



National Tourism Policies and Sustainability: A Comparative Study of EU Countries

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Abstract: *The main goal of this study is to analyze the national tourism plans of the 27 EU countries, and understand the significance attributed to the theme of sustainability in these strategic documents. This work was based on a methodology of document analysis. Based on the list of the 27 member states of the EU, research was carried out on the existence of national tourism plans that are currently in force. A content analysis was performed.*

The research resulted in the identification of 25 national strategic plans that were carefully analyzed. Of the documents analyzed, the theme of sustainability is very common and is included in most of the strategic visions defined.

The main limitation of the study is related to the methodology used. Researching and interpreting the strategic documents was also challenging, as many of the strategic plans were only available in the country's national language, with no English versions.

Based on the analysis carried out, it is possible to reflect on the commitment that each member state has made in relation to the development of tourism in its territory: whether sustainability is a fundamental premise, or if it is not a major concern.

1. INTRODUCTION

Tourism is a major economic activity with a broad influence on economic growth and job creation in Europe (Alfaro Navarro et al., 2020). It is also an important mechanism for reinforcing Europe's image in the world, projecting values and promoting the products and services of their countries (Andrés et al., 2019). But while tourism development causes diverse positive impacts, it is also responsible for some negative ones at an economic, environmental and sociocultural level. It is in this context that the role of tourism planning should be mentioned.

Planning of tourist activities is a tool for guiding tourism actions in such a way as to create benefits and well-being beyond the industry and tourism destinations (Saarinen et al., 2017). Thus, strategic planning in tourism should be considered an instrument of the economic, environmental and social policy of a country that ensures more sustainable development (Var & Gunn, 2020). It can contribute to promoting social cohesion and can ensure a more balanced and better distribution of equipment, infrastructure, economic activities and uses of the territory (Bailoa & Cravo, 2020).

Despite the importance of the topic, tourism policies and the processes of tourism planning and policymaking are topics of notable neglect (Dredge & Jamal, 2015). Some studies have served as inspiration for this study, but there is still much to be done. For example, Ruhanen (2004) analyzed the tourism plans of 30 local tourism destinations in Queensland (Australia) to determine the extent to which sustainability principles, particularly strategic planning and stakeholder participation, were included in the planning process. Collins-Kreiner and Ram (2021) analyzed national tourism strategies

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for five countries (Australia, Austria, Brazil, China, Israel and Italy) during the Covid-19 pandemic, while Nicholls et al. (2021) examined 22 destination plans relating to Wales. This study revealed that there are many opportunities for improvement in the tourism sector. Nonetheless, a combined document analysis of the national tourism plans of the European Union (EU) member states has not been performed until now. The main objective of this study is to ascertain the importance attributed to the theme of sustainability in these tourism plans. The methodology used in this study was document analysis, whereby the documents containing the national tourism strategies were collected and analyzed.

The paper is divided into five sections. After the introduction, a literature review is carried out. In this part can be found a theoretical development about the concepts of tourism planning and sustainable planning. Subsequently, in the methodology section, we outline the research approach and methods used to gather information. Next, the main findings of our study appear in the results section. Finally, in conclusion, we summarize the key findings and contributions of our study, refer to its main limitations and leave some suggestions for future studies.

2. LITERATURE REVIEW

The concept of tourism planning emerged as a response to the detrimental impacts of the growing development of tourism (Pato & Duque, 2023). Dredge and Jamal (2015) propose that the models for tourism planning emerged in the 1960s and were reinforced in the 1970s, supported by landscape architecture, and urban and regional planning.

It was formally acknowledged by UNWTO in 1994 in the document “National and Regional Tourism Planning: Methodologies and Case Studies” that tourism development should be planned (Inskip, 1994). Initially, attention was focused on the economic aspects, but later, attention to the physical aspects of the destination prevailed (Sosa, 2023). The development of tourism must take all the dimensions of the territory and population into consideration. For that reason, the social and cultural aspects of tourism development were also gradually incorporated, to a greater extent in the new millennium (Andriotis, 2001). It is also recognized that beneficial partnerships are essential for tourism planning (Pato & Duque, 2023; Wanner & Pröbstl-Haider, 2019). In other words, planning as a field of research and practice is derived from practitioners from diverse fields sharing their stories and contributing to the well-being of their territory (Dredge et al., 2016).

Several countries, aware of the importance of tourism planning in the development of countries, have developed strategic plans. Tourism planning at the national level represents the most important policies to develop this sector in a country (Bailoa & Cravo, 2020). Also, these national strategies for tourism help align public and private investment and direct resources in tourism to achieve national goals (Torkington et al., 2020).

