



Unbalanced Tourism Growth

Island Destinations Workshop

9 December 2021

Bernd Schuh, Wolfgang Strasdas, Helene Gorny, Arndt Münch, Melanie Wyss

Welcome!

- ▶ Mr. Leslie Vella, Deputy CEO and Chief Officer Strategic Development at Malta Tourism Authority
- ▶ Ms. Ramume Genzbigelyte-Venturi, Policy officer-Tourism, DG Internal Market, Industry, Entrepreneurship and SMEs Unit GROW G1 – Tourism and Textiles
- ▶ Mr. Bernd Schuh, Director, Austrian Institute for Regional Studies

Aim of the workshop

- ▶ Bring together tourism stakeholders from a same destination type to foster exchanges on problems and solutions to unbalanced tourism growth
- ▶ Present solution approaches to better understand the interlinkages between tourism and the territories
- ▶ Identify challenges and bottlenecks hindering the mitigation of unbalanced tourism growth
- ▶ Test the practical application of proposed indicators for overtourism risk assessment
- ▶ Develop concrete steps for destinations to move towards more sustainable practices and mitigate the impacts of unbalanced tourism growth

Agenda of the workshop

Timing	Sessions
08:45	Opening of the meeting room for the online participants Arrival onsite, health and safety, and registration – Coffee/tea
09:00	Welcoming
09:15	Introduction of participants (position/background) Participants' expectations regarding the workshop Format: round of introduction in plenary session
09:45	Part 1: Presentation of the project findings (Tasks A to D) Format: discussion in plenary session
10:15	Break
10:25	Part 2: peer-to-peer learning Participants present the challenges and problems faced as well as identified solution approaches Format: participants presentations and open discussions in plenary session
12:00	Part 3: Identifying, assessing and addressing tourism growth imbalances <ul style="list-style-type: none"> Step-by-step interactive simulation of a methodology for identifying, assessing and addressing tourism growth imbalances Simulation of the methodology by the participants under guidance of the project team Format: Interactive application of the methodology in plenary session
12:30	Lunch break

Timing	Sessions
13:30	Part 3 (cont.): Identifying, assessing and addressing tourism growth imbalances <ul style="list-style-type: none"> Simulation of the methodology by the participants under guidance of the project team Feedback Simple open Q & A session based on the discussion Format: Interactive application of the methodology in plenary session
14:30	Coffee/tea break
14:45	Part 4: Validation and key challenges <ul style="list-style-type: none"> Presentation and discussions on the outcomes of the methodology as well as the main issues encountered in regards to unbalanced tourism growth Format: World café – group work
16:15	Break
16:45	Summary of findings, conclusions and next steps in plenary session
17:15	End of the workshop



Let us know who you are...

Your expectations...

What are the three main aspects you hope to learn about by the end of this workshop?

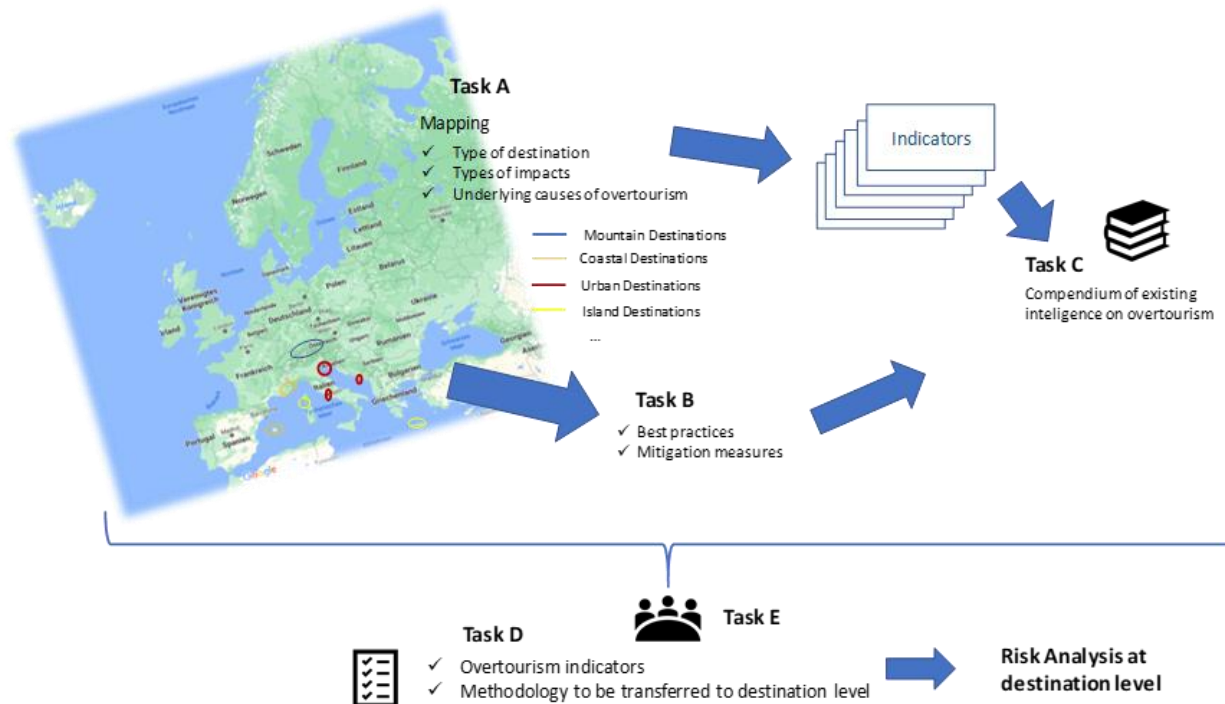


Part 1: Presentation of the project

Objectives of the project

- ▶ To build solid evidence on the phenomenon of overtourism, in particular by focusing on multiple root causes and effects of overtourism at the destination level, as well as on gathering concrete best practice solutions (preventive and mitigating actions).
- ▶ to gather evidence on whether and in what ways the COVID-19 crisis has led to the changes in strategies and actions of the tourism destinations when addressing unbalanced tourism growth
- ▶ to propose a set of overtourism indicators that would serve for tourism destinations to establish their risk analysis, allowing them to detect the potential risk of overtourism and address the challenges in due time

Project Tasks



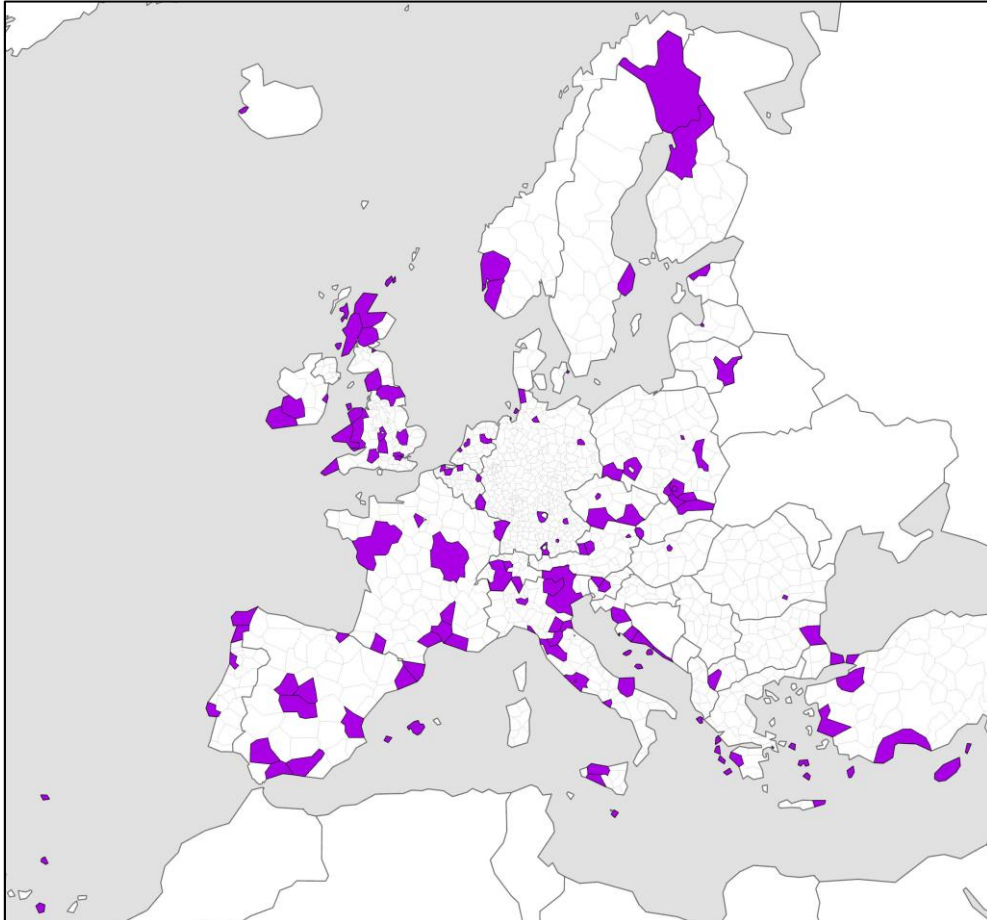
- ▶ Task A: Mapping and analysis of the root causes of overtourism at destination level and the evident impacts at economic, environmental and socio-cultural level
- ▶ Task B: Identifying best practice solutions, successfully applied by tourism destinations in the EU and globally
- ▶ Task C: Establishing an annotated compendium of currently existing intelligence on overtourism
- ▶ Task D: Proposing a set of overtourism indicators that would help tourism destinations to detect and measure risks of overtourism
- ▶ Task E: Organising a series of stakeholder workshops on overtourism and outreach

Task A: Definition of overtourism

“(Overtourism represents a) situation in which the impact of tourism, at certain times and in certain locations, exceeds physical, ecological, social, economic, psychological, and/or political capacity thresholds”.

