SWECO

The role of tourism in the monoculturalization of local retail

Final report

30 July 2025

Sweco - 51024292



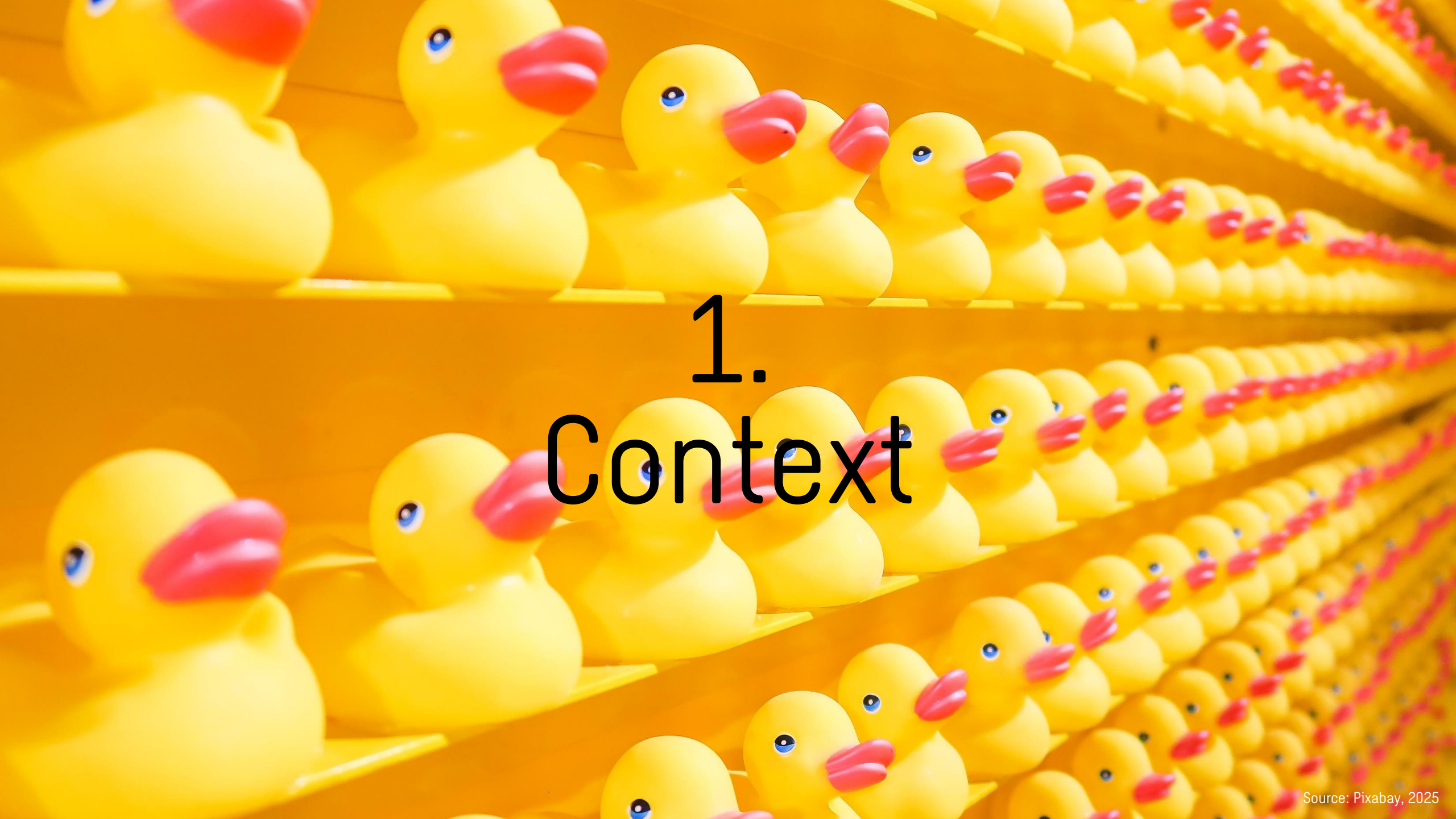
Source: Pixabay, 2025

Table of contents

	Table of contents	**p. 2**
1.	**Context**	**p. 3**
2.	**Analysis of drivers and trends**	**p. 9**
3.	**Methodological and comparative case study**	**p. 15**
4.	**Instruments**	**p. 33**
5.	**Conclusions**	**p. 44**
	Appendix	**p. 50**

Sweco Nederland B.V. ('Sweco') has prepared this document with the diligence of a good contractor and has exercised the necessary care. This document is intended solely for Sweco's client and may only be used within the client's internal organization. No part of this document may be reproduced, disclosed, or used for any purpose other than that for which the document was created. The interpretation and use of this document and the resulting decisions are at the user's own risk. Sweco accepts no responsibility in this regard and disclaims any liability.

SWECO



1. Context

Source: Pixabay, 2025

Introduction

Introduction

Tourism is one of the major economic drivers in Europe. It provides economic growth, employment and social development. European cities, as top tourist destinations in the world, benefit particularly strongly from the sector. With the number of tourists continuing to grow, destinations are increasingly experiencing the impacts of (mass) tourism. The fragmented nature of the touristic product causes threats posed by the increase of tourists to have harmful and far-reaching effects including derivative effects on sectors like local retail.

In European city centers, particularly those with historical significance, there is a growing concern that the influx of visitors affects the local retail environment. Local retail is facing the threat of monoculturalization, where the local environment is moving towards a homogenization of shops and services that cater predominantly to tourists. This phenomenon of monoculturalization is often at the expense of local, artisanal, and iconic businesses. Therefore, this shift can lead to a loss of cultural identity, diminished quality of life for residents, and harm to the local economy.

This reports gives an insight in how the influx of tourists influences the monoculturalization of local retail and identifies measures within a European policy framework.

The goal of the research initiative is:

Identifying challenges and potential solutions related to monoculturalization caused by tourism and establishing a shared approach preventing monoculturalization across all participating EuroCities' members.

The research consists of the following three parts:

- Analysis of Drivers and Trends that affect Shop Diversity.
- Methodological and Comparative Case Study.
- Challenges and Policy Opportunities for Local Authorities in addressing Monoculturalization.

Research Methodology

Research methodology

The study is based on the following research methodology:

- Online questionnaire under the Eurocities network. To study the role of tourism in the monoculturalization of local retail in European city centers, an online survey has been distributed among European cities that are part of the Eurocities network and beyond. The aim of the survey was: gaining insight in the level of tourism in these cities and the extent to which they are dealing with monoculturalization. Additionally, questions were asked about the challenges the cities face, measures they have already taken, and strategies they consider successful. 37 cities from 18 different countries completed the survey (see the following sheet). The respondents are spread across different parts of Europe, including both small and less touristic cities, as well as metropolic cities and cities facing significant issues due to tourism.
- Online interviews with 11 selected cities. Based on the tourism profile, geographical distribution, and the willingness of the cities to cooperate, a selection was made of cities that participated in the online survey. The goal of the interviews was to learn more in detail about monoculturalization in the cities. Besides 9 cities that are dealing with a monoculturalization, 2 shadow cities were spoken. The shadow cities are cities that are comparable to the monocultural cities in size and recreational retail function, but do not have a strong touristic function. Comparing the results of the monocultural cities with the shadow cities enables us to filter out the trends that cause monoculturalization not caused by tourism.
- Analyses of general data and reports and information on the selected 9 cities.

Karoline Wiegerink
Professor City Marketing Hotelschool The Hague

Kevin Penalva Halpin
Architect and Urban Planner Sweco Belgium

Jan van der Borg
Professor University of Leuven, Belgium

Dario Bertocchi
Assistant Professor of Tourism, Geography and Sustainable Mobility at the IMC Krems Univestity and University of Venice

Greg Richards
Professor of Placemaking & Events at Breda University and Professor of Leisure Studies at Tilburg University

- Personal interviews with experts and two brainstorm sessions with the experts. The experts all have knowledge and experience with the topic ‘monoculturalization within EU cities’, as shown in the expert panel above.
- Several sessions with the project group comprised of representatives of the EU Alliance on Balanced Urban Tourism, the EU Urban Agenda Partnership on Sustainable Tourism and Eurocities. They have supervised the survey. Their role consisted of sharing relevant documentation, information and ideas and reflecting on the report. The following people were part of the project group:

Eleonora Orso
Policy and Forum Offices Economic Development, Eurocities

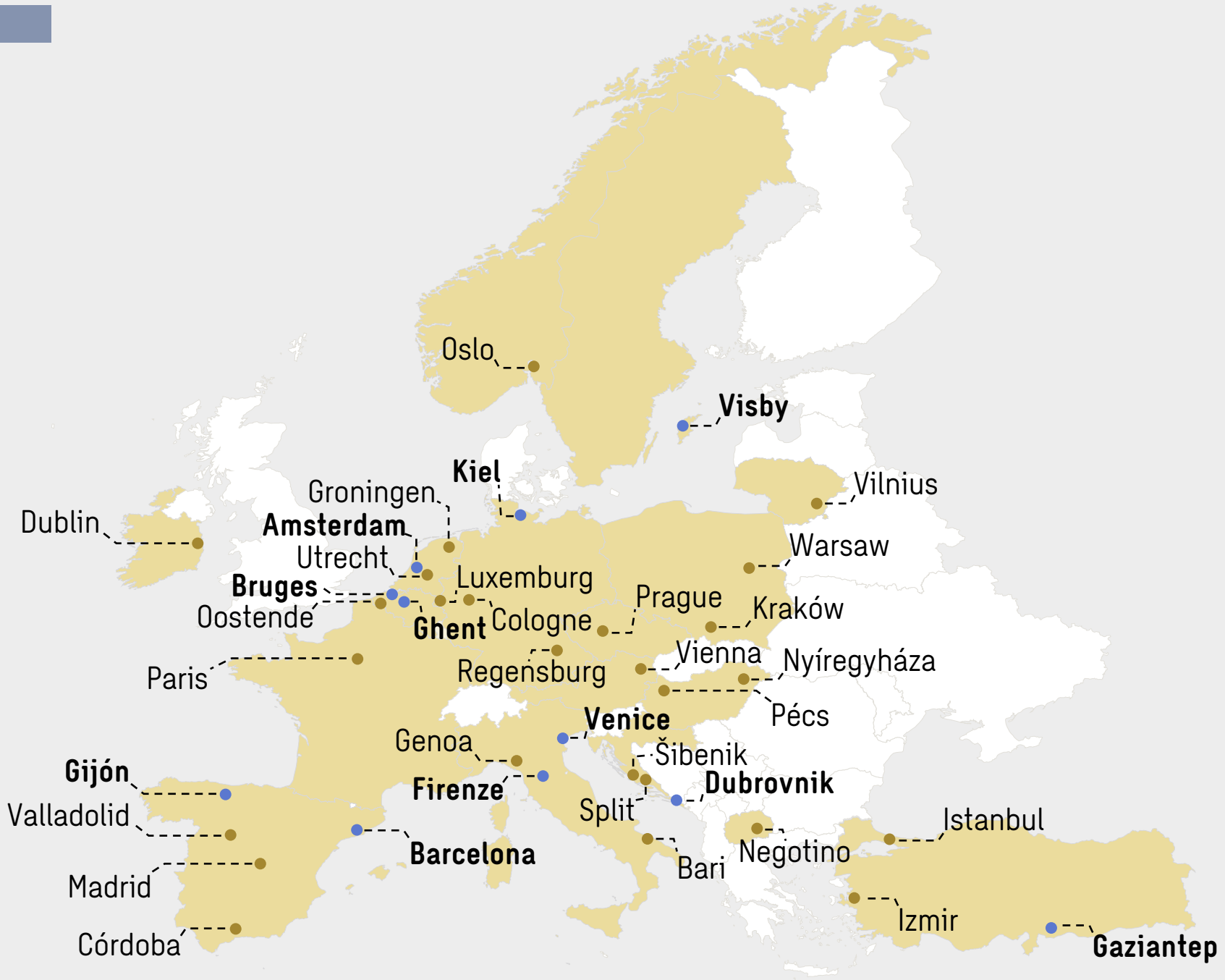
Judit Romera
Director of Tourism at Barcelona City Council

Stefaan Praet
Destination development manager for the city of Bruges, Belgium

Mark Boekwijt
EU Representative, City of Amsterdam

Jelmer Peter
Program Manager Visitor’s Economy, City of Amsterdam

Map of participating cities



02-08-2024

SWECO

Researching monoculturalization

The phenomenon of monoculturalization has remained a largely underexposed research area. Objective or universal criteria to measure it are non-existent. Upon analyzing this multi-layered, interconnected phenomenon, the following considerations are in place:

- **Abstraction of monoculturalization**

  The characteristics or extent to which monoculturalization as a phenomenon is prevalent in city centers is not unambiguous. As the concept is relative, the way monoculturalization works, will always depend on the context of the city center. For instance, a zone with tourist-oriented shops does not imply a touristic monoculture within the whole city center. Overall, the concept is not always clearcut and consistent. Therefore, finding a common theme throughout the context of various European cities requires a certain level of abstraction of the phenomenon of monoculturalization.

- **Non-absolute view on monoculturalization**

  In line with the above, monoculturalization as a relative concept will be viewed differently from person to person. Considering we interviewed experts in each city; we aimed to gather a comprehensive overview based on their expert judgement. The results of the study therefore mainly reflects the view of the experts on monoculturalization and related aspects in their cities. In addition, not all relevant information may be always be centrally available within one department or a few experts. It should be considered that the study therefore cannot include all the nuances of each city center and offer an absolute, objective view on the phenomenon in their city. The study provides an insight in how experts and policymakers in the cities perceive monoculturalization in their city center, within the context of this research, including its time and budget restraints.

- **Non-generalizable results**

  As the results mainly reflect the perspectives of involved participants on the issue and objective metrics to measure to monoculturalization are not at hand, the results are not generalizable to other cities. The individual results of each city should be seen within the context of the city, although the general pattern among the cities can be deduced to show how monoculturalization poses a threat to local retail in European city centers. This has been pointed out by the experts in the discussions with the expert panel.

- **Touristification versus monoculturalization of city centers**

  There is a difference between touristification and monoculturization of city centers. Touristification refers to the process in which certain elements, such as facilities, shops, restaurants or even areas, start to place a stronger focus on serving tourists, often to the exclusion or marginalization of others. Monoculturalization also puts a focus on a single, dominant cultural group, such as tourists, however the focus can also be on any other cultural group. Furthermore, touristification could refer to a single entity, shop, restaurant or bar, whereas a monoculture cannot exist without the context of its surroundings. Lastly, touristification implies some degree of scalability (e.g. weak to strong) whereas monoculturalization imposes a more absolute state in which the phenomenon (e.g. touristic monoculture) either exists or not.

Definitions used in the report

Monoculturalization phenomenon of city centers

A phenomenon where retail in city centers has a one-sided offer and caters predominantly to one target group, causing a decline in shop diversity at the expense of the local cultural identity and local businesses.

Monoculturalization proces of city centers

The mechanism in which local retail owners feel the need to make changes to their concept, services or products or leave in reaction to the changing local retail environment, causing loss of shop diversity.

Touristification / monoculturalization caused by tourism, as a phenomenon

The process where (part of) a city center undergoes a transformation to cater primarily to tourists, often at the expense of its original character and residents. This transformation involves changes in services, businesses, and the overall atmosphere, as they become more focused on tourist needs and desires rather than those of the local population. It often involves the conversion of local shops, housing, and public spaces into tourist-oriented businesses, such as hotels, restaurants, and souvenir shops. This process can lead to the displacement of residents, particularly those with lower incomes, as property values and rents increase due to the tourist economy. Touristification can also lead to changes in the social fabric of a place, with a shift in cultural norms and a potential loss of local identity. While often associated with negative consequences, touristification can also lead to economic benefits for local businesses. The following conditions are met in respect to touristification:

- A noticeable trend of loss in shop diversity over time (whether due to increased tourism or not).
- A substantial part of the retail has a focus on products for tourists.
- Loss of shop diversity due to the local tourist economy is part of the city's agenda.

Tourist shops

A retail, service and/or experience business that caters it's offering, products and/or services to the specific needs of tourists and not to residents or passersby working in the city. Features :

- Predominantly caters their offering, products and/or services to the specific needs of tourists.
- Does not cater to the needs of residents and/or passerby working in the city.
- Depends on a client base that originates from outside the local environment.
- Establish themselves in streets with much (recreational) traffic.
- Adapt their concept according to changing demands by the tourist economy.

City center

The entire city center as defined by the local city authorities. We explicitly do not focus only on the touristic city center as the contrast between the touristic / visitor's parts and other parts of the city center may offer insights in potential interventions and solutions regarding shop diversity.

Local retail

Independently owned (retail)businesses that reflect the local culture and craftsmanship, contributing to the community's identity, shop diversity and economic resilience.

Retail diversity

A variety of stores, products and services providing a wide audience access to different types of goods and services contributing to the local context of the city center. In this survey this is measured by the ratio of tourist shops in proportion to other retail groups..

Retailer's target group

We acknowledge that it is difficult to derive and define a retailer's target group as they are not so unambiguous and clear-cut (e.g. originally a retailer may cater to students but start attracting tourists over time).

Visitor / tourist

A visitor is a traveller taking a trip to a main destination outside his/her usual environment, for less than a year, for any main purpose (business, leisure or other personal purpose) other than to be employed by a resident entity in the country or place visited (IRTS 2008, 2.9). A visitor (domestic, inbound or outbound) is classified as a tourist (or overnight visitor), if his/her trip includes an overnight stay, or as a same-day visitor (or excursionist) otherwise (IRTS 2008, 2.13). (UN Tourism, 2024)

For this research, we consider both domestic and international visitors.

2. Analysis of drivers and trends



Source: City of Venice, 2025

Introduction

This chapter gives insight in the primary drivers and trends which affect shop diversity in city centers. The chapter is foremost based on a literature study and studies and projects related to retail diversity. We also included information from the methodological and comparative case study (chapter 3). Keeping the reader in mind, we believe the results of the case study are better understood if the analysis of the driving factors is introduced beforehand. So, this analysis builds upon a theoretical foundation, however, has been further corroborated with the input of the empirical research as elaborated upon in the next chapter.

Multiple drivers and factors are at play, which we have elaborated following the Political, Economical, Social-Cultural and Technological (PEST)-analysis method. The results per category can be found on the following sheets.



Source: Sweco, 2025

A. Tourism

Tourism causes a loss in shop diversity in city centers due to the following aspects:

- **Large amount of (temporary) visitors**, especially during the holiday season. These visitors generally spend more money than locals in shops. The result is that it is highly profitable to have a tourist-oriented shop. The more tourists in a city center, the more tourist shops. These shops are generally situated in high streets, around public transport nodes and touristic sights.
- **New entrepreneurs** enter the market due to the high number of visitors, like in Bruges.
- **Locals avoid** parts of **the city center** due to busy crowds. The red-light district in Amsterdam for instance has been taken over by tourists.
- A hotel-stop in certain cities has **increased the number of day trippers** who are looking for easy consumption. This happens for example in Bruges, where tourists stay the night in Brussels, Antwerp or Ghent. They visit Bruges for a day. Before they leave, they are looking for a quick bite to eat. A lot of low-quality shops and restaurants have emerged in Bruges, affecting the traditional high-quality identity of Bruges.



Source: Pixabay, 2025

B. Politics & Economy

POLITICAL DRIVERS & TRENDS:

- **Free-market.** Within the political context in the European Union, the single-most influential principle affecting shop diversity is the free-market principle.
- **Regulations and policies.** Regulations and/or policies imposed by EU, national, regional or local governments are part of the framework that sets the preconditions for the functioning of the retail landscape. This framework has massive power to execute control on local retailers and influences shop diversity, in a positive, but also in a negative way. For instance, regulations and/or policies are imposed to sustain a sufficient retail offering, regulate excesses, and protect local businesses. Also, a lack of regulations and/or policies can lead to undesirable proliferation of shops, extreme excesses, or monopolization. These regulations and/or policies do not affect shop diversity by itself, but have the function to set the right conditions for the market to function (more on the regulations and policies in 4.1).
- **Local investments by local governments**. Now that the retail sector is under pressure with an increase of vacancy, some local governments have started acting as a real estate party. They purchase vacant retail(blocks) with a negative effect on the city center's functioning and redevelop it into an attractive concept. After the redevelopment such buildings are sold, but increasingly municipality maintain these buildings to have a permanent influence on its use, promoting a higher degree of shop diversity and adding value to a city.

ECONOMICAL DRIVERS & TRENDS:

- **Commercial chain stores (e.g. H&M, ZARA, UNIQLO).** Most European city centers have a substantial offering of commercial chain stores found in most countries around the world. Although these shops can offer a welcoming addition to the local shopping landscape, the availability of the same brands and chains in every European city weighs down on the uniqueness of the local retail offering in a city. The dominant position of commercial chain stores due to international reputation, heavy marketing and market share can have a destructive impact on local retailers. Shop diversity may eventually be undermined by these chain stores as they create a more uniform offering in each city, as well as push out local retailers in establishing a more dominant position in the market.
- **Higher rents.** Rising property prices and escalating rents are the cause that higher rents can be commanded especially in respect to prime retail locations in high-traffic areas, such as in European city centers. A significant number of people visit or pass by these areas. This can increase the potential customer base for retail businesses and leads to a high demand of these locations. As higher rents lead to higher costs, local and independent businesses consequently struggle to meet these costs. This can lead to a closure or relocation to a cheaper location. Retail chains with more financial resources can absorb higher rents more easily than smaller businesses. Once smaller or local retailers leave the market, the large retailers start dominating the landscape. This leads to a decrease in the variety of available products and services and a more homogenized offering.
- **Increased competition among retailers.** Directly tied to the escalating rents and rising property prices, retailers are facing a more competitive marketplace nowadays. This relates to the proliferation of chain stores and corporate retail expansion drift of global chains and corporations. This increased competition may result in a form of market consolidation in which smaller, local businesses cannot compete on pricing or scale. Also, retailers have increasingly standardized their offerings to meet general consumer trends to stay in pace with competition. While competition is generally seen as beneficial for consumers, these paradoxically lead to a lack of diversity in the marketplace.

C. Technology

- **Online retail.** The rise of online platforms has resulted in the emergence of numerous webshops, making E-commerce businesses a serious challenge for traditional, physical shops. As more consumers (continue to) prefer the ease of purchasing goods online, physical shops struggle. Consequently, this has led to the closure of chain stores that did not meet consumer's demand well enough and local stores. What remains in the high streets are mostly chain stores that focus on the average consumer.

  As there is less foot traffic in the shopping streets due to online retail, local shops may start to target the type of customers that remain visiting physical stores. Shops therefore could feel compelled to alter their retail offering. This leads to a vicious cycle in which the retail offering becomes slightly more one-sided, making the city center less attractive to visit and causing more customers to buy online instead of visiting a city centre.

  Interestingly, day visitors and tourists form a steady, reliable flow of customers for physical shops since this group of customers will still want to buy directly in-store. They cannot wait for delivery. (Partially) catering to visitors and tourists can thus mean continuity for local retailers, in the absence of local customers due to e-commerce. On the basis of the above arguments, the rise of online platforms, webshops and e-commerce businesses are a strong driver in the loss of shop diversity in European city-centers. However, it also contributes to more diversity.

