the analysis of the subjective perceptions of local stakeholders in comparison with the policy frameworks related to urban tourism. The target content-oriented analysis contrasts tourism policies with stakeholder’s perceptions. The outcomes are displayed comparing stakeholders view and tourism plans’ content.
### Tourism strategy documents and stakeholders participation to the survey

<table>
<thead>
<tr>
<th>City</th>
<th>Strategy Documents</th>
<th>Stakeholders participation to the survey</th>
</tr>
</thead>
<tbody>
<tr>
<td>Barcelona</td>
<td>Strategic Tourism Plan 2016-2020 (published in 2017)</td>
<td>Total: 21</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Public authorities: 2</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Public-private boards: 2</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Civil society organizations: 3</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Business organizations: 4</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Researchers/Consultants: 8</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Public authorities: 2</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Civil society organizations: 1</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Business organizations: 3</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Researchers/Consultants: 1</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Public authorities: 3</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Civil society organizations: 2</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Business organizations: 1</td>
</tr>
</tbody>
</table>

### Stakeholders’ perception on sustainability challenges

The tourism stakeholders consulted in Barcelona believe this activity has positive benefits on economy (85%) and culture (67%) in addition to the significant negative impacts it has on the environment (57%) and the daily life of the citizens (52%). The main negative issues are overcrowding, environmental degradation, housing and labour conditions.

<table>
<thead>
<tr>
<th>What is the impact of tourism in Barcelona?</th>
<th>What are the main negative issues?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Economic impact 85% Positive – 15% Neutral</td>
<td>Overcrowding</td>
</tr>
<tr>
<td>Cultural 67% Positive - 14% Neutral; 14% Negative.</td>
<td>Environmental impacts</td>
</tr>
<tr>
<td>Environmental 043% Neutral; 57% Negative</td>
<td>Housing</td>
</tr>
<tr>
<td>Daily life of the citizens 52% negative; Neutral 24%; Positive 24%</td>
<td>Labour conditions</td>
</tr>
</tbody>
</table>
In Lisbon, the tourism stakeholders consulted supported the idea that this activity benefits the economy (85%) and the culture (56%) having some negative impacts on the daily life of the citizens (43% neutral, 28% negative) and the environment (50% neutral, 43% negative) linked with overcrowding, environmental degradation and housing.

**What is the impact of tourism in Lisbon?**

**What are the main negative issues?**

<table>
<thead>
<tr>
<th>Economic impact</th>
<th>85% positive; 15% negative</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cultural</td>
<td>56% positive; 25% neutral; 15% negative</td>
</tr>
<tr>
<td>Environmental</td>
<td>43% positive; 14% neutral; 43% negative</td>
</tr>
<tr>
<td>Daily life of the citizens</td>
<td>29% positive; 43% neutral; 28% negative</td>
</tr>
</tbody>
</table>

Overcrowding
Environmental impacts
Housing

The tourism stakeholders consulted in Paris affirmed tourism has positive benefits on economy (100%), culture (100%) and the daily life of the citizens (33%). They reported negative impacts for the environment (33%) and issues related to transport and mobility, waste and housing.

**What is the impact of tourism in Paris?**

**What are the main negative issues?**

<table>
<thead>
<tr>
<th>Economic impact</th>
<th>100% positive</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cultural</td>
<td>100% positive</td>
</tr>
<tr>
<td>Environmental</td>
<td>17% positive; 50% neutral; 33% negative</td>
</tr>
<tr>
<td>Daily life of citizens</td>
<td>33% positive; 67% neutral</td>
</tr>
</tbody>
</table>

Transport and mobility
Waste
Housing
Sustainability challenges identified by cities

Barcelona

The diagnosis of the strategic plan is based on initial provisions and a participative process divided into 13 thematic working groups. The following tourism trends were identified:

- Overcrowding and pressure from highly popular tourist areas.
- Socio-demographic development of highly popular tourist areas.
- Increase of tourism in cities.
- Increase of sensitivity for the geopolitical situation.
- Tourists’ use of metropolitan infrastructures.
- New intermediaries and tourist activities.
- Increase of offers and new types of tourist accommodation.
- Increase of relative influence of tourism on the city’s economy.
- New tourist, visitor and resident profiles.
- Changes in residents’ perceptions of tourism.

Lisbon

The plan has no reference to the negative impacts of tourism: “tourism has made a very significant contribution to the Lisbon region, with 6% year-on-year growth since 2009”. The main conclusions of the diagnosis regarding tourism in the Lisbon region just mentioned economic and market issues:

- Tourism’s contribution and performance in the region
- Source markets and accessibility
- Key segments
- Attractions/Product
- Communication and promotion

Paris

The plan includes a section of “challenges”. The main challenge is to maintain “a leading position in the increasingly competitive field of global tourism”, and the secondary challenges are the following:

- The need to increase and modernize the capacity of transport infrastructure.
- The need to increase the number of new hotels in order to be able to receive more tourists.
- The need to have regulation in order to ensure the sustainability and the balance between the housing market and the furnished tourist rental options.
- The need to diversify Paris offer both in space and time as traditional tourist sites is saturated.
- The need to innovate in order to improve the satisfaction of the visitors.
4.2. The integration of sustainability into tourism policies

Stakeholders’ perceptions on sustainability of tourism policies

According to the survey, more proactive public actions are needed to tackle sustainability issues. Barcelona and Paris’ stakeholders believe public authorities are already being proactive towards the promotion of tourism sustainability. In Lisbon, however, stakeholders believe sustainable tourism should still be promoted.

Environmental and social sustainability is not sufficiently incorporated into tourism policies according to the participants’ survey. In Paris, respondents believe sustainability is well or very well considered; in Barcelona, they are more cautious; in Lisbon, the majority consider it is slightly or not considered at all.
### Content analysis of sustainability into tourism plans

Barcelona is the only city including tourism sustainability transversely across the various dimensions of the plan. In the case of Paris, sustainability remains a secondary pillar, behind quantitative growth. Lisbon tourism plan does not consider sustainability at all.

<table>
<thead>
<tr>
<th>City</th>
<th>Sustainability is related to the city, and not only with the competitiveness of the destination. Sustainability is part of the seven initial provisions of the plan; and it is one of the five criteria to build the framework for tourism policies.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lisbon</td>
<td>The tourism plan focuses on marketing and economic issues. Sustainability criteria is not present explicitly in this strategy.</td>
</tr>
<tr>
<td>Paris</td>
<td>Sustainability is mainly related to the quality of life of local citizens and, in a secondary level, protection of the environment (climate) and natural resources (food). One of the four strategic areas is dedicated to “development of sustainable tourism” although specific objectives and action plans remain unclear.</td>
</tr>
</tbody>
</table>

#### Table 9: Mentions of the word “sustainability” and “sustainable” into tourism plans (per page)

<table>
<thead>
<tr>
<th>City</th>
<th>Barcelona</th>
<th>Lisbon</th>
<th>Paris</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>0.83</td>
<td>0</td>
<td>0.61</td>
</tr>
</tbody>
</table>

*Source: own analysis (eco-union, 2018)*

#### Planning period of tourism plans

Sustainable development is generally regarded at the long term and it does not really fit into the average 4-5 years framework, which tend to correspond to political mandates. Even Barcelona, despite having the most ambitious sustainability approach, has a limited five-year timeframe, which will lead to difficulties when it comes to introducing significant structural changes in the destination management and tourism trends.

