Towards sustainable urban tourism: challenges for cities and tourism SMEs

Mapping urban tourism challenges with the participation of local stakeholders

WP1 - Building knowledge for tourism SMEs

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1. Introduction

The present report has been elaborated within the framework of the Tourban project, which is co-funded by the COSME programme of the European Union. The main objective of Tourban is to spearhead a transnational and cross-sectoral movement towards tourism sustainability in urban areas across Europe, leveraging SMEs' capacities and skills to uptake best practices and develop innovative solutions that make them both more sustainable and competitive. In this regard, identifying opportunities for urban tourism SMEs necessarily requires an initial focus on the challenges they face and the contextual situations in which they are operating. Therefore, this report focuses on mapping urban tourism challenges in the seven Tourban pilot cities (Amsterdam, Barcelona, Copenhagen, Dubrovnik, Kiel, Budapest, and Tallinn), with the participation of local stakeholders.

As many other tourism destinations around the world, the seven Tourban pilot cities experienced an increasing tourism pressure during the last decades. This led these cities to a confrontation between the positive impacts of having a vibrant tourism sector as a driver of socio-economic development and the negative impacts associated with overtourism and unbalanced tourism development. Moreover, the entire sector has been abruptly disrupted by the Covid-19 pandemic, which is having dramatic consequences on the entire tourism and travel industry. The necessary restrictions put in place to mitigate the health crisis and to contain the spread of the virus resulted in limited possibilities for people to travel and sometimes required temporary closures of tourism businesses. This means tourism destinations and businesses went from facing issues concerning overtourism to a situation of limited or even absence of tourism. At the time of publication of this report there are still several uncertainties about the future. There are hopes that a widespread vaccination will put an end to the health crisis and, as a consequence, the tourism and travel industry will start a recovery phase. When this will happen is not clear yet, and there might be significant differences between countries and continents. In this situation, several tourism SMEs, also in the Tourban pilot cities, are struggling to survive. Moreover, the uncertainties about the future make it difficult for them to take any type of decision, from designing new products/services, to managing and keeping their staff or catching opportunities to invest in more sustainable practices for their businesses.

Nevertheless, sooner or later, people will start to travel again, and this is the reason why it is still very relevant to map urban tourism challenges concerning a pre-Covid-19 situation. As mentioned by Higgins-Desbiolles (2020), the Covid-19 pandemic polarised tourism academics and professionals into two different positions: one sees tourism going back as soon as possible to 'the previous normal situation', while the other considers the Covid-19 crisis as "an opportunity to critically reconsider tourism's growth trajectory and to question the logic of more arrivals implying greater benefits"(Gössling et al., 2020, p. 13). In both cases, mapping urban tourism challenges concerning a pre-Covid-19 situation provides useful insights for tourism SMEs, both as knowledge and awareness regarding challenges that might come back soon and to critically reflect on mistakes that have been done in the past and might be avoided in the future.

The first part of this report focuses on mapping urban tourism challenges at a 'destination level'. Collecting secondary data through online desk research provided evidence concerning the relevance of tourism in the seven Tourban pilot cities and allowed to analyse valuable information regarding the social, environmental and economic impacts of urban tourism in these cities. In the second part of the report, the focus shifts more on tourism businesses, narrowing down the analysis to a 'tourism SMEs level'. To collect useful insights, semi-structured interviews have been conducted with 113 tourism SMEs across the seven pilot cities, investigating the factors that are limiting or preventing them from adopting more sustainable business practices. Following the interviews, a focus group was organised in each of the pilot cities, involving tourism SMEs, representatives from academia, sector associations, public administrations and other relevant stakeholders, as a form of validation of the data collected through the interviews.

The outcomes summarised in this report aim to shed light on urban tourism challenges in the development of more sustainable business operations in urban areas, such as the seven pilot cities, focusing on the following categories of tourism SMEs:

- Hotels and similar accommodation;
- Holiday and other short-stay accommodation;
- Camping grounds, recreational vehicle parks and trailer parks;
- Travel agency, tour operator and other reservation service and related activities.

2. Challenges in the Tourban pilot cities

Before focusing on the challenges that are limiting tourism SMEs in embracing more sustainable business models, we provide an overview on a broader destination level. This will help the reader to gain contextual insights concerning the challenges of urban tourism in the pilot cities. After elaborating on the significance of tourism in the pilot cities, the reader will be informed about the main social and environmental challenges affecting tourism in the considered urban destinations and the additional difficulties generated by the impact of the Covid-19 pandemic.

2.1 Relevance of tourism in the pilot cities

The Covid-19 pandemic determined a dramatic disruption of several economic activities. Among the sectors most affected by the pandemic we can certainly include the travel and tourism industry, which experienced an unexpected interruption of a long-lasting global trend of growth. Along with remarkable positive impacts, the mentioned growth also determined serious concerns regarding negative socio-cultural and environmental impacts. Topics such as overtourism and unbalanced tourism development have become themes dominating the public, professional and academic discussion concerning urban tourism.