  Online retail has led to a reconsideration of physical retail locations. The focus of the larger chain stores has shifted to the largest cities of a country. Traditionally brand stores and international retailers that are exploring a new market, also focus on these cities. This leads to a higher extend of shop diversity in these cities. By withdrawing from medium-sized and small cities, these cities are struggling. On the long run however, it offers an opportunity for local and smaller retail as rents in these cities will drop.

- Retailers are increasingly facing **technological developments** in their business operations. Examples are payment- and security systems and marketing & communication systems like electronic fitting mirrors. Besides the high rents, increase of personel and other costs these new developments make it difficult for especially small and local retailers to maintain. This has it's effect on shop diversity.

D. Social & cultural

- **Changing consumer preferences and marketing methods**. Changing consumer preferences and marketing methods are hugely altering the consumer landscape. For instance, social media campaigns or influencers on platforms like Instagram or TikTok are increasingly shaping customer preferences and are effectively used for brand recognition. This may lead to a more centrally imposed 'sameness' in demand among consumers, meaning that customers are increasingly opting more for uniformity, convenience and branded products. Increased demand for specific types of goods, familiar products or brands are favored over local options due to these changes in the consumer landscape.
- **Lifestyle focus**. A trend that stimulates shop diversity is the focus on consumer lifestyle. Now that consumers do not automatically visit a shop / shopping area and retailers do not queue up to occupy a shop, property owners are increasingly thinking about the use of their properties. Owners of multiple properties focus on offering distinctiveness. Lifestyle focus is a method to achieve this. The opportunities can be aired from the lifestyle of the visitors in the catchment area or all visitors. This can be responded to in the retail offer. This way smaller cities can distinguish themselves from their competitors and offer what their specific target group needs and wants. On the scale of larger cities, this method can be applied for in a specific sub-area.
- Another noticeable trend relates to **the demand for experiences** instead of products or goods. Consumers are more focused on looking for new experiences rather than new products. This reflects in the strong competition between retail and catering in shopping streets. Next to a decline in visits to physical retail, this causes an extra pressure on retail. Whereas these changes are significant drivers for loss in shop diversity, it should be mentioned that changes in the retail landscape are of all times. For instance, the rise of (modern) shopping malls or supermarkets that have taken over the role of specialized food-related shops, such as bakeries, butger's and green grocers. What we see is that retailers effectively adapt to these changing demands. Blurring concepts of food & retail are a good example.
- **Gentrification.** The process of gentrification in city centers and surrounding neighborhoods is a known driver for the loss of shop diversity. It is known that the influx of more affluent residents changes the demographic profile of the community and can cause traditional local businesses to be replaced by more upscale establishments.
- **Diminishing supply of local shops.** A loss of shop diversity is also partly driven by the decline of local shops. Due to several drivers mentioned before, it has become increasingly difficult for local shop owners to continue their business in the same way they have always done. A common trend accordingly is that local shop owners do not have a successor for their businesses. Young entrepreneurs are either not interested to continue the traditional local shop due to the difficult market, find it an unattractive job, or rather open a modern shop which fits their interests' better.



3. Methodological and comparative case study

Source: Pixabay, 2025

Introduction

This chapter gives insight in the findings from the comparative case study. It combines the results from the questionnaire among 37 cities and the in-depth interviews held in 11 cities. Therefore, it aims to provide an understanding of monoculturalization and shop diversity in the participating cities and the differences between the cities.

First the chapter elaborates on **A. retail diversity** in general in Europe, zooming in specifically on the state of retail diversity in the cities, the metrics used to measure and the drivers impacting retail diversity. We also dive into the role of tourism in monoculturalization and to which degree it undermines shop diversity.

Secondly, we look at **B. monoculturalization** in the participating cities by portraying the extent to which the phenomenon is prevalent. According to the status of monoculturalization in the city centers, we classify the cities. Furthermore, we discuss the similarities and unique aspects of monoculturalization in an analysis of how monoculturalization takes form in the city centers.

Lastly, we zoom in on **C. retail and tourists** namely, the commonalities in the way tourist shops are defined and measured across the participating cities. We will also elaborate on how local shops have adapted to increased visitor numbers.



Picture: Stroopwafel shop Leidschestraat, Amsterdam
Source: Sweco, 2025

Retail diversity and metrics to measure

The state of retail diversity and the metrics to measure it as well as the drivers impacting it, give a first indication to what extent there is a one-sided offering in city centers in Europe. It provides a general perspective on how diverse the retail landscape is across different European city centers and which conditions can be connected to this.

Retail diversity in Europe

Touristic cities all have one or more monocultural areas in their city centre with one-sided retail offerings that are mainly aiming at tourists.

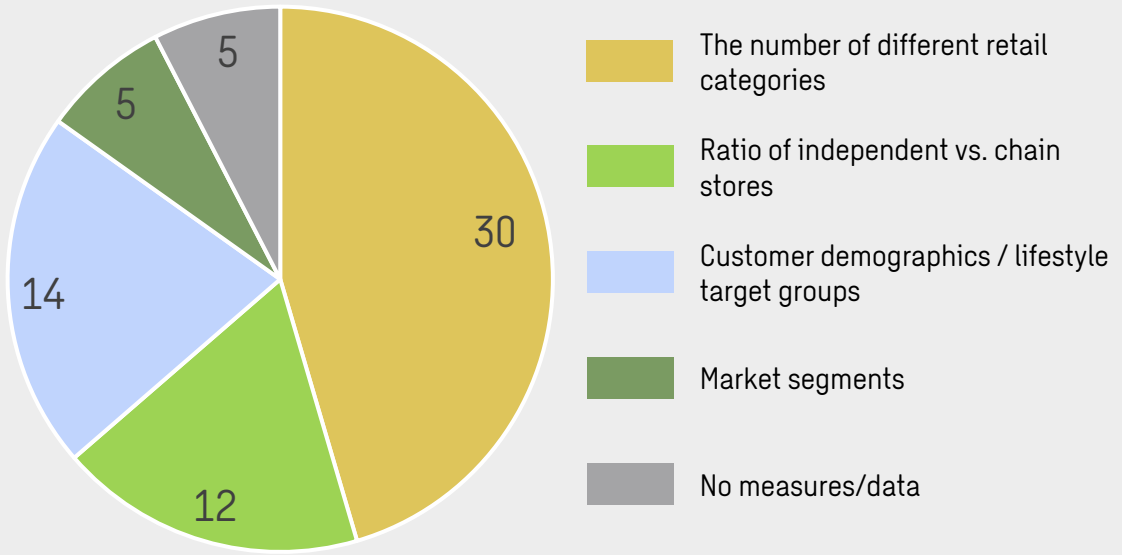
Decline in shop diversity in almost all cities over the past 5 up to 10 years: 90% of the cities state that their city center has experienced a loss in shop diversity in the last 5 to 10 years. Most cities have seen an extreme loss. Only Cologne, Gaziantep and Groningen did not experience any loss in shop diversity.

Access to goods and services varies: Almost half of the cities imply that there is no problem with the accessibility of a wide variety of goods and services for consumers in their city center. Several city centers however, like Izmir and Dubrovnik, have an extreme deficit and almost half of the cities have a slight to moderate issue with an access to a wide range of retail.

Role of local retailers (very) important: About two-thirds of the cities consider the local retailers as extremely important for the diversity of the retail landscape in their city. None of the cities indicated the role of local retailers to be not at all relevant for shop diversity, with the rest finding it slightly to moderately important.

Metrics to measure (trends in) retail diversity

- **Measuring is common practice.** Most cities track retail diversity in their city centers one way or another. Only 5 cities (Oslo, Luxembourg, Warsaw, Valladolid and Bari) state not to measure or have no data on retail diversity.



SWECO

Main drivers impacting retail diversity

High rents. The level of commercial rents for retail properties in most cities impacts the retail diversity. The type of retailers which can sustain their business in the city centers is based on their financial bandwidth.	27 cities (73%)	*"Most central locations are only affordable in rent for the huge chain shops", "small local retails do not have the finances to stay", "rents in the city center (and in the whole city) are high", the rents for local retailers are too high".*
Changing consumer behavior. Retail diversity is strongly impacted by changing consumer preferences. The demand of consumers shapes the offering in retail. Increased demand for specific types of goods, familiar products or brands are favored over local options due to changes in the consumer landscape.	26 cities (70%)	*"Changing consumer behavior shifts focus from goods to experiences", "we see that purchasing behavior is changing", "diversity of shops = mainly dependent on consumer population and purchasing behavior of that population", "consumer choices shape market demand", "less money spent on high quality goods".*
Online platforms. The rise of online platforms has resulted in the emergence of webshops. It makes e-commerce a serious challenge for traditional shops, as more consumers (continue to) prefer the ease of purchasing online.	26 cities (70%)	*"Online platforms has increased in last 10 years", "online platforms further challenges traditional stores", "The convenience of e-commerce, coupled with the increasing use of smartphones, has shifted consumer behavior. Many consumers now prefer shopping from home or on-the-go".*
Commercial chain stores. The dominant position of commercial chain stores due to international reputation, heavy marketing, market share and possibility to pay high rents, influences shop diversity. They create a more uniform offering in each city and push out local retailers.	25 cities (68%)	*"Bigger brands and franchises are taking a step beyond the small retailers", "people turn to chain markets and shops", "chain stores are receiving increasing attention, especially considering that they conduct much more effective marketing communication than retail stores".*
Tourism. As tourists become a dominant consumer group within the local retail landscape, the preferences and demands of tourists will strongly impact the offering of retail and thus its diversity.	20 cities (54%)	*"Tourism drives demand for visitor-oriented shops, often at the expense of local retailers", "the growth of tourist flows has led to a decline in small local shops and traditional craft businesses", "confronted with an increasing number of tourist shops that sell low quality souvenirs, chocolate and beer".*

Main drivers impacting retail diversity



Diminishing supply of local shops. It has become increasingly difficult for local shop owners to continue their business in the same way they have always done due to trends described before like online retail, the rise of chain stores and change of consumer preferences, but also technological developments. It has caused the decline of local shops impacts shop diversity.

19 cities (51%)

"Retail owner usually are on their latest ages of the working life. It is difficult for them to adapt to the new era of e-business", "combination of factors has led to a decrease in the number of local shops".



Gentrification. The changes in socio-economic landscape in city centers and surrounding neighborhoods is a known driver for the loss of shop diversity. Changes in the demographic profile of the community can cause traditional local businesses to be replaced by more upscale establishments.

18 cities (49%)

"Great increasing low-budget families in the city" ,"The centre is affected by touristification and gentrification , the appartments are occupied by airbnbs, the rents are very high, the shops and services for locals are replaced by services and shops that focus on tourists", "impacted by gentrification".



Regulations or policies. Regulations and/or policies form the framework that sets out the preconditions for the functioning of the retail landscape.

11 cities (30%)

"Regulations have a major impact on investment decisions".



Increased competition. Retailers are facing a more competitive marketplace nowadays. Increased competition influences the diversity of retail in the form of market consolidation. Offerings are more standardized with which smaller businesses cannot compete on pricing or scale.

10 cities (27%)

"Macro economic trends have a large effect on the diversity of retail space. These include rates, costs of services, labor etc", "Increased competition from both global brands and online platforms".



Local investments. As local governments purchase vacant retail(blocks) and redevelop it into attractive concepts, municipalities increasingly maintain influence on its use. By doing so they stimulate shop diversity.

9 cities (24%)

"The influence of local investments also shape the retail landscape, affecting the city's unique commercial identity".

Conclusion main drivers impacting retail diversity

INTERCONNECTED DRIVERS

The main drivers impacting retail diversity are part of a larger arena of forces that altogether influence the dynamics of the local retail landscape. These drivers form an interconnected web in which drivers influence and amplify each other. The city of Split illustrates this in detail:

"The main drivers impacting retail diversity in Split's city center include the outmigration of younger families due to rising living costs and limited affordable housing. This reduces demand for everyday retail services. Poor accessibility and insufficient delivery infrastructure discourage diverse retailers and local shoppers, favoring tourist-oriented businesses. The dominance of tourism drives the growth of souvenir shops and cafes at the expense of stores catering residents. The decline in local residents, pushed out by high rents and the tourism boom, has further reduced the demand for essential services."

The above example shows that the developments are linked to each other and that not one perpetrator can be pointed out for the decline of local retail (diversity) and services. Rather than isolating drivers, we should see them as an interconnected network that altogether influence the retail landscape and each other in the process.

IN MORE DETAIL:

- Florence describes how the interconnected developments are powering a vicious circle, creating a city center catering more and more to tourists than residents. Rents in the city center are very high, and therefore local retailers A) have to adjust their offerings, tailoring to the touristic demand, or B) have to relocate outside the city center, where rents are lower. In return, students, employees and residents more and more avoid the city center, because services for them (work opportunities, university, local retailers) are displaced outside the city center.

- In some cities, specific **local developments** impact the retail diversity of the city center:
  - In Bruges, the hotel-stop has increased the number of day trippers (who now sleep in Brussels, Antwerp or Ghent) who want easy and ready-to-go consumptions.
  - In Visby, many public services moved to a new location outside the historic city center, strongly influencing the number of retail vacancies and shop diversity.
  - In Amsterdam and Gijon, supermarkets are a strong driver for local specialized shops and grocery stores to be pushed away.

Tourism as a driver

Whereas cities like Kiel, Utrecht or Nyíregyháza with a less touristic profile do not deal with a huge influx of tourists, they also state that they are dealing with a loss of shop diversity. This implies that **the loss of retail diversity is not necessary always caused by an increasing number of visitors**. It illustrates that some degree of change in the retail landscape is evident, regardless of (high) tourism.

11 cities amongst which Oslo, Luxembourg, Negotino, Madrid and Oostende, have indicated that **tourism is not a main driver impacting retail diversity**. Other drivers need to be considered playing a larger role, making tourism a minor factor in the interconnected network of drivers.
In touristic cities where tourism is seen as the main driver, it is in fact not the standalone cause for the loss of shop diversity. Tourism can therefore be seen as a catalyst within the equation, with a stronger impact in one city than the other.

While tourism is not indicated in every city to be a main driver impacting retail diversity, it may still be an undermining factor in the interconnected network that shapes the retail landscape. As seen in the graph on the right, **the role of tourism as a threat to retail diversity can be seen as prevalent**. The large majority of cities state that tourism has been an undermining factor towards some degree. Only 7 of 34 cities (=21%) indicate it is not an undermining factor for shop diversity in their city center.

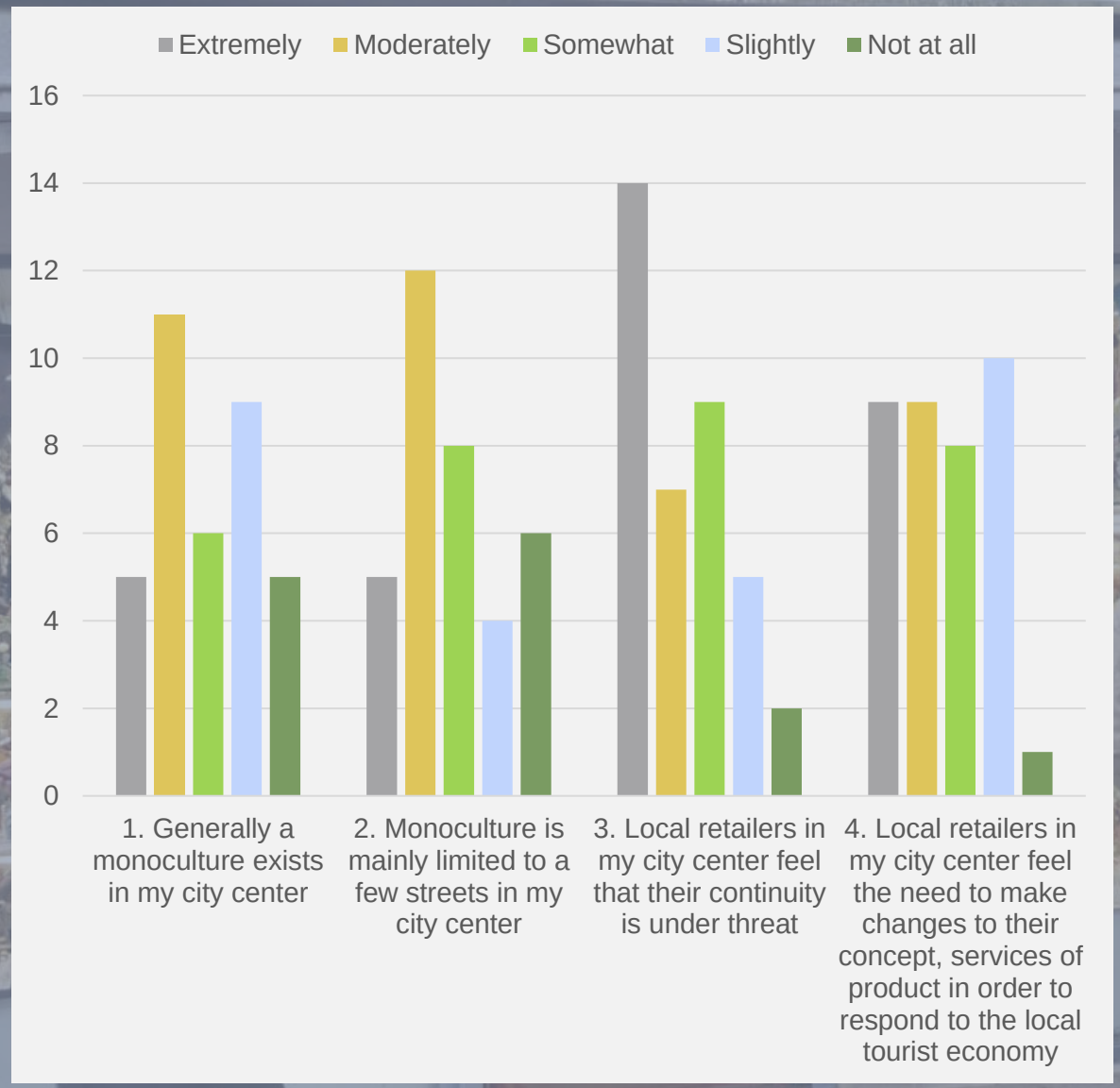


Extent of monoculturalization

As indicated before, tourism is in many cities a driver causing the loss of retail diversity. It fuels the homogenization of shops and services catering predominately to tourists. This one-sided offering can become a touristic monoculture. We examine the extent to which this phenomenon 'monoculturalization' appears in the participating city centers to identify the scope of the issue.

The extent of monoculturalization

- **Varied degree of monoculture.** Most cities feel that to some degree there is generally a monoculture in their city center. Only 5 cities mention there is none. Nevertheless, there is a great variation within the state of monoculturalization in the city centers, as can be seen in the graph on the right.
- **Mainly limited to a few streets.** In most cities, the concentration of monoculture seems to be limited to a few streets within the city center.
- **Continuity local retailers (very) threatened.** Almost all cities indicate that local retailers in their city center feel that their continuity is under threat. In more than one third of the cities this threat is extremely high.
- **Local tourist economy influences retail offering.** With the exception of one city (Groningen), all cities observe that local retailers in their city center feel the need adapting to changes to their business, responding to the local tourist economy. The degree to which retailers make changes to their concept, services or products to cater to tourist demand however, varies strongly per city.



Extent of monoculturalization

The presence of tourist-oriented shops per commercial street strongly indicates the extent to which monoculturalization takes place in participating cities. Retail catering primarily to tourists establishing a dominant presence within the shopping streets causes the offering to become one-sided. This may be different for the city center as a whole or particular areas or streets.

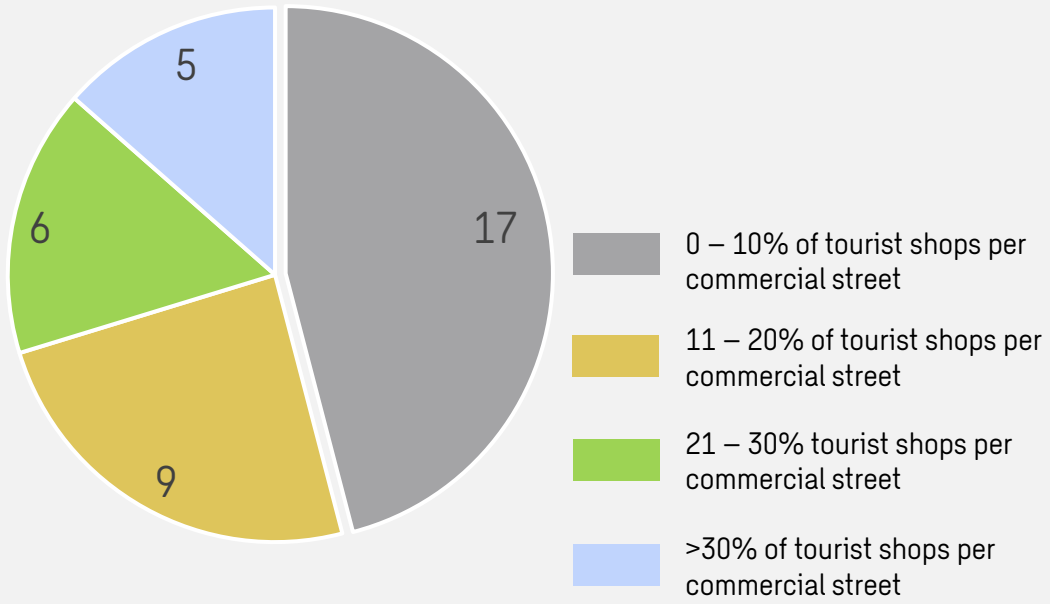
The dominance of tourist shops in particular streets

- **Tourist shops are concentrated in particular areas.** Examples are:
  - Calle Deanes in Córdoba.
  - The 'Royal Route' in Prague.
  - All side streets of the central market square in Bruges.
  - The Via San Lorenzo, Strada Nuova, Porto Antico and Via Cairoli in Genoa; in other words, all major attraction areas.

- **Particular streets or areas have a high(er) percentage of tourist shops.** For instance:
  - Floriańska, Szewska, Grodzka, Sławkowska and Mikołajska in Krakow. In theses streets 50% of the shops are tourist oriented.
  - Marmontova street in Spilt which has 70%+ tourist content.
  - The main streets in the old town of of Šibenik; 40% are souvenirs and shops for tourists.
  - The 1st, 2nd, 3rd and 4th district of Paris plus the 5th, 6th, 8th, 9th and 18th district all have a concentration of 50 to 70% of tourist shops.

The dominance of tourist shops in city centers as a whole

- **Tourist shops significantly present in city centers.** Tourist shops in most cases barely establish a dominant position within the whole city center. There are a few exceptions. 5 cities (e.g. Firenze, Dubrovnik, Venice) report a presence of more than 30% of tourist shops per commercial street. Almost half of all cities indicate a 0 – 10% presence. This means tourist shops make up for a significant amount of shops in most city centers.