<table>
<thead>
<tr>
<th>City</th>
<th>Planning period of tourism plans</th>
</tr>
</thead>
<tbody>
<tr>
<td>Barcelona</td>
<td>4 years (2016-2020)</td>
</tr>
<tr>
<td>Lisbon</td>
<td>4 years (2015-2019)</td>
</tr>
<tr>
<td>Paris</td>
<td>5 years (2017-2022)</td>
</tr>
</tbody>
</table>

*Source: own analysis (eco-union, 2018)*

---

26
Governance of sustainable urban tourism – stakeholders’ perceptions

Several actors deal with sustainability of the studied destinations, although public stakeholders prevail. According to stakeholders’ consultations, Paris and Lisbon are led by public (municipal or metropolitan) governments; in Barcelona there is a more diverse and shared leadership among private sector stakeholders at the same level than public sector.

![Figure 12: Stakeholders related to sustainable tourism (own survey, 2018)](image)

Other areas involved in sustainability of tourism

Beyond tourism, the other key areas reported to be involved in the sustainability of the destinations are urbanism (public spaces and urban planning) as well as transport and mobility. Barcelona and Lisbon stakeholders mentioned local economy, jobs and business, transport and mobility, urbanism and tourism. In the case of Paris, the areas are urbanism, tourism, mobility and transport.

![Figure 13: Policies areas involved in sustainability of tourism (own survey, 2018)](image)
Conclusions from stakeholders’ perception

In summary, the stakeholders consulted shared common concerns but tourism policies are quite diverse among cities. Barcelona stakeholders stated that sustainability is not sufficiently considered in current policies despite the fact that sustainability is now included transversally in the different areas of the new strategic plan. Lisbon stakeholders think sustainability is not part of the current tourism policy which is consistent with the lack of sustainability perspective in the tourism plan. Paris stakeholders believe that sustainability is well considered even if its tourism strategy includes sustainability only as a secondary priority among others such as tourism growth and city reputation.

The coordination among diverse city departments still remains limited according to the stakeholders in all destinations. There is an ample room of improvement with regards to the integration of diverse urban policies into tourism strategies, as stakeholders’ perception show.
5. Recommendations for sustainable urban tourism policies

This chapter introduces a set of key recommendations to integrate sustainability into urban tourism policies based on the analysis of the tourism strategies of the benchmarked European cities.
5.1. Manage overcrowding and gentrification

Overcrowding is characterised by high concentration of tourists and tourism services in specific urban areas, historical or commercial city centres, iconic attractions, etc. This overconcentration on specific urban areas could led to an increase of the cost of life, the reduction of retail for residents, the substitution of houses for tourism apartments, among other effects that limit the opportunities for living of the local residents. Moreover, other migrations of highly skilled workers, wealthy visitors and youth students contribute to the increase of housing renting prices, and consequently force residents with lower wages to displace to other districts or cities. Innovative planning and policy instruments must be put in place to manage those issues, such as:

✓ Promote comprehensive metropolitan tourism strategies to spread out tourists in wider geographical areas:
  - Develop alternative tourism products in the metropolitan region in coordination with the metropolitan authorities.
  - Promote responsible and inclusive marketing strategies in a wider metropolitan context.
  - De-marketing crowded and saturated places.

✓ Integrate land use planning into tourism policies as regulatory instruments to prevent overspecialization and overcrowding in specific urban sites:
  - Development of spatial hotel planning to manage accommodation supply. Integrate urban fiscality to compensate the housing space restriction by tourism accommodation.
  - Retailing planning to ensure diverse local businesses for different urban users, keeping a right balance between permanent and temporal users.

✓ Development of urban special mobility plans for tourist areas to prevent saturation around main attraction areas by pedestrianizing them and managing the cars and coaches parking.
✓ Implementation of short room letting regulation to regulate network accommodation and prevent illegal accommodation.
✓ Promote social housing for low and middle wages households, especially in city centre districts.

5.2 Increase knowledge sharing, assessment and monitoring

A sustainability strategy requires the identification and monitoring of current issues and tourism impacts in a constant and structured way in order to develop stronger evidenced-based policies. The establishment of observatories, sharing knowledge and open data with stakeholders, the strength of cooperation with research centres and the civil society and collaboration with other similar destinations are key elements to build a strong knowledge and innovation system oriented to improve policy making for sustainable tourism development. Some of the recommended actions are the following:

✓ Development of the city ecological footprint and carrying capacity assessments to measure environmental impacts related to carbon emissions, water and energy use, waste generation, among others.
✓ Implementation of tourism observatories to collect, monitor and share tourism impacts at the municipal and metropolitan level. Data should be widely disseminated in open platforms for researchers, industry and civil society organizations to have an easy access.
✓ Facilitation of technical trainings, multi-stakeholders workshops and academic research to address specific sustainability issues.
5.3. Guarantee social return in the destination

Tourism as any economic activity must contribute to the sustainable development of cities. Social responsibility of the industry must be promoted to assure a better social return in terms of fair working conditions, increase of opportunities for people at risk of social exclusion, improvement of supply change management to enhance the multiplier effect on local economy, among many other practices. Some of the recommended actions are the following:

- Support Sustainable Public Procurement (SPP) practices by introducing green and social criteria when accessing to public procurements or getting touristic/accommodation licenses.
  - Amsterdam Hotel Plan introduces a sustainability check.
  - Barcelona City Council is promoting social and green criteria in public procurement.

- Implementation and usage of tourist taxes to improve the quality of the destination and maintain ecosystem services instead of reinvesting in tourism promotion.
  - Reykjavík, through the Tourism Site Protection Fund, reinvests the tourism tax on cultural and environmental resources.
  - Barcelona reinvests 50% of the tourist tax to improve public space and accessibility on denser tourist areas of the city.

- Promote green or social certifications at the industry and destination level.
  - Biosphere Tourism Scheme in Barcelona promotes a common certification for the destination and engage tourism businesses in sustainability strategy of the city.

- Disseminate sustainable practices, businesses and products in the destination.

- Increase (financial and technical) support to sustainable entrepreneurship and responsible businesses.
  - Design entrepreneur programs for sustainable businesses
  - Provide public funding for responsible practices

5.4. Promote inclusive governance and transversal management

Urban tourism is a complex economic activity that gathers highly diverse and fragmented actors, from local family-owned businesses to large international corporations. It also impacts non-related tourism parties such as residents, citizens and other community-based actors. Therefore, it is essential to guarantee open, participative and comprehensive consultation processes that include all relevant stakeholders in the management and regulation of tourism activities. Tourism plans should also interact with other urban policies such as mobility, housing, social affairs, economy, environment and waste, among others. The recommended actions are the following:

- Guarantee inclusive stakeholder participation to engage with civil society organizations on tourism planning and policy-making.
  - Barcelona City and Tourism Council includes social and tourism stakeholders to follow-up the implementation of the Strategic Tourism Plan.

- Enhance crosscutting and integrated tourism management to develop more comprehensive and integrated policies related to other urban plans.
  - Barcelona Tourism Plan integrates other policy areas and city departments.
  - Amsterdam City in Balance plan is linked with the city sustainability strategy.
5.5. Reduction of environmental impacts and resources consumption

Tourism is a large consumer of natural resources related to water, energy, food and land. It is therefore necessary to reduce overconsumption and mitigate environmental pollution (air, noise, land, water, etc.) from tourism activities. In particular tourism mobility is a critical issue as it is mainly based on high-carbon transports (planes, cruises, cars, etc.). Different environmental strategies should be implemented in cooperation with municipal departments to minimise, compensate and prevent major environmental impacts. Recommended practices are the following:

✓ Develop sectorial mobility plans for tourists in specific areas, sites and time:
  - Introduce the tourist perspective in the development of public transport policies.
  - Adapt public and collective transport resources during peak periods.
  - Manage tourist coach traffic avoiding overcrowding and pollution of local sites.
  - Promote bike use and facilities for local residents and visitors.
  - Increase walkability through pedestrianization and road signs.