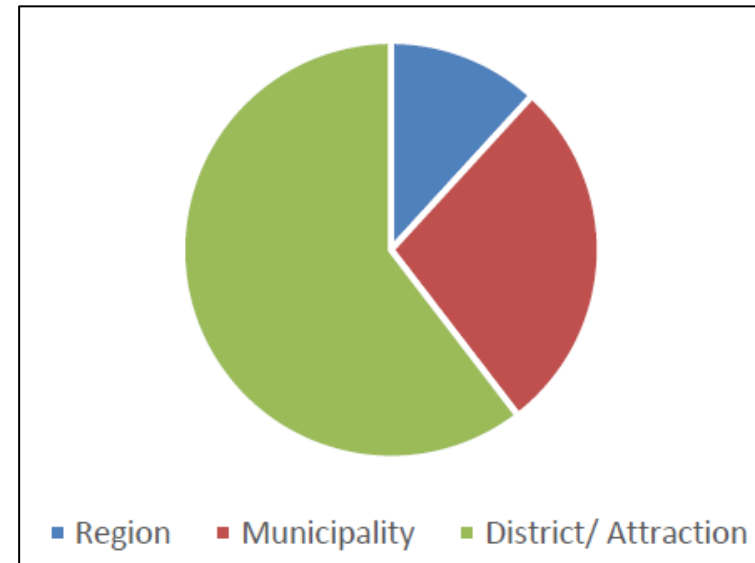
(Peeters et al. 2018)