Extent of monoculturalization

Zooming in on the extent of monoculturalization caused by tourism – 'touristification', we look upon our definition of the phenomenon. These three conditions give an overall, objective view on the severity of monoculturalization in each city center. We score every city on the three conditions in the table below (& p. 25), using the color-coding scheme on the right. The scoring of the cities is done based on the analysis of the output of the survey, interviews and additional information or documentation received from the cities.

DEFINITION
MONOCULTURALIZATION, CAUSED BY TOURISM

A phenomenon where retail in a city center has a one-sided offer and caters predominantly to tourists, causing a decline in shop diversity at the expense of the local cultural identity, local businesses and inhabitants. The following conditions are met:

1. A noticeable trend of loss in shop diversity over time (whether due to increased tourism or not).
2. A substantial part of the retail has a focus on products for tourists.
3. Loss of shop diversity due to the local tourist economy is part of the city's agenda.

COLOR-CODING
CONDITIONS ARE MET:

- TO FULL EXTENT
- PARTIALLY
- NOT AT ALL

COMPARATIVE CASE STUDY CITIES	1. A noticeable trend of loss in shop diversity over time (whether due to increased tourism or not).	2. A substantial part of the retail has a focus on products for tourists.	3. Loss of shop diversity due to the local tourist economy is part of the city's agenda.
Amsterdam			
Barcelona			
Bruges			
Dubrovnik			
Firenze			
Gaziantep			
Ghent			
Gijon			
Kiel			
Venice			
Visby			

QUESTIONNAIRE CITIES	1. A noticeable trend of loss in shop diversity over time (whether due to increased tourism or not).	2. A substantial part of the retail has a focus on products for tourists.	3. Loss of shop diversity due to the local tourist economy is part of the city's agenda.
Bari			
Cologne			
Córdoba			
Dublin			
Genoa			
Groningen			
Istanbul			
Izmir			
Kraków			
Luxembourg			
Madrid			
Negotino			
Nyíregyháza			
Oostende			
Oslo			
Paris			
Pécs			
Prague			
Regensburg			
Sibenik			
Split			
Utrecht			
Valladolid			
Vienna			
Vilnius			
Warsaw			

Extent of monoculturalization by tourist shops

Extent of touristification	Description of characterics	Cities
Minimal to low	• None to very little retail in the city center has a focus on products for tourists. • Tourist-oriented shops (if any) are situated directly around tourist attractions. • Monoculturalization does not threaten local cultural identity, businesses and inhabitants. • Touristification of shops occurs on a minimal degree. • Locals do not avoid the city center due to a one-sided offering or tourism. • Loss of shop diversity due to the local tourist economy is not part of the city's agenda, as the drivers impacting retail diversity are unrelated to tourism.	Bari, Cologne, Dublin, Gaziantep, Groningen, Gijon, Izmir, Kiel, Luxembourg, Negotino, Nyíregyháza, Oslo, Pécs, Regensburg, Utrecht, Valladolid, Vienna, Vilinius, Visby
Moderate	• Slightly to somewhat part of the retail in the city center has a focus on products for tourists. • Tourist-oriented shops are mainly limited to concentrated areas in the city center and around tourist attractions. In these concentrated areas, monoculturalization caused by tourism, can take moderate forms on a local level as it has not (yet) widespread throughout the city center. • As most shops serve both locals and tourists, touristification occurs up to a fair degree. • Locals & retailers are not (yet) feeling displaced and avoiding the city center • There may be some (underexposed) issues with retail diversity, however tourism is considered to be one of the many factors related to this. • Loss of shop diversity due to the local tourist economy is/may become part of the city's agenda, however it has not lead to concrete actions and is not significant within the public debate.	Amsterdam, Córdobà, Ghent, Istanbul, Kraków, Madrid, Oostende, Paris, Warsaw
High to extreme	• Substantial to great part of the retail in the city center has a focus on products for tourists. • Tourist-oriented shops are found in a majority of the city center, causing a widespread touristic monoculture, often with a very dominant presence in particular streets with high tourist flows or nearby tourist attractions. These areas (or the whole city center) are often avoided by locals. • Shops increasingly cater to visitors, inducing the touristification of shops to a high degree. • There are known issues with retail diversity due to tourism, especially around the diminishing retail offering for locals and local retailers being displaced out of the city center. • Monoculturalization forms a serious threat for shop diversity at the expense of local cultural identify, local businesses and inhabitants. The issue is also often linked with other problems related to high visitor numbers. • Loss of shop diversity due to the local tourist economy is part of the city's agenda and has led to concrete measures to intervene with monoculturalization leading to varying results.	Barcelona, Bruges, Dubrovnik, Firenze, Genoa, Prague, Sibenik, Split, Venice

The shared aspects

Looking upon the characteristics of monoculturalization in more detail, it provides an overview of which distinct features can be attributed within the scope of a tourist monoculture. At first, we examine which similar aspects can be found across the participating cities. Secondly the determining factors for the unique aspects of monoculturalization are identified.

"*In varietate concordia*": the foremost commonality of monoculturalization is that it is different in every city as the context of each European city shapes it differently. Nevertheless, the shared principles below uncover similar characteristics related to the phenomenon.

Loss of shop diversity. One of the main characteristics of monoculturalization is a more one-sided retail offering, causing a decline in shop diversity.	33 cities (89%)	Evidently this was also seen among the participating cities, as almost all cities (90%) mentioned they have faced (slight to extreme) losses in retail diversity.
A substantial part of **retail** is **tourist-oriented**. Another main principle of touristic monoculture is that the one-sided retail offering is tourist-oriented, meaning it caters predominately to tourists and visitors.	25 cities (68%)	With about one third of the cities stating tourist shops are not dominant, the majority of cities indicate tourist shops have a slight to extreme dominant position within the retail landscape in their city center as a whole. Within particular streets, even more cities see this dominant position (27 cities).
Inadequate offering for locals. In most cities the one-sided tourist-oriented retail offering goes hand in hand with a diminishing offering (retail, services, work opportunities) in the city center for local inhabitants.	25 cities (68%)	In most cities (two-thirds) the offering for locals in the city center as a whole is considered inadequate. This was less perceived in respect tot particular streets (23 cities).
Copy cat behavior. As products and concepts succeed in the tourist market, businesses start to copy each other's merchandise and services, fueling the homogenization of the retail landscape even more.	24 cities (65)%	Copying successful concepts is seen to be evident in streets dominated by tourist shops towards some degree in more than half of the cities, with 7 cities indicating this to take extreme forms.
Locals avoid the center. As the offering starts to cater mainly to tourists and the offering for locals is diminishing, locals tend to avoid the city center.	23 cities (62%)	Tourism is reason for locals to avoid the city center in the majority of the cities. In almost half of these cases, locals avoid the center moderately to extremely.

(For the full results see the appendix.)

SWECO

The shared aspects

Catering only to visitors. As a substantial part of the retail landscape starts to be tourist-oriented. Businesses start to cater their products and services to visitors only (especially in particular streets).	23 cities (62%)	→	In streets dominated by tourist shops, more than half of the cities see that businesses cater their products and services only to visitors.
Tourist reputation*. Shops and their one-sided offering leads local inhabitants to perceive particular streets to be touristic in a negative way.	23 cities (62%)	→	A touristic reputation of particular streets is a characteristic of monoculturalization recognized by more than the majority of cities, of which 8 cities perceive this to be a slight issue and 7 cities perceive an extreme touristic reputation.
Economic functioning under pressure. With a heavy reliance and pressure from tourism, one of the aspects of monoculturalization elicits is that the general economic functioning is under pressure due to tourism.	21 cities (57%)	→	Economic functioning of the city center is under pressure due to tourism to some degree in more than half of the cities, with 5 cities indicating the extent of this form to be extremely.
Foreign language use. Catering to foreign tourists, monoculturalization also characterizes itself through retailers using foreign languages.	19 cities 51(%)	→	About half of the cities indicate that business do present themselves in the local language(s), although it does not take moderate or extreme forms in most cities.
Aggressive street marketing. Another aspect connected with monoculturalization is the strong presence in the retail streets through excessive signage, the use of proppers, or loud music.	19 cities (51%)	→	Again about half of the cities see this form of monoculturalization in particular streets dominated by tourist-oriented shops, whereas also aggressive street marketing is not considered to be very prevalent in most cities.

**Streets with a touristic reputation often can have a negative connotation for locals.*

(For the full results see the appendix.)

The shared aspects

A. LOCAL RETAILERS DISPLACED

Linked close to the fact that particular areas have a touristic reputation among locals and that locals are avoiding the city center, a common aspect of monoculturalization is that local retailers are displaced. Reduced demand from locals and high rents in the city center form difficult circumstances for local stores to survive in the city center, causing them to forcefully quit, move or change their concept.

B. QUALITY GOES DOWN

Due to an increasing demand for certain products and services by tourists, a more one-sided retail offering follows. Tourists as 'no repeat consumers' in the city center more often have lower standards than locals and seek out easy, fast and convenience products like e.g. low quality products, fast food, and takeaway.

C. PRICES GO UP

As a result of increased demand from visitors, shops are able to charge more for their products. Especially considering prices for low quality products, the value for money balance is increasing more rapid than without monoculturalization.

D. POLICITAL AGENDA

A common denominator of monoculturalization in the city centers (especially those with intense severity) is that the topic is part of the political agenda of the city. The public debate about the lack of local offering and the tourist-centric retail landscape has often led to political action, policies or programs. These cities have often already taken measures in an attempt to intervene with monoculturalization, illustrating it as a defining factor for the issues.
It should be noted that often the issues with monoculturalization come together with more diverse problems related to tourism and increasing visitor numbers. More often than not, the monoculturalization is one of the subjects on the political agenda the city is trying to address.

IN MORE DETAIL:

- In Dubrovnik locals shop outside the city center, which has led to new retail areas outside the Old Town to sprout up to meet this local demand.
- In Florence, as rents in the city center are very high, local retailers A) have to adjust their offerings, tailoring to the touristic demand, or B) have to relocate outside of the city center, where rents are lower.
- In Amsterdam, the transformation of the shopping streets into areas dominated by tourist-centric shops, results in less space for authentic local businesses.

- Bruges is a facing significant challenges due to the increasing number of fast-food outlets, takeaway shops and tourist shops selling low-quality souvenirs, as retailers are responding to the demands of visitors.
- Addressing low-quality shops is more important than fostering a diverse retail landscape in Venice.

- In Dubrovnik there are only two supermarkets left in the city center, which also serve tourists. Due to high demand, these supermarkets drive up their prices.

- In Barcelona, tourist shops are defined in the municipalities use plan, which is accepted policy. The city does not help tourism enterprises and rather fosters traditional retail.
- Bruges tries to emphasize and strengthen the diversity, attracting and guiding the right shops, rather than restricting and enforcing strong regulations.
- In Ghent, local retailers are expectant for more strategic direction in terms of policy in regard to tourism developments from the city.
- The city of Venice has consistently sought to preserve non-touristic functions in the historic city center, countering trends of decline in retail.
- The 'Living city' is a prevalent theme in Visby and the public debate about the effects of tourism on the livability of the city center grows.

The different aspects

Whereas monoculturalization has several common aspects, it remains a relative concept. Relative meaning that the context of each city center shapes monoculturalization in a different way. Among the participating cities, certain determining factors can be identified which largely influence how a touristic monoculture is perceived.

- **Geographical determiner.** The geographical scale on which monoculturalization is examined is highly determinant for the issues are perceived. This scale can be a single street, a zone or particular areas in the city center, or even the whole city center. This has several implications:
  1. Monoculturalization may be concentrated in specific areas or streets (like Bruges) or be an issue for the whole historic city center (like Dubrovnik).
  2. The one-sided tourist-oriented retail offering may seem like an enormous issue on a local street level, whereas there are no issues for a city center as a whole.
  3. Two similar situations of monoculturalization in city centers may be experienced completely different due to the scale of the city(center). Consider for example the same amount of tourist shops in both large metropolis Paris or in small historic city center of Visby.
- **Definition determiner.** Not every city defines (tourist-oriented) retail the same way. There may are large differences in the legal or juristic definition between countries. This may lead to the same cheese-shop being considered part of the touristic monoculture in Amsterdam, whereas it may not be an issue in Oostende. Another example could be Bruges which classifies takeaway as retail, whereas national law in Italy only distinguishes retail in food and non-food.
- **Cultural determiner.** The cultural differences between countries play a determining factor in the perception which shops are considered to be tourist-oriented. For example, whether a city attracts a lot of domestic visitors or international tourists makes large difference. Usually retail in domestic destinations is perceived to be less touristic, as the original offerings for locals can also cater to domestic tourists. Think of the retailers that sell products native to the country such as typical food or books in the domestic language.

  While destinations receiving a lot of international visitors will lead to some retailers making (necessary) changes to meet the demand of foreign customers. People generally enjoy familiar products and services they are used to. Changes could involve therefore introducing culturally exotic products or adding foreign languages. Typically, these retailers would be perceived more touristic than retail catering to domestic tourists, even when certain culturally exotic retailers are more often visited by locals.
- **Quality determiner.** Within the same city it is not always clear which shop is perceived to be catering to tourists, and which is not. In this, the (perceived) quality of the store and price of the products can play a determining role. Although largely subjective, it is often that when the quality of the products and store are (perceived) low, it is more frequently labelled as an undesired tourist shop. When the tourist shop offers high quality products, it is often thought of as a non-harmful addition to the retail landscape. This always includes a personal, subjective factor in which someone's perception is shaped. Moreover, this inability to use quality as an instrument and evaluate shops objectively has been mentioned as a challenge by several cities (e.g. Ghent, Bruges, Firenze).
- **Seasonality determiner.** Whether a city is known to have strong touristic seasonality patterns can also be a determining factor in how monoculturalization takes form. This has mainly to do the fact that, in year-round destinations, tourists alone can form a steady and reliable source of customers for retailers, making local residents subordinate clientele. In contrary, retailers in seasonal destinations depend to a greater extent on local customers as tourists number dry up in the off-season. Hence, retailers will be focused more on also catering to local inhabitants to ensure a steady income. Evidently this works two ways, as the influx of tourists can also help to sustain certain level of retail and services in the city.

Defining and measuring tourist shops

A. IDENTIFYING TOURIST SHOPS

Almost all cities struggle with the identification of tourist shops as hard metrics to define tourist-shops are usually not at hand. A few exceptions include for example Amsterdam, Bruges, and Venice (food vs. non-food) which have attempted to staple down the tourist-oriented retail in a definition. However, most cities adopt a relatively intuitive approach in the identification process, using certain indicators to help distinguish them. Therefore, between the cities there is little precise commonalities in set definitions, although some general features are often mentioned by the cities:

- Type of products
- Language used
- Location / Proximity to high foot traffic
- Appearance of the shop
- Type of brands
- Higher pricing / revenue
- Type of customers / numbers of visitors
- Seasonality of opening time

IN MORE DETAIL:

- Amsterdam:"Forms of retail that, according to their advertising, presentation, assortment, and/or operations, are exclusively geared towards day-trippers and/or tourists."
- Bruges: "Businesses that, through a combination of one or more of the following characteristics, target day-trippers and/or tourists, specifically their advertising, presentation, assortment, operations, design, striking colors, and/or low pricing.“
- Split: “Tourist shops are primarily selling souvenirs, postcards, magnets, T-shirts, and locally branded items (e.g., olive oil, lavender products, or wine), usually having signage in multiple languages.”
- Šibenik: “By the range of goods such as souvenirs and by operating only in season.”
- Ghent: “A shop catering in the need of tourist demand, located in touristic zones, but we did not define it yet specifically for policy purposes.”
- Genoa: “The proximity to high foot traffic from tourists is a key indicator. For example, the narrow alleys of the historical center, often host shops targeting visitors with souvenirs, regional products, and crafts.”
- Izmir: “does not have a specific regulatory framework to differentiate tourist-oriented shops from other retailers.”

B. MEASURING TOURIST SHOPS

Partially due to the missing identification metrics, barely any city is measuring or keeping of tourist shops in a regulatory way. Without a common framework, measuring is not possible. An exception is Venice, which tracks the number of stores as the result of imposed regulations on limiting the opening and transfer of both food and non-food businesses (No. 26/2022) in protected areas.

The largest issue with measuring tourist shops lays within the demarcation: when is a shop primarily catering to tourists or locals. Usually this distinction is a grey area, that can not be easily grasped in a formal definition or measurement. This is examplified by the notion of touristification (see p. 7) of shops and services originally aimed at locals. Visby illustrates this particular difficulty as follows: Many shops are a hybrid between tourist shops and for local "needs and wants“, as local people can also enjoy crafts shops and vintage shops etc.

How have local shops adapted to increased visitor numbers?

A. ADAPTING THEIR OFFERING

Almost all of the mentioned adaptations of local retailers in the cities have to do with the change in product offering & variety to serve the needs and wants of tourists. These adaptations can be divided according to changes related directly to the product itself as well as the way how the product is being offered.

Changes in the **product** itself: more takeaway; fastfood; tourist friendly products like souvenirs & local specialties; more stores focused on convenience; increasing food & beverage activities and other tourist services; restaurants offering more space and opening terraces in the season; and shifting to experience-based offerings such as cultural workshops and traditional food experiences.

Changes in the **way** the product is being offered: increase in capacity (by adding workforce and additional staffing); training current employees for a better service level; marketing and attending in several foreign languages; offering cashless payments; extending opening hours (or vice versa hospitality only opens during daytime for same day visitors); touristic sector widening their services; partnerships with tourism operators; seasonal adjustments; and adopting digital solutions / presence on social media.

IN MORE DETAIL:

- In Visby shops for every day errands decrease every year. Local countryside farms open crafts shops in the old town as an annex to a farm shop. Many tourist shops are only opened in the summer and closed during September-May.
- In Cologne, there are no major adaptations within retail, only in leisure (musicals) and gastronomy.
- To balance the needs of local residents, some business owners in Split try to offer discounts or special offers for locals during the off-season.
- In Ghent, they see that some shops have a strategy to remain focused on local customers, however in doing so they may become tourist attractions themselves.
- The yearly gastronomy festival in Gaziantep and the events organized to promote local products have revealed that the public has financial difficulties in accessing these products, showing the downside of these adaptations by local vendors.
- In Vienna, some local businesses had to leave due to high rents.
- A slight change in Pécs is known, until now only touristic service sector has adopted.
- In Nyíregyháza, tourist attractions serve the needs of tourists (e.g., gift shops in the zoo, museums and spa). It is not typical for local businesses to tailor their services and merchandise specifically to the needs of tourists.

B. IN ALL CITIES?

Several cities (14) indicated that local shops are not so much adopting to increased visitor numbers or that it does not apply to their city center. Examples include: Oslo, Luxembourg, Negotino, Vilnius and Gijon. It illustrates that visitors or tourists are not a serious target group in every city, or perhaps that the local clientele is substantial enough for local shops, meaning they do not have to adopt to this new customer group.

All in all, the majority of the cities have indicated that local shops in their city centers have indeed adapted to increased visitors numbers in some way, as described above.
Then again, it should be noted that there is also a varied degree to which shops are adapting to visitor numbers. In some cases (e.g. Groningen), there are just minor adaptations where shops try to 'by-catch' the visitor segment. Whereas in other cities (e.g. Genoa, Ghent), shops have adapted by modifying the goods sold and try to sell the most attractive products for tourists, particularly in areas with the highest tourist flow.

4. Instruments



Source: City of Venice, 2025

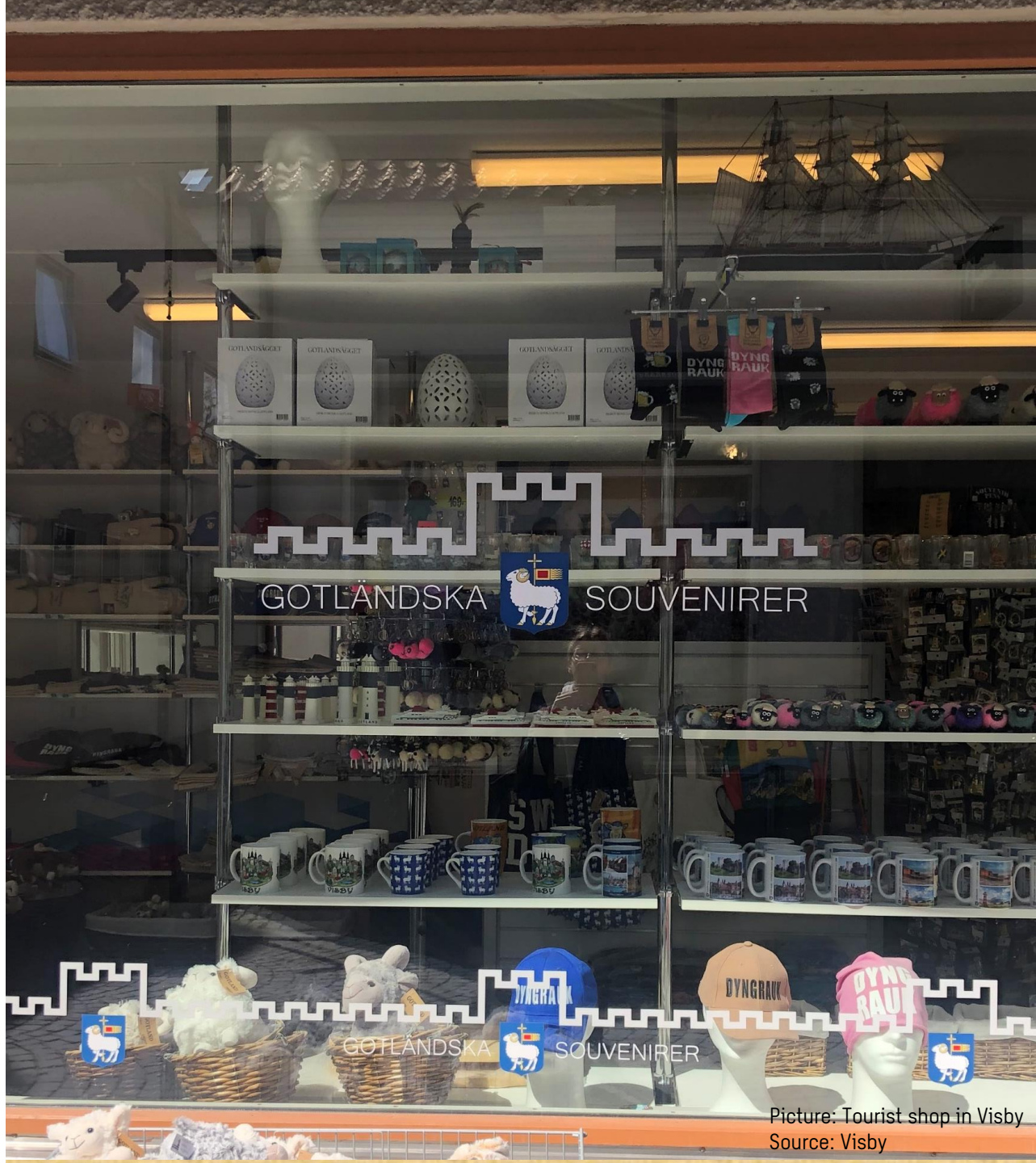
Introduction

This chapter gives insight in the instruments that can be implemented to intervene with monoculturalization. The chapter does not only provides a toolbox of recommended measures but also screens current strategies and best practices of the participating cities.