Considering a pre-Covid-19 situation, the 7 Tourban pilot cities share a substantial trend of tourism growth when looking at recent data. Some examples might help in understanding the relevance of this growth. Between 2014 and 2019 Barcelona saw an increase of 40% in the number of passengers moving through the city airport (AENA, 2020). Tourist arrivals in Amsterdam increased from 6.8 million in 2015 to 9.2 million in 2019 (TourMIS, 2020), meaning an increase of 35% in just 4 years. Still, a lower rate if compared with the increase of 60% registered in Dubrovnik, where over the same period of time tourist arrivals passed from 0.89 million up to 1.44 million (Statista, 2020a) or the case of Budapest, which saw an increase of 53%, from 3 million tourist arrivals in 2014, up to 4.6 million in 2019. Even in Kiel, which is the smallest urban centre among the pilot cities, overnight stays increased by 33% between 2014 and 2019, higher than bigger cities, if compared to the +18,5% registered in Copenhagen (Danmarks Statistik, 2020) or the +17% experienced in Tallinn (Alamets, 2020). In most of the cities, international tourism represents the most significant part of the total. For instance, domestic tourism represents only 15% of the total in Tallinn (Alamets, 2020), it counts for 17,8% in Amsterdam (Gemeente Amsterdam, 2020) and 16,9% in Barcelona (Observatori del Turisme a Barcelona, 2020a). The pilot cities often represent by far the most visited destination in their country. For instance, Budapest alone accounts for approximately 60% of inbound Hungarian tourism (Magyar Turisztikai Ügynökség, 2017) and the city's travel & tourism direct GDP counts for 81.4% of the entire country's travel & tourism direct GDP (WTTC, 2019).

Another similarity shared by the pilot cities concerns the seasonality of tourism flows. Overall, it is clearly recognisable a higher season (generally from April till September, with peaks in June-July-August). An analysis of the Gini indicator provided by TourMIS (2020) shows how the seasonality of tourism in Amsterdam is certainly less dramatic than in other European capitals, similarly to the situation of Barcelona or Budapest, while Dubrovnik has a significantly higher seasonality factor than all the other pilot cities. In the case of Tallinn (Alamets, 2020) and Barcelona (Ajuntament de Barcelona, 2021) the seasonality is remarkably noticeable for international visitors, while domestic tourism appears considerably less affected.

The significance of tourism as a socio-economic phenomenon in the pilot cities becomes evident by looking at the number of jobs directly or indirectly tourism-related and the contribution of tourism to the local GDP. For instance, it has been estimated that in Amsterdam in 2019, 11% of the jobs were in tourism (Tours in Amsterdam, 2019). In 2018 the hotel industry was the second largest economic sector in Barcelona, with the highest volume of employment contracts in the city, accounting for 16.7% of the total (Ortiz, 2019). If considering absolute numbers, the tourism industry in 2019 was contributing with 16,500 full-time jobs in Kiel (NIT, 2018) and 169,000 jobs in the Greater Copenhagen (Visit Denmark, 2020). In Dubrovnik, city's travel & tourism direct GDP contributes with 17.8% of total city's GDP (WTTC, 2019) and 35% of the residents are employed by "Accommodation, food & service" activities (Global Sustainable Tourism Council, 2020).

Concerning the countries of origin of tourism flows, besides domestic tourists, the pilot cities generally attract a high number of visitors from the neighbouring countries. Overall, the EU represents the main market for the analysed cities, in terms of geographical area. Nevertheless, also the UK represents a relevant market for all the pilot cities. Some of them attract a considerable number of visitors also from the US (e.g. in Barcelona and Amsterdam the US market counts for approximately 10% (Gemeente Amsterdam, 2020; Observatori del Turisme a Barcelona, 2020b) and it is relevant also in Budapest and Copenhagen). Moreover, the Russian market is increasingly important in the pilot cities, especially for Budapest, Kiel and, obviously, for Tallinn (due to its geographical location).

Considering the tourism resources attracting visitors to the pilot cities, we can certainly mention architecture and other tangible heritage (e.g., Sagrada Familia and other Gaudi masterpieces in Barcelona), intangible cultural heritage ('the local way of living' has become one of the main reasons for travelling), events and festivals (e.g., the Sziget festival in Budapest), food and gastronomy, shopping and leisure activities. Together with the leisure market, the MICE sector also plays a meaningful role in the pilot cities and it was predicted to grow further, for instance, in Kiel, Amsterdam and Budapest (Peeters et al., 2018; van Loon & Rouwendal, 2017). Unfortunately, the sector has been severely disrupted by the Covid-19 pandemic and the future still looks uncertain.

The combination of several factors (availability of cheap flights above all) often promoted the increase of forms of "nightlife tourism" or "party tourism". In several cases this resulted in negative consequences for residents (e.g., inappropriate visitors' behaviour associated with drugs and alcohol consumption, violence, littering, noise pollution, etc.). Among the pilot cities, Amsterdam, Barcelona and Budapest are probably the ones having experienced more intensively these issues, which are also frequently reported among the consequences typically associated with overtourism. Cities have all been active in searching for solutions, such as preventive or mitigative actions aimed at curbing the mentioned negative impacts. For instance, since a few years already, the Amsterdam City Council aims at increasing the city's revenues from tourism by reducing the number of bookings of budget hotels (reducing the number of large groups of backpackers and stag night travellers coming to the city) shifting the focus on 'quality tourism' instead (Jordan, 2017). As a consequence, the city's marketing efforts in tourism have been re-focused on attracting higher-paying cultural tourists and reducing the number of budget tourists, as a way of counteracting negative associations to the city's image and negative consequences concerning overtourism (Dai et al., 2019).

2.2 Overtourism and unbalanced tourism growth

While in Kiel overtourism does not seem to be an issue yet (visible tourism pressure occasionally reported in few specific cases), Tallinn and Copenhagen have seen the urban city centre increasingly under pressure, especially in recent years (pre-Covid 19). Nevertheless, local authorities seem to have kept the situation relatively under control. As a consequence, although sometimes expressing their concerns, local residents did not experience dramatic consequences yet and did not develop a negative sentiment towards tourism as a result of excessive pressure on the socio-cultural fabric of the city (CELTH, 2018; Peeters et al., 2018).

