

# Thoughts on Spanish urban tourism in a post-pandemic reality: challenges and guidelines for a more balanced future

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## Abstract

**Purpose** – This study aims to identify the challenges faced by urban destinations in Spain in the current transitional stage towards a new reality of tourism, caused by the outbreak of COVID-19 and the ongoing global changes in the tourism industry.

**Design/methodology/approach** – An extensive literature review and an analysis of current debates were conducted to identify the different factors that have influenced the recent tourism phenomenon and the development of destinations on a global, regional-national and local-urban scale.

**Findings** – Four main challenges are identified, including the new mobility patterns of the population; information and communication technologies and the digitalisation process in urban and tourism management; sustainability, as a factor of the competitiveness, stability and viability of urban destinations; and governance in urban destinations.

**Originality/value** – The study's findings provide valuable insights for urban destination managers to make informed decisions and adapt to the new reality of tourism.

**Keywords** Governance, Sustainability, Spain, Urban tourism, Mobility, Information and communication technologies

**Paper type** Viewpoint

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## 1. Introduction

Prior to the COVID-19 pandemic, there were already symptoms of change in the tourism industry and a need to rethink the existing tourism model. These symptoms had been present for the past decade in the context of ongoing global changes. However, the COVID-19 outbreak at the end of 2019, and its subsequent spread across the whole world, was an exceptional event. Furthermore, during the current, post-pandemic phase, in addition to the ongoing health crisis, there is a global unstable economy and a war in Europe, which, together, paint an uncertain and changing future.

The current context of global interconnectedness is an essential reference point for understanding the recent evolution of tourism and its future, both in general terms and, more specifically, on Spanish urban destinations. Urban tourism experienced a boom throughout the world in the second decade of the 21st century (Canalís, 2015) and in 2018 accounted for 45% of global international tourism (WTTC, 2018). Within this evolution, we can observe examples of good practice in the management of urban destinations in different parts of the world, such as in Linz (Austria), Antwerp (Belgium), Copenhagen (Denmark), Berlin (Germany) and Turin (Italy) (UNWTO/WTCF, 2018). In Spain, during this decade, urban tourism came to represent as much as 35% of the whole Spanish tourism sector (EXCELTUR, 2017). It is worth noting, however, that this percentage varies slightly

depending on the indicator considered (number of overnight stays and contribution to tourism GDP). This trend in the increasing importance of urban tourism was altered with the outbreak of COVID-19; city tourism was the tourism sector most affected during the two years of the pandemic, although, since the summer of 2022, the sector's recovery has accelerated considerably.

Within the overall context of global change, the process of constructing a new tourism reality must have the objective of generating competitive, safe and sustainable tourist destinations (López et al., 2022b). In this vein, we conduct an extensive literature review and a follow-up on the debates on the topic, to identify different events that have negative influences on this objective at a global, regional-national or local-urban scale on the tourism phenomenon and the development of destinations.

Decisions taken by different actors to create a new tourism reality have to contemplate different challenges associated to a complex reality (López et al., 2022a). For this study, to analyse and evaluate the urban destinations of Spain, it was decided to explore challenges that were considered, at the time of the study, to be the most significant according to the recent literature on the topic and considering the role played by public and private actors in the urban destinations' dynamics. Specifically, four challenges were identified:

1. the new mobility patterns of the population;
2. information and communication technologies (ICTs) and the digitalisation process in urban and tourism management;
3. sustainability, as a factor of the competitiveness, stability and viability of urban destinations; and
4. governance in urban destinations.

In the next four sections, we discuss each of these challenges, before finishing with an epilogue that introduces strategic proposals to help with decision-making and to adapt to the new reality of tourism.

## 2. The new mobility patterns of the population

The transformation of visitor flows into a phenomenon of mass tourism in Spanish cities in the past decades, with the well-documented, resulting impacts on the cities' historical quarters, was brought about by the motivational changes of demand, the effects of certain urban renovation and image creation projects, the increased popularity of short trips and by improvements in connectivity. All of these factors stimulated both holiday and business tourism, and they had clear repercussions on the urban space. Within this context, which formed part of the tertiarisation of urban economies, the highest levels of tourism pressure were recorded in cities that enjoyed a high level of air connectivity (typically, connections through low-cost flights); had a consolidated market image; and were cruise ports. These cities included Barcelona, Palma, Valencia and Málaga (Calle & García, 2020).