First we elaborate on the challenges the cities face with monoculturalization as well as intervening with it. This gives a good starting point of understanding which obstacles are holding back the cities from intervening.

Secondly we give an overview of the measures that are currently taken in the participating cities. In this analysis we excerpt patterns among the measures as well as look into most commonly used measures. We have rated these measures accordingly to provide insight in how effective, efficient and costly these strategies are.

Lastly, we translate this rating into a concluding analysis on the instruments and concrete measures against monoculturalization.



Picture: Tourist shop in Visby
Source: Visby

Challenges cities face with regard to monoculturalization

Conflicting interests at the destination. Economic and short-term interests conflict with the long-term vision of governments.	"Local businesses have no motivation to continue fighting to guarantee their presence in the major tourist spots and that they find a faster economic benefit in tourist shops" "Landlords of retail properties do not cooperate" "Retailers do not want to organize and adapt to new ways of doing business, space owners rent space exclusively based on the criterion of a better price".
Free trade. The principle of free market dynamics is not always deemed desirable; certain governments would prefer to exert more control over economic processes.	"While market liberalization encourages supply, it has transformed historic centers into tourist traps filled with visitor-oriented shops", "We have difficulties in regulating the number of stores, taxis or short-term rentals", "it is not possible to prohibit certain kinds of undesirable shops due to freedom of trade", "it is not possible to intervene with the high rents private owners ask for their units".
Quality assessment. It is difficult to operationalize and evaluate quality of shops.	"Large chains dominate the limited spaces for hospitality due to high demand and therefore rents are unaffordable for local retailers" "We installed a cut back on hospitality in our main shopping area and now we notice that prices of those premises have risen extremely. That wasn't our aim".
Online shopping. Local entrepreneurs have trouble competing with online commerce and struggle to adapt to new forms of online marketing, retail channels and social media.	"Retail owners usually are on their latest ages of the working life. It is difficult for them to adapt to the new era of e-business" "online platforms further challenges traditional stores".
EU and/or national law. The most mentioned challenge is the misalignment between national and regional legislation and the municipality's priorities. This makes it more difficult to effectively govern the local retail landscape.	"There is a desire to differentiate between the historic center and the rest of the city, balancing free market dynamics with the need to avoid monoculture in retail, but this is restricted by EU service directive" "policy visions can not be enforced due to EU Services Directive"

Challenges cities face with regard to monoculturalization

Limited resources. Governments struggle with limited resources to prevent monocultural retail landscapes or to foster diversity.

→ "There are insufficient means available for promotion and marketing." "The cost of the resources needed to combat monoculturization is a challenge" "Regulatory enforcement tends to lag behind actual developments" "The legislative process is slow".

End of the line: Traditional shops are closing down with no successor interested in taking over the store.

→ "Despite municipal financial support, it's challenging to attract local entrepreneurs to occupy vacant shops (e.g. a butcher in the city center)", "It is difficult to motivate new entrepreneurs for running local shops as it has become less profitable and desirable jobs to have in a changing retail landscape."

Transitional rights*: (overgangsrecht) if a shop changes owner, the new shop owner is entitled to continue the existing business (regardless of branch or quality of the shop).

Another challenge that was mentioned by cities are the **ever-rising numbers of tourists**.

→ "Balancing the needs of residents, tourists, and businesses requires a thoughtful, multi-faceted approach that prioritizes local culture while also acknowledging the economic importance of tourism" "There is a lack of alternative markets besides tourism where local people can build businesses."

*(*In some cities regulations are in place that protect the function of the shop, meaning that the city cannot change the function when the shop transitions to new owner.*

Measures

Possible measures have been inventoried based on the meetings with the expert panel, the methodological case study and desk research. The focus is on intervening with monoculturalization and enhancing & preserving local retail. Whereas the measures are wide-ranging some general patterns and commonalities are identifiable. Generally, we see that measures can be divided according to two delimitators:

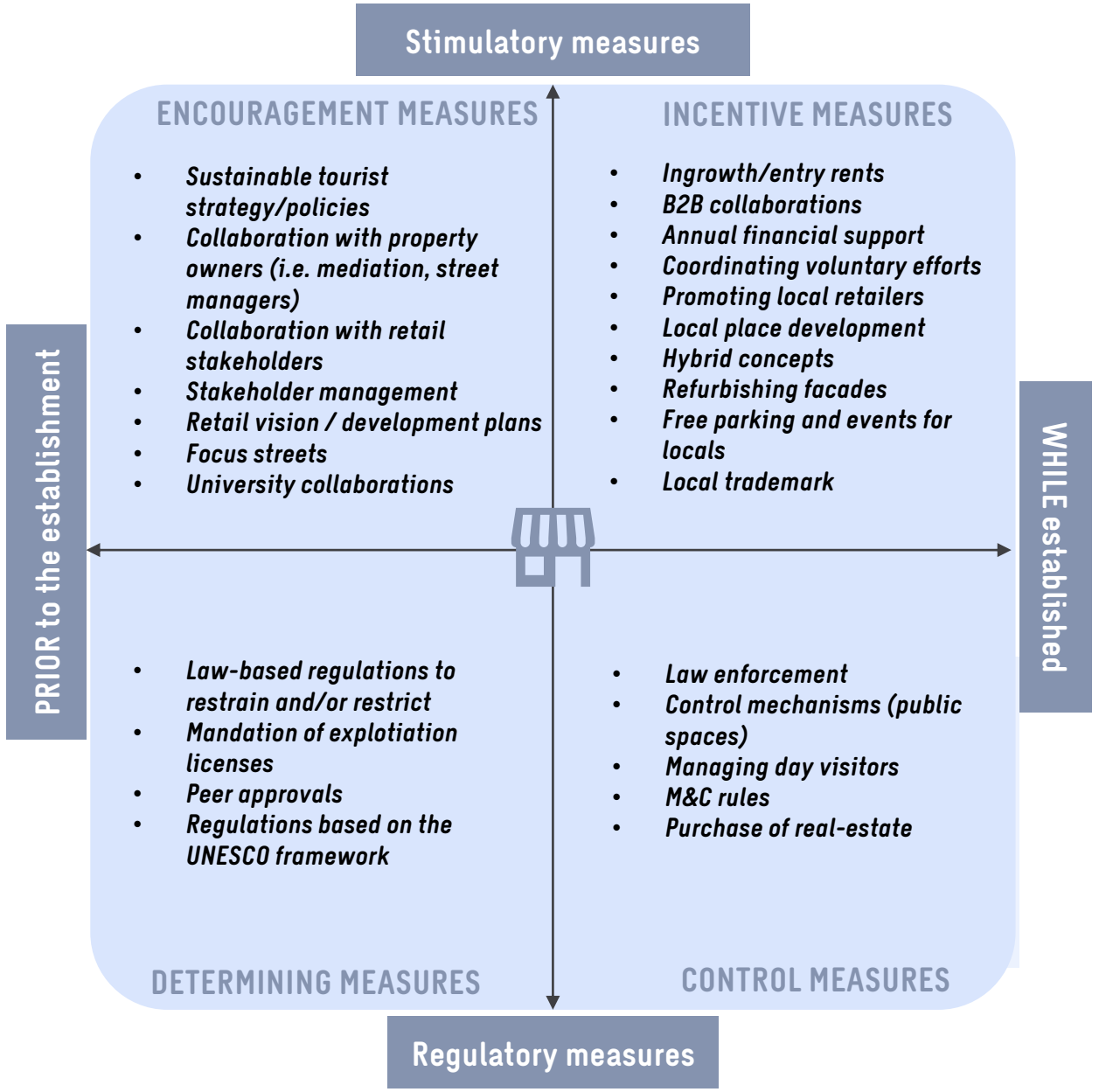
- **The nature of the measure** (**stimulatory** versus **regulatory**)

  The first delimitator divides the measures based on the stimulative or regulatory functioning of the measure. On the one hand, there is a clear pattern in interventions with the intent to boost, encourage or incentivize positive developments, such as the prioritizing of local retail over tourist shops. On the other hand, we see that initiatives are designed to control or manage developments, by exercising control on and governing the local retail landscape.

- **The entry moment of the retail establishment** (**PRIOR** versus **WHILE** established)

  The second delimitator divides the measures based on the timing, specifically whether the tourist-oriented shop has already opened its doors or not. Therefore, we divide these into 'prior to the establishment' and 'while established'. There is a clear division between measures that focus on at creating the right (pre)conditions **before** a tourist-oriented has opened (e.g., preventing new tourist shops to open in certain areas). On the other hand, there are also measures aimed at supporting and preserving local retail or mitigating the effects of tourist-oriented shops **after** they have already been established (e.g., exercising control on the type of products sold).

The quadrant model is a tool to structure and illustrate commonalities within measures taken against monoculturalization.



For the explanations on the measures, see the following pages.

SWECO

Encouragement measures: *stimulatory measures prior to the establishment*

	Measure	Description of measure with examples
1	Sustainable tourist strategy/policies	This focusses on creating a sustainable development of tourism by spreading tourists over more areas and / or over the year. It sets the preconditions / framework for the destination to combat tourism and the effects of tourism such as monoculturalization. Examples among others include **Amsterdam, Barcelona, Gaziantep, Ghent, Gijon, Krakow, Split, and Visby.**
2	Collaboration with property owners	Effective collaboration with property owners can prevent monoculturalization by ensuring a mix of retail offerings. In **Amsterdam**, area managers mediate between stakeholders to maintain oversight of new businesses. This helps promote shop diversity and prevent the dominance of large chains. Similarly, **Visby** collaborates with real estate owners and heritage councils to manage the retail landscape. Other examples include **Bruges**,
3	Collaboration with retail stakeholders	Retail stakeholders are crucial in maintaining a balanced retail environment. Cities like **Ghent** have close ties with discussion forums related to center management, nightlife, and culinary sectors. These partnerships help promote local retail through coordinated efforts and support for traditional crafts and shops. **Cologne** organizes retail conferences to inform retailers and owners to show best practices, stimulating the arrival of pop-up-stores and start-ups. Other examples: **Bruges**, **Dubrovnik, Firenze, Gaziantep, Gijon and Kiel.**
4	Stakeholder management	Managing various stakeholders is essential for urban development. **Gaziantep, Ghent** and **Visby** exemplify this through multi-disciplinary approaches involving councils related to tourism, retail, nightlife, and heritage. These collaborations support local retailers through promotion and funding projects aimed at maintaining a vibrant local retail environment.
5	Retail vision / development plans	Retail visions and development plans for the city center also contribute in obtaining a balanced retail mix, especially when the vision / plan is produced in cooperation with all the stakeholders. Examples among others include **Bruges**, **Dublin, Gaziantep, Kiel, Visby and Utrecht.**
6	Focus streets	Identifying and monitoring key streets can help better manage retail diversity. **Amsterdam**, for example, has implemented regulations to monitor crucial areas and enforce shop diversity. This approach helps to obtain a balanced mix of retail offerings in important city areas. Moreover, it is effective to achieve targeted results in a confined space as a full-blown approach for the whole city is too costly. Also the city of **Venice** has focus points such as busy squares.
7	University collaborations	Academic partnerships provide valuable insights for urban development. **Visby, Gaziantep** and **Venice** collaborate with universities to research and develop tourism masterplans that inform policies for sustainable urban growth. **Vienna** works together with the university to collect and analyze data on tourist numbers and the effectiveness of measures.

Incentive measures: *stimulatory measures while established*

	Measure	Description of measure
1	Ingrowth/entry rents	Subsidized rents for new local businesses can encourage local entrepreneurship and maintain retail diversity. **Amsterdam** uses this approach to give local entrepreneurs a fair chance to establish their businesses in the city center.
2	B2B collaborations	Business-to-business partnerships can strengthen local retail. In **Amsterdam**, collaborations between local flagship players like Heineken help preserve local cafes and businesses through collective efforts. Another example is **Kiel**.
3	Annual financial support	Financial challenges can hinder local businesses. Cities like **Barcelona** provide annual financial support to traditional crafts and shops, sustaining local businesses and preserving local retail diversity. Other examples include **Bruges**, **Dubrovnik and Kiel.**
4	Coordinating voluntary efforts	Community-driven initiatives can enhance retail vitality. **Ghent** and **Amsterdam** coordinate voluntary efforts involving local shop owners, creating a vibrant and diverse retail environment through community action.
5	Promoting local retailers	Promotion of local shops is essential to preserving the city's character. **Bruges**, for instance, promotes local entrepreneurs and quality products through marketing initiatives and labels like 'Handmade in Bruges'. Other examples are **Regensburg** and **Sibenik** who promote local retailers / handicraft with tourism marketing. With the manual 'Cultivating **Prague**' the city has set out the rules for sophisticated advertising. The **Paris** Bioclimatic Local Urban Plan (PLU-b) aims to transform Paris into a more sustainable and resilient city by integrating climate change adaptation and mitigation strategies into urban planning. Key aspects include protecting and expanding green spaces, promoting local businesses, and ensuring a mix of housing and commercial spaces. Other examples are **Dubrovnik** and **Firenze**.
6	Local place development	Focusing on local place development rather than destination development helps improve living conditions and retail offerings. **Visby's** tourism strategy emphasizes local place development to create a balanced and sustainable urban environment. **Firenze** and **Dubrovnik** is working on repopulating the city center to recreate local demand and the latter works together with a local NGO that supports the sustainable, local development of the city.
7	Hybrid concepts	Innovative retail concepts like pop-up shops and art galleries can attract diverse customers and maintain retail attractiveness year-round. **Visby** uses hybrid concepts to keep the retail environment vibrant during low seasons. Also, **Bruges** encourages entrepreneurs with pop-up displays.
8	Refurbishing facades	Improving shop appearances enhances the retail experience. **Venice** has strong restrictions on store front objects, ensuring aesthetic improvements that create an attractive shopping environment. Also, **Bruges** gives subsidies for refurbishing the façade, as well as has a ban on the use of neon-light signing and placing signs on the sidewalk. Other examples are **Barcelona and Gaziantep.**
9	Free parking and events for locals	To promote locals to visit the city center, some cities work with incentives for local people. **Split** for instance offers locals free parking and organizes cultural events that celebrate local traditions.
10	Local trademark	Promoting local trademarks and products helps foster a strong local identity. Cities like **Firenze**, **Gaziantep, Ghent and Gijon,** identify genuine local shops and crafts, supporting local businesses and maintaining city character. **Prague** supports the quality certification of products and services in tourism. Prague has its own high-quality products designed and made by Czech artists.

Determining measures: *regulatory measures prior to the establishment*

	Measure	Description of measure
1	Law-based regulations to restrain and/or restrict	Legal frameworks can limit undesirable retail developments. **Barcelona** and **Venice** have introduced restrictive regulations to limit the number of low-quality souvenir shops and fast-food outlets. **Split** works with a cap on short term rentals which limits the number of properties converted to short-term lease contracts. These measures preserve local character and heritage by controlling retail developments aimed primarily at tourists. It asks for a thorough maintenance of the rules. Other examples include **Amsterdam, Bruges and Venice.**
2	Mandatation of exploitation licenses	Mandating exploitation licenses raises higher barriers for new shops to open, ensuring that only economically viable businesses are established. **Amsterdam** uses this approach to vet businesses and prevent the proliferation of tourist-oriented shops. It means a thorough check of new retailers.
3	Peer approvals	Community involvement in business decisions can prevent excessive tourist rentals. In **Dubrovnik**, neighbor approval is required for certain rentals, ensuring that the community is engaged and local living is supported.
4	Regulations based on the UNESCO framework	Leveraging the UNESCO framework, cities like **Venice** and **Firenze** implement regulations to preserve cultural heritage and control retail developments. These measures help maintain the historical and cultural character of the city. Other examples (who have explored) include **Amsterdam** and **Bruges.**

Control measures: *regulatory measures while established*

	Measure	Description of measure
1	Law enforcement	Effective law enforcement ensures policy implementation. **Venice** and **Amsterdam** enforce regulations to maintain retail diversity and ensure adherence to policies aimed at preserving local character.
2	Control mechanisms	Regulating public spaces is crucial for managing retail dynamics. **Dubrovnik** imposes regulations on restaurant terraces and public space usage to preserve cultural heritage and manage retail activities.
3	Managing day visitors	Efforts to manage and disperse tourist numbers throughout the year and avoid overcrowding. For instance, **Dubrovnik's** system for booking time slots to manage tourist flows, Venice's access fee or Bruges' efforts to make day trips less attractive. Other examples include **Bruges** and **Venice**.
4	M&C rules	A city like **Regensburg** has strict rules for advertising in public space in the protected World Heritage (old town) district.
5	Purchase of real estate	Municipal purchase of significant real estate can prevent large chains from dominating the retail landscape. Cities like **Amsterdam**, **Dubrovnik** and **Visby** explore this as a long-term solution to maintain control over a diverse variation of shops. This ensures that local character is preserved and monoculturalization is prevented. By purchasing retail real estate, **Prague** influences the offer in the premises. In **Paris**, the implementation of the right of pre-emption (droit de préemption) primarily involves the city council's (Mairie) ability to purchase properties before other buyers, particularly within designated zones for urban development. This right is exercised to facilitate public projects, social housing, but also local trade and craft preservation. The city must be notified of a property sale within the pre-emption zone and has a specific period to decide whether to exercise its right. Purchase of property can also help repopulating city centers with local residents as seen in **Firenze** and **Dubrovnik**. The advantage is that it creates local demand for non-tourist shops.

Rating of measures I

=	
++ or --	2 or -2
+ or -	1 or -1
0/- and 0/+	0,5 or -0,5
0	0

Measures *(Rating consists of an estimation)*	Effectiveness + = Effect 0 = Neutral effect - = Limited effect	Efficiency from municipality's side + = Limited use of manpower 0 = neutral use of manpower - = a lot of use of manpower	Efficiency from municipality's side + = Limited use of money 0 = neutral use of money - = a lot of use of money	Total score with weighting factor: 2x Effectiveness 1x Efficiency manpower 1x Efficiency money
ENCOURAGING MEASURES				
Sustainable tourist strategy/policies	++	0/-	+	4,5
Collaboration with property owners	+	0/-	+	2,5
Collaboration with retail stakeholders	+	0/-	+	2,5
Stakeholder management	+	0/-	+	2,5
Retail vision / development plans	0/+	0/-	0/+	1
Focus streets	+	0/-	0/-	1
University collaboration	+	+	+	4
INCENTIVE MEASURES				
Ingrowth / entry rents	++	0	-	3
B2B collaborations	++	+	++	7
Annual financial support	++	0	-	3
Promoting local retailers	0/+	0/-	0/-	0
Local place development	+	0/-	+	2,5
Hybrid concepts	+	0/-	+	2,5
Refurbishing facades	+	+	+	4
Free parking and events for locals	+	0/-	-	0,5
Local trademark	+	0/-	-	0,5

Rating of measures II

=	
++ or --	2 or -2
+ or -	1 or -1
0/- and 0/+	0,5 or -0,5
0	0

Measures *(Rating consists of an estimation)*	**Effectiveness** **+ = Effect** **0 = Neutral effect** **- = Limited effect**	**Efficiency from municipality's side** **+ = Limited use of manpower** **0 = neutral use of manpower** **- = a lot of use of manpower**	**Efficiency from municipality's side** **+ = Limited use of money** **0 = neutral use of money** **- = a lot of use of money**	**Total score with weighting factor:** **2x Effectiveness** **1x Efficiency manpower** **1x Efficiency money**
DETERMINING MEASURES				
Law-based regulations to restrain / restrict	++	-	0/-	2,5
Mandation of exploitation licenses	++	-	0/-	2,5
Peer approvals	++	+	+	6
Regulations based on the UNESCO framework	++	0/-	0/-	3
CONTROLING MEASURES				
Law enforcement	++	-	0/-	2,5
Control mechanisms	++	-	0/-	2,5
Managing day visitors	++	-	0	3
M&C rules	+	0	0/-	1,5
Purchase of real estate	++	0/-	--	1,5

Conclusion instruments

The following conclusions can be drawn based on the rating of the instruments:

- The ‘encouraging measures’ are in general effective and do not cost the municipality much in terms of money. These measures do need some manpower however.
- The ‘incentive measures’ are effective, but most of them need some manpower. Financially these measures don’t show a common picture. Some measures are costly, others need some budget or don’t cost the municipality anything.
- The ‘determining measures’ are all very effective, but either need a lot of manpower or cost some money, with the exception of the peer approvals.
- Most ‘controlling measures’ are also very effective, but need a lot of manpower or some finances.
- The regulatory measures are more effective than the stimulatory measures. In terms of efficiency the stimulatory measures have a higher score. The regulatory measures need either more manpower or more finances.



- Whereas the regulatory measures are ‘very effective’, they are not so efficient - they need a high use of manpower or finances. The stimulatory measures are ‘effective’ and efficient.

- The top 5 of measures, weighing the effectiveness higher than the efficiency are:
  1. B2B collaborations
  2. Peer approvals
  3. Sustainable tourist strategy / policy
  4. University collaboration and refurbishing facades
  5. Ingrowth entrée rents and annual financial support and regulations based on the UNESCO framework and managing day visitors

As the monoculturalization phenomenon differs per city, the measures needed to obtain a diverse retail landscape also differs per city. The measures shown give cities some inspiration and possibilities for their own use.

5. Conclusions



Source: Sweco. 2025

Concluding summary

This research provides a first **benchmark** on the role of tourism on the monoculturalization of local retail in European city centers. Tourist influx can lead to a homogenization of shops and services catering predominantly to tourists, resulting in adverse effects on local, artisanal, and iconic businesses. This shift can lead to a loss of cultural identity, diminished quality of life for residents, and harm to the local economy.

The growing concern in European city centers for the effects mentioned on local retail is not without foundation. The survey shows that a clear pattern in a decline of shop diversity in the last 5 to 10 years is seen throughout cities in Europe. This decline does not necessarily have to be linked to tourism, as even non or less touristic cities deal with decline in shop diversity. It emphasizes the fact that more **drivers** are at play (see p. 46) and that the role of tourism in influencing shop diversity is more nuanced.

Nevertheless, tourism can act as a catalyst amplifying the effects in some cities more than in others. Many cities who participated in the study see how a continuous flow of tourists has a strong impact on local retail. In some cases, this results in touristification or monoculturalization of their retail environment. **The extent and form of monoculturalization** (see p. 47) varies but is generally limited to a few streets within city centers. Certain shared aspects of monoculturalization are more prominent than others whereas differentiating factors also influence this.

Lastly, cities are facing serious challenges preventing monoculturalization and protecting local retail. Current EU legislation, especially the EU Services Directive, is focused on free-market system and limits the opportunities for cities to intervene. Cities are therefore implementing a wide variety of **measures** (see p. 48) within their capabilities to prevent or push back the effects of monoculturalization. Measures to address this phenomenon are critical, as the retail offering for locals will further diminish if the trend continues.