Contrarily, in Barcelona, Amsterdam, Budapest and Dubrovnik the increasing tourism pressure already determined profound fractures in the socio-cultural and economic fabric of their complex urban environments, determining negative consequences concerning the liveability of the city, the wellbeing of inhabitants and the degradation of the environment.

The pilot cities, especially the ones characterised by a more significant tourism pressure, experienced several overtourism related consequences. Below some examples:

- Physical overcrowding of the city, especially the historical centres and around a small number of very popular tourism hot spots. This causes conflicts in the usage of infrastructure and facilities between tourists and residents;
- Tourists' offensive behaviour, including public urination and vomiting, littering, drunkenness and noise;
- Displacement of stores and facilities for locals, replaced by souvenir shops and facilities for tourists;
- Increase of prices in the city, leading to a loss of purchasing power of residents and worsening their quality of life. This is particularly dramatic in terms of housing prices. Additionally, more and more houses are offered to tourists through platforms such as Airbnb, losing *de facto* their residential function;
- *Disneyfication* of the city, more and more perceived as a theme park and developed primarily to fit the preferences of tourists, not the needs of the residents;
- Pollution and degradation of the environment near popular tourist sites;
- Development by residents of a negative and hostile sentiment against tourism.

The combination of the above-mentioned factors also determines a sort of 'locals' displacement', as residents are forced to move out from the places where they lived their entire life. "Some areas had become so overcrowded with tourists that people in Amsterdam didn't feel at home in their own neighbourhoods. They felt like they were living in a city that didn't belong to them anymore," says Vera Al, spokesperson for the deputy mayor Everhardt (DW, 2020, para. 7).

Moreover, cities typically experience an unbalanced tourism development characterised by the concentration of tourism, including its positive and negative impacts, in a limited number of hot spots/areas, while larger parts of the urban environment are completely left out, even when they might be potentially interesting from a tourism point of view. This is also something that most of the Tourban pilot cities have in common. As a more equal distribution of tourism pressure can potentially ease or mitigate the negative impacts on the most visited areas, some of the cities (e.g., Amsterdam) have been experimenting strategies to spread tourism more evenly. Nevertheless, there might be the risk of spreading tourists to neighbourhoods that are not prepared to manage visitor flows, with additional consequences on the socio-cultural fabric of the area. Another interpretation of unbalanced tourism development concerns the danger of developing an urban economy too much reliant on tourism, as in the case of Amsterdam and especially Budapest, with the travel & tourism direct GDP counting respectively for 35% and 81.4% of the entire city's GDP (WTTC, 2019). Such an unbalanced situation, besides posing issues from a socio-cultural and environmental point of view, might compromise the resilience of the local economy, when unexpected disruptions happen (e.g., Covid-19 pandemic) and affect the entire tourism industry.

Overtourism and, more in general, unbalanced tourism growth have been determined by specific trends, often visible at a global level, but also recognisable in most of the Tourban pilot cities. Among these trends we can mention the success of low-cost airlines, which allowed to attract younger targets of visitors (mostly interested in the nightlife), tourism strategies mainly focused on increasing the number of arrivals, seasonality factors (high peaks of devastating tourism pressure and low seasons with other social issues, such as unemployment), lack of visitor management strategies and the role of cruise tourism in certain destinations.

2.3 The impact of cruise tourism in the pilot cities

Water is a natural element that the Tourban pilot cities have in common. Besides Budapest, all the other cities are coastal destinations, where the sea provides visitors with a maritime atmosphere. This ranges from the Mediterranean coastal environment of Barcelona and Dubrovnik to the Nordic landscapes of Tallinn, Kiel or Copenhagen. The iconic canals are the tourism 'trademark' of Amsterdam, while Budapest is crossed by the river Danube, Europe's second-longest river and famous for the river cruises connecting several European cities. As a matter of fact, cruise tourism plays a significant role in all the Tourban cities. For instance, in 2018, 345 cruise ships docked in the Port of Copenhagen, which means 463,000 tourists visiting Copenhagen as part of a cruise itinerary (Molsted Wanshener, 2019). According to estimates, in 2019 Budapest had more than 400,000 cruise tourists (Magyar Turizmus ZRT, 2015). The transnational ferry service between Germany, Sweden and Norway is one of the most important segments of tourism in Kiel. Besides the ferries, 174 cruise ships, carrying over 800,000 passengers docked in Kiel in 2019 (Stüben, 2019). Barcelona receives around 2.6 million cruise tourists annually, with an average of 10,700 passengers per day during the months between May and October (Escuela de Periodismo El País, 2017). During the peak season, Dubrovnik receives an average of 9,000 passengers each day, hosting a total of 622 cruise ships in 2019, which represents a reduction from the 843 cruise ships hosted in 2013 (Statista, 2020b).

Cruise tourism has often been named as one of the main contributors in terms of overtourism (Peeters et al., 2018) and it has frequently attracted critics concerning its environmental impact. Cruise passengers usually benefit of all-inclusive offers, which generally include accommodation, meals and on-board leisure activities. Therefore, even when they dock at a certain city, they do not contribute significantly to the local economy. According to Magyar Turizmus ZRT (2015), unless they start or end their cruise programme in Budapest, cruise passengers do not represent a significant source of income for the tourism economy in Budapest. Moreover, they often represent large groups of people willing to visit a few popular tourism hot spots in the city, significantly contributing to the congestion of these areas. Doubts about the 'quality' of cruise tourist are often raised by the city councils and residents. In Amsterdam and Barcelona cruise tourists have been criticised as making use of eco-unfriendly cruise ships, involving large groups and causing traffic jams and city congestions (Gerritsma & Vork, 2017; O'Sullivan, 2014). In Kiel, the cruise industry also received substantial critics from the local community. During the summer of 2019 it was the target of several protests by environmental activists (Stüben, 2019; t-online, 2019). In Amsterdam, to balance the negative effect of cruise tourism, since 2019 the municipality applied a 'day tripper tax', taxing every cruise passenger with €8 per day, to reduce the number of 'stopping-over' cruise passengers. Consequently, two cruise lines have replaced Amsterdam calls with Rotterdam to avoid paying such a high tax (Dai et al., 2019).