Task A: Inventory of overtourism

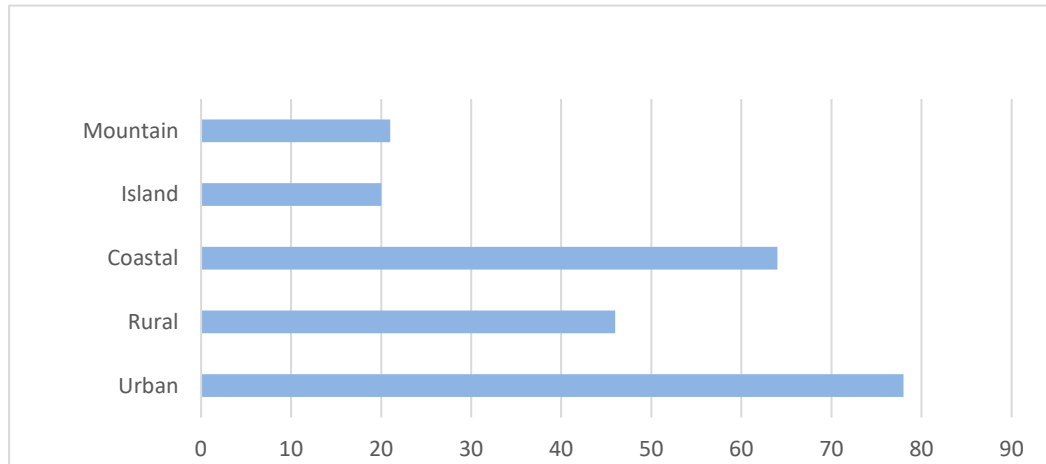


Source: Project team, 2021

Spatial level where overtourism occurs



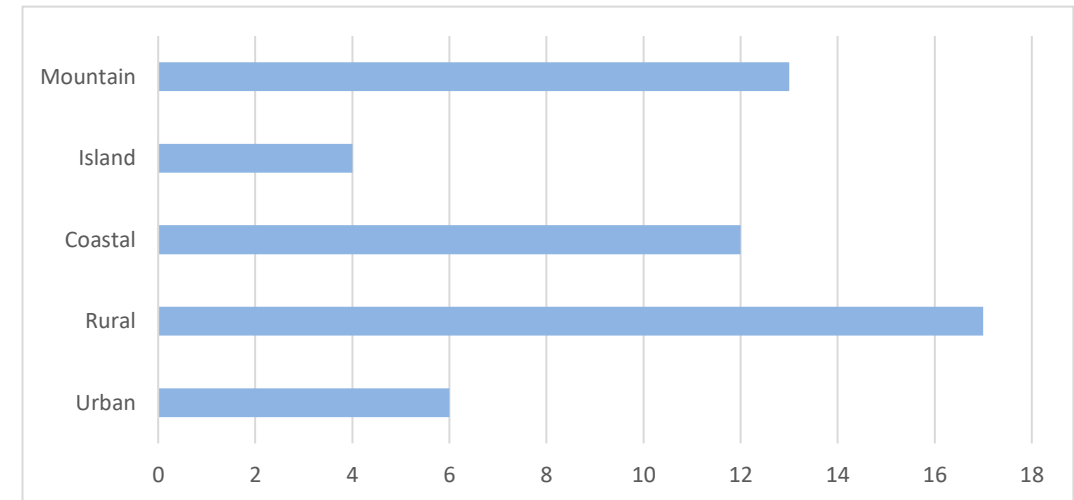
Task A: Inventory of overtourism



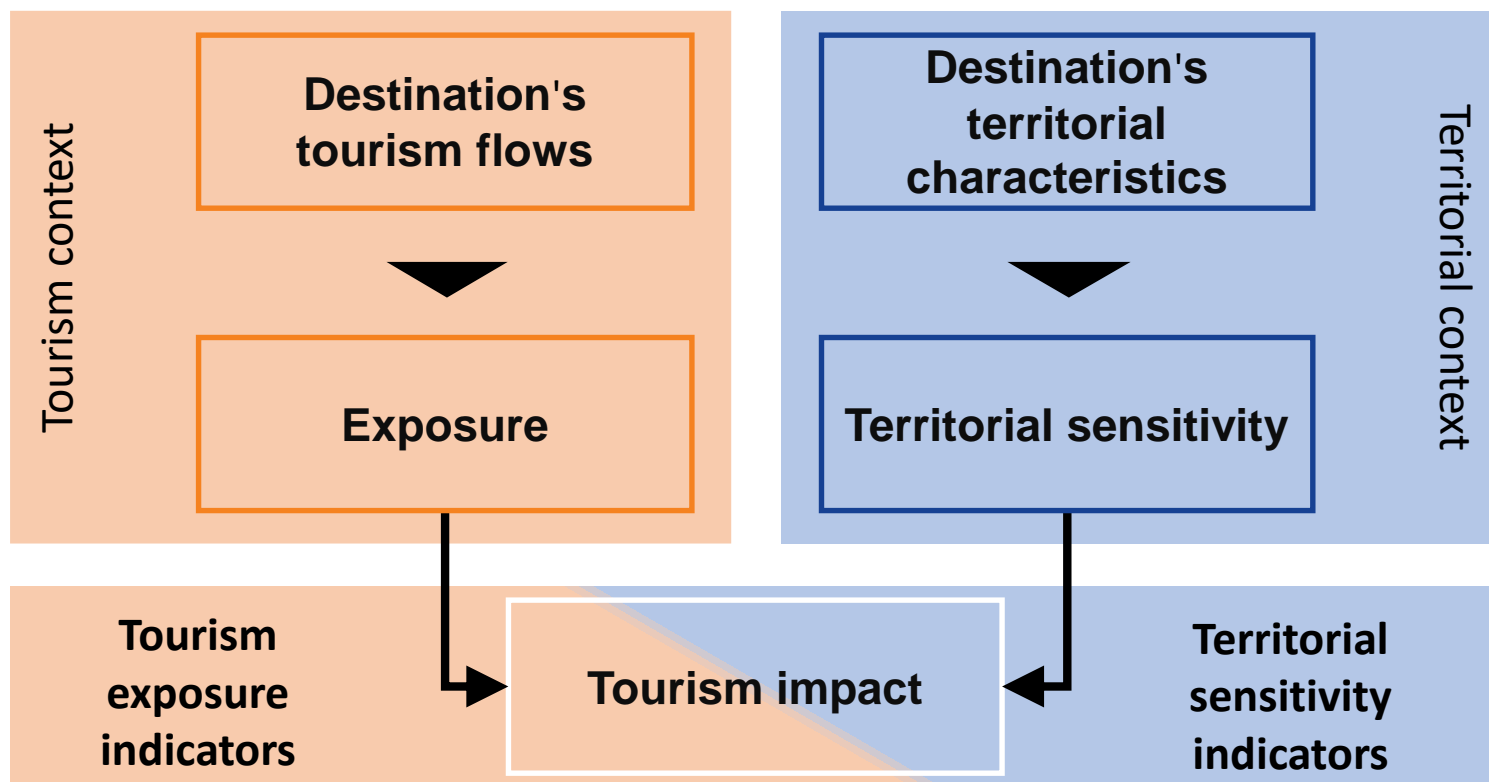
Affected destination types before Covid

Source: Project team, 2021

Affected destination types during Covid

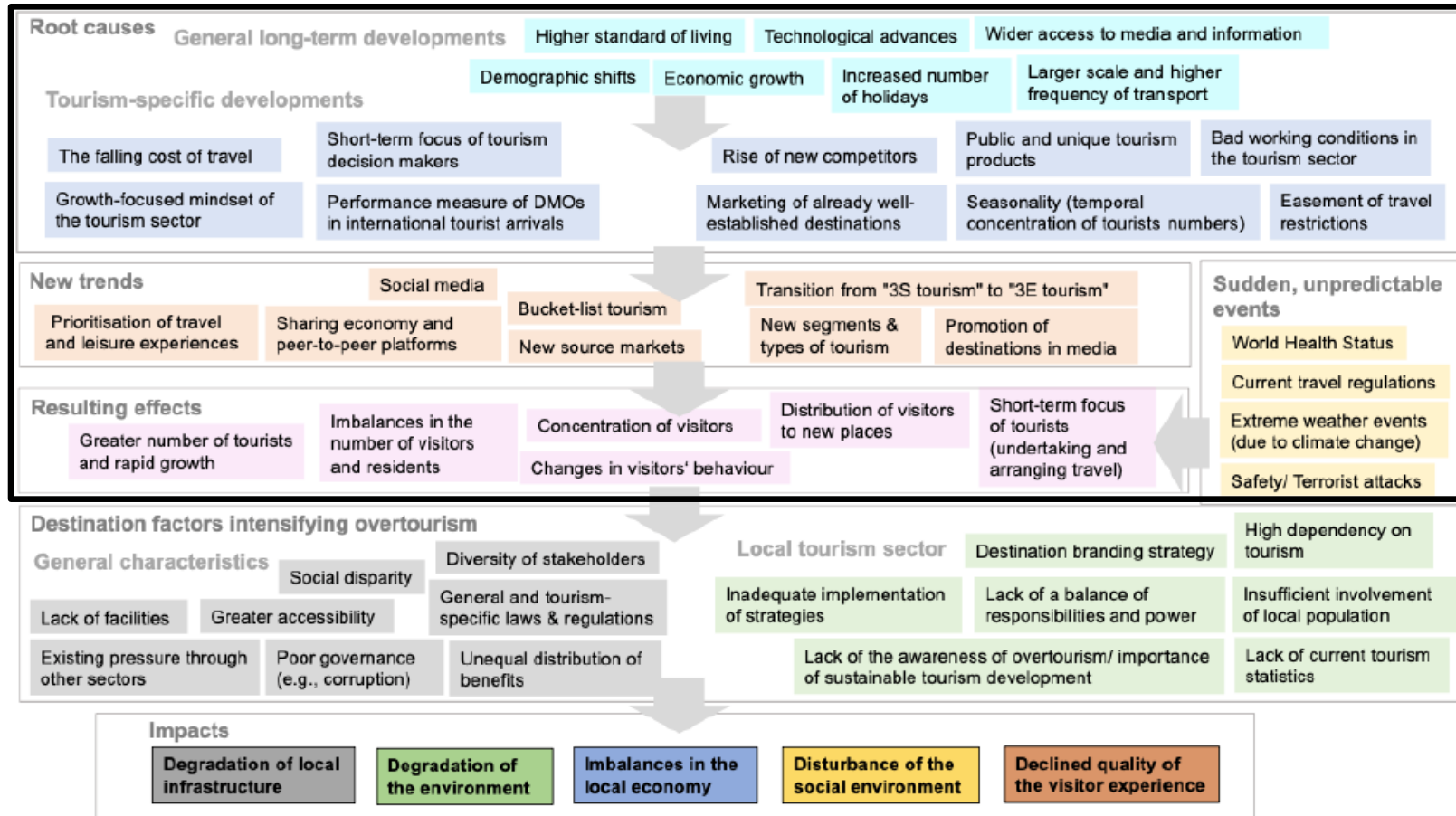


Task A: Root causes and impacts of overtourism



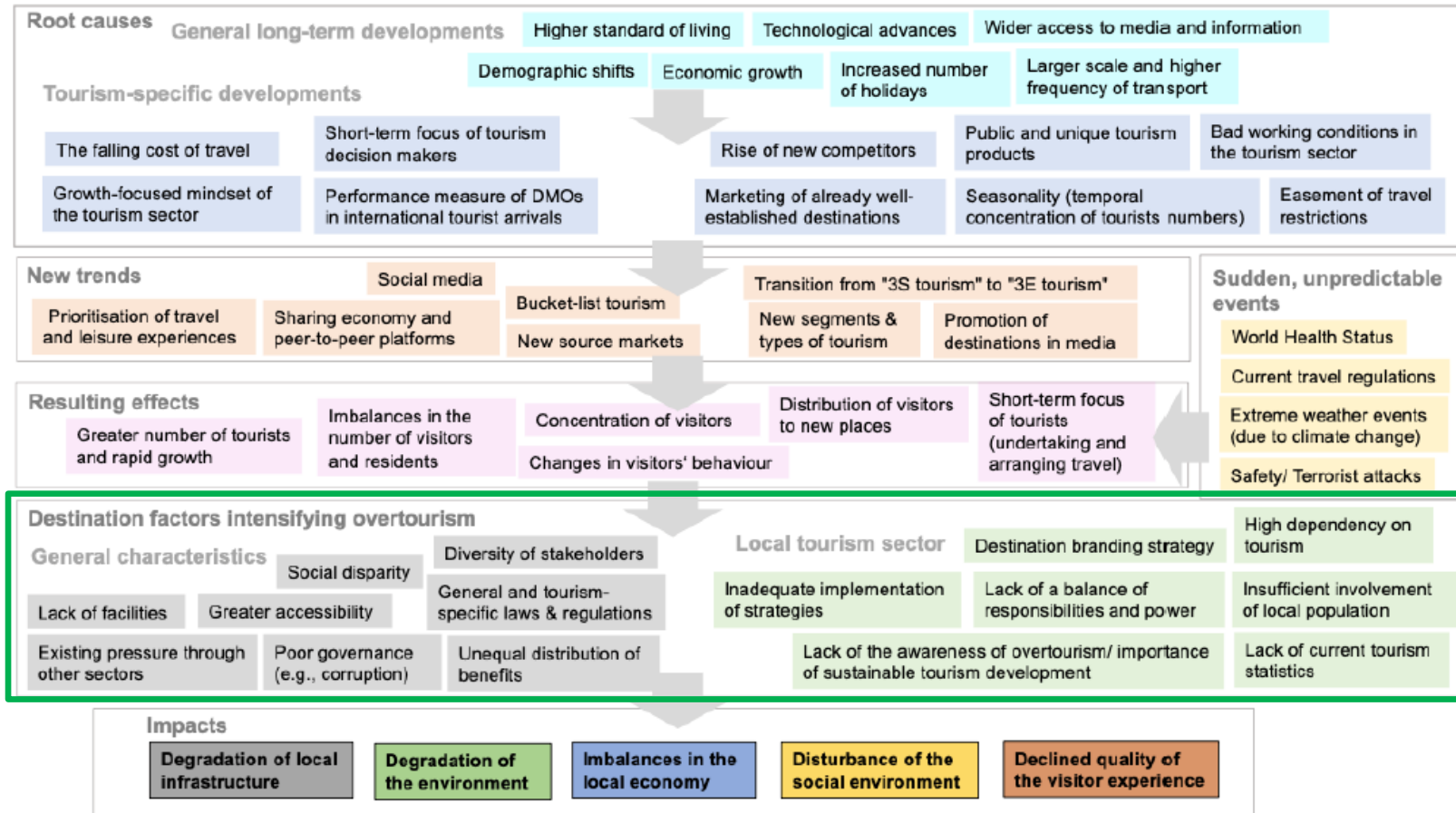
Source: ESPON Tourism, 2021

Task A: Root causes and impacts of overtourism



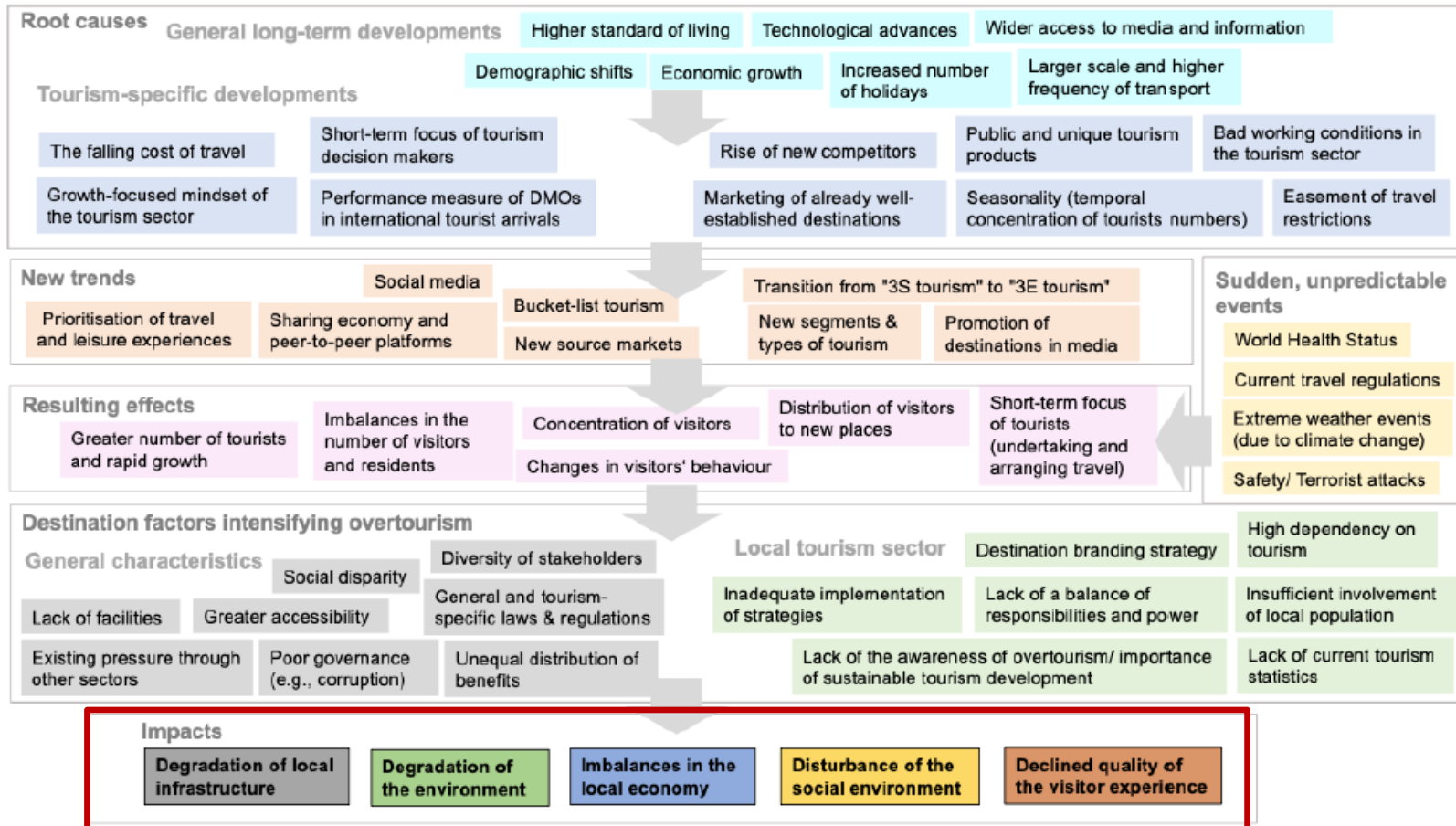
Source: Project team, 2021

Task A: Root causes and impacts of overtourism



Source: Project team, 2021

Task A: Root causes and impacts of overtourism



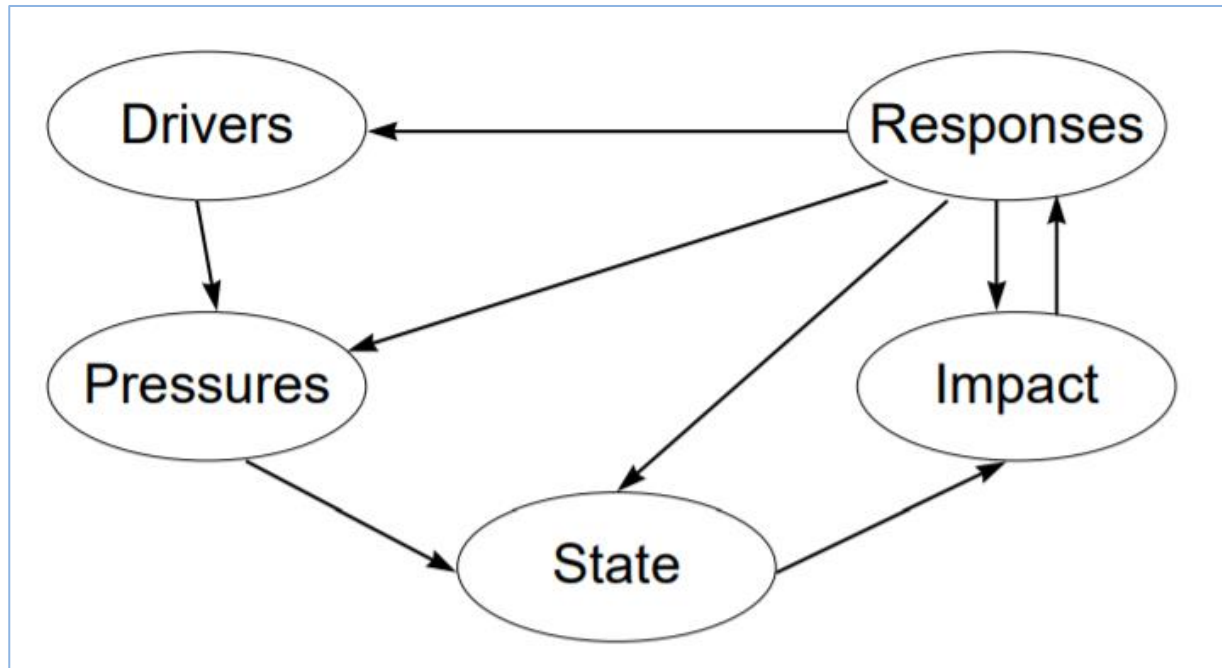
Source: Project team, 2021

Particularities of island destination

- **Limited space and natural resources** (no hinterland)
- **Vulnerable ecosystems** (e.g. endemic species)
- **Dependence on external supplies** (vulnerability)
- **Transport an issue** (costs, reliability), with limited options
- often high **dependence on tourism** (incl. cruises)
- **Socio-cultural vulnerability**
- High degree of **economic leakage**

⇒ Smaller islands can be affected by overtourism in their entirety!

Task A: Measuring overtourism



The DPSIR Framework, Source: European Environment Agency 1999

Task A: Measuring overtourism

Metric	McKinsey	Peeters	Schuh	ETIS	DPSIR type
Tourism spending/revenue			x	x	Driver (ext.)
Importance of tourism (% GDP, employment)	x	x	x	x	Driver (int./ext.)
No. of bed-spaces/resident			(x)	x	Driver (int.)
Spatial distribution of bed-spaces			x		Driver (int.)
Arrivals growth (%)	x		x		Driver (ext.)
Bed-nights growth (%)			x	x	Driver (ext.)
Length of stay			x	x	Driver (ext.)
Occupancy rate			x	x	Driver (ext.)
Share of Airbnb bed-spaces		x	x		Driver (int.)
Share of second homes/residents				x	Driver (int.)
Seasonality: Distribution of demand	x (air arrivals)		x		Driver (ext.)
Air travel intensity		x			Driver (ext.)
% of same-day visitors			x	x	Driver (ext.)
Means of transportation, distances covered by tourists				x	Driver (ext.)
Proximity to airport, cruise port, UNESCO WHS		x	x		State

Compiled by project team, 2021

Task A: Measuring overtourism

Metric	McKinsey	Peeters	Schuh	ETIS	DPSIR type
Tourism intensity	x	x (+ TPR)	x	x	Pressure
Tourism density	x	x (+ TDR)	x		Pressure
Attraction concentration (based on visitor reviews)	x				Pressure
Historic site prevalence (based on visitor reviews)	x				Pressure
CO ₂ emissions from tourist transportation			x	x	Pressure
Energy use per tourist			x	x	Pressure
Waste production per tourist			x	x	Pressure
Water consumption per tourist					Pressure
Air pollution	x				Impact
Residents' satisfaction; identity			x	x	Impact
Visitor satisfaction: Negative reviews, complaints	x		x	x	Impact
Waste management by tourism enterprises				x	Response
Sewage treatment				x	Response
Water management by tourism enterprises				x	Response
Energy efficiency and renewable energy use				x	Response
Biodiversity conservation by tourism enterprises				x	Response

Compiled by project team, 2021

Task A: Measuring overtourism – Key local indicators

- ▶ **Size of the actual tourist area** (tourism density + intensity)