✓ Promote the offer from local goods suppliers to reduce carbon footprint and create local jobs in the food and craft industry.
✓ Insure sound waste prevention and recycling schemes, banning the use of single use plastics, and engaging tourists and industry through educational campaigns.

- Support the implementation of energy and water efficiency measures in the hotels, transport and tourism facilities.
- Implement programs of food-waste reduction in hotels and restaurants, with the support of local civil society organizations.
6. Conclusions

In order to be supported by local communities and civil society stakeholders, tourism should contribute positively to sustainable development in European cities. A set of general recommendations are therefore provided to improve the integration of environmental and social sustainability into urban tourism policies.

- **Comprehensive sustainability assessment** is the first step to understand the real impact of tourism in the destination. It should be undertaken in collaboration with external experts or scientific institutions to ensure objective analysis.

- **Monitoring and transparency** is essential to gather knowledge, feed the public debate and inform correctly policymakers of urban sustainability. The access to information and knowledge allows to engage with relevant social, environmental and economic stakeholders.

- **Policy coherence and transversal coordination** between different urban policies is needed, by involving all city departments, reinforcing the destination management beyond economic promotion and marketing, because sustainable tourism is a cross-cutting policy issue.

- **Mitigation and prevention of negative environmental and social impacts** should be insured by integrating different policies, strategies and practices related to natural resources management and social equity objectives.

- **Regulation of tourism market and the access to urban resources** is critical to reduce saturation of public spaces and ensure an equitable access to (and preservation of) public goods (public spaces, land, housing, water, energy, food, etc.). There is an ample room to improve urban and environmental fiscality.

- **Quantitative tourism growth** aspirations must be redefined under a sustainability perspective. Increasing tourism visitors in overvisited destination will increase even more the environmental and social conflicts, jeopardize the quality of destinations and the liveability of the cities.

- **Mobility and transport patterns** should be changed to reduce carbon emissions related to low-cost airlines, cars and cruises. National and local transport authorities must implement clean mobility and public transport to meet climate change targets. Sustainable mobility strategies are a key aspect to reduce mass tourism in cities and promote environmental justice. The accessibility policy (airlines and cruises) should be redefined according to climate targets.

- **The regulation of housing market and sharing economy** is another key issue where a mix of regulatory and legal policies at the local, national and European level must assure the access to housing for permanent residents.
7. Research limitations

This research faced different issues when gathering information from cities. It created limitations in the accuracy of policy analysis related to the quality, comprehensives and exhaustiveness of data. Some of the relevant issues are the following:

- **Statistical data from cities**: most data has been gathered from TourMis database, where European cities display their information regularly. However, some cities share data at the metropolitan level. These cities are, for example, London, Paris, Dublin and Vienna; while others display different accountability scales. This diverse gathering jeopardises the comparative analysis.

- **New forms of accommodation**: sharing accommodations based on private apartments and residents' rooms sold through commercial online platforms are difficult to estimate. Those non-licensed accommodation are not easily trackable by administrations, so the statistics in this report must be cautious. Researchers used alternatives sources (such as Inside Airbnb) to show the importance of this new source of accommodation in cities.

- **Accessibility of tourism plans**: many cities do not display their tourism policies documents in an accessible way or in another official EU language. This has been the reason to discard some cities from the analysis. Other cities publish the executive plan, but not the detailed actions. Few cities display the full information transparently and with easy access.

- **Policy fragmentation**: several cities do not have an inter-sectorial tourism coordination body or/and they have delegated tourism issues on public-private boards, mainly orientated to city marketing. This situation makes more difficult to gather comprehensive policies and regulations related to sustainability issues of urban tourism. Despite having an email and phone contact with city tourism departments, most of them were not able to deliver further information related to other city departments. Researchers have looked into alternative city plans from urbanism, transport, environment, etc., where tourism was not prominently mentioned despite their economic importance.

- **Participation in the survey**: the results should be taken with caution in Lisbon and Paris, because of the relatively small participation (6 and 7 answers respectively). However, it fairly covered a diverse scope of stakeholders (public administration, business associations, NGOs, etc.). Barcelona has a larger answering panel (21 answers), and the questionnaire can be considered a good indicator for policy analysis for this city.

- **Analysis of prioritization**: the oriented-content analyses methodology is not a suitable method to identify prioritization as tourism policies do not regularly display this information clearly. A combination of different indicators should be integrated to identify prioritizations: objectives/vision
8. References

In the case of references from benchmarked cities, the researchers use diverse references to contextualise the case studies analysis (annex). Some destinations include more references as others, according to the availability of references and the need to display further information in the case studies.

8.1. Footnotes


2 See the work of Ernest Cañada (2018) Too precarious to be inclusive? Hotel maid employment in Spain, Tourism Geographies, 20:4, 653–674

3 Tourism Watch: Assessing Tourism Resource Use (Göosling, S. and Peeters, P)

4 This report uses the term “metropolitzation” as a process to enhance metropolitan policies, but also as spatial dimension of tourism destination beyond the city limits.


12 https://ec.europa.eu/growth/tools-databases/vto/policy/europe-worlds-no1-tourist-destination


16 Belle and Bramwell, 2005; Dodds and Kelman, 2008; Santos-Lacueva and Saladié, 2016.

17 http://www.amsterdam.nl/ondernemen/horeca/horeca/hotelbeleid/


19 https://www.stadtentwicklung.berlin.de/wohnen/zweckentfremdung_wohnraum/


22 http://www.la-loi-alur.org/


24 Ibid.

25 Ibid.

26 https://environnement.brussels/thematiques/transition-de-leconomie/le-label-entreprise-ecodynamique


32 https://www.metropoolregioamsterdam.nl/artikel/20180313-strategische-agenda-toerisme-in-de-mra-2025


34 https://www.amsterdam.nl/ondernemen/horeca/horeca/hotelbeleid/

35 https://maps.amsterdam.nl/overnachtingsbeleid/?LANG=nl


37 Ibid.

38 http://ajuntament.barcelona.cat/pla-allotjaments-turistics/es/


8.2. Methodology and references


TourMis.Info: Tourism statistical database from European cities. Website developed and maintain by Modul University of Vienna. Access to data in February, March and April 2018. [http://www.tourmis.info](http://www.tourmis.info)


8.3. Policy documents

Amsterdam


Barcelona


Berlin


Brussels


Brussels Airport: Connecting Belgium to the future 2040. https://www.brusselsairport2040.be

Copenhagen

Ecological Council (2017) Air pollution with ultrafine particles from cruise ships in Copenhagen, Denmark”. Link: www.ecocouncil.dk


Dublin


Lisbon


London


Paris


**Reykjavik**


**Vienna**

9. Annex: City case studies

AMSTERDAM

Tourism Strategy
Main Document: Tourism Strategic Agenda in the MRA 2025
Original title: Strategische Agenda Toerisme in de MRA 2025 (2017-2025); Metropolitan Plan
Timeframe: 2017-2025 | Date of publication: 2017 | Coordinator: Metropoolregio Amsterdam Bureau

Amsterdam tourism popularity has increased considerable in the last decade through an ambitious city marketing strategy to attract international visitors, businesses and temporary citizens. The sustainability measures are notorious and creatively developed, but question might arise on how to conciliate tourism growth with the urban sustainability in coming years.

Amsterdam tourism policy framework is composed of different policies led by municipal and metropolitan administration. Tourism is incorporated as an urban issue that generates unbalances between visitors and residents. The main tourism policy, Strategic Agenda for 2025, developed by metropolitan area of Amsterdam, is oriented towards “controlled” growth in the Metropolitan area.