2.4 Attitude of residents towards tourism in the pilot cities

Despite experiencing an increasing tourism pressure and suffering overtourism related consequences, residents of the Tourban pilot cities maintain an overall positive attitude towards tourism in their cities. Even in cities such as Barcelona and Dubrovnik, heavily affected by overtourism, most residents still think that tourism is overall beneficial for the destination (Institut za turizam, 2020). This stance is mainly justified by the tourism contribution in terms of jobs, income and entrepreneurial opportunities. Nevertheless, an increasing number of residents have been raising their voices against overtourism and the impact of tourism on the socio-cultural fabric of their cities, as frequently reported by international media. A survey in Barcelona (Ajuntament de Barcelona, 2019) revealed how locals' worries are mainly concerning issues such as massification, increases in prices and rents, uncivilised tourists' behaviours, pollution and environmental degradation, loss of neighbourhoods' life and gentrification.

Interestingly, Gerritsma and Vork (2017) reported that irritations and negative attitudes towards tourism in Amsterdam are particularly strong among people living in the city centre and other areas massively frequented by tourist, while neighbourhoods with a low tourism pressure (e.g. Amsterdam Noord) showed a more positive attitude towards tourists and tourism. The double-sided impact of tourism is also noticeable from the outcome of a survey in Dubrovnik, showing that 75% of the participants fully agreed on the statement that tourism makes the life in the community better, while 82% of the participants also thinks that tourism activities deeply and negatively affect the environment and endanger natural and cultural resource in the wider city area (Institut za turizam, 2020).

2.5 Environmental impacts

The positive contribution of tourism to the local economies, comes at a price, also in the Tourban pilot cities. Besides the above-mentioned social impacts, the pilot cities have been suffering also substantial consequences in terms of pollution and environmental degradation.

Cruise tourism is something all the pilot cities have in common and, therefore, they also share the related environmental issues. Among the direct pollution generated by cruises, we can mention water and air pollution, eco-toxic metal emissions from antifouling coating and underwater noise (Institut za turizam, 2007). Specifically, Barcelona port has been declared the most contaminated in Europe in 2017 (European Federation for Transport and Environment AISB, 2019). Moreover, ferries, cruise ships, cars, trailers, tourist buses, they all make use of the port and the surrounding areas, causing congestion problems, as well as pollution. This is particularly inconvenient in cities where the port is not very far from the city centre, such as in Tallinn, Kiel and Barcelona, for instance.

The transportation to the destination is often the main contributor to the environmental pressure of inbound tourism. In the specific case of Amsterdam, relatively old data showed that approximately 70% of the environmental pressure of inbound tourism originated from transport to the city, 21% from accommodation, 8% from visiting attractions and other leisure activities and 1% from local transportation (Peeters & Schouten, 2006). More recent sources confirmed that in Barcelona transport by airplane represents 75% of the carbon emission from tourism in the city (Rico et al., 2019). The level of tourism-related CO_2 emissions represents the main environmental issue also in the Greater Copenhagen, together with other concerns as for instance food waste (Erhvervsministeriet, 2019). In Tallinn, the concentration of entertainment facilities in the Old Town substantially contribute to noise pollution (CELTH, 2018).

Several initiatives have been initiated and implemented in the pilot cities, by a variety of stakeholders, with the intention to strategically incorporate environmental challenges in the tourism development vision of the cities. In some cases, these initiatives took the form of strategic plans for the city. For example, the city of Kiel has published a master plan '100% climate protection' and the 'Green City Plan' for the implementation of sustainable and emission-free mobility, which also regards the role of tourism in the city (Landeshauptstadt Kiel, 2018). In other cases, efforts and commitment have been put in achieving the standards required for obtaining a certain environmental certification. For example, Barcelona was the first urban destination to obtain the Biosphere certification for its commitment to sustainability in the tourism sector (Biosphere Responsible Tourism, n.d.). Other initiatives in the cities were initiated by particularly proactive private tourism businesses, which are also contributing in the general efforts to mitigate the environmental impact of tourism.

2.6 The impact of Covid-19 pandemic on the pilot cities

As everywhere around the world, the Covid-19 pandemic severely impacted tourism in the Tourban pilot cities, causing a drop in tourism volumes and revenues. International tourist arrivals experienced a -70% contraction in cities such as Barcelona, Copenhagen, Tallinn and Amsterdam, where international arrivals count for most of the total visitors. Dubrovnik experienced a -80% decrease of arrivals during the summer months. Hotels in Budapest experienced a similar contraction in terms of revenues. In Barcelona, 82% of large events have been affected (cancelled or transformed into virtual events). The second and third wave of the pandemic in Europe are not allowing tourism to restart yet. At the moment in which this report has been finalised, there are hopes that the vaccination strategy will allow a normalisation of the situation and by the summer 2021 tourism business can start to operate, although certain restrictions might still be in place. There are lots of uncertainties and this obviously has an impact on the potential survival of several tourism SMEs. It also influences the way in which they look at the future, the decisions they can afford to take in terms of investments and human resources. National and local governments have responded to the crisis by implementing a variety of financial and fiscal measures to support tourism business, ranging from loans guaranteed on favourable conditions, grants, postponement of payments and obligations, and different types of tax reliefs.