- ▶ **Seasonality** (Tourism density + intensity in high and low season)
- ▶ **Day visitors** (in absolute terms and in relation to overnight tourists; spatial & temporal distribution)
- ▶ **Private accommodation** offered on booking platforms (overall share and spatial distribution)
- ▶ **“Sentiments” of both residents and tourists** (surveys and/or online platforms)

Task B: Selected Case Study Destinations

Destination Category	Destination Cases
Urban	Florence, Italy
	Lucerne, Switzerland
	Vienna, Austria
Coastal	Lübeck Bay, Germany
	Geirangerfjord, Norway
	Palma, Spain
Island	Majorca, Spain
	Iceland, Iceland
	Malta, Malta
Rural	Burren and Cliffs of Moher, Ireland
	Parc Naturel Régional des Monts d'Ardèche, France
	Plitvice Lake, Croatia
Mountain	Bled, Slovenia
	Dolomites, Val Pusteria, Italy
	Rigi, Switzerland

Task B: Island Destinations

- ▶ **Unbalanced Tourism Developments**
 - Fast growth over the last decade (Iceland)
 - Gradual and continued growth (Mallorca, Malta)
- ▶ **Degree to which unbalanced tourism is a problem: depends on stakeholder's perspective**
- ▶ **Spatial Aspects of “Unbalanced Tourism”**
 - Iceland: at specific attractions, along southern “Golden Route” (Iceland)
 - specific beach locations, historic-cultural sites (Malta, Mallorca)
- ▶ **Temporal aspects**
 - All year tourism (Malta)
 - Mostly summer months (Mallorca, Iceland)

Task B: Island Destinations – Visitors

- ▶ **Very high recent tourism growth 2009-2019 (arrivals)**
 - Mallorca: 36% (2009: 8,718,788 | 2019: 11,874,835)
 - Malta: 107% (2009: 1,330,000 | 2019: 2,771,888)
 - Iceland: 308% (2009: 493,940 | 2019: 2,013,190)
- ▶ **Tourism intensity:** 24 (Iceland) | 57 (Mallorca) | 94 (Malta) overnights per inhabitant
- ▶ **Tourism density:** 82 (Iceland) | 1,503 (Malta) | 13,980 (Mallorca) overnights per km² of administrative tourism area

Task B: Island Destinations – Drivers

▶ General Drivers

- High accessibility (all modes)
- Cruise ships
- Low-cost carrier expansions
- Expansion of privately rented accommodations / Airbnb

▶ Specific Drivers

- education, foreign investments (Malta)
- increased residential tourism (second homes) (Mallorca)
- a new trend destination (Social media and effect of films, Iconic attractions) (Iceland)
- Classic Mediterranean island and cultural attractions (Malta, Mallorca)

Task B: Island Destinations – Impacts

▶ Socio-economic

- Increased real estate prices
- Touristification and changes in neighbourhood structures
- Reduced visitor experience quality
- Reduced quality of life for locals

▶ Ecological

- Noise pollution (Mallorca and Malta)
- Air quality issues (from cruise ships)
- Waste management
- Water use (Mallorca and Malta)
- Unsuitable recreation in nature (Iceland and Mallorca)

Task B: Island Destinations – Solutions

- ▶ Various controls and limits embedded in laws, regulations and policies: Mallorca Intervention Plan for Tourism; Sustainable Tourism tax
- ▶ Some regulations and a soft approach directly addressing visitor
- ▶ Marketing strategies: balance out seasonal bottlenecks, address new visitor segments
- ▶ Monitoring frameworks
 - Malta: Tourism Observatory planned
 - Iceland: Tourism Balance Axis
 - Majorca: Sustainable Tourism Observatory of Majorca (by the UNWTO)