This metropolization of tourism aims to deconcentrate the city centre by rising tourist tax in the centre, increasing hotel capacity and diversify the tourist offer in metropolitan areas as well as improving public transport infrastructures.

Other plans are also part of this tourism strategy: Amsterdam in Balance Program aiming at a better balance between different parts of the city; the Amsterdam Hotel Policy is strongly limiting the creation of new hotels in certain areas and introducing sustainability criteria to open new facilities; I am Amsterdam marketing strategy to attract businesses, knowledge workers and “active city dwellers”; Amsterdam short stay policy, providing accommodation for business visitors on extended stays in an in home-like environment; private holiday rental policy for homeowners to rent out their apartments or houseboat without a permit, up to 60 days/year.

Tourism growth trend
Amsterdam had a strong increase of tourists in the last decade. Tourism arrivals has raised up to 38% in overnights stays with 14 million visitors in 2016, more than 8 tourists per resident and 15,000 tourists per km² density of tourists in the city.
Sustainability Vision

One of the objectives of Tourism Strategic Agenda 2025 is to balance future visitors’ growth while balancing ensuring geographic distribution at a metropolitan level. As explained in the plan, “growth trend identified for the future needs to be supported and will benefit to the whole metropolitan area”. “Visitors will need to be spread out across the metropolitan area in order to avoid intense pressure on the city centre”. “There is a need to attract even more visitors”. “Support business travel”.

The Amsterdam in Balance policy framework aims to balance growth with sustainability, coordinating diverse policies from different city and metropolitan departments, with four objectives linked with tourism and the urban sustainability of Amsterdam:

- Greater variety of high-quality shops
- Clearer regulations and less nuisance
- Looking beyond the city limits

Sustainability Issues: related to “Need to balance between residents and visitors”

Policy Instruments

The Metropolitan tourism strategy of Amsterdam integrates other programs and plans like Amsterdam in Balance and Hotel Policy, offering an integrated framework to manage tourism and sustainability issues.

<table>
<thead>
<tr>
<th>Issues</th>
<th>Instruments</th>
<th>Measures</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sustainability of the Hotel sector</td>
<td>Incentives and regulation</td>
<td>Amsterdam Hotel policy: sustainability check to open new hotels</td>
</tr>
<tr>
<td>Overtourism</td>
<td>• Marketing</td>
<td>- Amsterdam Hotel Plan to control hotel growth and sustainability criteria.</td>
</tr>
<tr>
<td></td>
<td>• Improving relations</td>
<td>- Amsterdam City in Balance to coordinate diverse policies and city departments.</td>
</tr>
<tr>
<td></td>
<td>• Knowledge</td>
<td>- Looking beyond the city limits distributing visitors outside city centre. It introduces different tourist taxes for city centre and metropolitan area.</td>
</tr>
<tr>
<td></td>
<td>• Land-use planning and regulation</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Increase resources</td>
<td></td>
</tr>
<tr>
<td>Environmental impacts</td>
<td>• Knowledge</td>
<td>- Amsterdam Noise Policy to reduce noise levels in the city</td>
</tr>
<tr>
<td></td>
<td>• Regulation</td>
<td>- Small-scale experiments to spread visitors more evenly throughout the city and reduce nuisance.</td>
</tr>
<tr>
<td></td>
<td>• Increasing resources</td>
<td></td>
</tr>
<tr>
<td>Housing</td>
<td>• Regulation</td>
<td>Private holiday rental policy: limiting homeowners to 60 days/year.</td>
</tr>
<tr>
<td></td>
<td>• Improving relations</td>
<td>- Short stay policy</td>
</tr>
</tbody>
</table>
Barcelona destination is among the most compacted and dense urban destinations in Europe, where tourism and floating population has grown exponentially in the two decades. Barcelona is also the first Euro Mediterranean cruise destination. In parallel to tourism growth, the city has a renting housing share of 25% and is facing affordable housing shortage, where the renting average price has increased by 24% since 2014. These issues are at the core of the negative perception about tourism in Barcelona. In fact, tourism is currently the worst problem for local citizens and tourism de-growth is the second priority among residents. Barcelona City Council has recently renovated its Strategic Tourism Plan where urban policies are predominant.

Tourism growth trend

The popularity of Barcelona during the last decade is manifested by its tourism growth pattern, with a small downturn during the financial crisis. 2016 was an extraordinary year, experiencing the highest year-on-year growth rate (9.7%), and more than 26 million bed-nights, up to 32 million including all forms of commercial tourism accommodation.

It is a plan of plans, where different departments share areas of management with the tourism department (e.g. Tourism Mobility Plan, Special Accommodation Tourism Plan PEU-AT, etc.). The metropolization of tourism is also institutionalized, with specific measures to integrate strategies with the Provincial and Metropolitan governments (Diputació de Barcelona). This governance shift looks at sustainability issues of the destination from different policy instruments beyond marketing and economic ones. It is today the only benchmarked city where tourism growth is not a strategic priority and that is planning accommodation capacity contention. However, the implementation of some measures must be assessed in several year terms to evaluate its effectiveness for the urban sustainability.
Sustainability Vision

Sustainability is incorporated transversely in the tourism strategy and it is clearly manifested in its vision, as the plan states, it “needs to integrate all the available tools and mechanisms so new sustainable future scenarios can be built to ensure that the generation of wealth from tourist activities does not compromise the future of the destination. Secondly, the destination’s sustainability has to be guaranteed by “incorporating environmental issues, job quality and the local economic fabric.”

Sustainability Issues:

Sustainability issues are mainly related to overcrowding, gentrification, labour conditions, mobility and tourism use of infrastructure, and in particular:

- Increasing tourism in cities
- Tourists’ use of metropolitan infrastructures
- Increase in offers and new modes of tourist accommodation
- Increasing relative influence of tourism on the city’s economy
- Changes in trends in residents’ perceptions of tourism
- Overcrowding and pressure from highly popular tourist areas
- Socio-demographic development of highly popular tourist areas
Policy Instruments

Sustainability is included transversely in the plan, with 5 strategic challenges, 10 programmes of action and more than 100 measures.

<table>
<thead>
<tr>
<th>Issues</th>
<th>Solutions (Instruments + Measures)</th>
</tr>
</thead>
</table>
| Promote a Sustainable Destination | Incentives and marketing:  
  - Sustainable public procurement.  
  - Promotion of fair work certification and eco-labels of products/services.  
  - Marketing support of sustainability products/businesses. |
| Overtourism                     | Marketing: Improving relations; knowledge; land-use planning and regulation; increase of resources; taxing; transport planning.  
  - PEUAT: special plan for accommodation; de-growth, zero growth and controlled growth areas. Tourist taxing changes by area.  
  - De-concentration strategy  
  - Encourage metropolitan planning  
  - Tourism Mobility Plan  
  - Regulation of economic activities; land use planning.  
  - Tax measures to promote local commerce.  
  - Increasing resources to avoid property-mobbing and illegal accommodation.  
  - Re-invest tourist tax on city instead on tourism promotion.  
  - Increasing Social housing investment. |
| Environmental Impacts           | Incentives; knowledge; regulation; taxing  
  - Tourism Mobility Plan  
  - Reduce carbon footprint in accommodation: training, regulation, data-management and awareness.  
  - Negotiate for cleaner energy at ports  
  - Cruise waste tax.  
  - Environmental byelaw to reduce noise. |
| Housing                         | Regulation; land use planning for accommodation; improving relations; increasing resources; communication.  
  - PEUAT: special plan for accommodation  
  - Increasing social housing  
  - Increase inspection for illegal accommodation  
  - Mediation services between residents and legal tourist flats.  
  - Campaign for tourists in Barcelona about sharing accommodation [http://www.fairtourism.barcelona/](http://www.fairtourism.barcelona/) |
| Labour conditions               | Increasing resources; incentives; knowledge  
  - Training programs  
  - Encourage good practices at businesses  
  - Observatory  
  - Promote social and cooperative economy |
The popularity of Barcelona during the last decade is manifested by its tourism growth pattern, with a small downturn during the financial crisis. 2016 was an extraordinary year, experiencing the highest year-on-year growth rate (9.7%), and more than 26 million bed-nights, up to 32 million including all forms of commercial tourism accommodation.