Another crucial element of tourism planning is the growing concern about the sustainability of the sector. The beginning of the twenty-first century has been characterized by considerable changes in the tourism sector, as competition is becoming increasingly global rather than regional and governments are losing their capacity to intervene in the market (Costa, 2006). Moreover, the environmental, social and economic problems caused by the tourism industry are increasingly evident. Within this context, the re-invention of tourism planning has become one of the priorities on the planners' agenda (Costa, 2006) because of the need to ensure sustainable environments.

Sustainable planning for tourism can be regarded as a strategy focused on how to encourage tourism development while minimizing potential negative impacts (McLoughlin, 2017). Although there

are several definitions of the concept of sustainable tourism, it can be understood as a “normative orientation that seeks to redirect societal systems and behavior on a broad and integrated path toward sustainable development (...) integrating social, cultural, economic and political alongside environmental issues” (Bramwell et al., 2017, p. 6). Indeed, more than ever, sustainable tourism planning requires an understanding of the meaning of sustainable development and the guiding values for promoting sustainable tourism (Costa, 2014).

Several European countries and regions have paid attention to the role of sustainability in tourism planning. For instance, Andriotis (2001) identified several problems caused by excessive tourism that affected the Greek island of Crete. He studied the solutions that were applied to the territory and that are included in strategic plans. However, the conclusion of the study shows that greater investment is needed in the planning of tourism activity at local and regional levels. Dodds (2007) studied one of the Mediterranean’s most popular sun, sea and sand tourist resorts - Calviá (in Mallorca, Spain). In her study, Dodds (2007) outlines the motivations behind establishing a sustainable tourism policy, the process, successes, obstacles to implementation and lessons learned. More recently, Pato and Duque (2023) completed a national analysis, focusing on tourism plans in Portugal, and the study revealed the growing focus on sustainability in national planning.

At a macro level, the European Union has the ambition to promote greener tourism as part of the broader objective of developing a more sustainable and responsible ecosystem. This process involves coordinated action and the involvement of all players in multilevel governance: industry, destinations, national and regional and local authorities, but also tourists (European Commission, 2023b). As an activity that is based on the cultural and natural heritage and the traditions of each country, tourism needs to reconcile economic growth and sustainable development through planning (Andrés et al., 2019)

3. METHODOLOGY

Since the objective of this study is to analyze strategic plans and their content, the methodology used was document analysis. According to Liasidou (2019, p. 77), “document analysis helps in understanding and identifying what was said or written versus what was applied to shed light on the historic development of tourism”. This methodology has already been used and validated in other studies such as Collins-Kreiner and Ram (2021) and Pato and Duque (2023).

Based on the list of the 27 member states of the EU, research was carried out on the existence of national tourism plans that are currently in force. Using the Google search engine, the authors researched the concepts of national tourism plan, national tourism strategy and national tourism policy associated with the name of each of the 27 EU countries. The research was conducted in English to obtain more comprehensive results that could be analyzed by the authors. An Excel file was prepared in which several topics are identified, such as: whether the country has a national tourism plan (in force); whether the document is available for public consultation; the language used in the document; whether concerned with the concept of sustainability is visible; and whether the document’s strategic vision refers to sustainability. This research intends to answer these and other pertinent questions.

4. RESULTS

The EU consists of an economic and political union that has worked for peace, prosperity and the wellbeing of its citizens for more than 60 years. From six founding countries in the 1950s (Belgium, Germany, France, Italy, Luxembourg, the Netherlands), it has grown into a current union of

27 countries (Austria, Belgium, Bulgaria, Croatia, Cyprus, Czechia, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden). See Figure 1.

It was created after the Second World War and what “started as an economic project to help raise living standards in post-war Europe has led to the creation of the world’s largest single-market area, where people, goods, services and money can move freely” (European Commission, 2023, p. 4). In terms of tourism, Europe is the world’s number one tourist destination (Roman et al., 2020) and tourism is the third largest socio-economic activity in European Union territory, making a critical contribution to the EU’s gross national product and to employment (Santos & Cincera, 2018).



Figure 1. European Union countries

Source: European Commission (2023a, p. 8)

The search found 25 strategic plans. There were only two countries for which it was not possible to consult the strategic documents: Belgium, which does not have a tourism plan, but a document with some recommendations for the sector, and Croatia, whose document is not yet available for consultation.

One of the major challenges the researchers faced was the fact that many plans found were written in the official language of the countries and did not have an English version. There were 11 plans written in English - Austria, Estonia, Finland, Greece, Ireland, Italy, Malta, Netherlands, Portugal, Slovenia and Spain. The remaining 14 documents – Bulgaria, Cyprus, Czechia, Denmark, France, Germany, Hungary, Latvia, Lithuania, Luxembourg, Poland, Romania, Slovakia,

Sweden - were written in other languages such as Bulgarian, Czech, Latvian, French, German, Hungarian, among others. Since the authors do not have a mastery of all the languages used in these plans, the solution found was to translate the documents using the Google Translate tool.