Picture: New façade of tourist shop in Venice
Source: City of Venice

Concluding summary

Retail diversity & the role of tourism

Retail diversity in Europe is under pressure. Over the past five to ten years on a wide scale European cities have witnessed a decline in shop diversity. This trend is detrimental to the local retail landscape, diminishing the access to a wide variety of goods and services available to consumers, influencing livability and eroding the unique cultural identity of each city. Although the access varies per city, measuring the retail diversity is common practice among European cities for which they use similar definitions. In fostering a diverse retail landscape, most cities consider the role of local retailers to be extremely important.

As shown on the right, several drivers (non-exhaustive) have been indicated to influence retail diversity. Among high rents, consumer behaviour, and online platforms, tourism is named as one of the most influential drivers. Commercial chain stores, diminishing supply of local shops and gentrification are also indicated as influential drivers. To a lesser degree, increased competition, regulations & policies and local investments are mentioned. As the retail environment is very volatile and interconnected, the drivers cannot be isolated. Drivers rather form an interconnected web in which they influence and amplify each other. Subsequently, tourism cannot be seen as a standalone cause for loss in shop diversity and understanding the other drivers allows it to be placed in a broader context.

Tourism however still is a threat for retail diversity. The large of influx of tourists as entering the retail environment of a city center as potential consumers inevitably has an impact on the local retail landscape and its diversity. The (very) touristic cities in Europe all have one or more areas characterized by shops and services primarily catering to tourists. Tourism can therefore be seen as an undermining factor for shop diversity.

Tourism

- Large amount of visitors
- New entrepreneurs
- Locals avoid the city center
- Increased number of day trippers

Political drivers & trends

- Free-market system
- EU, national, regional and local regulations and politics
- Local investment by local governments

Economical drivers & trends

- The dominance of commercial chain stores
- Higher rents which only chains can afford
- Increased competition among retailers

Technological trends

- Online retail
- Payment- en security systems and other new technological developments

Social & cultural trends

- Changing consumer preferences and marketing methods.
- Lifestyle focus.
- The demand for experiences
- Gentrification
- Diminishing supply of local shops

Drivers influencing retail diversity

*** High rents
*** Consumer behaviour
*** Online platforms
*** Tourism
** Commercial chain stores
** Diminishing supply local shops
** Gentrification
- Increased competition
- Regulations / policies
- Local investments

Concluding summary

Monoculturalization in European cities

Whereas the (very) touristic cities in Europe all have one or more areas characterized by shops and services primarily catering to tourists, there is great variation in the degree of monoculturalization; between cities, but also within cities. Being a relative concept, the context of each city shapes the phenomenon differently. Five determiners have been identified which give insight in how monoculturalization may take a different form or be perceived differently from city to city: 1) geographical, 2) definition, 3) cultural, 4) quality, 5) seasonality.

Nevertheless, general patterns across the European cities in the study emerge (as seen to the right). In an attempt to scale the extent of monoculturalization, participants with a high to extreme degree of monoculturalization include Barcelona, Bruges, Dubrovnik, Firenze, Prague, Sibenik, Split and Venice. Generally, monoculturalization is mostly limited to a few streets in the city center. Still, in particular streets or areas, the dominance of tourist-oriented shops can rise to 70% of all retail establishments. In line with that almost all cities indicate that the local tourist economy changes the retail offering, they feel that the continuity of local retailers is under threat.

The effect of monoculturalization shows how local retailers either are displaced due to high rents, changing clientele, reduced demand of locals, or need to adjust their offering to the touristic demand. In return, the retail offering generally becomes more oriented on tourists which often goes hand in hand with lower quality retail and higher prices. As a result, rents may continue to rise, but also locals start to avoid (certain parts) of the city center as the offering no longer meets their needs. Cities sometimes see how these interconnected developments power a vicious cycle, in which the effects of monoculturalization fosters the conditions to worsen the effects to problematic proportions. Solutions become a top priority as measures are put in place by cities to intervene.

Shared aspects EU cities on monoculturalization

***	Loss of shop diversity.
**	A substantial part of the retail is tourist oriented.
**	Inadequate offerings for locals.
**	Copy cat behaviour.
**	Locals avoid the city center.
**	Catering only to visitors.
**	Touristic reputation particular streets among locals.
**	The economic functioning is under pressure.
**	Retailers use foreign languages.
**	Agressive street marketing.

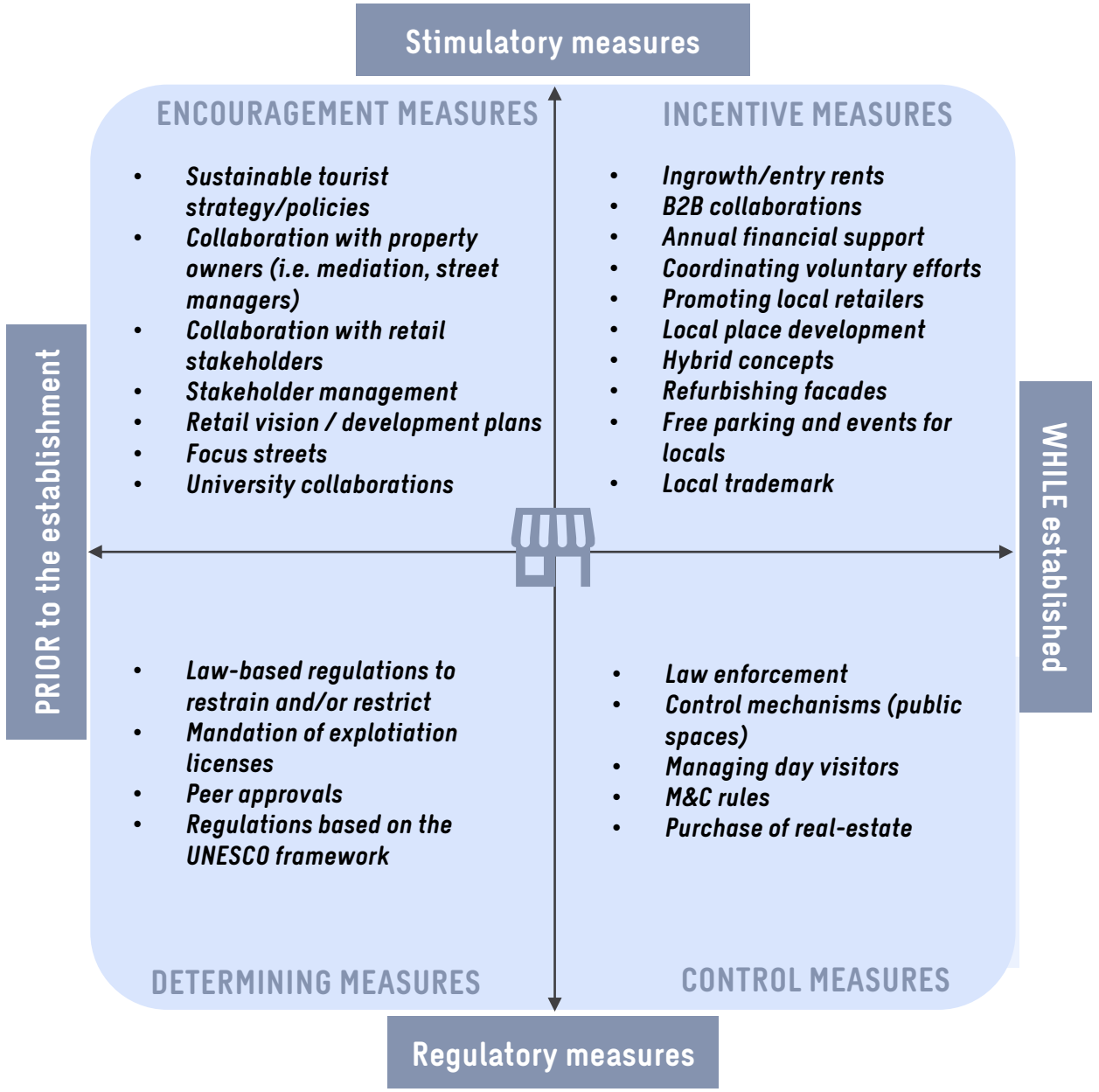
Concluding summary

Challenges and measures

In the process of implementing measures to intervene with monoculturalization, cities run into common challenges that prevent successful mitigation of the impact of tourism on local retail. Apart of the ever-rising number of tourists, these include the conflict of interests in the city, limited resources, transitional rights, online shopping, quality assessment, and the end of the line for local businesses. However, the most mentioned challenge is presented by the cities feel that the biggest challenge is presented by current EU legislation, specifically the EU Service Directive. It subjects local governments to the vagaries of the free-market system without adequate instruments to intervene, therefore misaligning with the municipality's priorities to govern the local retail landscape. In essence, local governments have very little room to act effectively.

Within their capabilities a wide variety of measures is therefore applied, with varying degrees of success. Displayed on the right, the measures used depend heavily on the context of the city and vary strongly in frequency, form and effectiveness. The quadrant model provides structure and insights on commonalities within measures along two delimitators, 1) stimulatory vs. regulatory measures, and 2) 'prior to the shop's establishment' vs. 'while the shop is established'. With these delimitators measures are categorized in encouragement, incentive, determining and control measures.

In general, the regulatory measures are more effective than stimulatory measures. However, as they also require more manpower or finances to enforce them, making stimulatory measures more efficient in terms of resources. the stimulatory measures, making them less efficient. A selection of effective (less efficient) measures include B2B collaborations, peer approvals, sustainable tourist strategies (including managing day visitors), university collaboration and refurbishing facades, ingrowth entrée rents, annual financial support and regulations based on the UNESCO framework.



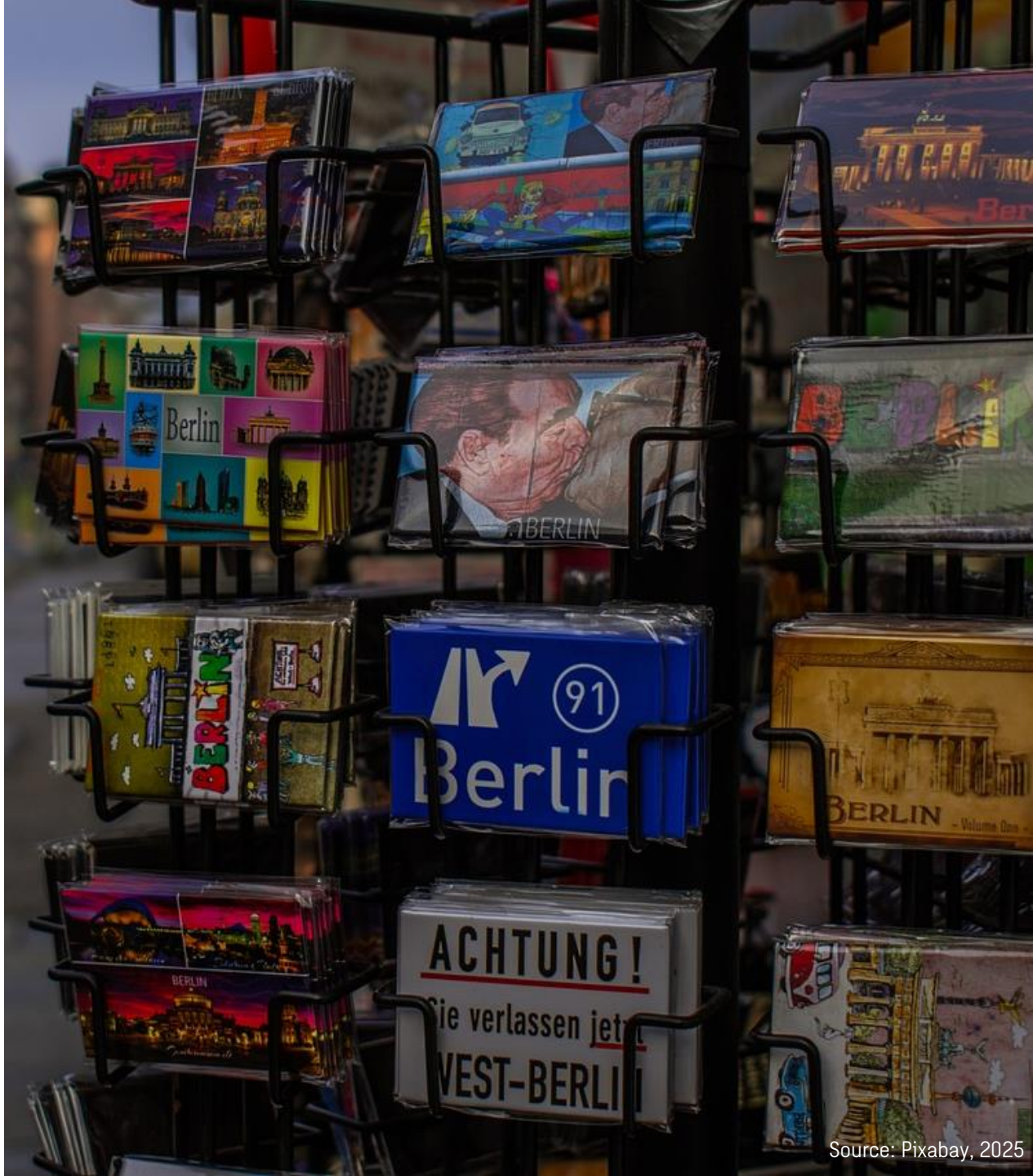
Recommendations

Political agenda setting of the issues at an EU level

- Addressing the issue as a collective. Various European cities have expressed their concerns about the phenomenon. This report can be used to point out the extent of the problem, asking for new or amended EU legislation.
- Support for local governments to govern the local retail landscape according to the municipality's priorities in reaction to patterns of monoculturalization. For instance, the capital of local retail and other initiatives for funding and support from the EU.
- Embed the issue of monoculturalization within the larger problems with tourism. A sustainable tourism development agenda, helps the industry become aware of the effect of tourism on local retail.
- Search for the connection with local retail initiatives.

Knowledge exchange

- Sharing of arguments behind measures (e.g. for the EU Services Directive / UNESCO strong justification is needed to restrict certain retail).
- Defining a common language to address the problem. At the moment there is no commonality in the identification of 'tourist shops' or 'monoculturalization'. Every city looks at the issues differently as it remains a relative concept. Objectivity and indicators are needed in the knowledge exchange and common language. The more layered, objective concept of touristification allows for a better discussion than the highly relative concept of monoculturalization.
- As a possible indicator – giving a stronger foundation/common language: the Shop Diversity Index (taking into account multiple factors to weigh the pressure of tourist shops upon local retail). Another possible indicator is the tourist explicit/implicit shops (establishing a density index based on GIS data).

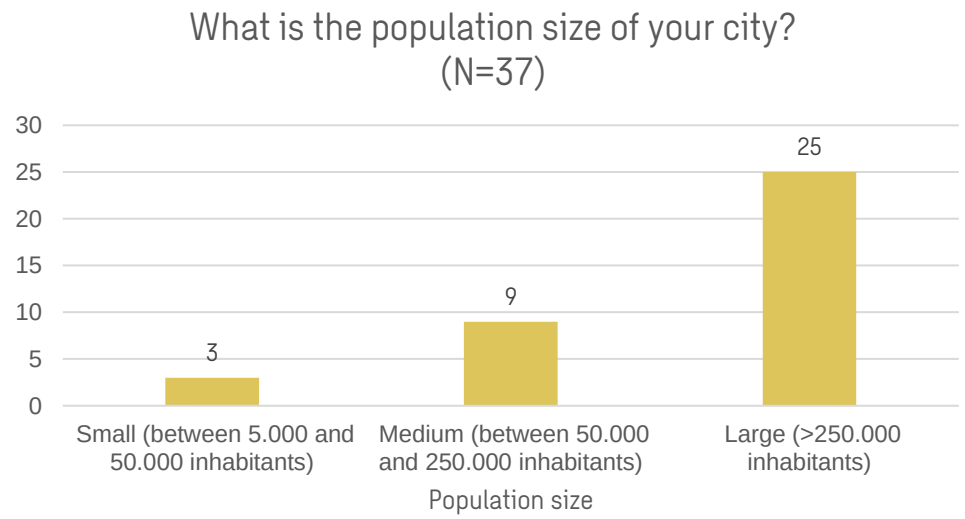


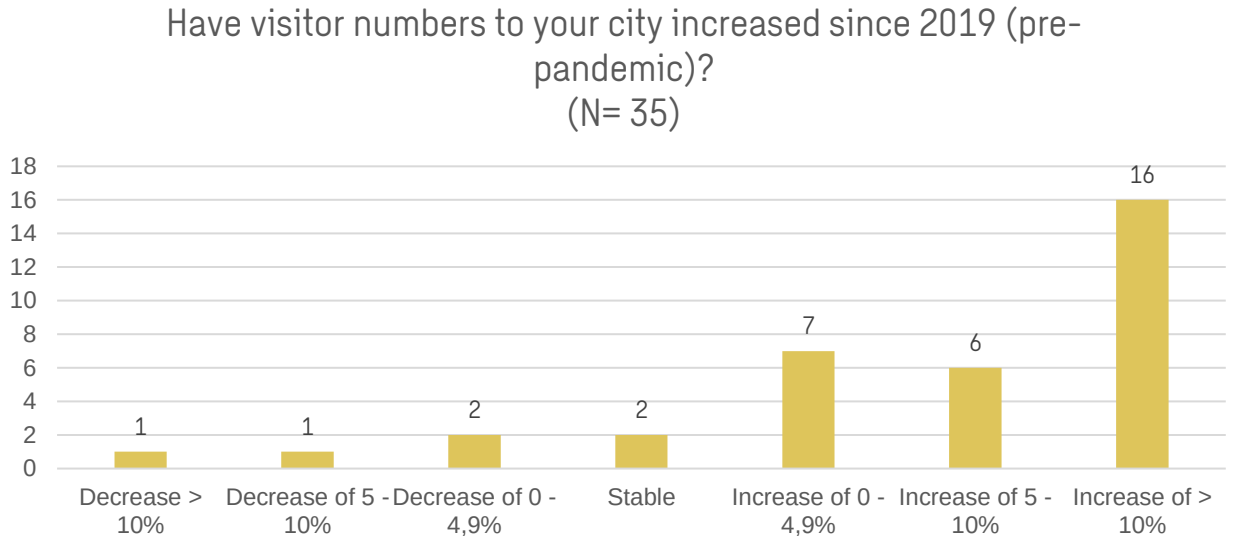
Source: Pixabay, 2025

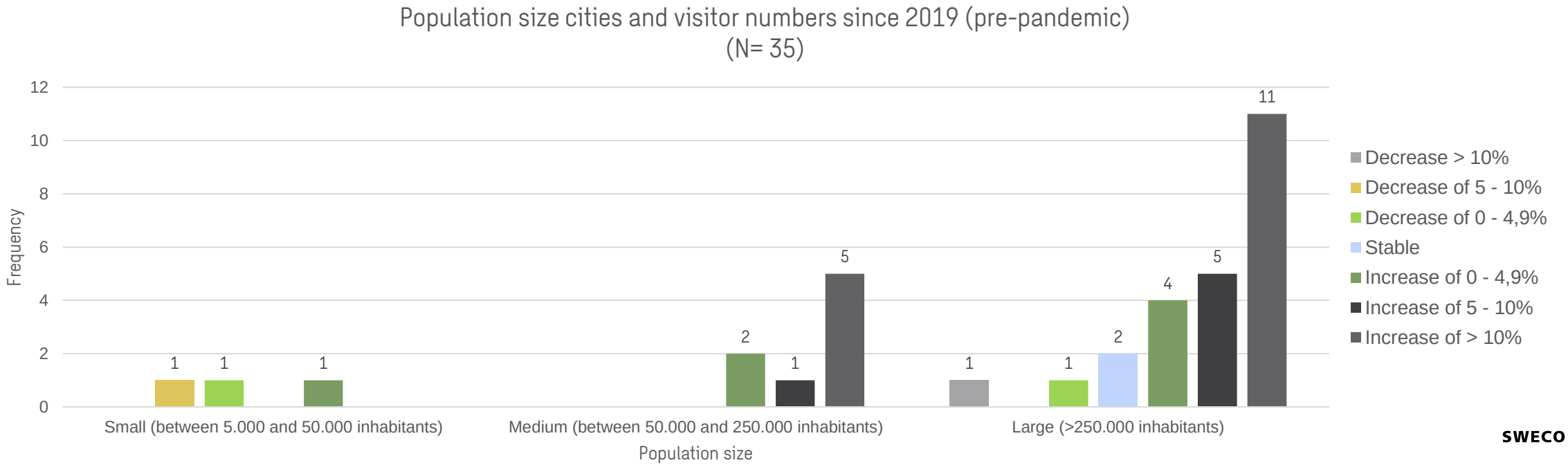
Appendix

A. Questionnaire sample demographics & results
B. Infographics of case study cities

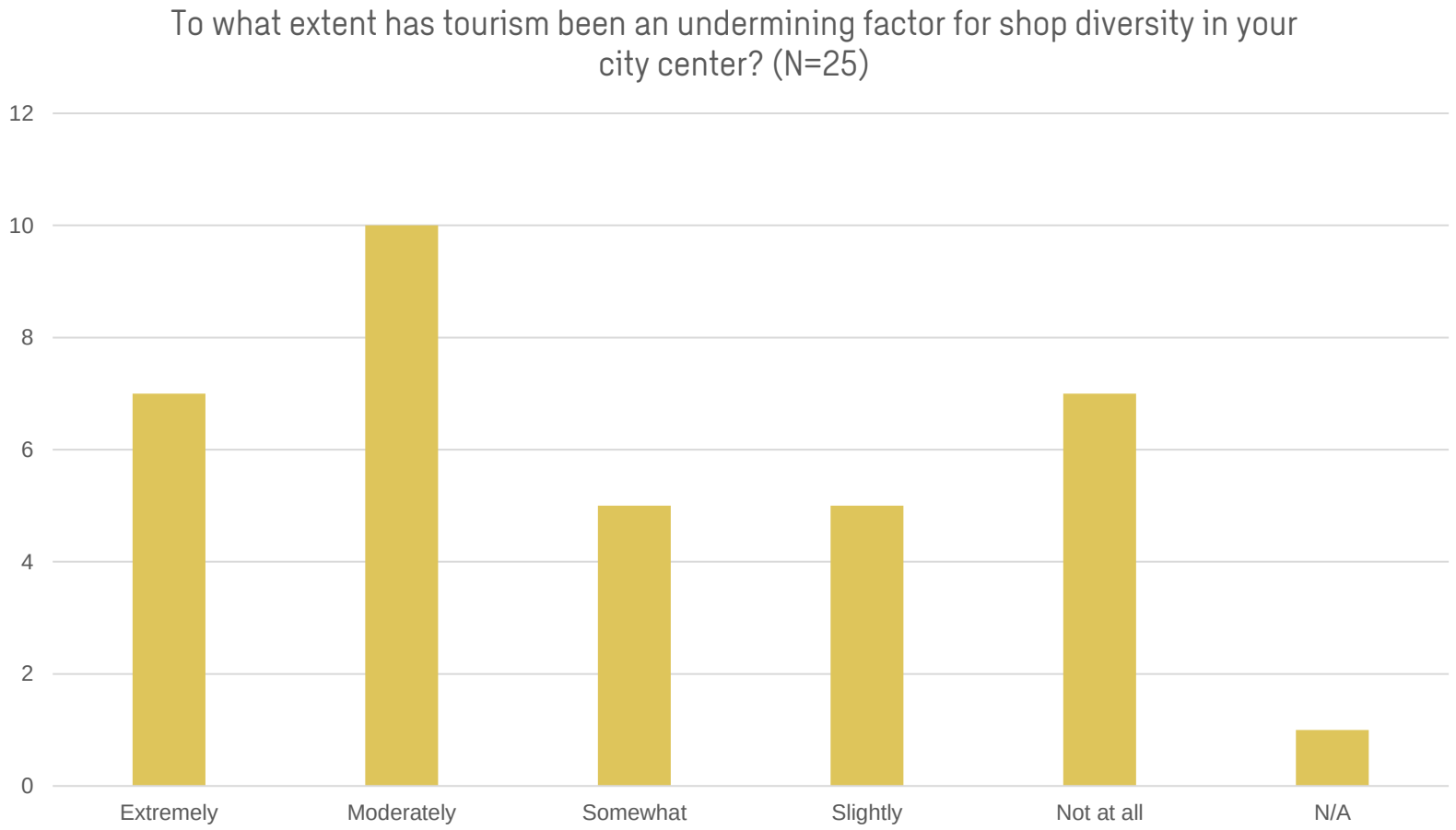
APPENDIX A QUESTIONNAIRE SAMPLE DEMOGRAPHICS