Task B: Overall Core Findings

Key Lessons

- ▶ Unbalanced tourism is a **process that evolves uniquely** at each destination
- ▶ Unbalanced tourism is mostly **subjectively perceived** by local stakeholders as a fact of reality, particularly by residents, and depends on seasons
- ▶ The evolution of **social media** use enabled some specific sites becoming hotspots without key management organizations having a rapid and necessary control in place
- ▶ Most visible impact of unbalanced tourism includes various **congestions**
- ▶ The **monitoring** of unbalanced tourism is **not yet well advanced**, however many destinations are currently setting up better monitoring

Task C: Compendium of currently existing intelligence on overtourism

- ▶ Main objective: aggregation of the information, studies and guidelines gathered throughout the project implementation, into a comprehensive, annotated compendium
- ▶ Division into main and sub-topics, coherent with the project tasks, some of which are supplemented by case studies of good practice (Task B)
- ▶ Each topic is briefly introduced by presenting the respective key findings of the project
- ▶ 2-5 publications per topic
- ▶ Each listed publication includes a short summary of its content, key findings, keywords, online link and availability (open source)
- ▶ Structure along types of destination
- ▶ Plane to the left of the document with a navigable structure

Task D – Measuring overtourism

1. Measuring global (demand) trends that act as driving forces for overtourism

- Growth in international arrivals, particularly from emerging economies
- Growth in passenger numbers of low-cost airlines, charter flights and cruises
- Indicating *general risk of overtourism in sensitive destinations*

2. Measuring tourism pressure on the regional & local levels (NUTS-3 or lower)

- Tourism intensity & density
- Growth in tourist arrivals/nights spent
- Economic significance of tourism
- Indicating *more concrete risk of overtourism in specific areas*

3. Measuring tourism pressure and actual impacts locally

- Common set of core indicators (day visitors, seasonality, informal accommodation, surveys of visitor satisfaction and residents' sentiment)
- Individual indicators measuring local impacts and issues

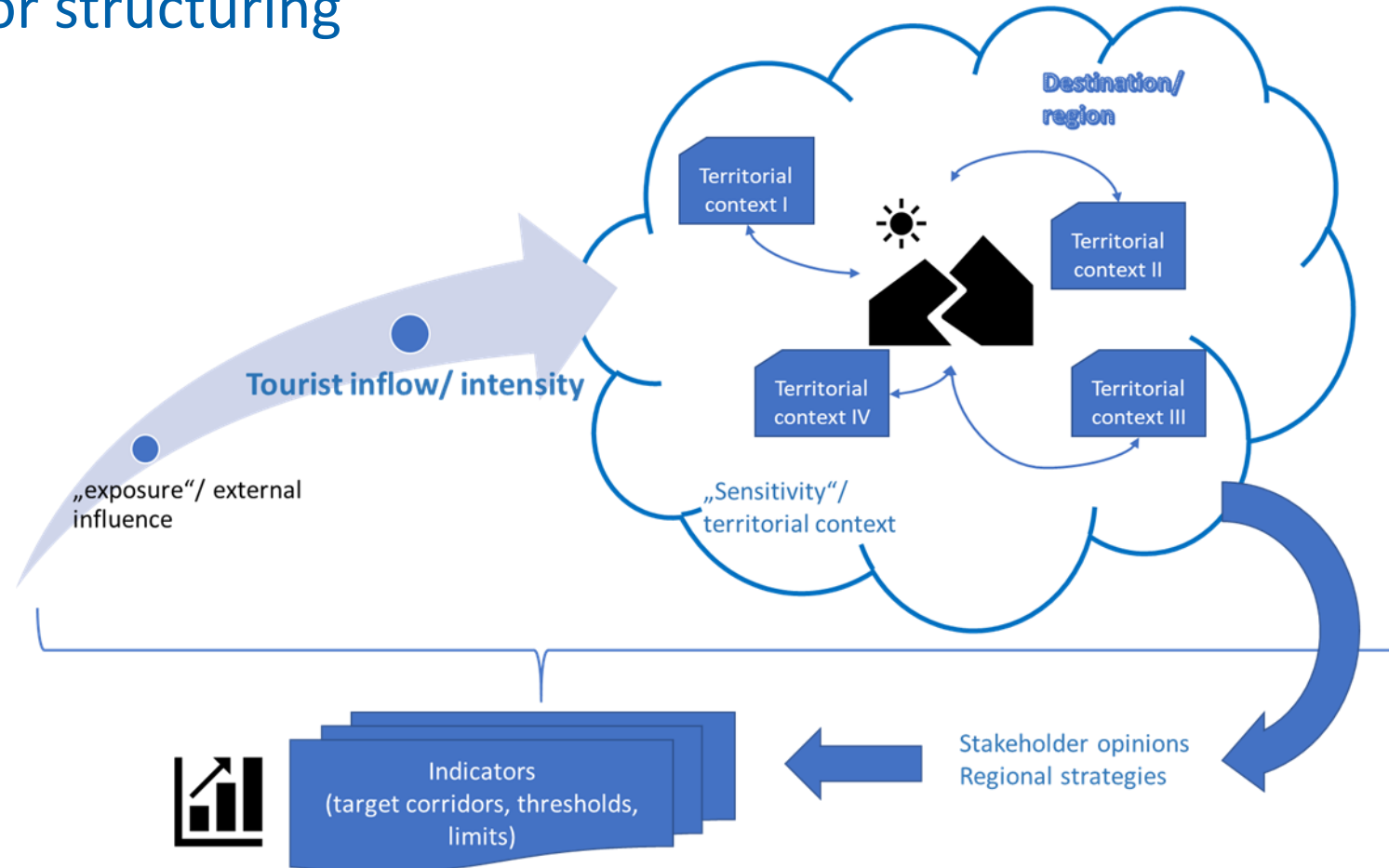
Part 2: Peer-to-peer learning

- ▶ Ms. María Reynisdóttir, Specialist – Ministry of Industries and Innovation, Department of Tourism – Iceland
- ▶ Ms. Carolina Mendonça, Azores DMO Coordinator
- ▶ Ms. Laura Esther Castro Hernández, Director of Tourism of the Tenerife Island Government
- ▶ Mr. Leslie Vella, Deputy CEO and Chief Officer Strategic Development at Malta Tourism Authority



Part 3: Identifying, assessing and addressing tourism growth imbalances

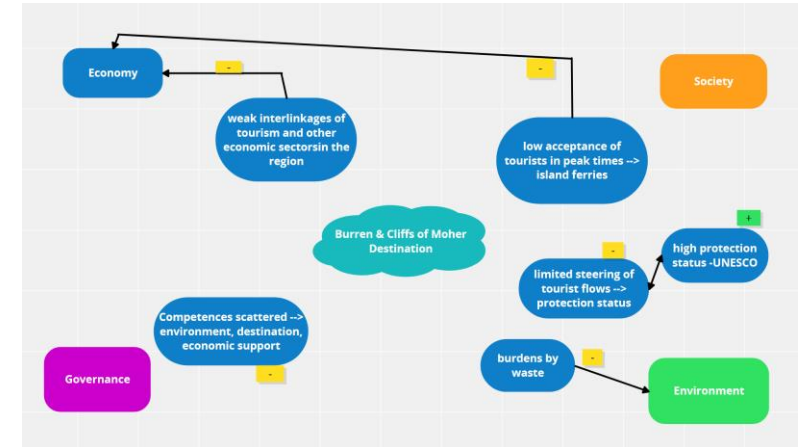
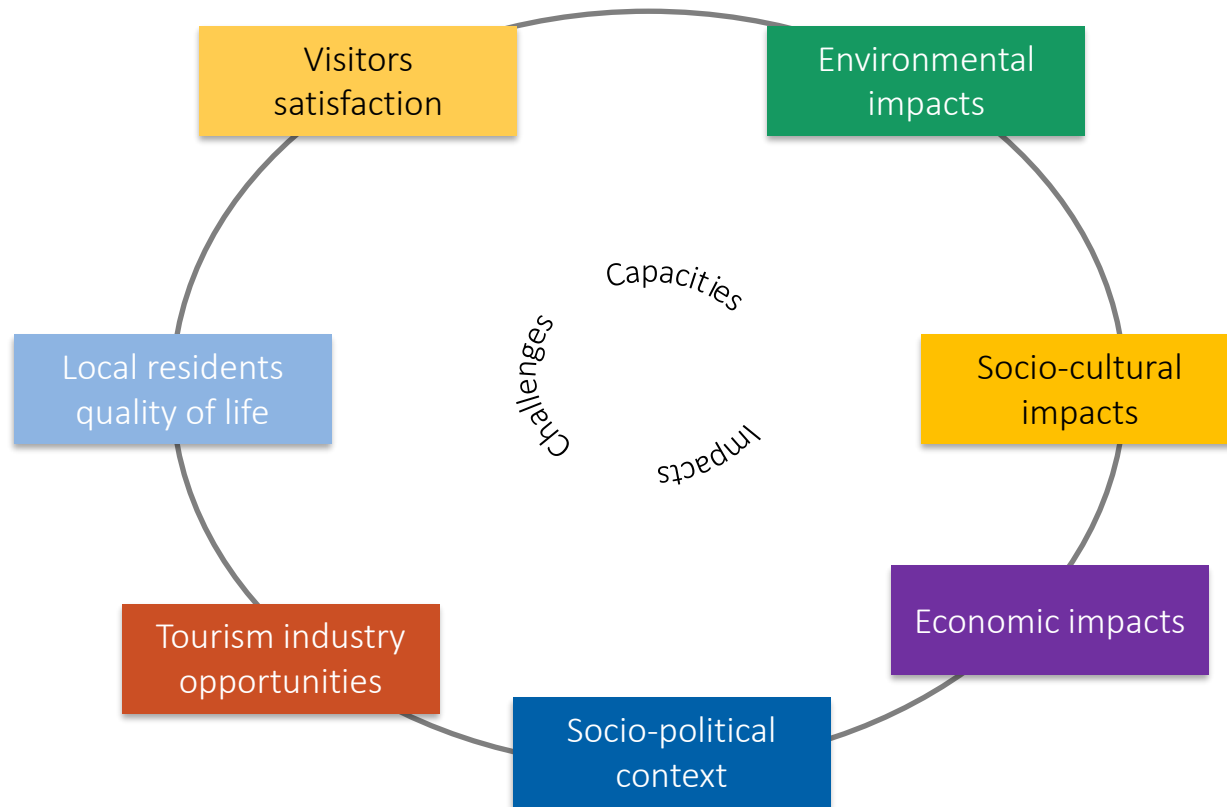
Bringing the P2P learning into a common perspective and adding to it – an attempt for structuring