The pandemic has also forced cities to question their approach to urban tourism and re-think strategies, visions and plans concerning urban development and the role of tourism in a more sustainable approach that needs to be implemented after the pandemic. For instance, Amsterdam is now committed to “create a visitor economy that doesn't harm the liveability of our city, and that takes into account the needs of residents and locals”(DW, 2020, para. 12). Concerning Barcelona, the Catalan Tourist Board has been updating the objectives of the Strategic Tourism Plan for Catalonia 2018-2022 (Catalan Tourist Board) with the aim to make their tourism development strategy smarter and more sustainable, adding value through boosting digitalisation and the promotion of even more sustainable practices. Although these initiatives point into a good direction, effective and long-term strategic changes require time and bottom-up approaches, aiming to involve a wide variety of stakeholders with different interests, as they are the change-agents able to make urban tourism more sustainable and resilient.

3. Tourism SMEs challenges in embracing more sustainable business practices

After presenting broader contextual insights concerning the challenges of urban tourism in the pilot cities, the focus of this chapter shifts on uncovering factors and challenges that are limiting tourism SMEs in adopting more sustainable business practices, embracing business models based on circularity and sustainable principles. The outcomes presented in this chapter are based on 113 interviews conducted with tourism SMEs operating in the Tourban pilot cities. The gathered insights have been discussed and validated through a focus group conducted in each of the pilot cities.

3.1 Importance of sustainability: tourism SMEs' perspective

Overall, tourism SMEs consider a transition to sustainable business models as something important. Generally speaking, rather than referring to the past, they think a sustainable business model is key for survival in the future, because of the evolution of the demand and since more and more governments will impose laws and restrictions related to sustainable use of resources. Nevertheless, they have different view on how long this process will take (1-10 years). Having said this, how sustainability is defined depends very much on the type of business, the scale of operations and the market context where the business operates. Therefore, there might be different interpretations of sustainability, its role and its importance:

- Environmental sustainability is perceived as important because it may reduce costs and improve customer satisfaction;
- Other businesses indicate that the definition of sustainability should not only refer to the environment, as tourism has the obligation and possibility to address also the social and cultural sustainability. Most tour operators focus on social aspects of sustainability and not on the environmental ones. For them, the impact of SMEs on the environment is seen as marginal. Especially smaller businesses that do not own buildings or assets state that the added value of tourism businesses should focus on generating a positive social impact;
- Companies that manage assets (events/ hotels/ boats) face challenges in finding the balance between new investments needed (in electrical boats, solar energy, etc.) and the short term profit reduction due to additional costs. Only if entrepreneurs are really ambitious (and socially oriented) they are willing to let go short-term profits;
- Several tourism SME owners see sustainability as a personal value, a moral choice, that should define one's behaviour and decisions. Many business owners indicate it is "in the core of our work".

3.2 Sustainability as a feature for SMEs' competitiveness

When it comes to considering sustainability as a potential source of competitive advantages, the perception of tourism SMEs is mixed. In principle, SMEs agree with the general idea that sustainability can make companies more competitive, but their position is not always clear-cut and depends on the sector of activity. Below, some of the most frequently mentioned insights:

- Accommodation providers generally confirm that sustainability might be a source of competitive advantage to them since it reduces costs or leads to higher revenues per room. However, they also indicate that clients do not necessarily behave in a more responsible way, when confronted with sustainable solutions. Some SMEs indicated that sustainability should actually be seen as a competitive advantage for the city as a whole, not only for the SMEs that are operating in that city;
- If the city regulations become stricter, like in Amsterdam for instance, the SMEs' possibility to gain a competitive advantage is taken away, because all players must comply with the same stricter environmental rules. However, if government regulation is still absent, sustainable products and services are sometimes seen as offering a competitive advantage. Especially owners of smaller businesses tend to see a higher competitive advantage linked to sustainability;
- Some SMEs observed that customers are clearly more sensitive to the visual aspect of sustainability: they observe if goods are packaged in plastic or sourced with regional farmers. Higher priced hotels also indicate that more customers are willing to pay higher prices for local and organic food, although this observation is certainly not valid for all the customer segments;

- For many SMEs the sustainability of their company might not be a decisive factor to attract customers and it does not considerably affect a customer's purchase decision. Many are convinced that most gains can be made by offering a high-quality service to guests and not by trying to "educate" them in being more sustainable. It also depends on the product or service as well as on the target group. A hotel might be offering local honey at breakfast and selling it at the front desk. It might work very well, but if guests' towels are not as soft or do not smell nice as well (due to the use of less/organic detergent), guests might complain. Quality thus is always the most important, according to the majority of SMEs in the pilot cities;
- Often, SMEs perceive customers mostly as very price and quality sensitive, therefore not willing to pay an extra for a more sustainable service or product. For example, it should not be taken for granted that customers are ready to pay a higher price for a guided tour by electric bus (vs non-electric bus). Moreover, if a business is operating in a price sensitive segment (e.g., cheap hotel), cost reduction is interesting but also very difficult to achieve;
- Many SME owners also refer to digital solutions (e.g., smart booking and asset management systems) that do offer a competitive advantage while implementing a certain degree of sustainability transformation.