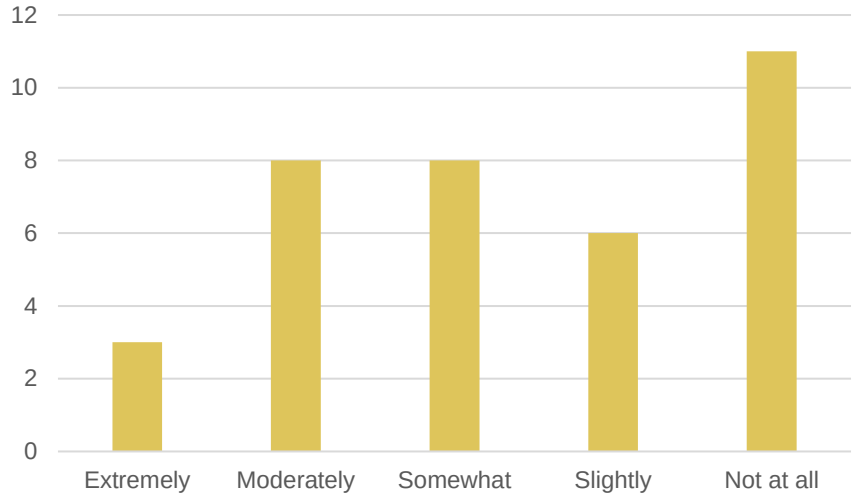


SWECO

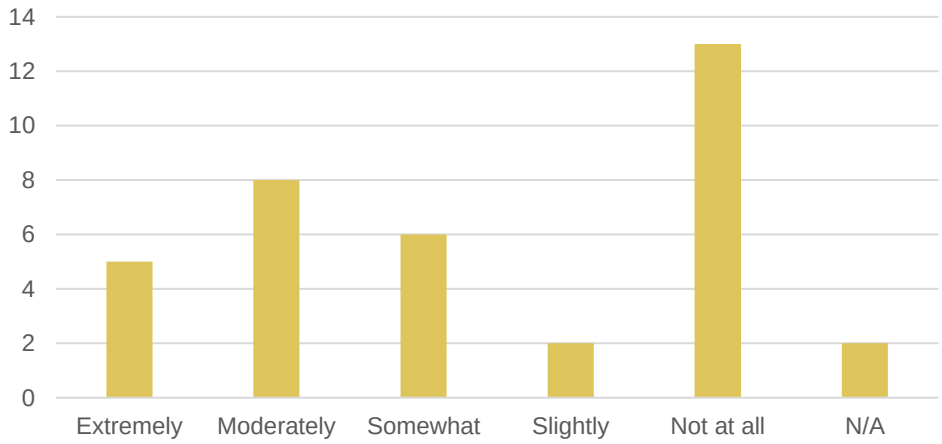

To what extent has tourism been an undermining factor for shop diversity in your city center? (N=25)
12
10
8
6
4
2
0
Extremely
Moderately
Somewhat
Slightly
Not at all
N/A

To what extent does monoculturalization take the following form(s) in your city center as a whole?

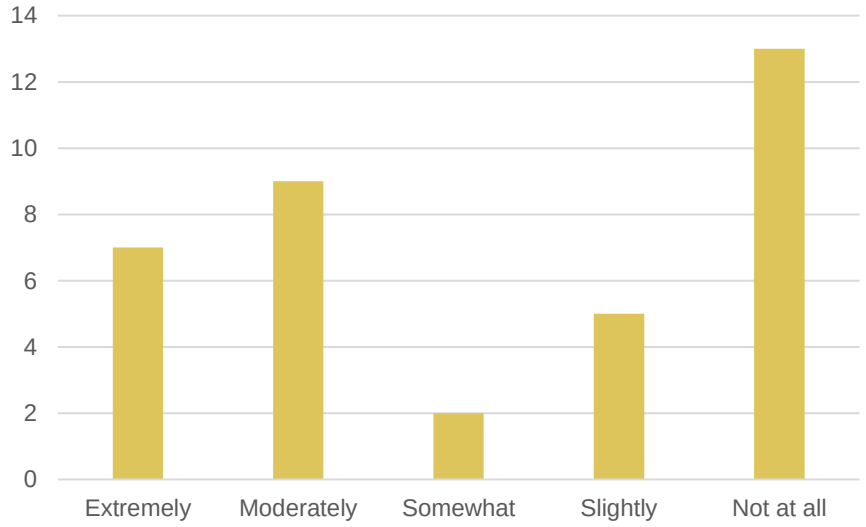
Tourist shops dominate the retail landscape (N=36)



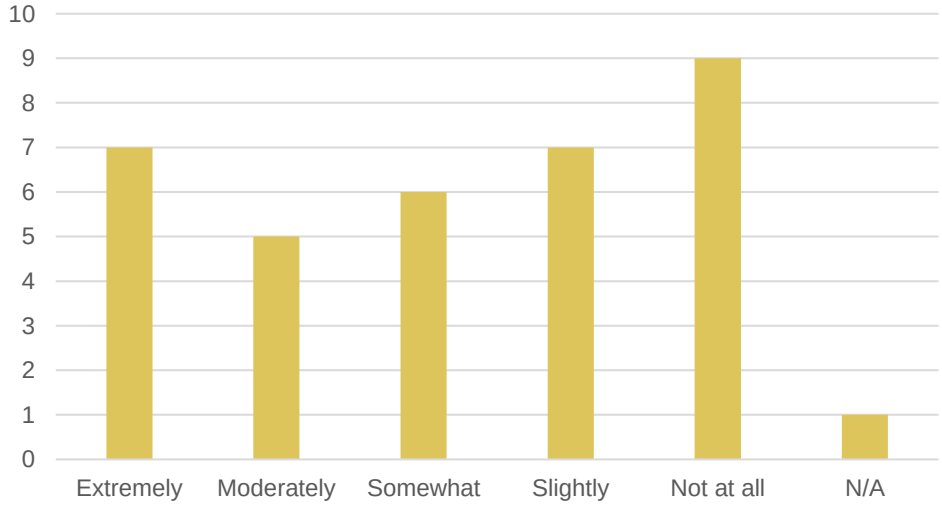
Economic functioning of the city center is under pressure due to tourism (N=36)



Locals avoid the city center due to tourism (N=36)



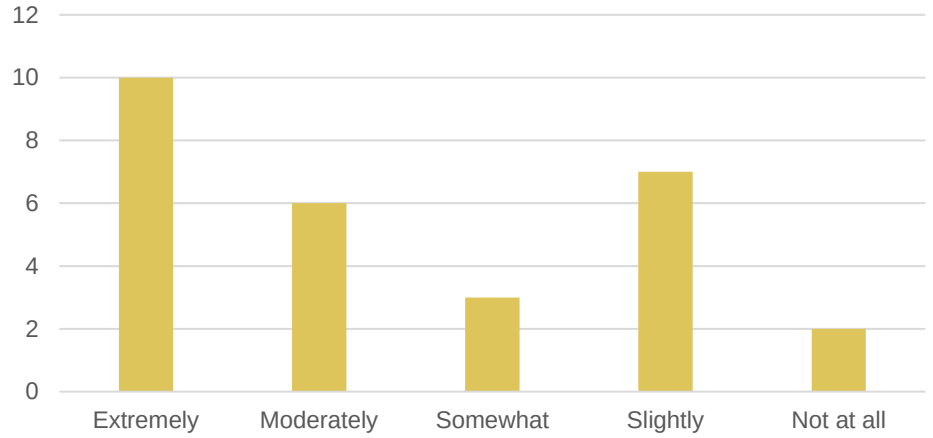
Inadequate offering for locals (N=35)



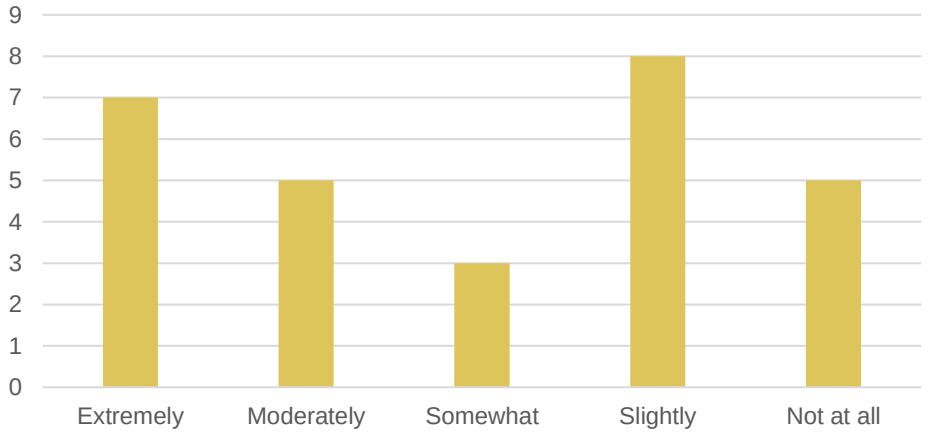
SWECO

To what extent does monoculturalization take the following form(s) in particular streets in the city center in which tourist shops dominate?

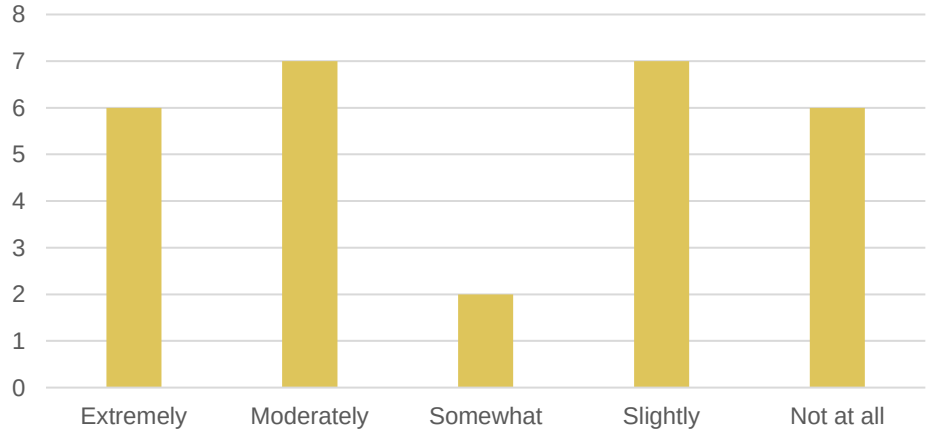
Tourist shops dominate the retail landscape (N=28)



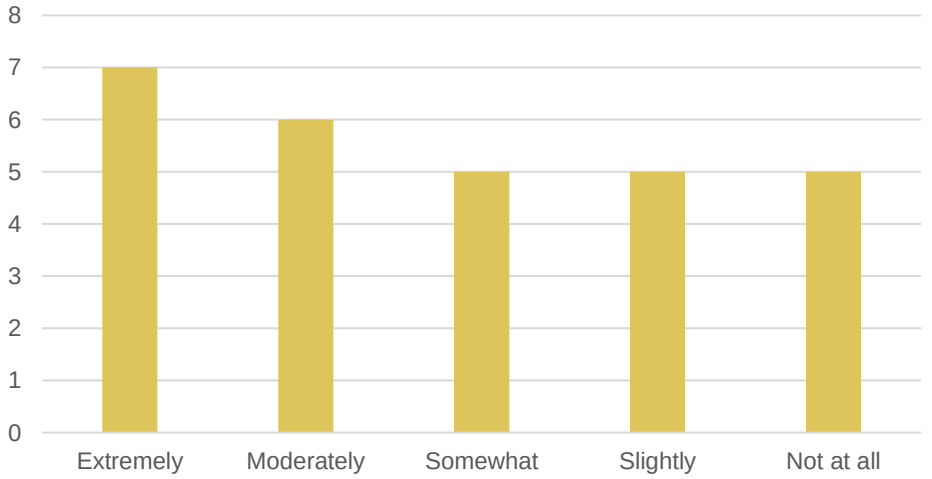
Touristic reputation of these streets among locals (N=28)



Businesses cater their products and services to visitors only (N=28)



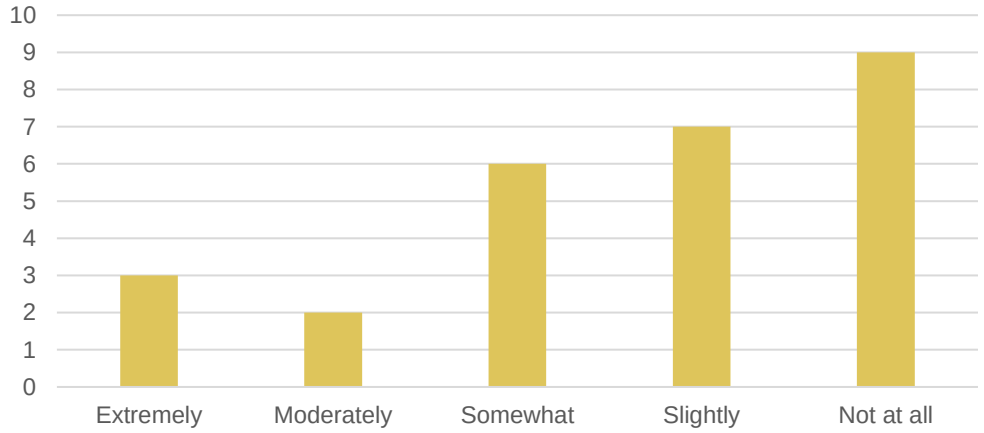
Inadequate offering for locals (N=28)



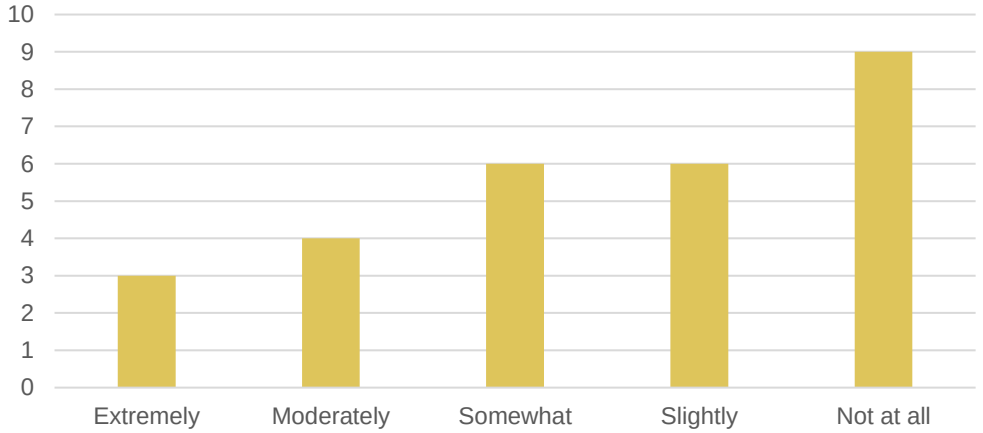
SWECO

To what extent does monoculturalization take the following form(s) in particular streets in the city center in which tourist shops dominate?

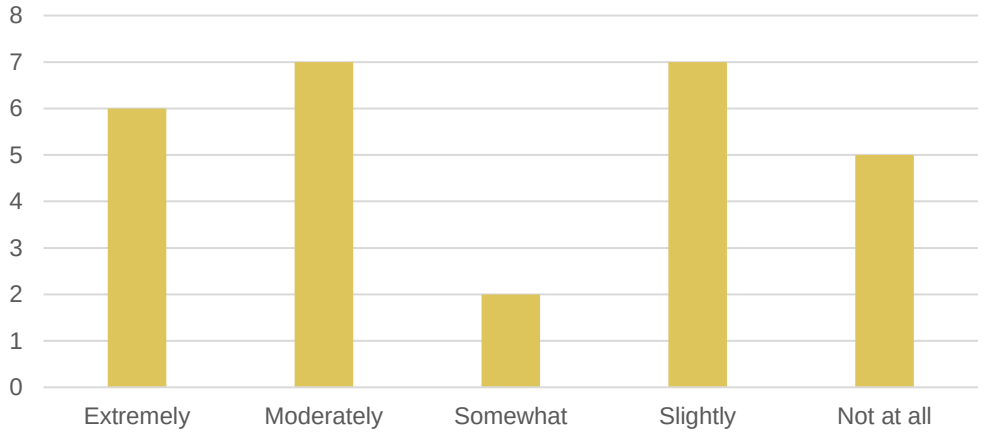
Businesses do not present themselves in your local language(s) (N=27)



Aggressive street marketing (e.g. proppers, excessive signage, loud music, etc) (N=28)



Businesses copy each others merchandise and services (copy cat behaviour) (N=27)



SWECO

Infographic monoculturalization of local retail and tourism, city of Amsterdam

931.748 inhabitants and consists of 219 km², with 8,04 km² city center

SWECO

Number of overnight stays

22,9 million in 2024

Number of same-day visitors

25,6 million in 2024

Total number of visitors

35,3 million in 2024
(9,7 million overnight visitors)

Increase or decrease of visitors?

5-10% increase of visitor numbers since 2019 (pre-pandemic)

Monoculturalization of local retail in Amsterdam

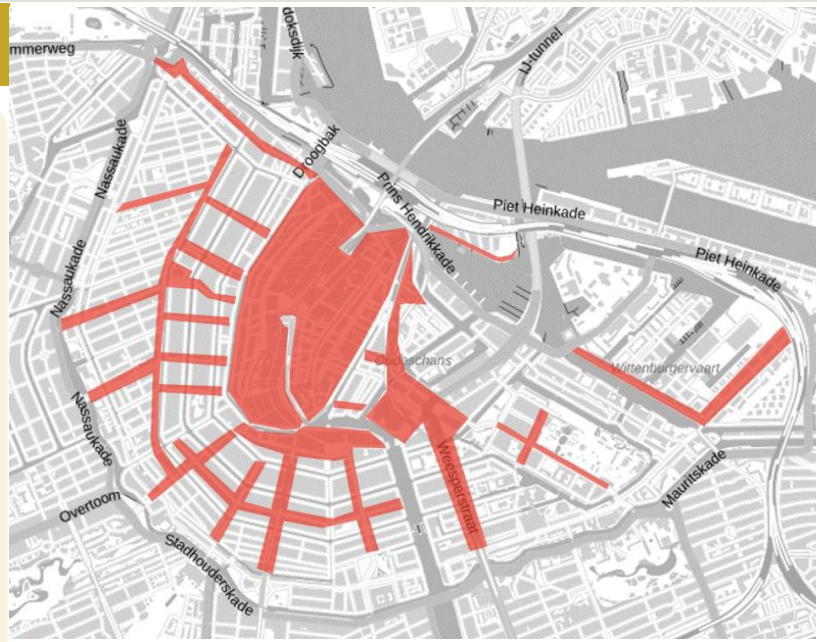
- Amsterdam is worldwide renown as a top tourist destination.
- The city struggles with the transformation of its shopping streets into areas dominated by tourist-centric shops, resulting in less space for authentic local businesses.
- High property rents are unaffordable for local entrepreneurs.
- Supermarkets push specialty stores like grocery shops away, there are lots of pop-up retailers, adapting to market trends (especially in the food and beverage sector).
- Some locals tend to avoid (parts of) the city center due to the high number of people and uninteresting offering of retail.

Main drivers impacting shop diversity

- **Tourism**
- **Higher property rents**
- **Supermarkets taking over specialized shops**
- **Declining visits to physical retail in general (trends of online shopping and e-commerce)**
- **Locals are avoiding the inner city**
- **Tourists are spending more money in shops**
- **Retail is under heavy pressure of food, drink and hospitality concepts**

Measures taken by Amsterdam

- **Regulations**: with the *'Bestemmingsplan Winkeldiversiteit'* & *'Aanpak Binnenstad'* the new establishment of tourist shops is restrained.
- **Authorisation**: mandating a exploitation license raises a higher barrier for new shops to open
- **Focus streets**: identifying and monitoring key streets to better manage retail diversity and enforce regulations.
- **Collaborations with property owners**: Working with area managers to promote and mediate for shop diversity and maintain oversight of new businesses entering the market.
- **Purchase of property:** buying significant real estate prominent in defining the local city center (e.g., Zeedijk)
- **'Ingrowth /entry rents':** subsidized rents for new local entrepreneurs for a fair chance to start
- **B2B collaboration**: between local flagship players (Heineken) to preserve local cafes
- **Explored possibilities within UNESCO framework**



Zones in which measures for tourist-oriented shops are in effect





Challenges

- **Limited room for laws & regulations:** especially the EU Services Directive prevents the exclusion of undesired shops.
- **Transitional rights:** (overgangsrecht) if a shop changes owner, the new shop owner is entitled to continue the existing business (regardless of branch or quality of the shop).
- **Negative sentiment:** the perception on tourism among locals is increasingly negative
- **Lack of (sufficient) enforcement**: a cat-and-mouse game is instigated with hospitality and shop owners who test the limits of the regulations.
- **Conflict of interests:** Disconnect between the (goals of) municipality and property owners
- **Volatility of retail**: The rapid turnover of retail businesses poses a challenge for maintaining a diverse shopping environment.
- **Fragmented Ownership**: The involvement of multiple property owners complicates efforts to maintain diversity in retail offerings.

Best practices in regard to measures

- **Exploitation licenses:** through a pilot in certain areas a permit system is introduced to vet businesses based on their economic validity. It raises a barrier for new shops to open because of extra screening on 'bad' shops.
- **Regulatory Measures**: introduction of regulations that limit the number of chain stores in certain areas to preserve local character and diversity.
- **Increasing Control Over the Market**: the municipality is increasingly taking steps to control the market by acquiring its own real estate.
- **Coordinated voluntary efforts:** initiated by the city, local shop owners at street level help to create a vital retail environment

Infographic monoculturalization of local retail and tourism, city of Barcelona

1.702.547 inhabitants and consists of 100 km², with 4,37 km² city center

SWECO

Number of overnight stays

37,4 million in 2024

Number of same-day visitors

18.25 million in 2024

Total number of visitors

33.75 million in 2024
(15,5 million overnight guests)

Increase or decrease of visitors?