This extraordinary growth has led to a 36% increase in the intensity of tourism in the last decade.

Berlin has positioned as the third European tourist city. Its population has kept growing in the last decade, with 100,000 new residents from 2010 to 2013, increasing the human pressure on the city. Its tourism policy is a story of growth success for businesses and cultural visitors. The Tourism Concept 2011+ led by Berlin Tourism Board recognises its intention for continuous growth by increasing marketing actions and airport long-haul and low-cost connections, but it is aware of the negative externalities related to this strategy. However, the plan does not display urban policies to manage sustainability issues related to tourism. In parallel, the Senate Department for Urban Development and Housing of Berlin City Council has implemented policy instruments beside the Tourism Strategic Plan to control and manage the expansion of (illegal) short room and private apartments through online platforms. Moreover, the “Urban Development Concept 2030” recognises tourism as a “city function” to be integrated in the urban policies, a reasonable way to understand tourism by its urban impacts, not just by the economic profitability and market share.

Tourism growth trend

The popularity of Barcelona during the last decade is manifested by its tourism growth pattern, with a small downturn during the financial crisis. 2016 was an extraordinary year, experiencing the highest year-on-year growth rate (9.7%), and more than 26 million bed-nights, up to 32 million including all forms of commercial tourism accommodation.

This extraordinary growth has led to a 36% increase in the intensity of tourism in the last decade.

**BERLIN**

**Tourism Strategy**

Main Document: **Tourismuskonzept Berlin 2011+**

- **Timeframe:** 2011-2017
- **Date of publication:** 2011
- **Coordinator:** Berlin Tourism Board

**Berlin’s arrivals and year-on-year growth rate (Source: TourMIS)**

**Berlin’s bednights and year-on-year growth rate (Source: TourMIS)**

**Berlin’s tourism intensity ratio and year-on-year evolution (Source: TourMIS)**
Sustainability Vision

The vision of the Berlin Tourism Concept 2011+ is oriented towards tourism growth while considering the visitor and local needs; as the plan states, “the goal for the coming years is to (be) among the top 3 travel destinations in Europe. Therefore, the intention is to consolidate the image of the city, strengthen new target groups and promote business and conference tourism. [...] It should take its visitors’ needs into account the same as those of its inhabitants”.

However, its objectives does not pursue a fair balance with local needs as all of them are oriented towards tourism growth:
- Becoming the third city travel destination in Europe (Ausbau der Position Berlins als Städtereiseziel Nummer drei in Europa)
- Becoming one of the leading international congress locations (Ausbau der Position Berlins als einer der International führenden Kongressstandorte)
- Expanding tourism as key economic factor for Berlin

Sustainability Issues:
- Over crowdedness, gentrification and price increase

Policy Instruments

<table>
<thead>
<tr>
<th>Issues</th>
<th>Solutions (instruments + measures)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Housing</td>
<td>Regulation</td>
</tr>
<tr>
<td></td>
<td>- Change of use act (Zweckentfremdungsverbot)</td>
</tr>
<tr>
<td></td>
<td>- Protecting the availability of residential housing from conversion to sharing accommodation</td>
</tr>
<tr>
<td>Mobility and Environment</td>
<td>Increase resources; transport planning</td>
</tr>
<tr>
<td></td>
<td>- Control the increasing coach traffic to relieve tourist hotspots in the city centre.</td>
</tr>
<tr>
<td></td>
<td>- Secure and expand environmentally friendly, natural and barrier-free mobility services in the short and medium term.</td>
</tr>
<tr>
<td>Sustainable practices in businesses</td>
<td>Incentives; marketing</td>
</tr>
<tr>
<td></td>
<td>- Establish Berlin as a location for green meetings.</td>
</tr>
</tbody>
</table>

Other plans considering tourism and urban sustainability issues is the Berlin Strategy for Urban Development 2030. It considers tourism as an urban “function” for the city. The measures identified are related to sustainable mobility and distribution of tourists towards alternative areas:
- Supporting the spatial diversification of tourism demand towards the outer city by developing cultural venues and promoting for sensitive neighbourhood development.
- Improving accessibility and city-friendly mobility.
The political capital of Europe has encouraged the internationalization of the city, “Bruxelles, capitale de 500 millions d’Européens”, and it is a meeting point of professionals, tourists and students. The region of Brussels receives more than half of the Belgium tourism arrivals. The half of bed-nights are not leisure-based. Tourism has increased a 30% in the last decade. In parallel, the population in the city is growing year-by-year since 2000. Its International Airport is expected to grow by 33% its volume of passengers in 2040. This European centralisation is contributing to the urban transformations of Brussels as an international place.

Tourism policy of Brussels is encouraging this process by implementing a strategic promotion of the city through its Plan Stratégique for tourism and meetings. The main aspiration is to increase up to 10 million of bed-nights in 2020. The sustainability approach is limited to incentives and communication. The plan recognises there is an issue with city centre overcrowding which needs to be solved by spreading-out the tourists along the region. This strategy is difficult when half of overstays are not for leisure. The connection with other urban policies is limited and oriented to develop/improve events infrastructures/facilities and transport, sustainability practices are used for marketing purposes.

Tourism growth trend

Brussels has seen its number of visitors progressively increase since 2007, with the notable exception of 2016, following the terrorist attacks. Bednights follow a similar upward trend until 2016. The tourism density ratio is consequently increasing in 2007-2015, while in 2016 it goes back to its 2010 levels and loses 4,000 tourists per square kilometer in one year. The tourism intensity ratio is also following an upward slope until 2016 when it is comparable to 2008 levels at 2.5 tourist per resident.
The Brussels' plan has not a clear vision. Its objectives are primarily focused on achieving growth. Tourism is seen as a major economic sector which could benefit the whole regional area, and the city should also try to attract higher-quality tourism, that is in line with social models.

### Sustainability Vision

The plan does not have any sustainability measure to be implemented in the city. Visit.Brussels is committed to integrate environmental sustainable practices in their events and promote among stakeholders good practices. Alternative urban policies like the Plan Comunal de Développement and the circulation plan for the city centre are relevant strategies to integrate in tourism policy, but the connection is not clear.

### Sustainability Issues:
- Pressure-reliever on the hyper-centre

### Policy Instruments

The plan does not have any sustainability measure to be implemented in the city. Visit.Brussels is committed to integrate environmental sustainable practices in their events and promote among stakeholders good practices. Alternative urban policies like the Plan Comunal de Développement and the circulation plan for the city centre are relevant strategies to integrate in tourism policy, but the connection is not clear.
Tourism strategy
Main Document: The End of Tourism as we Know it; Local Plan
Timeframe: 2016-2020 | Date of publication: 2016 | Coordinator: Wonderful Copenhagen

Copenhagen (CPH) is one of the most environmental sustainable cities in the world and it aspires to be carbon neutral city by 202553. The tourism policy lead by Wonderful Copenhagen is oriented towards tourism growth and city marketing. Sustainable tourism is framed as an issue of balance with locals and social impact, but the marketing approach limits its real capacity to work on sustainability issues. The plan does not include any mention neither of sharing accommodation regulation nor of any other key urban policies like Copenhagen City Master Plan 2015, where the city planned land use changes to increase youth housing capacity in 6,000 by 2027; The Finger Plan, a smart metropolitan development strategy for the transport infrastructures; or 2025 Climate Plan, for the decarbonization of the destination. All of them have implications for the sustainability of tourism in the city, but they are not integrated in the tourism strategic plan explicitly.