3.3 Barriers for SMEs to move faster on sustainability

SMEs see sustainability as a fast-evolving concept. It looks like a moving target to them. It started with initiatives that were more resembling "greenwashing" approaches and now continuously evolves into more and more sophisticated solutions, requiring specific technical expertise that often SMEs do not feel to have. Sustainability is not only something to include in your Unique Selling Proposition for marketing purposes anymore, but it needs to be incorporated into the overall SMEs' business model. When speaking about factors that are keeping tourism SMEs away from embracing more sustainable business models, several elements have been clearly mentioned:

- Lack of financial resources was recognised as mayor limiting factor, although some companies reckoned that investments would pay off in the long run. Financial challenges have been further reinforced by the Covid-19 crisis;
- Lack of time was the second most important factor mentioned (even though it is a resource most SMEs have now, in times of the pandemic). In smaller companies, where sustainability is one of the many responsibilities of the owner or general manager, the topic often falls short due to other duties. Some say that they would need more time to inform themselves about what is possible to do and about available governmental funding opportunities;
- Lack of knowledge concerning the possibilities and opportunities offered by sustainable solutions was a factor frequently recurring as a limitation. Also, skills and expertise concerning the practical implementation of sustainable solutions were mentioned as frequent constraint. Technically qualified professionals are expensive. As a consequence, it is mostly the owner or the CEO, who is taking the responsibility for business sustainability, while embracing a learning- by-doing approach;
- Lack of available staff. Hardly any SME has a specific employee focusing on business sustainability and driving a sustainable transformation, although there is a widespread agreement on the fact that sustainability should be a core component for all the employees and treated as a transversal subject;
- A key downside expressed by SMEs is the abundance of bureaucracy and the lack of clear rules and regulations. On the one side, it is often difficult to understand what can be done and what not, as the rules are not clear. On the other side, some SMEs think that regulations are there, and they create a rigid framework that is perceived as not leaving space for testing new solutions and try new models;
- Lack of availability of good sustainable suppliers in the value chain. Sustainable services and products are therefore expensive and/or more difficult to get;
- Overall, several of the interviewed SMEs called for stricter governmental regulations in the sector. SME owners are convinced that governments should take the lead. This would be the best approach in order to advance in terms of sustainable transformation, as it would force companies to act and the whole value chain to adapt.

3.4 Funding to invest in sustainability: what is needed

In most of the pilot cities SME owners that have invested in sustainability measures indicate a 'step-by-step' approach as the preferable option. They have taken relatively small investments and put their own savings, equity or resources in. Not many have used bank loans or state subsidies. Examples of investments mentioned by interviewees are solar panels, waste and water cleaning, green energy, sound level (DB) meters. Below, some of the most relevant insights collected during the interviews:

- Most SMEs said that the main driver behind these investment decisions was the opportunity to save money. Sustainability is often seen just as a positive side-effect. When investing in sustainability, mainly it is a calculation and constant balancing between costs and revenues, and between what a business is obliged to do and what it would like to do;
- Some mentioned that the Covid-19 pandemic pushes towards specific solutions: digitalisation of the business, home working and “desk sharing” systems to reduce CO_2 emissions, e-invoicing and partial abolition of paper-based records, recycled paper and envelopes, paper furniture, distributing e-guidebooks, etc.;
- Hotels are investing to improve their supply chains, not so much in green buildings, as these are very costly.
- Banks are reported to be conservative and not very open to innovations by tourism SMEs. Strict banking rules make it impossible for larger companies to try new investments. The problem is not so much the cost of the loans but more the set of conditions that need to be met;
- SMEs experienced difficulties in attracting private investors. They perceive investors as not always ready or able to understand the ideas behind innovative business models or sustainable transformations. Moreover, SMEs report venture capital investors as having unrealistic profit expectations, considering the industry;
- Many companies are not effectively aware of governmental support options (or they are lacking information on them, or never invested time in looking for information on them). Generally, interviewed businesses do not feel well informed about possibilities for public grants or subsidies, but they realise that it is their own responsibility to inform themselves.

3.5 Marketing of sustainability efforts and sustainability certifications

Most of the interviewed SMEs in the pilot cities consider marketing and selling sustainable products not too difficult, in principle, as it entails a good marketing message. However, in practical terms, marketing and selling sustainability sometimes represent an issue for several companies. It is a matter of costs, time and knowledge. Below, some relevant insights shared by the SMEs interviewed:

- Tour operators indicated that selling sustainable tours is challenging, especially for small companies, who do not have the means for it. A sustainable or “green” tourism product is seen as a niche product. There are guests interested in it, but the key question is: are they willing to pay for these products? Shaping a correct and effective communication and make customers understand the values of sustainability is a challenge;
- Some companies mentioned concerns about being accused of “greenwashing”, so they are very cautious of what they are communicating;
- Several businesses agree on the fact that customers are generally price sensitive. Quality is key and a good balance in terms of value for money is necessary. Companies that are more ambitious in terms of sustainable development run the risk of overpricing and soon the challenge becomes how to stick to their principles and, at the same time, not loose clients because the products or services are too expensive. The larger companies can try out and take a longer timeframe because they have cash flow they can play with. Smaller companies need to convince the customers that their product or service is worth the price and add special personal service or a “special touch” to the product. But it is hard, for instance, to serve an organic red wine in a canal-boat that is twice the price of a regular wine (and takes away profit margin). So, this extra service has a limit and it is difficult to communicate. Anyway, there are segments of clients increasingly demanding sustainable products and services. In these cases, it is not a big challenge to market and sell them, as long as they are not considerably more expensive;
- Not all companies emphasise the environmental dimension in their marketing. It depends on their sector of activity. In some cases, they rather focus on the social dimension of sustainability;
- When it comes to labels and certifications, opinions are very diverse. Some argue that labels are good, as they help measure the socio-environmental impact of their activities, although they point out the costs

associated with certification processes. Others wonder about the added value of labels for their business or underline that existing labels are not specific or transparent enough;

- Sometimes SMEs do not have any knowledge about the existence of sustainability certificates. Others have never considered applying for sustainability or certification labels because, in their opinion, there is no measurable output they can provide as a business to prove sustainable practices;
- Another challenge is represented by the cost of certifications. Most of the businesses recognise that being certified may increase the trust of the consumers in the business (and therefore this might justify the price) but this also depends on the origin of the travellers and the type of customer;
- Most hotels have investigated the possibility of a green hotel certificate, but they have found that it involves a lot of administrative work, and there were several expectations they could not met and/or were not even perceived by SME owners as useful to make their operations more sustainable;
- Most of the SMEs that went through a process of certification do agree that the certification procedure helped them to learn about sustainability and to reveal points of improvement for the company. So, besides of a marketing tool, it is also considered an instrument to support internal change processes towards sustainability.