Since the aim of this article is to see if the issue of sustainability is relevant to the national tourism strategies of EU countries, the authors have focused their attention on defining the strategic vision. The definition of the strategic vision is one of the main elements of (tourism) planning. According to [Bibri and Krogstie \(2019, p. 6\)](#), “vision construction is about identifying the desired future state, which consists of vibrant descriptions of audacious goals and targets, as well as reflective statements addressing the aspired future”. The vision is the reflection of the path that the destination wants to follow and the image it wants to project for residents, visitors and professionals in the sector.

Table 1 presents a compilation of the information taken from the analyzed plans. In the table, the authors have indicated (underlined> all the times that the words sustainable and sustainability appeared in the countries’ vision. The concepts appear associated with the strategic visions of 16 countries: Austria, Bulgaria, Croatia, Czechia, Estonia, Finland, Germany, Greece, Hungary, Ireland, Italy, Malta, Portugal, Slovakia, Spain and Sweden. There are other situations where the concept does not appear explicitly, but the meaning is there, using expressions like climate-friendly (Cyprus), every person must benefit from tourism (Netherlands) or global green boutique destination (Slovenia).

Table 1. Strategic visions defined in EU countries’ national tourism plans

EU countries	Strategic Vision
Austria	On the way to the most sustainable tourism destinations in the world. The goal is sustainable tourism involving all enterprises, employees, local people and guests. (Source: Plan T - Master Plan for Tourism)
Bulgaria	Bulgaria: preferred destination for sustainable tourism in the four seasons. (Source: Updated National Strategy for Sustainable Development of Tourism in the Republic of Bulgaria 2014–2030)
Cyprus	Establishing Cyprus as a year-round, higher-quality, digitally smart, climate-friendly, and widely accessible destination, where all residents can benefit from tourism. (Source: National Tourism Strategy 2030)
Czechia	Czechia, a destination with sustainable tourism centres in all regions. (Source: Strategy of the Czech Tourism Agency and Czech Republic Destination for 2021–2025)
Denmark	Denmark is internationally recognized as one of the most innovative countries for business tourism and meetings. (Source: Meet Denmark’s Strategy)
Estonia	It is time to change the way we promote Estonia to the world. Whereas once we celebrated our destinations, today we are working to champion the world-leading experiences our visitors can encounter. Experiences that are remarkable, memorable and above all, sustainable. (Source: Visit Estonia Brand Strategy and Story)
Finland	Finland is the world’s leading sustainable travel destination. We add value to our society and customers and care of our unique environment. Finland is the first choice for mindful travellers. (Source: Visit Finland Strategy 2021–2025)
France	Destination France: a plan for reconquering and transforming tourism. (Source: Destination France ...)
Germany	A concrete vision is not defined, but several strategic objectives are mentioned instead: exploiting the diverse potential of tourism; strengthening the competitiveness of Germany as a tourist location; design of a modern, barrier-free, reliable and sustainable mobility and digital infrastructure; striving for quality tourism, in harmony with nature and culture; strengthening economic development in other parts of the world and making a contribution to peace, tolerance and international understanding; support for environmentally and climate-friendly development of tourism. (Source: National Tourism Strategy)
Greece	To showcase and fuse the uniqueness of Greek nature, Greek culture, Greek hospitality, and the Greek lifestyle through a multitude of tourism products and experiences which can address many and diverse markets, making Greece one of the most competitive and sustainable tourism destinations worldwide. (Source: Greek Tourism 2030)
Hungary	According to the Hungarian vision, these will be the characteristics of national tourism in 2030: the main sector of sustainable economic development; quality experience offer; availability and wide access, innovative solutions; a strong tourism country brand; and an attractive career. (Source: Tourism 2.0)
Ireland	To lead the development of a tourism industry that is on its way to making an even bigger and more sustainable contribution to Ireland’s economy, environment, society and culture. (Source: Strategy to 2023: from survival to recovery)