Tourism growth trend

Hotel tourism overnights stays in Copenhagen has increased by 41% in the last decade. Bed-nights have continually increased since 2009, and its 2016 level almost doubles 2006 one, with around 8 million bed-nights. Other indicators show an increase of cruise ship passengers estimated at 790,000 per year in 201454.

Sustainability vision

The plan’s vision emphasizes the relation of locals and visitors, and the liveability of the city as a selling point. As the plan states, “the ambition is to shift the nature of the relationship between locals and residents to promote a new tourism experience (...). It aims at creating a narrative where the two populations coexist in the same urban space (...). It recognizes the need to measure the added value to three different groups: society as a whole, the locals and residents. (...) Hence, Copenhagen focuses on “people-based growth” and will frequently consult its citizens on their view of tourism in the city”.

COPENHAGEN
Sustainability Issues: the sustainability diagnosis of tourism in the tourism strategy is rather weak and limited to general considerations by stating that “the increase in the number of tourism may be at the expense of locals”. Concrete sustainability issues are not clearly identified, like the harmful air pollution from cruises for example.

Policy Instruments
Sustainability is included transversely in the plan, with 5 strategic challenges, 10 programmes of action and more than 100 measures.

<table>
<thead>
<tr>
<th>Issues</th>
<th>Solutions (Instruments + Measures)</th>
</tr>
</thead>
</table>
| Balance between locals and visitors | Knowledge and communication  
- Carry out citizen assessment research to stay updated on local feelings towards visitors and the need for adaptive measures.  
- People-based growth initiatives to enable positive encounters between visitors and locals.                                      |

Other city plans dealing with tourism and sustainability issues
Alternative city plans have a strong impact on the sustainability of the destination. CPH Climate Plan 2025 could have a direct impact on the environmental sustainability of the destination. For example, in the energy requirements for hotels, the sustainable transport infrastructure and services or the electrification of cruise ships terminals. The City Master Plan and The Finger Plan could also have a positive impact on the tourism territorial strategy of the metropolitan area and on the housing, retailing and public space conflicts.
The Tourism Strategy for Dublin City includes the increase of the city hotel capacity to encourage its growth ambition. This strategy is coordinated with the regional tourism policy and city development plan. The Dublin City Development Plan 2016-2020 considers tourism as a key economic activity to be encouraged through public transport and pedestrianization, heritage conservation, the improvement/development of public spaces, and international linked. This plan also foresees Dublin as a more attractive city for “global capital”, businesses, international students and tourists. This “global” ambitious is followed by the Dublin Airport Strategy to develop a “Transatlantic Hub” to increase international connections for 2030. The tourism policy is for the Region of Dublin, “Collective Strategy for Tourism Growth”, which aspires to double the number of visitors by 2020. This policy is influenced by the Task Force for Tourism Growth, a group of tourism stakeholders from the city.

Tourism growth trend
Dublin’s arrivals followed a downward trend until 2011, and in 2014 they reached levels similar to the year 2009. Dublin City Council reported a 14% tourism growth in 2015, crossing the 6 million tourism arrivals. Cruise tourism is encouraged by the tourism policy but it is still far from other benchmarked cities.

The density ratio follows the same trend as the overall arrivals, with a downward trend in 2006-2010, with a record low of 40,000 tourists per square meter. It then follows an upward trend until 2014 and reaches back its 2009 level. Similarly, Dublin’s tourism intensity ratio slightly decreases in 2006-2009 before hitting its lowest record in 2010 with around 3.6 tourists/resident. It then reached back 4 tourists/resident in 2011, 2013 and 2014.
Dublin’s primary objective strategy is “to promote Dublin as a major tourist destination, to attract more visitors to the City, and enhance Dublin’s reputation as one of Europe’s premier and most desirable year round city destinations”.

Its vision is framed through three strategies: to enhance the visitor’s experience, improve visitor’s offer and to make a connected city by creating a highly accessible city.

### Sustainability Issues

The Dublin city tourism policy does not display a strategic diagnosis, rather a strategic proposal to increase tourism in the city and set up resources to encourage this ambition.

### Policy Instruments

<table>
<thead>
<tr>
<th>Issues</th>
<th>Solutions (Instruments + Measures)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sustainable mobility</td>
<td>Increase of resources</td>
</tr>
<tr>
<td></td>
<td>-Increase bike lines and pedestrianization</td>
</tr>
<tr>
<td>Waste</td>
<td>Increase of resources</td>
</tr>
<tr>
<td></td>
<td>-Implement objectives of the Litter Management Plan 2016 – 2018 including the extension of the pilot roll out of Smart Bins.</td>
</tr>
</tbody>
</table>
LISBOA

Tourism strategy
Main Document: Strategic Tourism Plan for the Lisboa Region: Metropolitan Plan
Timeframe: 2015-2019 | Date of publication: 2015 | Coordinator: Entidade Regional de Turismo da Regiao de Lisboa

Lisbon is becoming one of the most visited cities in Europe, and it is experiencing an important tourism growth in the last decade. Moreover, Lisbon is an important cruise tourist destination in Europe with over half a million visitors. Along with this dramatic increase in tourism, population is decreasing in the city centre, especially in the old town. Because of this progressive loss of population, 15% of its total households were empty in 2011. The Lisbon Master Plan (2012) established the building rehabilitation program as a city priority (reuse, rehabilitate and regenerate); however, since 2010, the hotel capacity has doubled, with an exponential touristic apartments increase (from 52 to 11,034). In a sense, tourism has renovated the historical and city centre of the city. This urban regeneration has a negative effect on the housing affordability, by increasing gentrification in the historical centre. The high increase of tourism facilities in such small time has led to a congestion of public spaces, services and infrastructures.

Lisbon tourism strategy is based on a Metropolitan Tourism Plan, oriented towards the increase tourism and diversification of the tourist offer. The metropolization of tourism is clearly based on tourism products and marketing as a de-concentration of leisure activities. However, there are no sustainability measures in the tourism plan.

Tourism growth trend
Lisbon has experienced a strong growth in terms of arrival, especially during the 2009-2016 period, with an annual increase of 14% in tourist arrivals from 2013 to 2014, and an average of 9% overnights stays increase by year since 2006. Similarly, Lisbon’s bed-nights have sharply increased during the 2009-2016 period, with +16% increase in 2014 compared to 2013.
With over 40,000 tourists per square meter, Lisbon’s tourism density ratio in 2016 was almost double compared to 2006. The intensity ratio also double the number of tourists per habitant in 2016 with respect to 2006.

Sustainability Vision

The vision of Lisbon’s plan is to “become one of the most visited European destinations”; its plan is thus primarily focused on tourism growth. Although it is not linked with sustainability, its objectives are first to better integrate Lisbon within its metropolitan area, to improve the city centre, and to develop already existing touristic assets. It details six strategic lines for six regional areas and it promotes tools to foster tourism across the region and not just in the city centre. The Plan affirms that “tourism has made a very significant contribution to the Lisbon Region, with 6% year-on-year growth since 2009”.