The pandemic initially resulted in immobility (Novelli & Milano, 2020), followed by a gradual recovery of tourist movements. However, this recovery led to a new problem of hyper-mobility that has complicated tourist destination management. The mobility recovery process is associated with changes in the spatial patterns of movement that have repercussions on tourism dynamics. These new patterns of mobility are determined by aspects such as security, a reduction in air pollution, a growing importance of intermodal transportation and travel times and an incessant evolution of technologies that facilitate movement.

Certain indicators evidence a return to pre-pandemic levels of high urban tourist numbers. In Barcelona, hotel overnight stays in 2022 have already reached 92% of the 2019 figures (according to the INE's Hotel Occupancy Survey). Demand for short-term rentals on

platforms has also recovered rapidly, exacerbating the rising price on the overall housing market. Added to these dynamics is the fact that many cities purposefully decided to attract so-called digital nomads and technology-based companies, as part of the strategies for the recovery of economic activity in this type of tourist destination.

To face the challenges arising from the new mobility context in urban destinations, the essential point of reference is an orientation towards sustainable mobility, which, as well as being a factor of tourist destination competitiveness, has to be understood as a reorientation towards mobility based on criteria of social cohesion, environmental quality, clean energies, enjoyment of the public space and universal accessibility.

Within this new context, in Spain, practically all urban destinations now incorporate mobility as an essential part of their local management via sustainable urban mobility plans (SUMP), which have the objective of implementing forms of movement based on pedestrianisation, bicycle lanes and the promotion of public transport, together with measures to reduce car traffic and the priority of pedestrian use in public spaces, among others. Regarding the transport model designed for motorised vehicles, the SUMP seek to place people at the centre of the planning and as the principal element of public transport. However, there are methodological problems involved in the operation of the SUMP (Vega, 2017) and difficulties and challenges in their implementation. In any case, the approach of sustainable mobility, aimed at achieving less polluting movements, with reasonable times and costs, both for the user and for society as a whole (Gallo & Marinelli, 2020), is key for the future of tourist destinations. This requires coordination between the plans being implemented and tourism policy, especially in the implementation of safe and efficient transport systems that allow equitable and inclusive access and that contribute to making tourist destinations more attractive.

Based on the observation of several cities in different geographical environments, Balsas (2019) argued that the pedestrianisation of urban centres contributes to reinforcing urban vitality, the safety of pedestrians and cyclists and tourism dynamization. However, these processes fostered by the pedestrianisation have also placed pressure on disadvantaged and peripheral urban areas, leading to a need for urban revitalisation interventions to be made in the context of spatial and social equity criteria. An example of this can be seen in the city of Seville in southern Spain. Typically, transformation processes in pedestrian areas are implemented in historical city centres, but in Seville, streets were also pedestrianised outside of the city centre. The effects of the pedestrianisation were studied and, when surveyed, the citizens gave positive evaluations of the programme (Castillo-Manzano, Lopez-Valpuesta & Asencio-Flores, 2014).

One noteworthy, more recent experience, in terms of sustainable mobility and the pedestrianisation of urban spaces is the case of the city of Valencia. This is a paradigmatic example of the transformation of a Spanish regional capital into a cultural and economic centre and a major tourist destination (Prytherch & Maiques, 2009). The city has almost 800,000 inhabitants (2023) and is the fifth largest urban tourism destination in Spain in terms of overnight hotel stays. It has a sustainable urban mobility plan (Valencia City Council, 2022) that sets out a network of more than 160 km of cycle lanes, plus a further 30 km of cycle paths, with proposals for other specific action on sustainable mobility and monitoring indicators to measure its performance. The local government has elaborated a Sustainable Mobility Guide and an ordinance, approved in 2019, with the codes, rights and obligations governing the city with respect to sustainable mobility. The guide guarantees the rights of citizens to accessibility, prioritisation of sustainable mobility and quality of life. This local policy, together with the increased pedestrianisation (30,000m<sup>2</sup> freed of traffic in the historical quarter in 2020–2021) and management of the city as a smart tourist destination (European Capital of Smart Tourism 2022), make Valencia showcase in changing towards sustainable mobility and quality as a residential city and as a tourist destination. However, these recent urban changes in Valencia have also given rise to urban policy and planning

challenges as the city exhibits the contradictions of navigating between global modernity and regional tradition (Prytherch & Maiques, 2009).