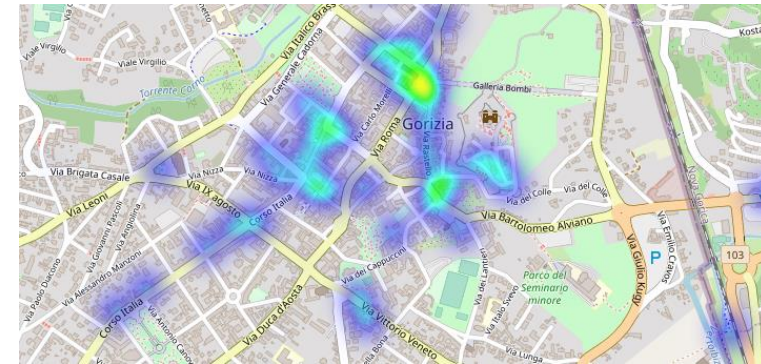
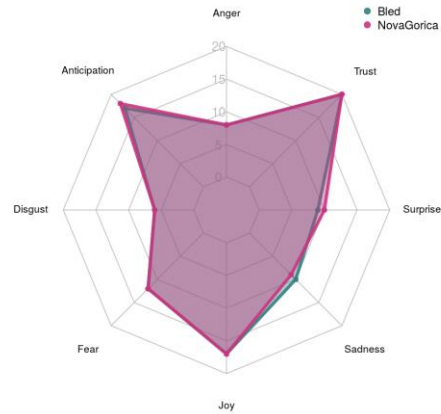
Introduction to the methodology – or how will we structure our island approaches



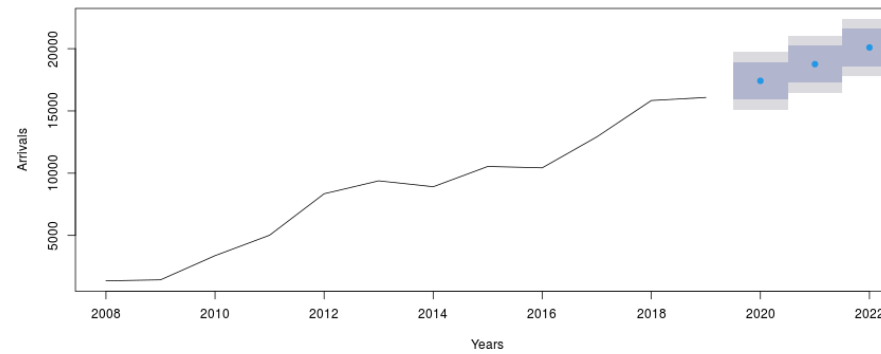
Step 1: Systemic picture



Step 2: Measurement of tourism Flows



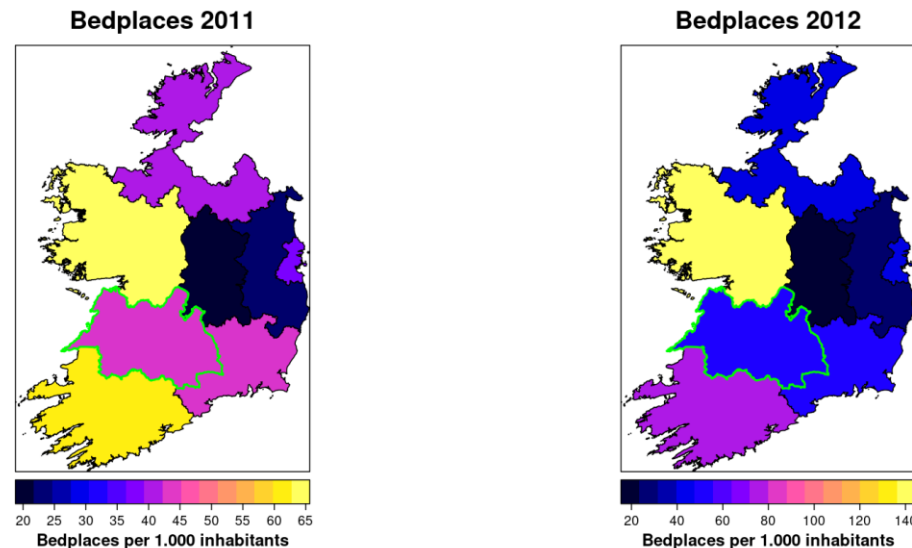
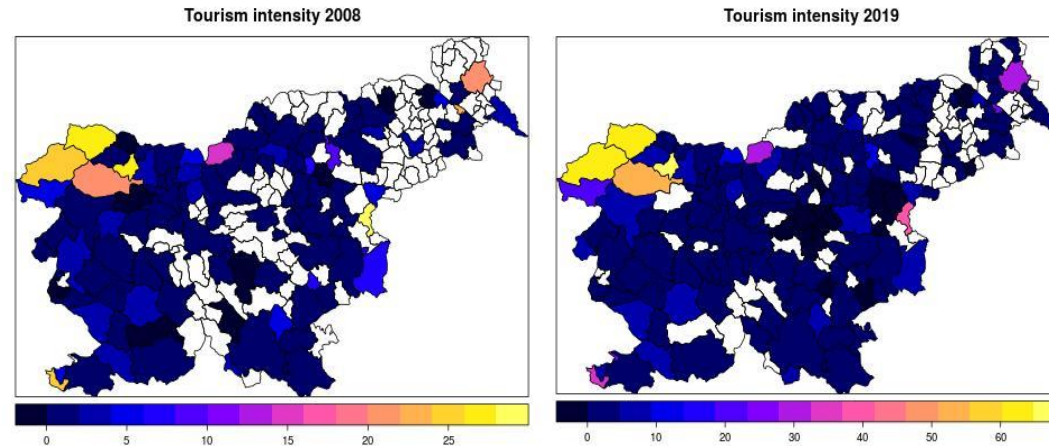
Divača



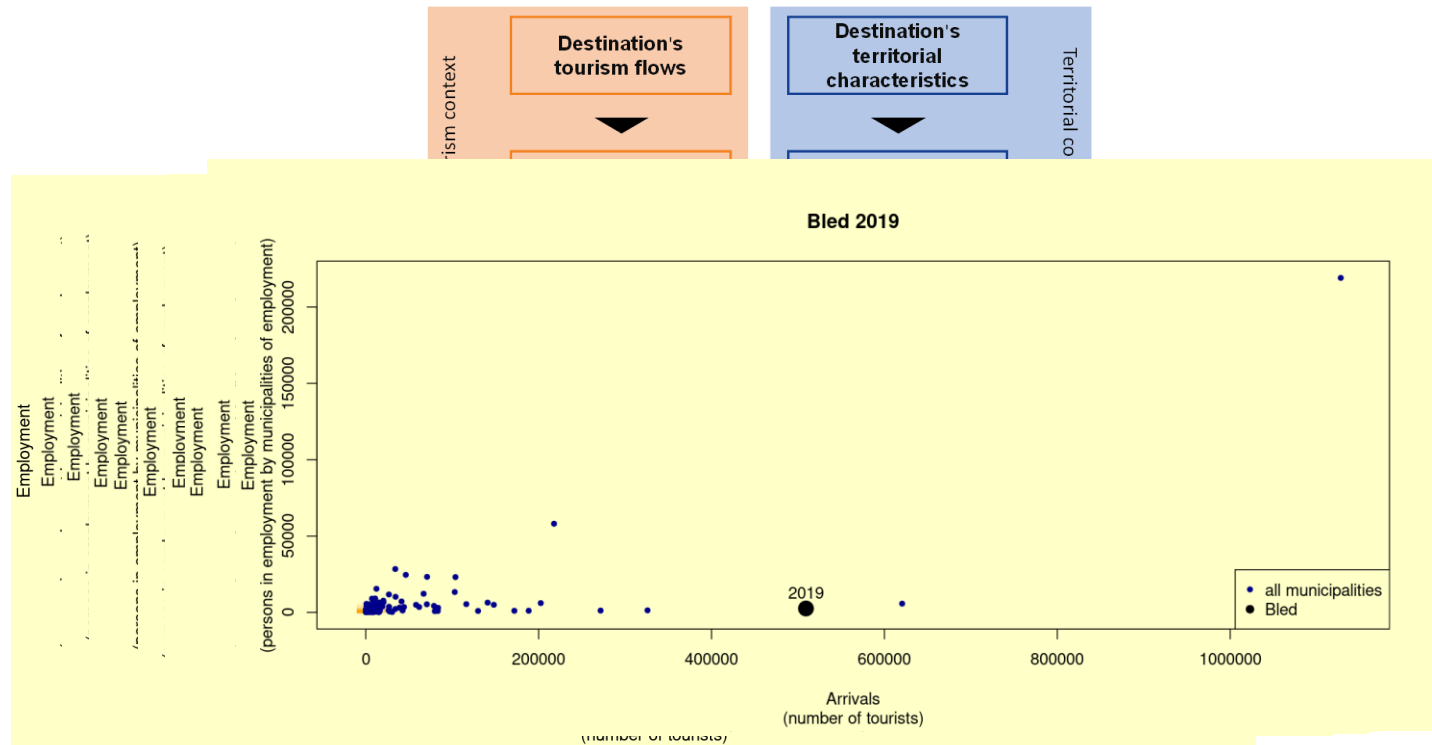
Step 2 (cont.)