Sustainability Issues: No identified

Policy Instruments

There is no reference to sustainability measures in the Strategic Tourism Plan for Lisbon Region 2015-2019. However, based on presentations from the Lisbon Tourism Council, some areas of action related to sustainability issues were identified to avoid gentrification and overtourism:

- New local accommodation framework: revision of the Lisbon Master Plan, creation of rules for new tourist establishments, tourist transportation and public space use.
- New housing policy: evictions restriction for old people; affordable housing for residents, etc.
- Creation of a tourist tax since 2016.
- Diversification of points of interest in the historic centre.
- Increase protection of historical places and historical stores (Lojas Com História).
- Improvement of public transport network.
London is the most visited city in Europe with 3% of European tourists traveling to London. It is also the 6th biggest world metropolitan in term of GDP. 9% of the European Foreign Direct Investment (FDI) goes into London, with Hotels and Tourism being the first sector to receive FDIs.

Tourism Vision for London 2025 aims to consolidate London as the global capital for tourism, by increasing tourism growth through higher hotel and airport capacity. London tourism policy is also displayed under the London Cultural Tourism Vision, as London’s top 20 attractions account for 90% of visitors. In this political and international business environment, growth and development are the key priorities and sustainable tourism perspective remains isolated.

Other key urban policies like the London Plan (LP) support tourism growth by increasing resources on new tourism attractions and cultural districts, promoting the night time economy, funding large scale leisure attractions in the outer London, and adding 40,000 net hotel rooms by 2036.

Tourism growth trend

London’s overnight stays accounts for 79 million in 2016, increasing by more than 8% in the last decade. 2012 Olympic Games supposed a big rise of overnight stays (+4.5%), followed by a large decrease (-8.3%) probably due to the terrorist attacks. In 2015, London received 18.6 million international visitors, and 206 million domestic day visitors. From 2011 to 2016, the hotel capacity has increased by 11%, with an expected rise of 11% till 2020. This trend makes London one of the most congested touristic cities in Europe.

Sustainability Vision

The Tourism London’s vision is looking at the visitors’ experience. While it mention sustainability, it relies the responsibility on the industry. As the plan states, “Our vision is that visitors will be able to unlock the best version of London for them by tailoring their experience to meet their needs. (...) They will be encouraged to do more and see more of London, which will step up their overall satisfaction and increase their likelihood of returning as visitors or to work, invest, trade or study. The tourism industry will work together to manage the expected significant growth in visitor numbers in a sustainable way. And we will achieve our vision by balancing the needs of Londoners and visitors, with more Londoners recognising the importance of the visitor economy and benefiting from its social and economic impact”.

London’s bednights and year-on-year growth rate (Source: TourMIS)
The objectives and strategic lines are focused on marketing the destination. The references to sustainability are oriented to encourage visitors to visit the surroundings of the city by sustainable transport means. The objectives and strategic lines are focused on marketing the destination. The references to sustainability are oriented to encourage visitors to visit the surroundings of the city by sustainable transport means.

### Sustainability Issues: No identified

### Policy Instruments

Most of the measures related to social or environmental sustainability are based on communication actions. An increase in resources to preserve and improve cultural and heritage infrastructures is mentioned, but there is no information about the budget, conservation objectives or accessibility issues. No measures were found related to land-use planning, regulation/bylaws, taxing, knowledge creation or incentives.

<table>
<thead>
<tr>
<th>Issues</th>
<th>Solutions (Instruments + Measures)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Promote Sustainable practices in the tourism industry</td>
<td>- Green Tourism for London Program: scheme for hotels, guesthouses, attractions and venues in the capital (*)</td>
</tr>
<tr>
<td>Preserve heritage and culture</td>
<td>- Preserve London’s cultural infrastructure: support the development of guidance for local authorities to encourage planning that supports cultural infrastructure</td>
</tr>
<tr>
<td>Congestion Accessibility</td>
<td>- Ease demand at peak periods by providing visitors with up-to-date information on congestion levels and queuing times at popular attractions.</td>
</tr>
<tr>
<td></td>
<td>- Legible London: help both residents and visitors walk to their destination quickly and easily.</td>
</tr>
</tbody>
</table>

(*) Measures found in the London Master Plan 2015
Paris is the second most visited city in Europe and attracts a significant number of students and young workers. This increase of temporal citizens has a direct impact on the housing market. Departure of local residents to the outer due to high rents and unaffordable mortgage results in up to 15% of unoccupied houses, used as second homes and temporary short term rentals in on-line platforms such as Airbnb. In five years, the rental market has lost about 20,000 homes, and in some districts (especially in the centre and West of Paris), tourism furnished apartments can represent up to 20% of the total rental offer.

The 2022 Tourism Strategy aims to strengthen Paris international position as a cultural and business world centre by improving infrastructures, tourism offer and increasing metropolitan hotel capacity. The plan emphasizes the governance of tourism integrating the urbanism and transport departments to deal with urban sustainability issues. The metropolization of tourism is an important element of the strategy through the Metropolitan Hotel Plan, aiming to increase hotel capacity in Greater Paris. The sustainability strategy is based on transport, environment, social economy, regulation of sharing accommodation and increasing resources on accessibility. However, the plan is clearly oriented towards economic competitiveness. Issues might arise on how to conciliate growth trends with conflicting sustainability issues in the coming years.

Tourism growth trend

London’s overnight stays accounts for 79 million in 2016, increasing by more than 8% in the last decade. 2012 Olympic Games supposed a big rise of overnight stays (+4.5%), followed by a large decrease (-8.3%) probably due to the terrorist attacks. In 2015, London received 18.6 million international visitors, and 206 million domestic day visitors. From 2011 to 2016, the hotel capacity has increased by 11%, with an expected rise of 11% till 2020. This trend makes London one of the most congested touristic cities in Europe.
The tourism intensity and density reveals a light decrease in the past years.

### Sustainability Vision

The 2022 Tourism Strategy Development Plan mentions that the main challenge is to maintain “a leading position in the increasingly competitive field of global tourism”, along with four areas of improvement: transport, accommodation, tourism offer and innovation. These focus areas are directly linked with the economic competitiveness of the destination.

The sustainability perspective is rather limited as a second priority over the tourism growth. As the plan states, “in 2022, Paris is the city that hosts the most visitors in the world, but also the city that ensures the best welcome in the world, through its high-quality, sustainable tourism that creates jobs, and is a source of international influence.”

#### Sustainability Issues:
- Population density
- Growth in other forms of tourist accommodation

#### Policy Instruments

<table>
<thead>
<tr>
<th>Issues</th>
<th>Solutions (Instruments + Measures)</th>
</tr>
</thead>
</table>
| Housing                 | Regulation  
- Control de development of tourists’ rental properties.  
- ALUR Law: establishing rent control, including a time span of leases and mechanism to regulate short-term tourist accommodation in the peer-to-peer economy. |
| Over-tourism            | Knowledge; increase resources; incentives  
- Observatory of international tourist areas  
- Keep tourist sites clean  
- Increase public toilets |
| Mobility and Environment| Incentives; increase resources; transport planning  
- Sustainable mobility strategies: increase bike lines and walkability  
- Promote bike tourism: Accueil vélo Label  
- Coach emission reductions  
- Tourism public transport cards  
- Improve Metropolitan public transport  
- Organize tourism coach  
- Improve accessibility in transport, museums and tourism offer |
| Sustainable practices in businesses | Incentives; increase resources; marketing  
- Promote solidarity and cooperative economy in tourism  
- Promote fair encounters with locals  
- Promote environmental practices in businesses.  
- Label “Destination for everyone” |
Reykjavík is among the European urban destinations that has growth more in the last decade. Its tourism policy was planned for a long framework (2011-2020) oriented towards tourism growth by marketing its tourist city image, developing new products outside the city and improving the quality of tourism services. Under the umbrella of the Ministry of Industry, Reykjavík has joined some initiatives to promote responsible tourism among businesses and tourists. Recently, new measures to manage conflicts with citizens were established: bus traffic limitations or land-use regulation for hospitality services. Despite these novel measures to manage negative impacts of tourism, the strategic plan does not pursue sustainable tourism. Consequently, the strategic tourism plan should be updated to include a strong sustainability perspective that could clearly define policies to manage the forecasted growth for coming years and redefine growth expectations.