Within the field of tourism policy, nationally, the Ministry of Industry, Trade and Tourism collaborates with the different levels of government (regional and local) to produce finances plans; these are delivered within the Government's framework for Tourism Sustainability Plans in Destinations (MINCOTUR, 2022). These plans are tools applied at the local level that seeks to improve the competitiveness of tourist destinations through investments that effectively incorporate sustainability and digitalisation into the destinations' management processes. The investments made through these plans respond to objectives that include initiatives to: combat climate change, implement sustainable mobility plans and design networks of cycle lanes. Unfortunately, a problem arises from a lack of coordination between these destination tourism sustainability plans and the local urban planning instruments or mobility plans (Monteserín *et al.*, 2022).

Also, digitalisation is indispensable for achieving sustainable mobility, so many destinations contemplate mobility as an essential part of their smart tourist destination management. In addition to positive results on using Web-app platforms with specific purposes for the users, we can also highlight the success of last mile micro-mobility solutions, which relate to sustainability in terms of how much time they save in displacements and CO<sub>2</sub> emissions. We should also remember the essential role of fiscal initiatives to promote new mobility patterns.

A key issue in the sustainable planning of tourist destinations is accessible tourism (Hernández-Galán *et al.*, 2017), which constitutes one of the principal challenges of urban tourism in Europe (Fundación Turismo de València, 2022). Accessible tourism is an indicator of a destination's progress towards being more inclusive. A comprehensive vision of accessibility is required as a fundamental axis within the smart tourist destination approach (López *et al.*, 2022b).

In summary, from a mobility perspective, the post-pandemic scenario in urban tourism in Spain had, in reality, already begun to take shape before 2020 based on the implementation of new models of mobility and the increasing use of ICTs as part of smart tourist destination management. However, the post-pandemic recovery in tourist flows has the potential to lead to a new phase of growth, which could have a negative impact on tourist urban destinations. In addition, the lack of coordination between public policies may impede the effectiveness of sustainable mobility measures.

### 3. ICTs and the digitalisation process in urban and tourism management

The growing digitalisation of tourism activity has contributed to the intensification of demand urban destinations within a context of hyper-mobility and the generation of new business models that have transformed tourism-city relations, at least in destinations that record high tourism pressure. The COVID-19 pandemic caused an interruption to these expansion dynamics, but the importance of ICTs was reinforced due to their role in the management of the crisis and the post-pandemic recovery of tourism activity.

Without a doubt, the consolidation of digital platforms in tourism services, thanks, among other factors, to the use of ICTs and their innovation capacity, particularly in short-term rentals, has had a considerable impact on urban dynamics and on the daily lives of citizens, contributing to the emergence of the so-called new urban tourism (Frisch *et al.*, 2019). Fundamentally, both accommodation and platform-based mobility services favour, on the one hand, the touristification of central neighbourhoods (such as the Central District of Madrid or the Eixample neighbourhood of Barcelona, which record the highest concentrations of tourism housing in any urban environment in Spain) and, on the other hand, the displacement of tourists across the whole city. Tourists are encouraged to venture out from city centres to search for more authentic experiences, and, in so doing, the impact of tourism extends to neighbourhoods that would not traditionally have been tourist

neighbourhoods. In Barcelona, this has been the case for the districts of Gràcia and Poblenou (Mansilla & Milano, 2019). This process of decentralised tourism also takes place alongside other forms of mobility and city living, such as the settling of digital nomads or other transitory inhabitants. This process gives rise to negative externalities, such as social exclusion processes (e.g. the expulsion of residents) or an unstable labour market. These negative externalities have generated social movements in different Spanish cities (Wilson et al., 2021), and these new practices of tourism decentralization have proved challenging, in terms of their regulation, because they are eminently commercial and far removed from the original principles of a sharing economy. Russo & Scarnato (2018) warn, in the case of Barcelona, that overcoming a certain threshold of social tolerance leads to a change in the public perception of tourism, which generates a new critical discourse on tourism and fosters policies aimed at containing the accelerated growth of tourism supply.