The tourist flow estimation can be based on a variety of available indicators in the database:

- ▶ Based on statistical data: arrivals, arrivals change, length of stay, seasonality tourism intensity.
- ▶ Based on big data: can be used to identify hotspots → e.g. Heatmaps



Step 3: The concept of carrying capacity – or how to find a way towards sustainable tourism ...



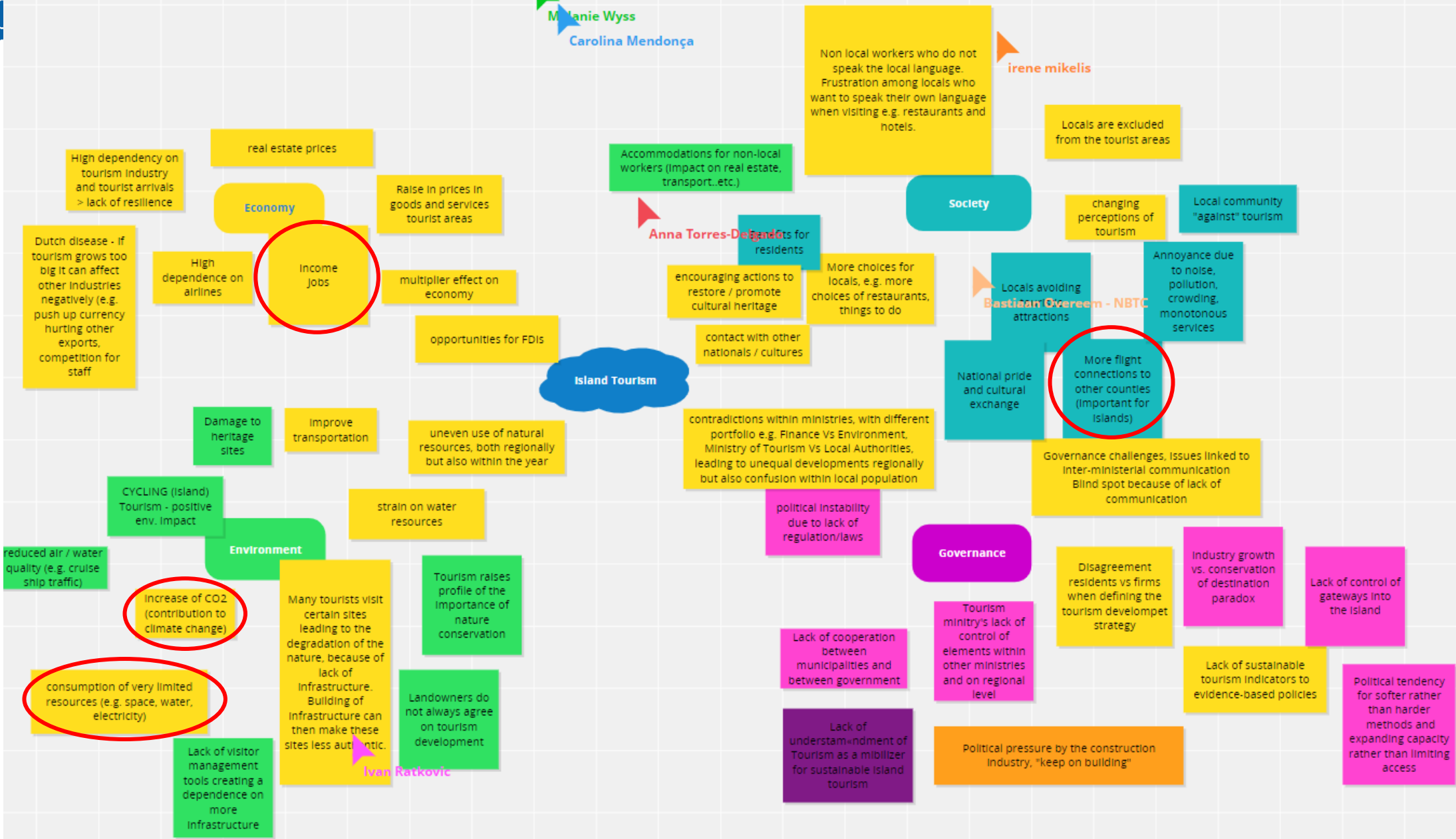


Lunch break

Session resumes at 13:30

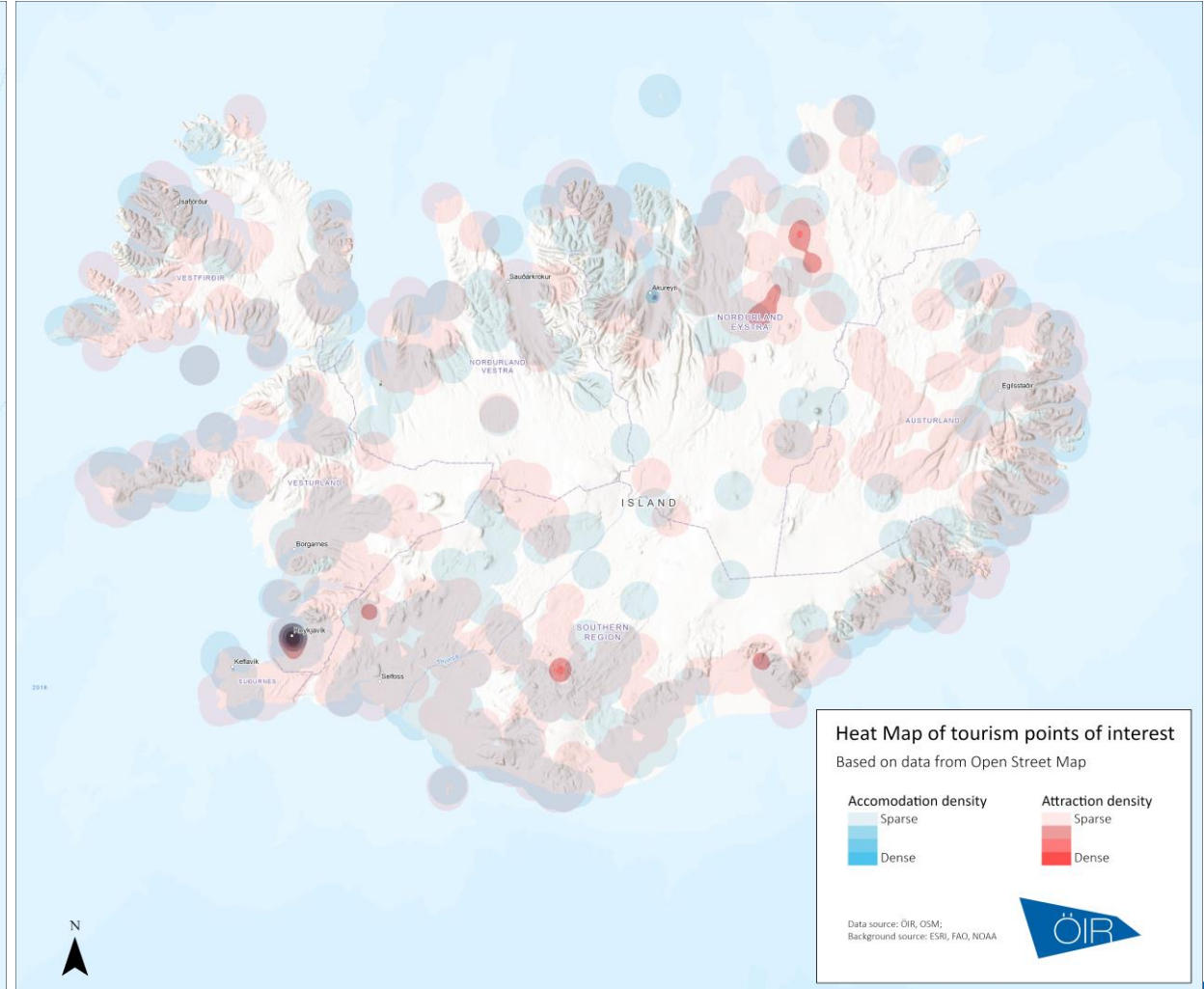
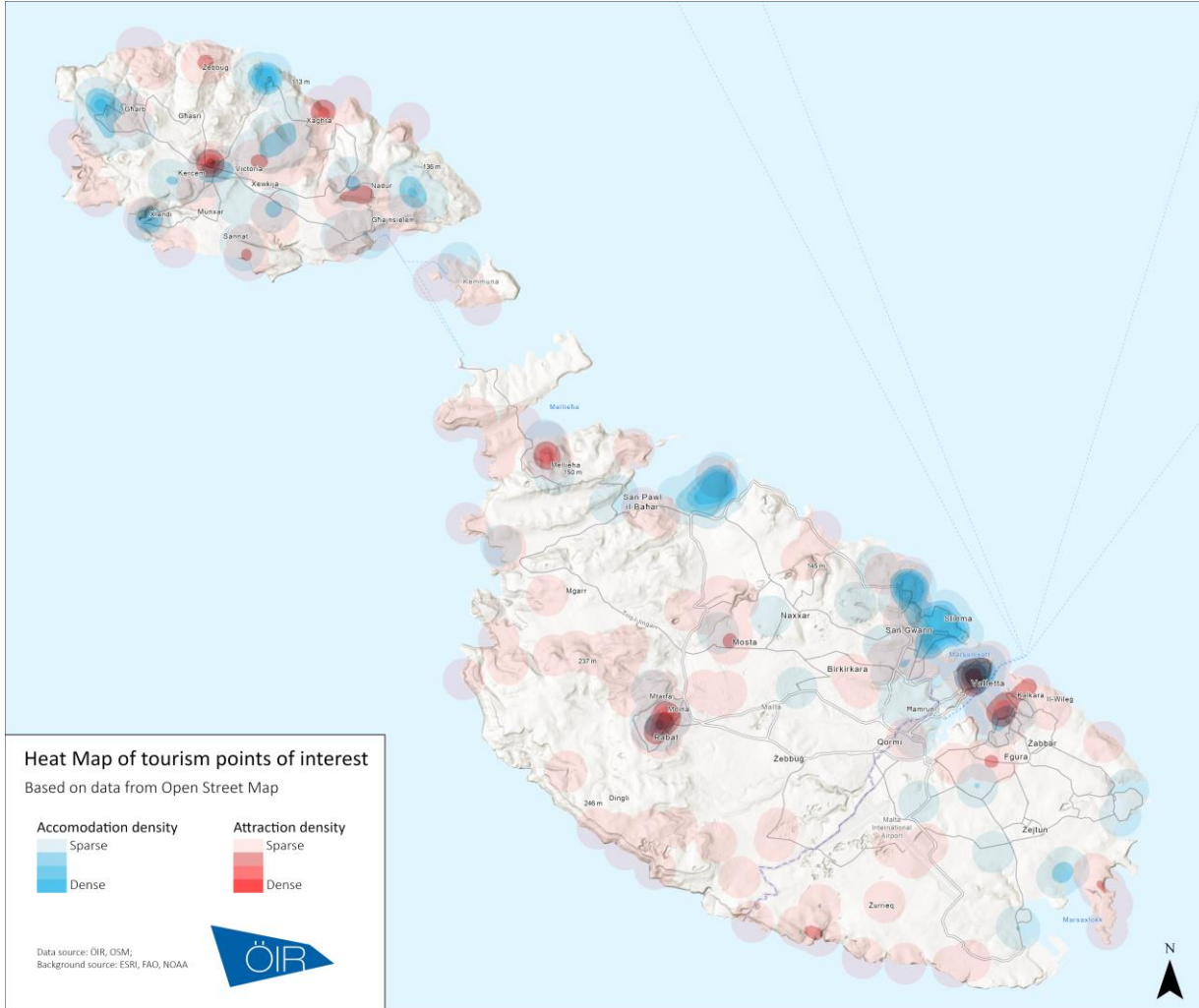