5-10% increase of visitor numbers since 2019 (pre-pandemic)

Monoculturalization of local retail in Barcelona

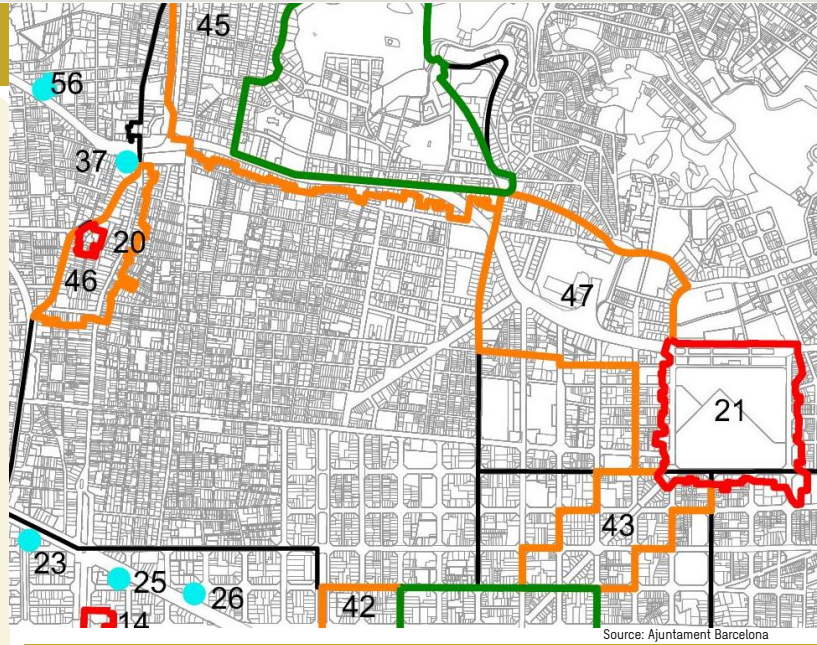
- Barcelona is one of the main tourist destinations in Europe, and as such stands for 14% of the city's GDP. The city does not actively stimulate tourism but rather limit tourist flows.
- A touristic monoculture in retail is a huge problem in the city center, with a high concentration of tourist-oriented shops: nails, phone covers, cannabis, souvenirs & vendors.
- Tourist shops are defined in the municipalities use plan, which is accepted policy. The city does not help enterprises that focus on tourism and rather fosters traditional retail.
- Dark kitchens (restaurants that have an online reservation system but closed fronts) are a problem in streets outside of the main shopping streets of the city (see measures).
- For the year 2026, Barcelona is proposed to be the first European Capital of Local Retail. This initiative is aimed at fostering more awareness on the protection of local retail.

Main drivers impacting shop diversity

- **Tourism (as main driver in the city center)**
- **Globalization of shops internationally**
- **High rents**
- **Change of needs**
- **Online retail shopping**

Measures taken by Barcelona

- **Urban planning tools:** The City Council balances the economic and social fabric and perserves neighborhood commerce and local life, to guarantee that residents have access to daily services, especially in high touristic streets.
- **Action plan:** a multi-sectoral approach in Barcelona's eight high flows areas aimed at, amongst others, retail: diversifying the economic landscape, strengthen local retail & limiting tourist shops.
- **Banning shops:** using the land-use plan of the city, tourist shops are banned in certain areas. As a result, when a shop leaves, only shops with other goods get a permit. Inspectors manage the legislation.
- **Limiting shops:** cannabis shops are limited by legal drug policies and health regulations.
- **Financial support:** the city provides a budget for high flow areas to support traditional shops via training, the organisation of festivals and events.
- **Redirections:** in case of roadworks (e.g. metro expansion), less accessible areas are re-connected to ensure continued business for retailers.
- **Store aesthetics:** Barcelona has strong restrictions in appearances and objects at the storefront (e.g. neon lights).
- **Regulating dark kitchens:** current regulation reduces the negative impact of this format of covert catering on the urban fabric, obliging them to move to industrial parks.



Source: Ajuntament Barcelona

Restricted-zones on openings of tourist-oriented shops in Barcelona



Challenges

- **Increasing tourist numbers:** although the city is not focusing on stimulating tourism (and rather is stimulating other sectors like science), the tourists are still coming in large numbers. The demand of tourism will not stop, it is expected to continue to grow.
- **Neighbor municipalities**: the policies to limit tourism include the opposition in the enlargement of the airport, limiting the amount of cruise ships, banning Airbnbs and forbidding the construction of new hotels. As a result, neighboring municipalities see an increase in demand for new hotel permits.
- **Finding balance**: as tourism is a large contributor to the economy of the city, it is challenging to find the right balance in posing restrictions within an industry that is profitable industry.
- **Negative sentiment**: as the public debate is heating in the media, local inhabitants are more and more opposing tourism which has led to mass protests against tourism.

Best practices in regard to measures

- **Action plan:** As one of the high flow areas, the Sagrada Familia area has an action plan which focusses on organizing community activities to increase social cohesion and community life. This multi-sectoral approach is based on the three functions: mobility, day-to-day life and retail. In terms of mobility some urban elements are removed or other measures to improve the flow of traffic, for instance changing bus or pedestrians' routes. Regarding retail, measures that diversify the economic landscape, strengthen local businesses and removing/limiting touristic shops are implemented. The department of tourism collaborates with the Retail Department and Chamber of Commence on the retail aspect.

Infographic monoculturalization of local retail and tourism, city of Bruges

119.765 inhabitants and consists of 138,4 km², with 3 km² city center

SWECO

Number of overnight stays

1.098.609
in 2024

Number of same-day visitors

6.878.632
in 2024

Total number of visitors

7.977.241
in 2024

Increase or decrease of visitors?

Stable number of visitor numbers since 2019 (pre-pandemic)

Monoculturalization of local retail in Bruges

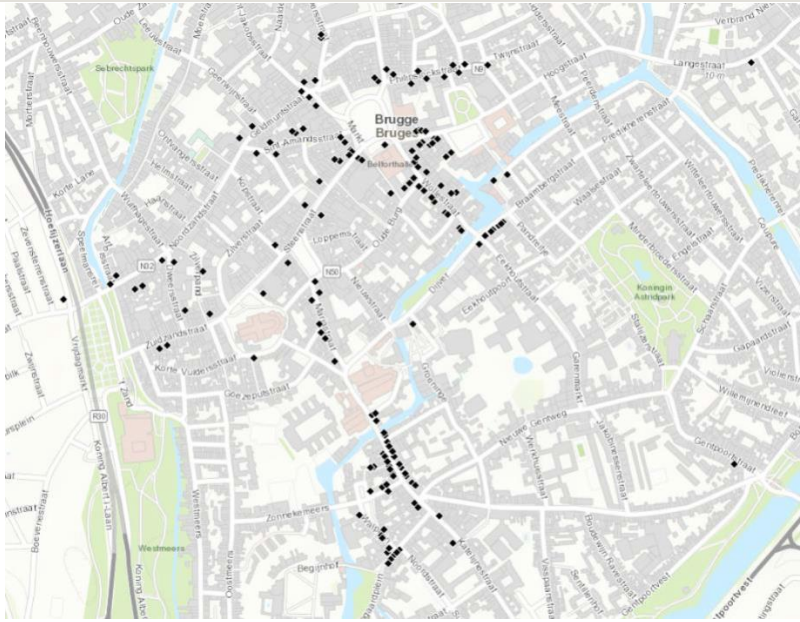
- Bruges is a touristic city with a UNESCO historic city center, facing significant challenges due to the increasing number of tourist shops selling low-quality souvenirs, chocolate, and beer.
- Retailers are responding to the demands of tourists and adapting their offering accordingly.
- This has led to a decline in shop diversity. The presence of fast-food outlets and take-away shops has further exacerbated the issue, as they cater primarily to tourists rather than locals. These are considered retail in Bruges.
- Bruges tries to emphasize and strengthen the diversity, attracting and guiding the right shops, rather than restricting and enforcing strong regulations.

Main drivers impacting shop diversity

- **Tourism**
- **New entrepreneurs enter the market due to the high of number of visitors in Bruges**
- **Changing consumer behavior**
- **Hotel-stop has increased the number of day trippers (who sleep in Brussels, Antwerp or Ghent) who want easy consumptions**

Measures taken by Bruges

- **City center policy**: A comprehensive strategy to enhance the city center's appeal and functionality.
- **Promoting local shops**: Marketing initiatives and actions to promote local entrepreneurs and quality products, with labels such as 'Handmade in Bruges.'
- **Subsidizing**: Grants focused on sustainability, ecology, accessibility, and long-term viability, prioritizing businesses that add value to the shopping area. Additional funding for neighborhood shops and vacant spaces.
- **Zoning shops and hospitality:** prohibiting hospitality from other, undesirable areas, restricting them to squares only..
- **Point of contact**: Centre managers are located in the shopping street to ensure accessibility, serving as liaison between the municipality and entrepreneurs. Highlight owners' responsibilities.
- **Mediation platform**: Connecting property owners with individuals seeking vacant buildings (formerly known Space Tinder).
- **Pop-Up displays**: Encouraging entrepreneurs to test their business in specific streets through temporary showcases.



Source: Policyvision Kernwinkelgebied 2022 Bruges

Map of tourist shops in Bruges





Challenges

- **Freedom of trade:** it is not possible to prohibit certain kinds of undesirable shops
- **Limited resources**: There are insufficient means available for promotion and marketing.
- **Authentic creators in tourist areas**: Some local entrepreneurs feel out of place.
- **Policy vision:** The current policy is not legally enforceable. If it were to be formalized, it would lead to continually lagging behind of retail developments.
- **Fast food**: (take-away) is classified as retail since it doesn't require seating, allowing it to establish anywhere, even in shopping streets where dining establishments are restricted.
- **Legislation delays**: The legislative process is slow. A case-by-case approach is preferred.
- **Quality assessment**: It is difficult to operationalize and evaluate quality of shops.
- **Impact of hospitality restrictions**: large chains dominate the limited spaces for hospitality due to high demand and therefore rents are unaffordable for local retailers.
- **Pedestrian-friendly streets**: There is a preference for car- and bicycle-free main shopping streets, but entrepreneurs are hesitant to support this.

Best practices in regard to measures

- **Promoting local shops:** Campaigns encouraging residents to shop locally have been well-received, helping to strengthen community ties and support local businesses.
- **Expensing day trippers:** Bruges tries to make day trips to the city less attractive by making them more expensive. Visitors who spend only 2-3 hours want easy consumptions, which is counter effective in creating a high-quality offering. This measure should however be seen within a larger context of tourism policy and profiling.

Infographic monoculturalization of local retail and tourism, city of Dubrovnik

40.000 inhabitants with only 1.200 in the citycenter. Consists of 0,21 km², with 21,35 km² city center

SWECO

Number of overnight stays

4.269.065
in 2024

Number of same-day visitors

2.037.313
in 2023

Total number of visitors

6.306.378
in 2023

Increase or decrease of visitors?

0-4,9% decrease of visitor numbers since 2019 (pre-pandemic)

Monoculturalization of local retail in Dubrovnik

- The Old Town of Dubrovnik is historical city-center with UNESCO heritage status and a renown international tourism destination.
- 90% of the shops in the Old Town is tourist-oriented, there are only two supermarkets left which also serve tourists. Due to high demand, these supermarkets drive up their prices.
- Locals shop outside the center, new areas outside the Old Town have sprouted up to meet this local demand.
- Barely any franchises or multi-national chain stores exist, as shops and F&B establishments are owned and run by locals.
- About 50% of properties in the center is owned by the municipality and local NGO: this consists for 5% in shops.
- In the low season (winter) tourist shops are mostly closed.
- Visitor numbers are getting better dispersed throughout the year, with less peaks and more spreading in time and space.
- Lots of properties in the center are rented out to tourists.
- Locals generally supportive of tourism with satisfaction of the efforts of the government to tackle prevalent issues.

Main drivers impacting shop diversity

- **Tourism (and the high profitability of tourist oriented shops)**

Measures taken by Dubrovnik

- **Repopulation of Old Town:** as part of creating a Living City, properties are purchased to rent out to local residents.
- **Creating local demand:** by repopulating the inner city, increasing demand for non-tourist shops is created.
- **Control mechanism:** outdoor public space is cultural heritage which allows the government to enforce (stricter) regulations.
- **Annual financial support:** financial help for traditional crafts and local shops.
- **Short term rentals:** needing approval of all neighbours in appartments buildings decreases the opportunity to rent out a lot of homes.
- **Managing day visitors:** implementing a system for booking time slots to manage tourist flow.
- **Marking authentic shops:** identifying and promoting genuine shops and crafts.
- **Cooperation with DURA:** this local NGO supports the sustainable, local development of the city.



Source: City Management Plan

Spread of tourist accommodations in Dubrovnik



Source: Jaime Saldarriaga

Challenges

- **Living City:** Long term goal of creating a city center where locals live (Old Town) in accordance with the city management plan.
- **Profit motives:** While efforts are made to educate and engage property owners, financial gain often takes precedence in their decisions to operate the retail landscape.
- **Filling Vacancies**: Despite municipal financial support, it's challenging to attract local entrepreneurs to occupy vacant shops (e.g. a butcher in the city center)
- **Focus on historic center**: There is insufficient time and funding to address areas beyond the historic center, which lacks heritage status and, consequently, has fewer opportunities.
- **Free market:** difficulties in regulating the number of stores, taxis or short-term rentals
- **Use of City-Owned Properties**: Many properties owned by the city are designated for offices museums and cultural institutions, limiting options for regulating tourist shops.
- **Tourist perspective:** Tourists evaluate the shop offering as partly insufficient due to the lack of multinational chain stores and brands

Best practices in regard to measures

- **First Right to Buy:** The ability to purchase properties with priority due to cultural heritage status, preventing large chains from buying or renting.
- **Control of public spaces:** The government can enforce regulations regarding outdoor areas, such as restaurant terraces, due to ownership of the public spaces and its cultural heritage status.
- **Better distribution of tourists**: Efforts to spread tourist visits not only during the high season but also in the low season.
- **NGO/Foundation cooperation:** An NGO or foundation acquires properties to ensure that no tourist shops are established, preserving local character.

Infographic monoculturalization of local retail and tourism, city of Firenze

36.2742 inhabitants and consists of 102,4 km², with 5 km² city center

SWECO

Number of overnight stays

10,3 million
in 2024

Number of same-day visitors

4,4 million
in 2024

Total number of visitors

14,7 million
in 2024

Increase or decrease of visitors?

0-5% increase of visitor numbers since 2019 (pre-pandemic)

Monoculturalization of local retail in Firenze

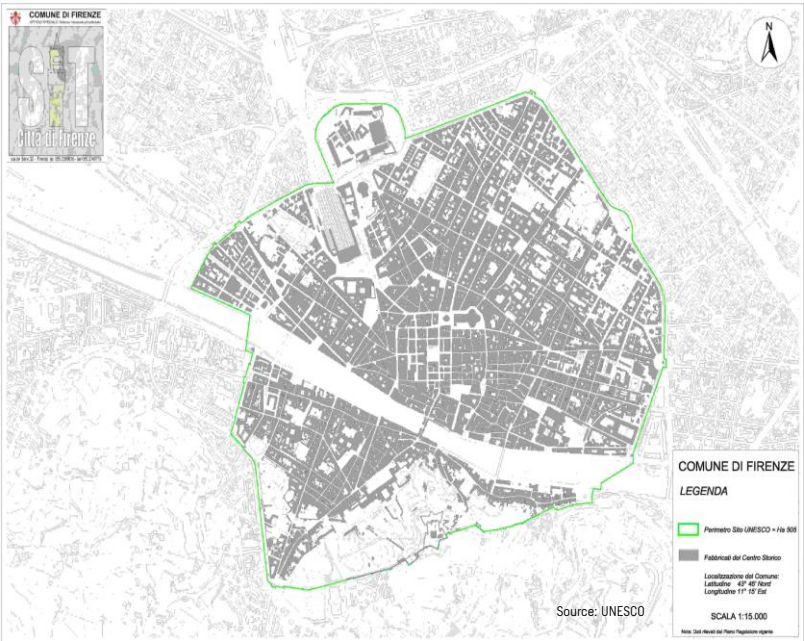
- Firenze has a historic city center, where 98% of the tourist go to. It deals with massive concentration of tourists in 5km2 and therefore a lot of businesses cater primarily to tourists.
- Students, employees and residents more and more avoid the city center, also because services for them (work opportunities, university, local retailers) are displaced outside of the city center.
- Rents in the city center are very high, and therefore local retailer A) have to adjust their offerings, tailoring to the touristic demand, or B) have to relocate outside of the city center, where rents are lower.
- These developments power a vicious circle creating a city-center catering more and more to tourists than residents.

Main drivers impacting shop diversity

- **Tourism as main driver of decline shop diversity**
- **Gentrification** (e.g. changes in social landscape)
- **High rents**
- **Changing consumer behavior**
- **Online platforms** (e.g. e-commerce, webshops)

Measures taken by Firenze

- **Regulating F&B retail:** using the UNESCO framework new F&B retail in the UNESCO area are blocked since 2016.
- **Collaboration with stakeholders**. The city maintains a close collaboration with stakeholders (public & private) by sharing information, with limited successes
- **Preserving historic streets and goods:** historic streets that have an unique & strong commercial identity can be preserved, such as Ponte Vecchio with jewellers.
- **Promoting local activities and retailers:** shops with more than 50 years of history in the city are promoted exclusively and are egible for taks benefits.
- **Repopulating**: there are strong actions imposed by the municipality to bring back local residents to the city center. One of the measures taken is the regulation of short term rentals which will be closely monitored.



Map of the UNESCO heritage site in Firenze



Challenges

- **Binary typology of retail**: There are no other classifications/categories possible on national level than the distinguishment between food and non-food. Therefore, there is no limitation on new non-food shops, while these can cater to tourists exclusively too.
- **Stand still**: Current regulations on food and beverage only restrict an increasing number of businesses, but does not enforce a decrease, as shops within the Unesco city center can move inside.
- **Quality assurance**: Inability to enforce a certain quality of product or service regarding the typologies mentioned above, and thus the inability to use quality as an instrument
- **Limited budgets.** Buying real estate is not an option due to high property prices.
- **Conflict of interest.** Collaboration with (retail) property owners and Airbnb is ineffective due to a conflict of interests and goals. Firenze sees these practices as economic activities.
- **Lack of instruments.** EU and national law lack instruments to regulate the local situation.

Best practices in regard to measures

- **UNESCO framework:** Firenze has used the UNESCO framework effectively in its effort to regulate F&B retail and specific retail in dedicated streets of the UNESCO area. On the one hand, new openings of F&B establishments are blocked to keep a better balance and protect the Outstanding Value of the historical city center. On the other hand, specific retail branches are protected in dedicated streets in the city center in favor of the heritage status, meaning other dedicated tourist shops cannot open here. Since 2024, these regulations have been applied to some streets outside of the UNESCO area, in order to protect the identity of these streets.

Infographic monoculturalization of local retail and tourism, city of Gaziantep

2.193.363 inhabitants and consists of 6.819 km², with 10,5 km² city center

SWECO

Number of overnight stays

1.071.005
in 2024

Number of same-day visitors

2.041.081
in 2024

Total number of visitors

3.112.086
in 2024

Increase or decrease of visitors?

More than 10% increase of visitor numbers since 2019 (pre-pandemic)

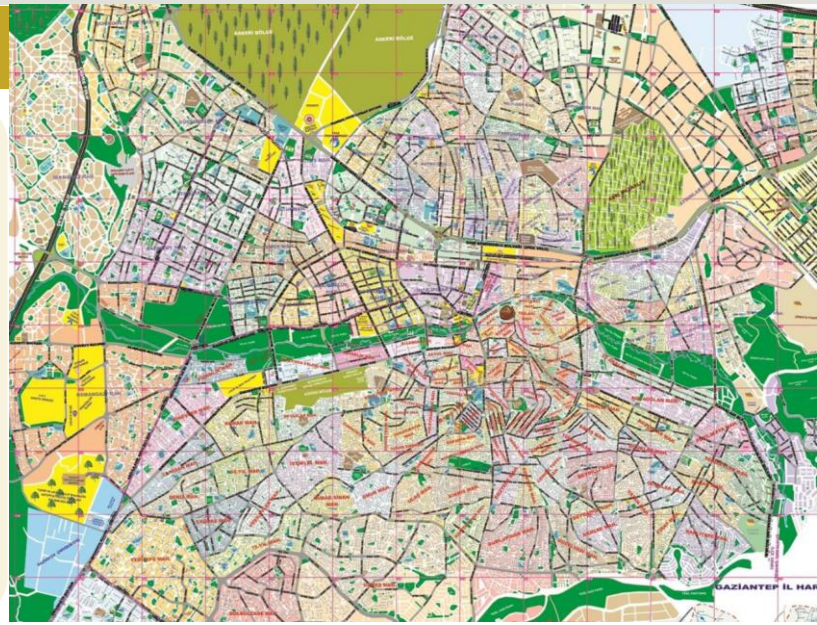
Monoculturalization of local retail in Gaziantep

- Gaziantep is a gastronomic city, with local shop offering catering to both tourists and locals. Yearly 900.000 visitors from Türkiye visit the city, and 200.000 visitors from abroad.
- The city has a lot historic bazaars and markets, where heritage products, textile, regional food (olives, cheese, pistache, baklava, peppers, pekmez) and handicrafts are sold.
- The markets are all around main touristic zones in the city, near the castle, the cultural road and Old town. Most shopping facilities, modern shopping malls, museums and inns (31) are also located here.
- Both locals and tourists shop in this area, and the range of products caters to the needs of both groups. While the market offers many traditional and local products, it does not primarily target local residents, It provides a balanced offering that appeals both to domestic and international visitors alike.
- Many restaurants remain open during Ramadan and praying hours, to cater to tourists.
- There is no monoculturalization in the city.
- Loss of shop diversity is only a minor issue in Gaziantep, as shop owners are responding quickly to the needs of locals and visitors like. According to the local chamber of commerce, 62% of shops are traditional (gastronomic, textiles, jewelry, handicrafts) the other 38% of shops are modern.

Disclaimer: Information in this infographic mostly refers to tourism in general, rather than the impact of touism on local shop diversity as, since the city doesn't see a loss in shop diversity through tourism.