Also, the intensive use of ICTs has led to the emergence of a smart approach in urban and tourism management. From the smart city point of view, public assistance programmes have been developed to support the adoption of new tourism-related technologies where tourism is considered a priority (National Plan of Smart Territories, 2017). From a smart destinations perspective, Spain has developed one of the most ambitious, institutional programmes in the world with the creation of a national network that brings together destinations, companies and technological and research centres, coordinated by the public entity SEGITTUR.

The degree of development of the smart cities and destinations on a local scale varies greatly, with projects differing in terms of their objectives and scope. Barcelona is a paradigmatic case as an international benchmark of a smart city that has evolved from a project with, initially, a fundamentally technological and economic orientation, and, more recently (after a change of government in 2015), a more social vision focused on technological sovereignty. Technological sovereignty relates to technologies developed by, and for, civil society as an alternative to commercial solutions that lead to a dependency on technology vendors (Mann et al., 2020); it is one of the foundations of a new approach to the smart city.

In many local situations, we can observe a certain disconnection between smart city initiatives and tourism management initiatives. This disconnection gives rise to a loss of opportunities for a more transversal tourism management. Furthermore, smart initiatives have limited scope for resolving problems, such as those derived from excess tourist pressure; their limitations result from their experimental nature, a technological bias and deficient integration in the urban-tourism strategy (García-Hernández et al., 2019).

More positively, we can observe advances that derive from the central role of innovation and the application of technology in urban and tourism policies within the framework of smart city strategies. The creation of sensor networks, and their integration into management platforms, has improved the efficiency of public services and facilitated the coordination of municipal departments in cities such as Barcelona and Santander. Moreover, in these two cities, the use of digital platforms (Decidim Barcelona and Santander City Brain) has promoted social participation in the planning and management processes of the city, including those related to tourism. Therefore, these platforms have constituted useful tools to enhance the integration of the citizens and transparency in local policy.

From a more sectoral point of view, tourism smartness constitutes another area of notable improvement. The most innovative tourism and marketing management entities, such as those in Barcelona, Seville or Valencia, are developing tourism intelligence systems that use new digital data sources to contribute to knowledge-based decision-making. The tourist intelligence systems conduct advanced analyses using big data techniques and incorporate predictive information with the objective of enhancing the whole cycle of a

visitor's trip. In addition to the technological component, which is the most developed, the creation of these systems should imply a greater public-private collaboration in the destination and the opening of data to facilitate the development of innovative initiatives (Open Data). However, the development of both of these processes is slow and complex. Among the most noteworthy projects, we can highlight: (i) the Tourist Data System (promoted by LabTurisme of the Provincial Government of Barcelona and EURECAT), a platform that integrates accommodation data to monitor the economic situation and compare performance between companies; or (ii) the Gijón Data Lab, with analogous objectives for the tourist accommodation sector of the city of Gijón.

Within the digitalisation context, three Spanish cities have been recognised as European Capitals of Smart Tourism: Málaga, Valencia and Seville. In the case of Málaga (2020), its transformation from a coastal destination to an innovative, cultural destination has been highlighted. It has used ICTs to improve the visitor experience and to reinforce the innovation of local companies, while strengthening sustainability and universal accessibility. In the case of Valencia (2022), its commitment to sustainability and its objective of becoming carbon neutral by 2030 have been highlighted, together with its development of a tourism intelligence system, its advanced management of cultural heritage and its improvements in both physical and digital accessibility. Seville has been recognised in 2023 as a benchmark for strategic, public-private partnerships that strengthen tourism competitiveness while attracting initiatives related to innovation, technology and creative industries. These advances have been developed in parallel with the commitment to sustainability, the fight against climate change and the promotion of accessible tourism.

#### **4. Sustainability, as a factor of the competitiveness, stability and viability of urban destinations**

The universalisation of tourism constitutes an important social gain, reflecting a certain level of well-being with more time and money spent on leisure and recreation. However, the growth in demand, and the fact that tourism has become an object of desire and accumulation, has led to a mass consumption of resources (environmental, socio-cultural and economic) that has put a strain on the sector.