3.6 Changing is a challenge in itself

SME representatives in the Tourban pilot cities mainly agreed on the idea that change is necessary, it is something important in order to keep up with the development of the market. One of the interviewees specifically mentioned that "if you do not change, you die. As a company you have to adjust, refocus, innovate, and rebrand yourself all the time" (SME representative, personal communication). Nevertheless, a transition to a more sustainable business model might require a lot of changes within an organisation. It requires "doing things in a different way" or "using different tools" than the ones normally used (e.g., introducing new technologies), or sometimes asking yourself questions in a different way, such as questioning "if a certain product is really necessary" or "by which more sustainable product can I replace another one?" (SME representative, personal communication).

Few specific points were most mentioned by SMEs, in terms of change-related challenges:

- Commitment of staff: changing procedures and behaviour only works if the whole team is on board. Therefore, internal communication about every little step is vital to ensure that employees at all levels understand why certain changes are being made and what the intended outcome is. Many SME representatives agreed that this is relatively easier in smaller companies and more challenging in larger SMEs with more employees;
- Leaderships skills are fundamental to steer the business operations in the desired direction, effectively engage with people, inspire and encourage them in pursuing ambitious objectives in terms of sustainable development;
- Commitment of customers: some SMEs pointed out that even the best changes made regarding a more sustainable business operation are worthless if customers are not used to it (e.g., waste recycling systems). Customers, as well as employees, must be made aware of the importance and the reasoning behind certain changes;
- Collaboration: some interviewees mentioned that changing certain things in a business to become more sustainable becomes easier when you have a strong local network of other businesses that are willing to share knowledge, ideas and also customers with each other. Also, the importance of collaboration between SMEs, local and national government bodies was mentioned.

3.7 Training and HR challenges

When investigating on SMEs' perception regarding training activities for employees, concerning sustainability and the implementation of sustainability principles regarding recruiting processes, employment conditions and HR practices, a number of challenges have been identified:

- Availability of good staff: In many pilot cities, it seems to be difficult to find skilled employees. This lack of choice can make it difficult for companies to pay close attention to a person's fit regarding the company's principles or their personal dedication to sustainability;
- Staff training: most of the SMEs agreed that training and awareness raising among employees and collaborators is seen as an important factor in achieving sustainability. However, only a handful of

companies in all seven cities offer formal staff training concerning sustainability. Most interviewees said that, when employees start working at the company, the main principles with regards to sustainable practices are explained to them during their initial training phase and they are instructed to pay attention to environmentally friendly and sustainable practices during their activities;

- Resources: some of the interviewees admit that regular sustainability trainings for all employees would be too costly and/or time consuming. Nevertheless, many recognised the need of taking staff trainings into consideration for the future;
- HR practices: most SME representatives assured that social sustainability in terms of employment conditions, equal opportunities and a good work-life balance are important to them. However, only very few of them have a set HR protocol regarding social sustainability, maybe due to their limited size as businesses.

3.8 Setting priorities in terms of most important challenges

When asked about prioritising the most important challenges in making their business more sustainable, SME representatives went back to some of the most significant aspects pointed out in the first part of the interview. The following points were mentioned most frequently:

- Not knowing where to begin: some companies simply do not know where to start and how to prioritise because the whole topic of sustainability seems too big and overwhelming. This includes writing guidelines and internal policies, staff training, waste and energy management, supply chain management etc. Some also said in this context that they are lacking inspiration and ideas;
- Time: some interview partners said that they do not have enough time to really dive into the topic and find out what is possible for their company and they also lack time to measure sustainability efforts;
- Finance: financial restraints are often mentioned as a challenge in becoming more sustainable. Interview partners say that investments have to pay off in the long run and it is often difficult to measure the short-term cost against long-term benefits. Also, the access to finance and a lack of knowledge about financing opportunities such as loans or government funds are often mentioned. Financial limitations are also aggravated by the Covid-crisis;
- Staff: another challenge is finding and keeping good staff, keeping them motivated, committed and also finding good training opportunities for them regarding sustainability;
- Customer demand and marketing: many interview partners said that they would like to make changes and be more sustainable but that guests are not willing to pay more for sustainable products or services. This makes marketing and pricing of products and services more difficult;
- Regulatory framework: SMEs think that governments and local authorities must implement clear sustainable policies; also, bureaucracy was mentioned as a challenge in one pilot city.

3.9 The role of sustainability in the recovery from the Covid-19 crisis

SME representatives interviewed in the pilot cities seemed to agree on the fact that sustainability and a shift to more sustainable business practices are very important for the future of the entire tourism industry. However, when specifically asked whether sustainability can help their company in the recovery from the Covid-19 crisis, interviewees had different stances, as reported below.