Italy	Italy is destined to reassert its leadership on the tourism market, making the beauty of its heritage and land a unique and distinguishing factor to achieve competitiveness and appeal. Tourism once again becomes the heart of the development model and can contribute to the sustainable and long-term management of natural and cultural resources, while generating economic and social benefits for local areas. (Source: The Strategic Plan for Development of Tourism 2017-2022)
Latvia	Latvia wants to achieve: improvement of the state body; long-term tourism development; and smart money investment. (Source: How to develop tourism in Latvia? Tourism Marketing Strategy 2018–2023)
Lithuania	The vision for the territory is not defined in the document; only the tourism brand is mentioned: Lithuania. Real is beautiful. (Source: Tourism Sector Development study)
Luxembourg	People, regions and economy: value-oriented tourism as an active driver for a better quality of life and stay. (Source: People, regions and economy - Tourism Strategy Luxembourg)
Malta	To manage and formulate the future development of tourism to Malta in line with sustainability principles through strategies aimed at making best use of the country's natural capital and cultural attractions in a way which balances the welfare and well-being of the country's residents and the maximization of visitor economic value and satisfaction. (Source: Malta Tourism Strategy 2021-2030)
Netherlands	The strategy points out that every Dutch person must benefit from tourism by 2030. (Source: Perspective Destination Netherlands 2030)
Poland	Establish Poland as a recognized tourist brand that is innovative, sustainable and accessible to diverse audiences. (Source: Strategic diagnosis for the needs of Polish marketing communication in tourism until 2030)
Portugal	Establish tourism as a hub for economic, social, and environmental development throughout the entire territory, positioning Portugal as one of the most competitive and sustainable tourism destinations in the world. (Source: Tourism Strategy 2027)
Romania	By 2035, Romania will be recognized as a high-quality tourist destination, available all year round, based on the uniqueness of its cultural and natural heritage, and offering services of international standard. The country will be among the leaders in tourism competitiveness rankings, due to strategic investments in infrastructure, education, marketing and promotion, which will provide unique experiences for visitors and attract relevant tourists from Europe and around the world. (Source: Romania's National Strategy for Tourism Development 2023-2035)
Slovakia	Slovakia will become a world leader destination through balanced of development when using "Slovakness" in the socio-economic development of the country and distribution of wealth in an inclusive and sustainable way. (Source: Mapping Study Slovakia: Unity of the Slovak Tourism Industry)
Slovenia	Slovenia is a global green boutique destination for demanding guests who are seeking a diverse and active experience, peace of mind and personal benefits. (Source: Slovenian Tourism Strategy 2022-2028)
Spain	The objective of this plan is to lay the foundations for the transformation of Spanish tourism towards a model of sustained and sustainable growth, which allows us to maintain its position of world leadership. (Source: Sustainable Tourism Strategy of Spain 2030)
Sweden	In 2030 Sweden wants to be the world's most sustainable and attractive destination based on innovation. (Source: Swedish National Tourism Strategy 2021-2030)

Source: Own elaboration (retrieved and adapted from the original tourism plans)

5. CONCLUSION

The importance of planning tourist activity is a topic that has been worked on by many authors for several decades. A national tourism strategy defines the main policy orientation of tourism development and provides guidelines to produce regional and local plans in the territory (Bailoa & Cravo, 2020).

The main objective of this study was to identify and analyze the national tourism plans of the 27 EU countries. In this analysis, the emphasis was on the concept of sustainability. The goal was to see if countries are effectively committed to adopting more sustainable tourism practices, or if the scenario was otherwise. It was found that of the 27 EU countries, 16 show their commitment in a very clear and evident way and expose this intention in the strategic vision, as a central element in the planning process. Some countries make no direct reference to the concept of sustainability, but the principles that guide this concept are implicit in the document, especially care for the quality of life of residents and concern for the benefits that tourism can bring to the community and local businesses. Without a strategy focused on sustainability, it is not possible to achieve development that can bring benefits to all stakeholders. A more in-depth study would be needed, with evidence

collected in each of the 27 countries, to ascertain whether this commitment to sustainability is in fact real or if it turns out to be a greenwashing strategy.

An element that is also worth mentioning concerns the reference to the COVID-19 pandemic, which recently affected the tourism sector worldwide. All plans that were drawn up after the year 2020 contain a reference to the pandemic. The perspective presented is mainly one of recovery and resilience, showing that tourist destinations are recovering from the losses sustained and that they have set new goals.

The main limitations of the study are related to the methodology used, which is only qualitative and uses the technique of document analysis. Another limitation was the researching and interpreting process related to the strategic documents as many of the strategic plans were only available in the country's national language, with no English versions.

As suggestions for future research, the authors consider that it would be pertinent to carry out a study with an evaluation of the results obtained when these plans end. That is, most of the documents have the year 2030 as a time limit, where an analysis could be made, based on national data and statistics for each country, to find out whether the proposed targets were met and the actions implemented. A more in-depth analysis of sustainability issues is also suggested for countries that are effectively committed to these issues, for example, seeing whether the 17 SDGs are referred to in the plan and analyzing the defined objectives and actions that will make it possible to materialize the vision.

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