Tourism development in Spain (and in many other parts of the world) has been based on a continual increase in the number of visitors (without taking into account the carrying capacity of the territory), and short-term economic benefits. Besides, tourism products have been traditionally rather homogeneous, with a low presence of the local culture and traditions, and the environmental pressure in the territory has been strong in terms of resource consumption (water, energy and land) (Ayuso, 2003; Murray, 2015). This tourism development in Spain has brought about clear negative impacts in many destinations and, especially, in mass tourism cities such as Barcelona, Palma de Mallorca, Madrid and Seville where examples of social contestation have been identified that question the real benefits of tourism (Milano & Mansilla, 2018; Elorrieta et al., 2022). Common strategies to combat mass tourism include limiting the accommodation supply and redirecting tourists to less well-known (and, therefore, less crowded) areas of the city. Barcelona, for example, opted to: decentralise the tourist bus routes, apply a moratorium on tourist apartment licences (to regulate the supply of short-term rentals) and implement a Special Urban Plan for Tourist Accommodation (PEUAT) for the territorial redistribution of tourist accommodation.

Spanish tourism is facing significant challenges from a sustainability point of view, such as overcoming its dependence on certain foreign markets, improving the quality of employment, achieving a real and satisfactory coexistence for tourists and residents and rationalising the consumption of resources for better environmental health. However, maybe the two most holistic and critical issues to address are the climate emergency and the constant, hyper-localised, tourism growth model.

According to the European Environment Agency, Spain is one of the European countries with the highest level of vulnerability in relation to the impact of global warming and its capacity to adapt to it. Although the potential for climatic incidents in cities would seem lower than some other destinations, as they are not so dependent on climate conditions, it should be noted that climate change will also have serious repercussions on tourism demand (motivation, planning the trip, annual distribution and days of stay) and could transform the tourist consumption model in urban destinations (López et al., 2022b).

Some Spanish destinations have already begun to implement actions to reduce the contribution of their tourism to climate change. The city of Valencia, for example, has calculated the carbon footprint for the whole of its tourism activity (VLC & Global Omnium, 2019) and has presented a Sustainable Tourism Strategy which commits to achieving a carbon neutral state by 2030. The lines of action focus on energy self-generation with renewable energies, electric mobility, the use of natural areas of the city as CO<sub>2</sub> sinks and the labelling of local products.

With respect to constant and hyper-localised tourism growth, it should be noted that this is unsustainable by nature. When resources are finite, a year on year increase in their consumption irremediably leads to collapse. If, in addition, this growth is concentrated in a few regions of the country (traditionally the islands and the coast), there will clearly be a more than probable and serious level of overcrowding and over-exploitation in the short to medium term. COVID-19 has highlighted this reality: the vulnerability of the tourism sector and the economic dependence of many Spanish cities on tourism. At the same time, the deceleration of international and mass tourism during the pandemic has significantly relieved the most overcrowded destinations, leading to a “temporal” improvement in residents’ lives. This relief has provided new arguments to the currents of thought calling for de-growth in tourism (Fletcher et al., 2020).

In summary, sustainability should not just be understood as a factor of competitiveness but also as a factor of stability and control. Therefore, the tourism sector (for its viability) should become involved in developing more sustainable tourism models. Although the Spanish tourism sector accepts this need, sustainability does not seem to be the option chosen spontaneously by the market. There is an imbalance between the will and the reality of the sector. The tourism sector continues to focus mainly on economic benefits and the short term, while the application of sustainability continues to depend, excessively, on a framework of reasoning and the territorial and social context. It seems clear that, on a discursive and apparent level, Spanish tourism has incorporated sustainability as an essential aspect. However, measurable results in terms of actions or strategies informed by sustainability are not widely evident or easily reportable.

## 5. Governance in urban destinations

The participation of the public sector in tourism development processes, and its role in the tourism system as a whole, have been a constant feature in Spain since the beginning of tourism, although the public sector’s purpose, means and intensity have varied over time. Historically, we have seen that in periods of crisis there have been almost unanimous calls for action by the public administration. This has been the case with the COVID-19 pandemic (López et al., 2022b) and is continuing during the post-pandemic stage.