Mentioned reasons why sustainability can help a company in the recovery phase:

- In coming years, sustainability will be the standard and if a business does not follow along, it will go out of business. Cities as well, as a whole, have to become more sustainable;
- Right now, many companies have the time to really dive into the topic of sustainability and make changes that otherwise might get lost in the day-to-day business;
- Sustainability always means a focus on quality, as one interview partner said: “when you’re thinking about sustainability, you’re also automatically thinking about quality, customer needs, employee satisfaction and economic success. And all of that is important in the recovery from this crisis” (SME representative, personal communication). Therefore, a focus on sustainability automatically gives a competitive advantage to the business;

- The crisis led to a change of attitude and values of customers and of the society as a whole. There is a growing focus on quality and also on sustainability.

Mentioned reasons why sustainability cannot help a company in the recovery phase:

- Some SMEs representatives state that they currently have more important things on their mind (how to pay their bills and employees and whether they will be existing in a couple of months) and therefore they do not have energy or motivation to think about sustainability right now;
- Some argue that customers have become even more price sensitive due to a strained personal financial situation. Others pointed out the opposite, mentioning that customers do have money for travelling, even more than before, but their focus is not on sustainability: "[Sustainability] is a mega trend, and the more attention it gets, the more value it will add to the companies working with it, with no added cost. But no, I do not believe it will help companies recover from Covid. The customers are hungry right now. They did not travel last year so they have a bigger budget than usual, which I believe they will spend with no regards to sustainability" (SME representative, personal communication).

3.10 Beyond sustainability: necessary changes for a post Covid-19 recovery

Considering the scope of Tourban, the interviews with tourism SME representatives have mainly been focusing on the theme of sustainable transformation and the challenges faced by businesses in initiating or implementing this transformation. Nevertheless, we know that the Covid-19 pandemic severely impacted tourism SMEs and even the possibility for them to continue their operations. The future is still uncertain, and it is not clear yet when the heath crisis will be over, and when businesses will be allowed to operate normally. In the light of these reflection, it seemed sensible and useful to conclude our interviews embracing a broader perspective. This led to discuss other changes with SME representatives, beyond a sustainable transformation, that they perceive as urgent, necessary, and helpful to recover from the Covid-19 generated crisis. In this regard, several factors were mentioned by SME representatives in the pilot cities:

- Change of target markets: some companies mentioned an intention of trying to attract new target markets, for example a shift towards more leisure travellers and less business customers, or more attention to the local/domestic clientele, instead of focusing only on international visitors;
- New collaborations: some interviewed SME representatives mentioned that a better collaboration and a close network with other industry players as well as professionals and local governments would be helpful to exchange ideas. It might help in getting new inputs and promote the sustainability aspects of the city as a whole;
- Focus on quality: for many, a focus on quality in every aspect of their operation will likely help them to achieve a competitive advantage in the recovery phase. This includes, for example, sustainability practices such as the use of local products as well as staff trainings and an even bigger focus on cleanliness and hygiene;
- Technology: some mentioned that new digital solutions (e.g., contactless payment methods) will be more important and should therefore be implemented with urgency;
- Change of perspectives in destination's policies: focusing on inclusive and bottom-up approaches in defining tourism destinations' strategies, involving and empowering a wide variety of stakeholders.

4. Conclusion

This report summarise valuable insights gathered through secondary as well as primary data collection in seven pilot cities, focusing on contextual and practical challenges that tourism SMEs face in their transformation towards more sustainable business operations.

Overall, it seems tourism SMEs in the pilot cities do have a body of knowledge and experience about sustainability, nevertheless, this often remains on a superficial layer. When it comes to identifying and practically implementing sustainable solutions that make tourism business more sustainable (and more competitive), this general knowledge is not sufficient and SMEs owners and managers feel overwhelmed by the complexity of the topic and the multiple perspectives concerning sustainability. The crisis caused by the Covid-19 pandemic is sometimes interpreted as a moment to re-think business strategies and pursue more sustainable approaches, nevertheless due to limited cash flow and uncertainties about the future, it is very difficult in this moment to plan and implement any type of change, especially if this requires substantial financial investments.

In general, there seems to be a sort of attitude-behaviour gap, as tourism SMEs overall recognise the importance of sustainability and the need to embrace a more sustainable approach in their way of doing business, but they struggle in translating this positive attitude into practical changes concerning their business operations. There are several reasons co-determining this gap. Among them:

- Lack of in-depth knowledge about the existence of more sustainable solutions able to make their business more sustainable;
- Lack of awareness concerning opportunities provided by more sustainable solutions, also in terms of competitiveness;
- Financial restraints (especially now, due to the Covid-19 crisis) and limited knowledge about existing governmental support for sustainability transformations (or bureaucratic complications in accessing this support);
- Challenges in balancing more sustainable operations/products with a variety of customers' expectations;
- Limited time and resources invested in terms of staff involvement and training concerning sustainability;
- Limited time availability to invested in getting more substantial information concerning possibilities and opportunities for a sustainability transformation.

When considering sustainability as a potential source of competitive advantage, the perception of tourism SMEs is mixed, their position is not always clear-cut and depends on the sector of activity. Clearly, an active role of local and national governments is seen as a key factor for the future, but also the willingness of SME business owners to try innovations and learn from that, may push the boundaries of further sustainable development of SMEs. Several SMEs themselves believe that a stricter regulation by governments should be the driving force of a sustainability transformation of the industry. This determines a sort of unconscious 'conflict of interests' for SMEs. From one side, some of the SMEs do believe that a sustainability transformation of their business can determine a competitive advantage for them. On the other side, by demanding stricter regulations, instead of aspiring to be the leaders of this change, they are asking for a common regulatory framework that would put everyone in the same conditions, certainly limiting the opportunities to gain a certain competitive advantage through sustainability transformations.

This raises questions about their perception in terms of 'making the difference' by being more sustainable and reinforces the above-mentioned considerations in terms of attitude-behavior gap, calling for future actions to support tourism SMEs in closing this gap.

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