Tourism growth trend

Reykjavík is a city with an extraordinary tourism growth in the last decade, experiencing an increase in all the indicators analysed. After the financial crisis, tourism arrivals grew by more than 60% and bed-nights by 70% between 2010 and 2013. It is expected to continue growing with the airport expansion planned by the International Keflavik Airport Master Plan, aiming to double the capacity of the airport into 9 million passengers by 2040.

The tourism intensity and density reveals a light decrease in the past years.
Consequently, the intensity and density ratios have increased significantly by 60% between 2010 and 2013 putting at stake the balance with local residents.

**Sustainability Vision**

The vision does not pursue sustainable tourism but instead business, cultural, health and nature tourism. As the plan states, “Reykjavik shall become a popular all year round destination and, in doing so, bolster the diversification of the economic and cultural life of the city. The systematic development of its infrastructure as a welcoming city for tourists, coupled with coordinated promotion work, shall ensure that Reykjavik is substantially strengthened as a venue for international conferences and events and enhance its reputation as an interesting cultural city in close proximity to unique nature. Health tourism services shall also become one of the area’s main pillars, since one of the unique features of Reykjavik is its use of pure energy, geothermal water and first class facilities”.

The city of Reykjavík’s emphasis is on becoming a stronger and more attractive destination by 2020, but (environmental) sustainability is also mentioned indirectly. As the plan states, it should “prioritise green values, such as health and the high quality of the area’s air and water (...), become a child-friendly city for tourists (safety, access, family-friendly leisure, educational elements and experiences). Quality is a prerequisite for the successful growth of tourism in Reykjavik

**Policy Instruments**

The tourism strategy for the city of Reykjavik “A City for All Seasons” does not display any concrete sustainability measure. However, the city seems to be planning new strategies to better manage the extraordinary tourism growth from the last decade. Moreover, some initiatives were been found through the Reykjavik tourism website.

**Hospitality and mobility**

- Hospitality strategy to avoid concentration of services on neighbourhoods.
- New hotels must leave ground floor open for services to general public (tourists and residents).
- Bus mobility restrictions in the city centre.
- Increase sustainable mobility among tourists and visitors: extent cycling/walking paths and improve public transportation to outdoors.

**Incentives and social return:**

- Promoting responsible tourism among businesses and visitors with Festa, the Icelandic Centre for Corporate Social Responsibility.
- Responsible tourism campaigns as The Icelandic Pledge (Ministry of Industry, Iceland)
- The tourist Site Protection Fund
Tourism strategy

Main Document: Tourism Strategy 2020; Local Plan
Timeframe: 2015-2020 | Date of publication: 2015 | Coordinator: Vienna Tourism Board

Vienna tourism has grown in the last decade, together with a population rise of 200,000 people, challenging the sustainability of the city. The Tourism Strategy 2020 presents the policy approach for a “world city” pursuing to enlarge the tourism market (by +40%) and its connections with 20 global metropolises. However, the plan does not approach sustainability beyond a brand position as a “smart destination”. The strategy wants to contribute to the balance among tourists, citizens and entrepreneurs, but there are no concrete measures specifically tackling this issue, despite of the International Transport Hub program for travellers’ mobility services and infrastructures.

Tourism growth trend

In the last decade tourism in Vienna, as the rest of major European city destinations, has grown exponentially, except for the period of the financial crisis. From 2006 to 2010, tourists’ arrivals grew by 38% and bed-nights by 35%.

This tourism growth increases the intensity and density ratios year-by-year; an issue not mentioned in the tourism plan diagnosis.
Sustainability Vision

The strategic approach aims to “balance” diverse user needs (visitors, citizens and entrepreneurs), but there is no clear mention of negative tourism impacts. As the plan states, “Vienna and its tourism industry do not only aim to step up the global tourism demand for the Austrian capital. Rather, the Tourism Strategy is also an instrument to promote the city and location as such and to balance the different needs of the “visitors’ city”, the “residents’ city” and the “entrepreneurs’ city”.

In relation with objectives, Vienna strategy clearly steps for tourism growth. As the plan states, “Vienna wants to benefit from this growth, improve its competitive position on an ongoing basis and strengthen its standing as an internationally coveted and well-connected top destination. This means that, starting with 2013 as base year and with 2020 as final deadline the number of overnight stays is to increase by 5 million, the rooms’ revenue is to be stepped up by Euro 400 million, and direct flights to Vienna are to be offered from another 20 metropolises worldwide.”

Policy instruments

The measures related to sustainable tourism concentrate on transport and housing. They focus on improving sustainable mobility and establish common “rules” for sharing and regular accommodation, without tackling negative externalities for residents.
10. Annex 2: Stakeholder survey

Stakeholder survey related to tourism plans indicators

This table shows the linkage between the information purposes of this research and the sources of information to reach the purposes. Both sources of information - questionnaire and tourism plans - concretely the question number and the indicator number, respectively.

<table>
<thead>
<tr>
<th>Information purposes</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Questionnaire</td>
</tr>
<tr>
<td>P1. Are there any policy/political willingness related to sustainable tourism?</td>
<td>1-2-3-4-5-6-7-8</td>
</tr>
<tr>
<td>P1.1 Relevance of this issue in the governmental agenda.</td>
<td>1-2-3</td>
</tr>
<tr>
<td>P1.2 What did motivate the inclusion of this issue in the agenda?</td>
<td>1-3</td>
</tr>
<tr>
<td>P1.3 Apart from the tourism area, is there any other policy domain involved in the tourism sustainability in the city?</td>
<td>4</td>
</tr>
<tr>
<td>P1.3.1 If there are, which ones?</td>
<td>4</td>
</tr>
<tr>
<td>P1.3.2 If there are, how is the coordination between tourism and the other policy domains implicated?</td>
<td>5</td>
</tr>
<tr>
<td>P1.4 Is there any other policy domain that is not involved in the sustainable tourism policies in the city but it should be?</td>
<td>6</td>
</tr>
<tr>
<td>P1.4.1 If there is, which one?</td>
<td>6</td>
</tr>
<tr>
<td>P1.4.2 Why?</td>
<td>8</td>
</tr>
<tr>
<td>P2. Which are the main policy instruments related to sustainable tourism policies?</td>
<td>7-8.1</td>
</tr>
<tr>
<td>P3. Which are the main issues to guarantee future sustainability of tourism activity in the city?</td>
<td>1-8</td>
</tr>
<tr>
<td>3.1 Is there any programme, plan or measure to deal with this?</td>
<td>8.1</td>
</tr>
<tr>
<td>P4. Key strategies or good practices related to sustainable tourism in the city.</td>
<td>7</td>
</tr>
<tr>
<td>P5. How is sustainable tourism governance in the city?</td>
<td>4-5-6-9</td>
</tr>
<tr>
<td>P5.1 Who are the main stakeholders (public, private, NGOs...) involved in the sustainable tourism policy development?</td>
<td>9</td>
</tr>
<tr>
<td>P5.2 Characteristics of these stakeholders (governmental, non-governmental, etc. to be specified)</td>
<td>9</td>
</tr>
</tbody>
</table>