The initial assessments of the events in 2020 and 2021 reveal the important work done by the public administration (at its different levels) to manage the crisis, although there were some contradictions. During the pandemic (which can be considered an exceptional period) the needs arising due to the health crisis were met, and help was provided to enable the tourism business fabric and labour markets of the destinations to survive. Tourism was on stand-by for months and the public administrations attempted to ensure a minimum level of activity whenever possible. During the pandemic phase, to minimise the

crisis, interaction between the private and public sectors was intensified. This cooperation was essential to enable the recovery of the market, with evolution towards a new model of urban destinations.

In an uncertain scenario of global change, a prominent role can be expected of both public and private actors. The prominence of the private sector is manifested in two directions:

1. in the defence of its own interests (of the pre-existing economic and social model), which could slow down the changes that are called for; and
2. in the design of strategies to adapt to the “new model”, which could enable evolution but at a slow pace.

The roles of the public and private actors are reinforced by the consensus that exists regarding the need for public–private collaboration and participation: once again we should remember that the public and private sectors should work more closely together both under normal conditions and in times of crisis to transform the sector. The public–private relationship is considered to be essential in the concept of governance, understood as a paradigm of destination management, in particular, of urban destinations. The relationship between the actors must include the host society (participation of the residents) and the tourists (consideration of their opinions and their behaviours).

Over the past 50 years, Spain has had successful experiences in public–private cooperation and collaboration, in particular, in the design and implementation of planning instruments in response to the cyclical crises that have ensued (Velasco, 2016). In recent years, an intensification of the institutionalisation process of tourism management on a local scale has been observed. This institutionalisation follows the principles of good governance, and Barcelona and Seville showcase several examples of practices and innovations in this field.

In 2008, Barcelona initiated the creation of strategic tourism plans and, to date, three have been elaborated. The latest is the Barcelona Strategic Tourism Plan 2020 (approved in 2017), which introduced a significant change in the tourism policy of Barcelona, shifting the traditional “tourism promotion” approach towards a “tourism management” approach for the city. The plan also committed to more open and participative tourism governance. It should be noted that the tourism management structure of Barcelona currently has two institutions responsible for participative collaboration and cooperation processes, the likes of which are implemented by very few cities. First, there is the Interdepartmental Tourism Board of the city council, created in 2014, and, second, the City and Tourism Council, created in 2015. These two institutions bring together members of the local government, leaders of political groups, representatives of entities (neighbourhood associations and business associations) and professional and academic experts.

Seville, like other large Spanish cities, has a consolidated strategic tourism plan, the City Tourism Plan of Seville (2021–2024), which is a joint strategy of the City Council of Seville and the Regional Government of Andalusia. The plan is structured into seven challenges, one of which refers to the “Improvement of destination governance” through which it seeks to work on a tourism management model based on cooperation, sustainability and innovation. The Seville tourism management structure is comprised of, among other instruments, a Local Tourism Council that was created in September 2021. It was designed as a body to cooperate with the rest of the public administration and with political groups, entrepreneurs, residents, universities and other entities. Its aims are to address governance and the recovery of tourism post-COVID, based on sustainability, to foster the coexistence of residents and travellers and to reinforce public–private collaboration.

Faced with an uncertain post-pandemic scenario and a new reality within a context of global change, Spain requires a new tourism policy that must be based on the governance paradigm. Governance, understood as good government, must be claimed and made

explicit. The pandemic, and its subsequent consequences, have shown the need for institutions to act when faced with crisis. Good governance is a desirable way to overcome the problems that arise from any type of crisis, and to cope with the complexities of the new realities that emerge. Tourism policies change and have to be adapted to the new realities.

Good governance is also essential to ensure development is sustainable and stakeholder participation is a vital aspect of this process. In 2019, the Sustainable Tourism Strategy of Spain 2030 was approved by the State Secretariat for Tourism. The strategy is structured into six principles, one of them being "Participation and governance".