Measures taken by Gaziantep

- **Masterplan 2030:** In collaboration with the university of Cappedoccia, Gaziantep is in the process of releasing a tourism masterplan to further develop the destination. For example: New commericial activities should not be allowed in historical places
  - Education about handicrafts
  - Better explanation about the (use of) local products and herbs
  - Zoning protection around heritage
- **Language classes:** the city offers free language classes to cizitens of the city, including local shop owners.
- **Application:** Gaziantep is developing a mobile application to help tourists navigate the city as a response to improve signage
- **Collaboration:** working together with other regions, 28 other cities and having 27 sister cities ensures the sharing of information and best practices.
- **Improving appearances:** through campaigns the municipality is willing to improve the appearance of the storefronts of shops.
- **Touristic council:** a group of tourism stakeholders is meeting bi-monthly to improve tourism affairs together with the city council.



Bron: Gaziantep Sehir Merkezi

Main drivers impacting shop diversity

- **E-commerce**
- **Rise of (modern) shopping malls**
- **Local shop owners do not have a successor, young entrepreneurs rather open modern shops (Starbucks)**

Map of city center of Gaziantep



Challenges

- **Language barriers**: Local shops owners do not speak the international languages of tourists, which sometimes lead to problems to selling their products to tourists.
- **Shop signing**: in the city signing on shops is sometimes unclear or missing, making it unclear to visitors which goods are sold, or which types of shops are where. Local words for products are still most often used in the shops.
- **Car traffic**: the city is dealing with significant car traffic, especially near the shopping areas as locals prefer to do their shopping by car.

Best practices in regard to measures

- **Protecting heritage:** Properties owned by the municipality that are part of Gaziantep's cultural heritage are protected under specific regulations concerning the use of the buildings. Shops, bazaars, and inns (including hotels and restaurants) are not permitted to alter the structure or appearance of the buildings, their designated functions, or their operating hours. These rules enable the municipality to safeguard and maintain the historical functions of key sites, such as the traditional bazaar, and to preserve the city's unique urban character. To support this preservation, the municipality offers incentives such as rent reductions and discounted water utility fees to shop owners renting these heritage buildings.
- **Foundation**: In addition to the municipality, certain heritage properties in the city are also owned by a charitable foundation affiliated with the Ministry of Culture and Tourism.
- **Bureau**: the Gaziantep Metropolitan municipality operates a dedicated unit called the Conservation Implementation and Control Bureau (Koruma Uygulama ve Denetim Büroları – KUDEB). This unit is responsible for overseeing the restoration, rehabilitation, and maintenance of heritage structures. KUDEB plays a key role in ensuring that all interventions on these historic buildings comply with conservation principles and contribute to the sustainable preservation of Gaziantep's cultural assets.

Infographic monoculturalization of local retail and tourism, city of Ghent

270.473 inhabitants and consists of 157,77 km², with 6 km² city center

SWECO

Number of overnight stays

1.6 million in 2023

Number of same-day visitors (touristic centre)

7.6 million in 2023

Total number of visitors

21.6 million in 2023

Increase or decrease of visitors?

More than 10% increase of visitor numbers since 2019 (pre-pandemic)

Monoculturalization of local retail in Ghent

- Ghent is a city tourism destination attracting many domestic day visitors as well as overnight international visitors. Having a strong retail profile within Belgium, shopping is a considerable main activity among tourists and visitors. It is the third largest retail city in Belgium.
- There has been a decline of shop diversity in the last years, however, was not only caused by the increase of tourists.
- Shops have adapted to product offerings to include tourists as their potential clients, especially around touristic hotspots. They have also changed their languages, marketing strategy and opening hours.
- Retailers do not divest locals as clients: touristification of shops is more in order rather than tourist-oriented shops.
- About half of the local population in the inhabitants' survey agrees that local entrepreneurs need to make way for commercial activities aimed at tourists.
- About 75% of the retailers is still local oppossed to large chains, however in certain areas local retailers are being pressed out by chains due to high rents.
- Local retailers are expectant for more strategic direction in terms of policy from the city.
- The city is still perceived to be very livable and not taking over by tourists or visitors. Retailers do however feel that certain areas are taken over by large chains stores.

Measures taken by Ghent

- **Policy visions:** the city is trying to give direction to developments such as logees
- **Close ties:** the municipality has close ties with several discussion forums related to centrum management, nightlife, culinairy and accommodation sector.
- **Urgent appeal:** together with other European cities, Ghent exclaims an urgent appeal to the European Commission to signify the gap between the EU Services Directive and the implementation at a local level.

Main drivers impacting shop diversity

- **Tourism (new offering due to the tourist clientele)**
- **High rents**
- **Commercial chain stores**
- **Gentrification**



Source: Visienota detailhandel en horeca Gent

Map of shops and potential permit applications in Ghent



Challenges

- **EU Services Directive**: the liberal framework imposed by the EU Service Directive creates a level playing field for business however subjects cities to vagaries of the free-market system, including the decline of local retail and shop diversity for local inhabitants.
- **Legal restraints**: policy visions (BGO) can not be enforced due to EU Services Directive
- **Political agenda**: Governmental priorities and budgeting d Budget limitations and governmental priorities cause decision makers to sometimes be less concerned of the issues.
- **Unaffordable real estate** : In triple A locations, the local retailers are struggling to compete with large, globalized chain stores
- **Retail decree**: only developments of more than 400 m2 can be evaluated against the policy. Smaller developments don't comply.

Best practices in regard to measures

- **European Capital of Local Retail:** Ghent is involved with the initiative of several cities create awareness around the topics concerning local retail.
- **Multi disciplinary approach:** With the close ties with councils in retail and other relevant sectors like Nightlife, Culinary, and the local DMO, Ghent adopts a multi-disciplinary approach towards protecting its local retail. Connections between stakeholders are easily made due to the close-knit network and funding for projects, promotion and support for local retailers is readily available from the municipality through the local DMO.

Infographic monoculturalization of local retail and tourism, city of Gijon

263.635 inhabitants and consists of 181,6 km², with 1,82 km² city center

SWECO

Number of overnight stays

600.000
in 2024

Number of same-day visitors

1,2 million
in 2024

Total number of visitors

1,8 million
in 2024

Increase or decrease of visitors?

5-10% increase of visitor numbers since 2019 (pre-pandemic)

Monoculturalization of local retail in Gijon

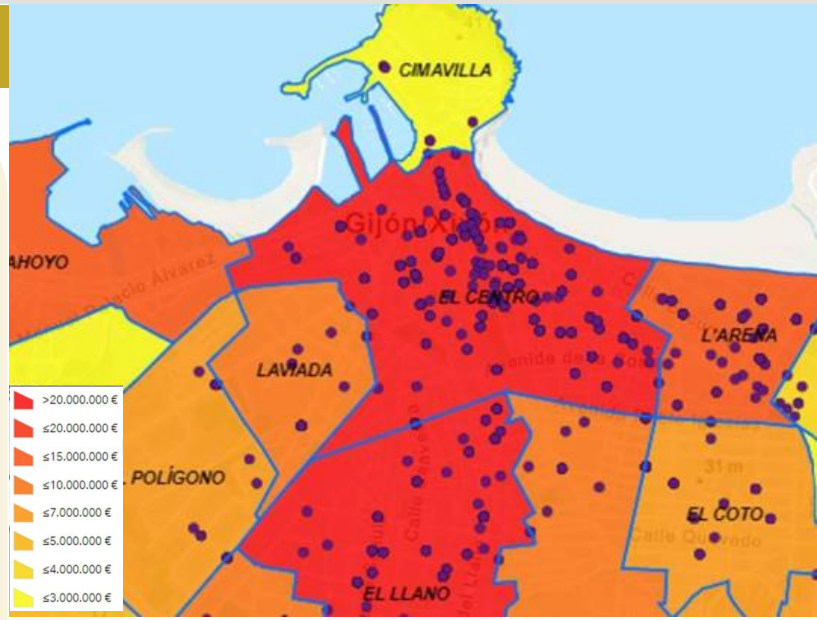
- Gijon is a touristic destination in the North of Spain at the coast, with mainly domestic tourists. (80%)
- It does not have shops that are only catering to tourists, with the exemption of a few stores. In turn locals do not avoid the city center due to a one-sided offering.
- There is a very limited impact of tourism on the local retail environment and monoculturalization is not prevalent in Gijon. Retailers and locals are hospitable towards visitors.
- Efforts are aimed on supporting local businesses, not regulating or closing tourist shops.
- There are a few larger chains, which is expected to become more as Gijon may continue to grow as an international tourism destination.
- The effects on shop diversity in Gijon as a tourism destination are caused by drivers mainly unrelated to tourism (such as the examples given below).

Main drivers impacting shop diversity

- **Local entrepreneurs do not have a successor**
- **E-commerce**
- **Emerge of big chains**
- **Tourism**
- **High rents and property prices**

Measures taken by Gijon

- **Strategic action plan:** as part of a larger regional initiative, Gijon tries to reduce local shop turnover by mitigating between retiring shop owners and young entrepreneurs take over the local businesses.
- **Digitalization support:** the city offers help to local retailers to deal with the online changing within the retail landscape.
- **Tourism strategy:** Gijon attempts to keep close to their local DNA with an authenic tourism and retail offering fitting with the city. Controlled growth is stimulated, with regulations on Airbnb growth.
- **Profiling local stores:** certain local retailers are profiled as they are a strong motivator for domestic tourists to come (back) to Gijon.
- **Concious spreading:** Gijon conciously decides not to devote their efforts on one industry, as they feel a healthy city needs multiple sources of income



Source: PLOC Gijon

Map of expenditure patterns in shops in Gijon



Challenges

- **Online adaption**: Local entrepreneurs have trouble competing with online commerce and struggle to adapt to new forms of online marketing, retail channels and social media.
- **Impact of media**: satisfaction with tourism is going down slightly due to the exposure of negative impacts of tourism in other cities as seen in the media.
- **More chains**: With the growth of (international) tourism numbers there is a large likelihood that there will be more chains and international stores coming to Gijon
- **End of the line**: Traditional shops are closing down with no successor interested in taking over the store. It is difficult to motivate new entrepreneurs for running local shops as it has become less profitable and desirable jobs to have in a changing retail landscape.

Best practices in regard to measures

- **Regional commercial association:** in the past 30 years this prevented some local businesses to close, by promoting local businesses, and helping them adapt to new trends (online shopping, different languages). This program is therefore successful at making local businesses more competitive within the changing retail landscape. The mitigation between retiring shop-owners and new entrepreneurs is also part of this program.
- **Promoting local things**: Gijon chooses to brand the city close to the local DNA, which means they don't brand the city as a sun destination for mass tourism, but rather as a nature destination oriented to family tourism.

Infographic monoculturalization of local retail and tourism, city of Kiel

251.379 inhabitants and consists of 118,7 km², with 1,02 km² city center

SWECO

Number of overnight stays

3.9 million
in 2023

Number of same-day visitors

17.6 million
in 2023

Total number of visitors

23 million
in 2023

Increase or decrease of visitors?

More than 10% increase of visitor numbers since 2019 (pre-pandemic)

Monoculturalization of local retail in Kiel

- Kiel is a large harbor city on the Baltic seacoast, with ferry and cruise routes towards the Nordic countries. It is mainly a destination for domestic tourism rather than internationals, although visitors tend to use Kiel as gateway for the region.
- There is hardly any retail in the city catering primarily to tourists, only one restaurant is known to be visited exclusively by Norwegian tourists: Löwenbräu Kiel.
- Monoculturalization by tourism or domination by tourist-oriented shops is non-existent in Kiel.
- Tourists from the ferry and cruise lines visit retail in the city for cheap alcohol, pharmacy products and clothing, however these shops are not sustained by visitors' expenditure.
- Some shops have adapted their product variety to the needs of visitors, including the placement in the façade to attract tourists, resulting in a minimal degree of touristification.
- Nevertheless, the city deals with a decline in shop diversity & high retail vacancy rate due to drivers other than tourism.

Main drivers impacting shop diversity

- **High rents**
- **Changing consumer behaviour**
- **Online platforms**
- **Less money spent by locals** (on high-quality goods which are usually offered by local sustainable shops)

Measures taken by Kiel (against loss of shop diversity)

- **City management:** in 2017 Kiel has started with city management to create and sustain an attractive, multifunctional city center. E.g. the redevelopment of Holstenfleet has displaced motorized individual traffic outside the city centre, keeping public spaces attracive and resulting in new local investments.
- **Funding:** the municipality supports local business ideas through funding, e.g. through a competition where the winners can win an (temporary) exemption on paying rent.
- **Digitalization support:** the municipality is helping local retailers to become more competitive in the new e-commerce climate.
- **Strategic rental management:** vacancy management has been introduced via social outreach, neighbour management, temporary users and profiling of specific areas.
- **Profiling zones:** with placemaking, six areas in the city center are given an unique identity (urban, chique, etc.) to attract specific target customers and shops that fit with the profile.
- **B2B collaboration:** via local DMO, the Norwegian Ferry liner uses its customer newsletter to promote shops in Kiel by providing discounts via coupons.



Source: Kiel Sailing City

Map of general shopping zones in Kiel

Challenges

- **Inner city problems**: the inner city of Kiel deals with several challenges which decrease the attractiveness of the city center, such as high retail vacancy rate in certain parts of the inner city and car-oriented streets, as well as a decentralized offering and lack of highlights. These challenges have been addressed by the city (see city management).
- **Low expenditures**: the local population does not have high expenditures on retail, making it difficult for certain retailers to come to settle in the city. Certain brands choose to leave Kiel as the (potential) market is too little for them to stay profitable (e.g. Zara).
- **Online trends**: the raise of e-commerce and webshops has presented Kiel with a large challenge when it comes to sustaining an attractive shop diversity in the city.
- **Limited opening hours**: Kiel has little to no instruments to enforce retailers to open their shops, due to the presence of strong trade unions protecting the store-owners.

Best practices in regard to measures

- **City management:** with a holistic approach Kiel tries to create and sustain an attractive city for its inhabitants. They stimulate a multifunctional city center with diverse functions for with locals living there, creating an attractive F&B offer, filling in vacancies, stopping the decrease in retail shops and by moving away from a car-oriented city center. Kiel was early to adopt this city management approach when public spaces along the canals were redeveloped, and ultimately resulting in an influx of start-ups, diversity and culture in this area.



Infographic monoculturalization of local retail and tourism, city of Venice

Almost 50.000 inhabitants in historic city center and 250.000 in the municipality of Venice. Consists of 414 km², with 7,98 km² historic city center

SWECO

Number of overnight stays

13.3 million
in 2024

Number of arrivals

5.9 million
in 2024

The average stay calculated as the ratio of overnight stays to arrivals

2.26
in 2024

Increase or decrease of tourists compared to 2019 (pre-pandemic)?

+6,4 increase in 2024 arrivals
+2,6% increase in 2024 overnight stays

Monoculturalization of local retail in Venice

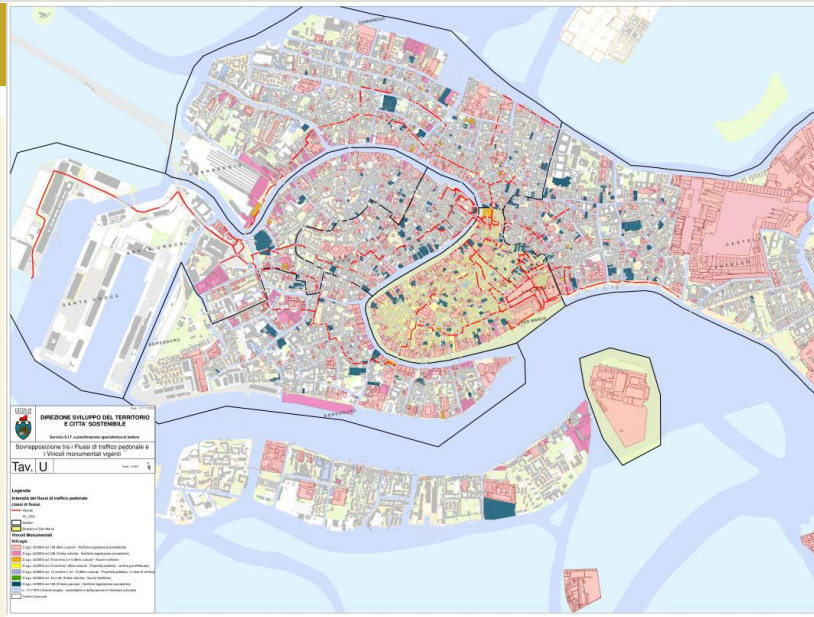
- The city center of Venice is a highly touristic city facing challenges related to excessive tourism. There has been a significant increase (since 1998) in the opening of low-quality souvenir shops and a surge in fast food restaurants.
- The city has consistently sought to preserve non-touristic functions in the historic city center, countering trends of decline.
- In Venice, the emphasis has been placed on addressing low-quality shops rather than fostering a diverse retail landscape. Initiatives are aimed at enhancing the overall appearance and ambiance of the city. To some extent, it has been acknowledged that certain functions - such as retail - are now primarily serving visitors rather than residents.
- The city notes that the measures implemented (Resolution No. 34/2018, No. 26/2022 & No. 13/2025) are showing tangible effects within the designated protected areas on the map. The number of new shop openings is the same as before however there is a significant change in the high-quality establishment of the shops. Local retailers are generally happy with these regulations and confirm the effects.

Main drivers impacting shop diversity

- **Tourism**
- **Free trade market**
- **High rents** only large chains can afford the rent

Measures taken by the Municipality of Venice

- **Zoning**: zones created wherein certain activities or retail are prohibited, restricting business relocation and expansion.
- **Focus points:** Specific identified areas in the historic city center with maps for major squares to address tourism issues.
- **Shop aesthetics**: Storefronts are modified to align with the city's unique image, with less emphasis placed on the nature of the merchandise behind the façade.
- **Shop regulations**: In areas like San Marco, only designated businesses can operate. City Council Resolution No. 34/2018 prohibits new bars, restaurants, and takeaway establishments in the historic center and certain islands, while Resolution No. 26/2022 & No. 13/2025 limit the opening and transfer of both food and non-food businesses. They allow only specific retail and production activities to be opened in the protected areas.
- **Access fee:** Implemented for 54 days in 2025 to manage tourist flow, with discounts for early bookings and surcharges for last-minute bookings. Data analyzed by university to assess long-term feasibility.
- **Hotel regulations**: New hotels are prohibited from opening in the historic city center. Discussions are ongoing about regulating private rentals.



Source: Citta di Venezia

Map of measures to limit the proliferation of low-quality commercial activities in the historic centre of Venice







Challenges

- **Free trade:** While market liberalization encourages supply, it has transformed historic centers into tourist traps filled with visitor-oriented shops. The aim is preventing it without depending on constant legal enforcement.
- **Legal & regulatory constraints:** the misalignment between national and regional legislation and the municipality's priorities, makes it more difficult to effectively govern the local retail landscape.
- **Tourism and space constraints**: The high volume of tourism and the lack of space pose significant challenges for new retail openings, as the demand of tourists creates a tourist-oriented supply within the limited space.
- **Decline of historic shops**: Many existing shops, often foreign-owned, sell low-quality souvenirs like magnets and t-shirts. It's difficult to change their products, but the shop's appearance can be modified.
- **EU Service Directive**: There is a desire to differentiate between the historic center and the rest of the city, balancing free market dynamics with the need to avoid monoculture in retail.
- **Ownership passes over**: When ownership changes without closing a shop, enforcing product changes is challenging. If the shop closes during the transition, there is more flexibility to implement such changes.
- **Cooperation**: Establishing consensus with shop owners is difficult due to both uninterested private investors and fragmented local ownership, hindering cooperation.

Best practices in regard to measures

- **Regulations**: Local shop owners express support for the City Council's regulations, highlighting visible positive effects that are, at least in part, have been measured. Concerns about a decline in restaurants, bars, and shops did not materialize; the number of new openings remains consistent, but with a focus on higher-quality establishments.
- **UNESCO framework**: The city's UNESCO World Heritage site facilitates the enforcement of certain regulations to preserve the city's character & quality.
- **University collaboration**: the city is working together with the University of Venice to try to uplift the attractiveness of storefronts and increase the quality of the shops, in correspondence with the city's image.

Infographic monoculturalization of local retail and tourism, city of Visby

26.305 inhabitants and consists of 12,44 km², with 0,1 km² city center

SWECO

Number of overnight stays

300.000
in 2023

Number of same-day visitors

800.000
in 2023

Total number of visitors

1 million
in 2023

Increase or decrease of visitors?

0 – 4,9% increase of visitor numbers since 2019 (pre-pandemic)

Monoculturalization of local retail in Visby

- Visby, a UNESCO Hanseatic town, is a city & major domestic tourism destination on the Swedish island of Gotland, reachable by ferry within 3 hours.
- Whereas there has been a decline in shop diversity in the last years, only several shops cater predominately to tourists. The 4 to 6 souvenir shops do not dominate at all.
- A larger amount of retail and hospitality closes in the low season as the base of only local clientele is too little. These closures are generally accepted but frowned upon.
- Certain (retail & public) functions have moved out the city-center however these developments cannot be ascribed to tourism alone.
- Tourism does affect the city however there are still lots of functions in the city-center and everyday life still prevails.
- The 'Living city' is a prevalent theme in Visby and the public debate about the effects of tourism on it grows.
- By far most shops serve a mixed clientele of local islanders and tourists alike and can be kept in place due to visitors' expenditures to the island. Retail touristification endures, as well as a high number of arts & crafts and vintage stores is seen.
- There are concerns that if nothing is done to regulate or control the trend of loss of shop diversity, the offering for locals will further diminish.

Measures taken by Visby

- **Local place development.** Visby's newest tourism strategy focuses on the local place development instead of destination development.
- **Buying real estate**: A possible long term solution Visby is exploring is to buy real estate to keep control on a diverse variation of shops.
- **Stakeholder management**: strong collaborations with different stakeholder groups such as real estate owners, heritage councils, and grassroots (citizens') initiatives (Eye on Visby).
- **Local perspective:** Due to the growing public debate, Visby is in the process of measure the perception of islanders on tourism affairs.

Main drivers impacting shop diversity

- **Tourism**
- **Internet / E-commerce**
- **Economical factors**
- **High real estate prices**
- **Vacancy after public services left the city center to new locations outside of the center**



Map of main shopping streets in Visby



Challenges

- **Political agenda.** Decision makers are not highly responsive on the effects of tourism on local tourism as the issues are not on the pollical agenda. Possibly the limited regulative measures as well as striking a balance in conflicting interests could also play a role.
- **Finding balance:** Part of difficulty is found in the benefits in terms of economy and livability that tourism brings, and the fear and unwillingness to harm these benefits including the incapability to keep a delicate balance within this playing field.
- **Limited regulative measures possible**. National legislation intends maintain uniformity and to prevent potential negative impacts on tourism. For example, municipalities in Sweden are currently not allowed to impose tourist taxes of any kind.
- **Mainland owners**: A substantial part of the owners of retail in Visby's city center comes from outside the island, creating a gap in the connectedness with the city's welfare.

Best practices in regard to measures

- **University collaboration.** Visby works together with the University of Uppsala to research the principles of the Living City.
- **Hybrid concepts**. Hybrid concepts as pop-up shops and art galleries are introduced on the empty shops in the winter months. By filling in the retail space in the low season, the city can still offer an attractive offering to local islanders.
- **Local products.** Local farms from the island have numerous retail outlets in the city center, stimulating local products.