In addition, the context of international interdependence requires a supranational "policy" approach and, in recognition of this fact, it has been confirmed that the European Union will no longer be a secondary actor but will, from now on, be a primary actor in the tourism sector. The European recovery funds (Next Generation Fund) are evidence of this as these funds were created to deal with the economic crisis resulting from the COVID pandemic, in which tourism is immersed. Spain is aligned with the European proposals for tourism recovery, which, ultimately, determine not only the aims for the tourism sector, but also the aims for other interrelated sectors (such as the environment, renewable energy, technologies). It should be noted that these funds are framed in the "new economic model"; therefore, they pursue a new reality (green economy, digitisation, sustainability and social reality), and, consequently, a "new tourism model". These supranational and national policies will be projected on a regional and local scale. It is at the local (metropolitan) scale where governance guidelines will have to be adapted and implemented, according to the specific management of each destination. Multi-level governance has emerged as a desirable and inevitable challenge.

## 6. An epilogue: strategic guidelines

The current transitional stage towards a new reality of tourism requires a number of challenges to be overcome, of which four have been addressed in the preceding pages. Considering the previous reflections made in this article, we make the following strategic proposals:

- Changes in the spatial mobility of Spain's population, of the means and modes of transport, of the new motivations of demand and of the effects of digitalisation in the current stage of transition, must be oriented towards sustainable mobility. This objective can be gradually materialised through sustainable mobility plans. However, it is crucial to coordinate the mobility policies and plans with urban planning and tourism actions, to generate real and effective sustainable planning of urban destinations.
- The new management approaches of major tourist city destinations should incorporate digitalisation as a lever for collaborative innovation while regulating the impacts (economic and socio-cultural) that are derived from the new business models brought about by the ITCs. The initiatives developed within the smart city/destination approach have favoured the development of innovative projects in a triple helix scheme (administration, technological and consultancy firms and universities/research centres), made evident in diverse initiatives that connect technology, innovation and entrepreneurship (hackathons, CityLabs and business incubators). These initiatives have reinforced a type of experimental governance (Cowley & Caprotti, 2018), with unequal results and, in general, with difficulties in terms of scaling up and generating benefits for the city/destination that have promoted them. Despite the interest of these initiatives in promoting innovation, the experience acquired shows that we should ask who is really benefiting from these initiatives, as they are based on public financing and test private solutions (Clark, 2020). Based on this analysis, where applicable, the priorities of the smart city/destination strategies should be redefined.

- In Spain, the smart city approach reveals a paradox between the smart destination and the city itself. The concept of the smart destination has become consolidated within a planning and management model that underpins the national network of smart destinations (with 437 member destinations in September 2022, of which 80% are provincial capital cities). However, the smart city does not play a central role in urban policies and has been criticised for its economic and neoliberal bias in cities such as Barcelona, which has redefined its smart strategy with more technology sovereignty and a people-centred orientation. This paradox urges to debate on the possibility of moving beyond the smart city/smart destination approach towards an urban and tourism management approach (Coca-Stefaniak, 2021; Kitchin, 2022).
- The Spanish tourism industry needs to debate on the limits of tourism growth to achieve a more socially and environmentally fair model. This debate must be about the real carrying capacity of destinations (restrictions in mass transport, disincentives to non-essential or short trips and limitation and distribution of accommodation places), but also about cost and benefit redistribution measures (taxes on transport carbon emissions, subsidies to local, small and medium-sized firms and investment in sustainable practices). Some European cities have already begun to announce measures in this respect, for example, Amsterdam proposes to limit the number of visitors, ban new hotels and increase the tourist tax (Goodwin, 2021).
- The tourism “success” of the country should be measured according to new criteria that facilitate a cost–benefit analysis of the activity. Having a performance dashboard that enables a combined reading of classic economic indicators (tourist expenditure and overnight stays) with quality of life and environmental well-being (satisfaction of residents, quality employment, carbon footprint and environmental certification) should facilitate more sustainable decision-making. The European Tourism Indicator System is a good example in this respect. Launched in 2013 by the European Commission, it provides 43 management and social, cultural, environmental and economic indicators of tourism and has been tested in more than 50 European destinations (European Commission, 2016).
- With respect to the governance of urban destinations, we have seen that destinations have the capacity to adapt to the new, post-COVID tourism situation, and that the different actors are committed to the process of constructing the new tourism reality. Therefore, the new tourism has to be based on creating competitive, safe and sustainable destinations. Governance constitutes a necessary and indisputable principle of present and future tourism.

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