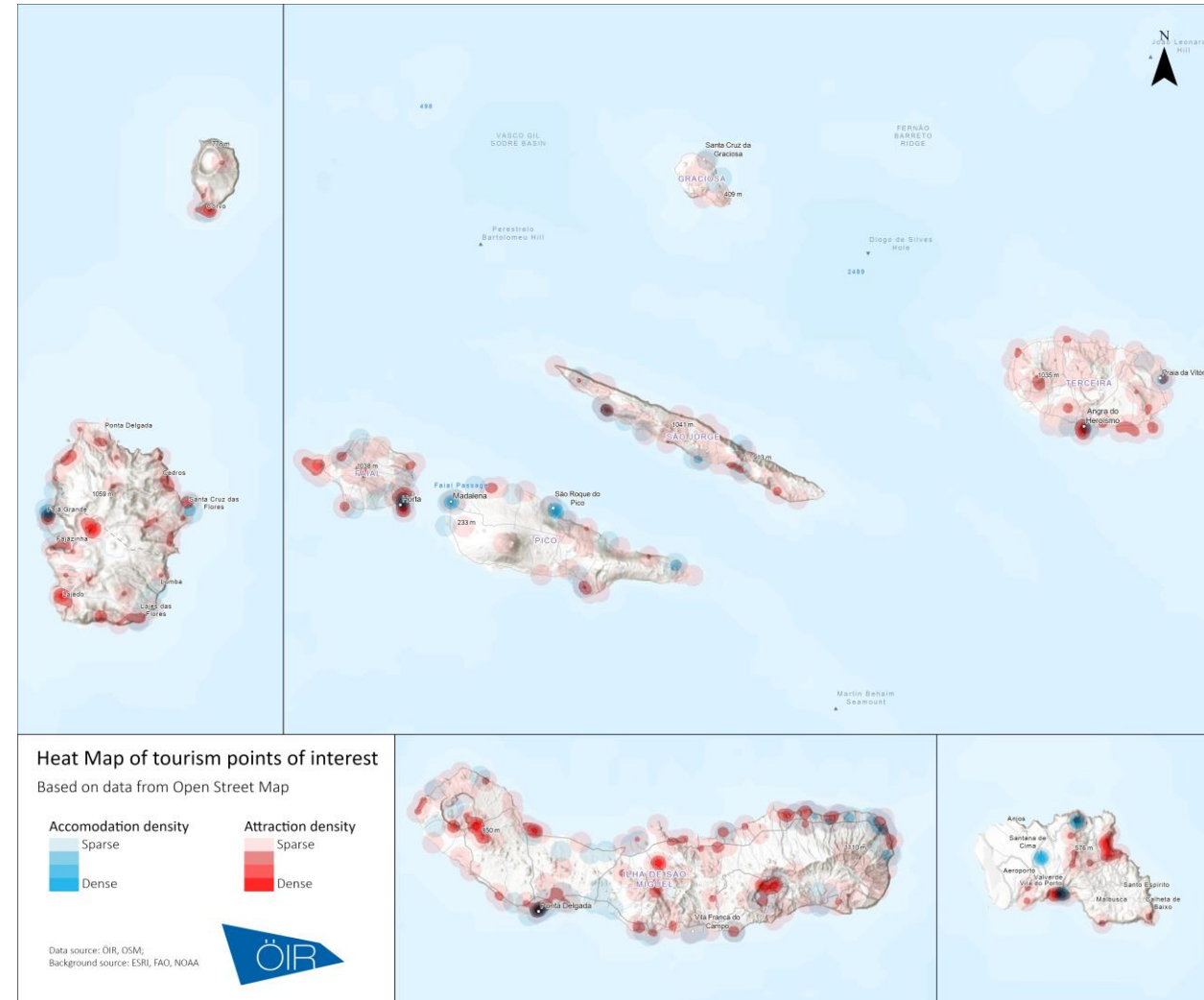
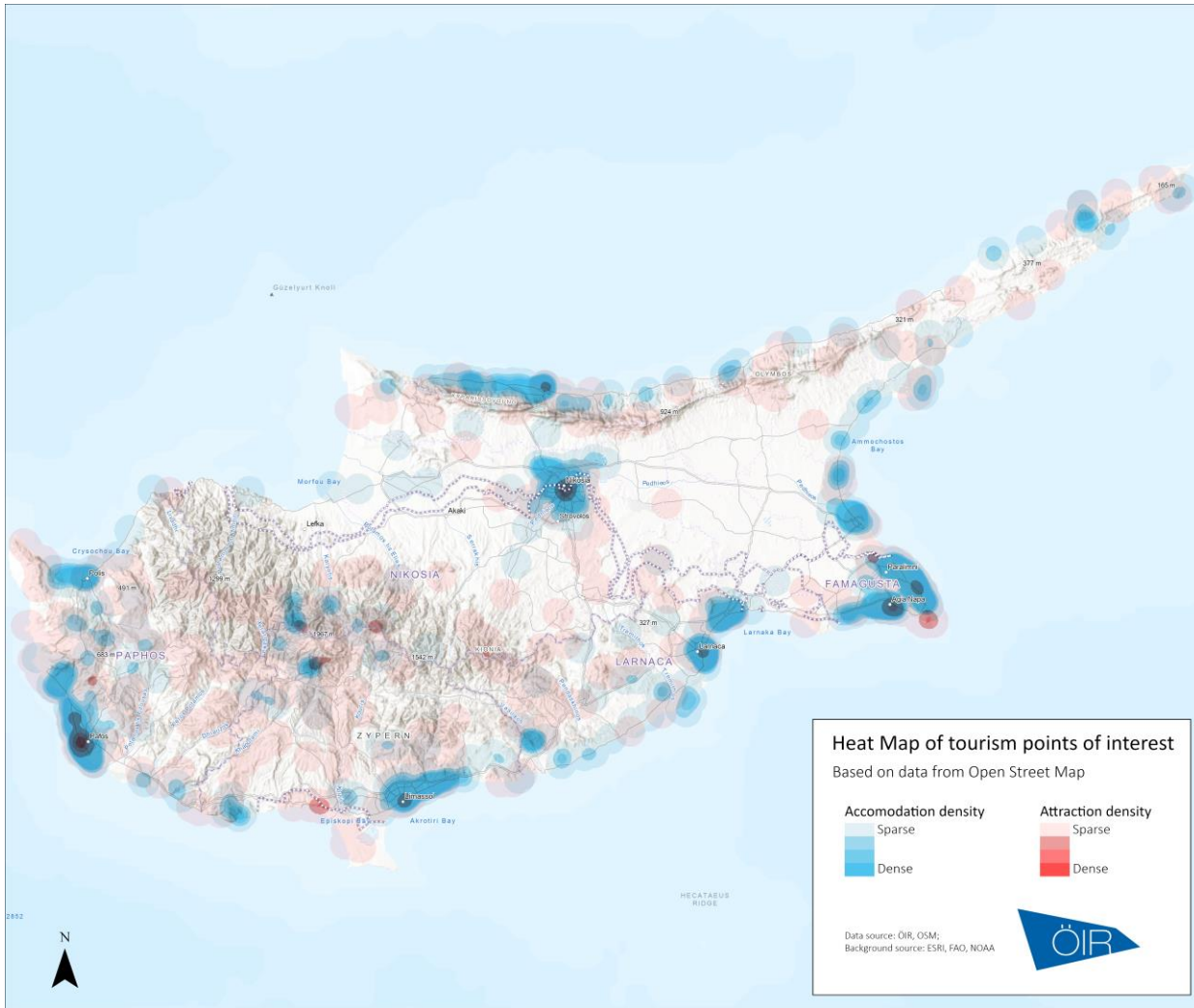
Melanie Wyss
Carolina Mendonça

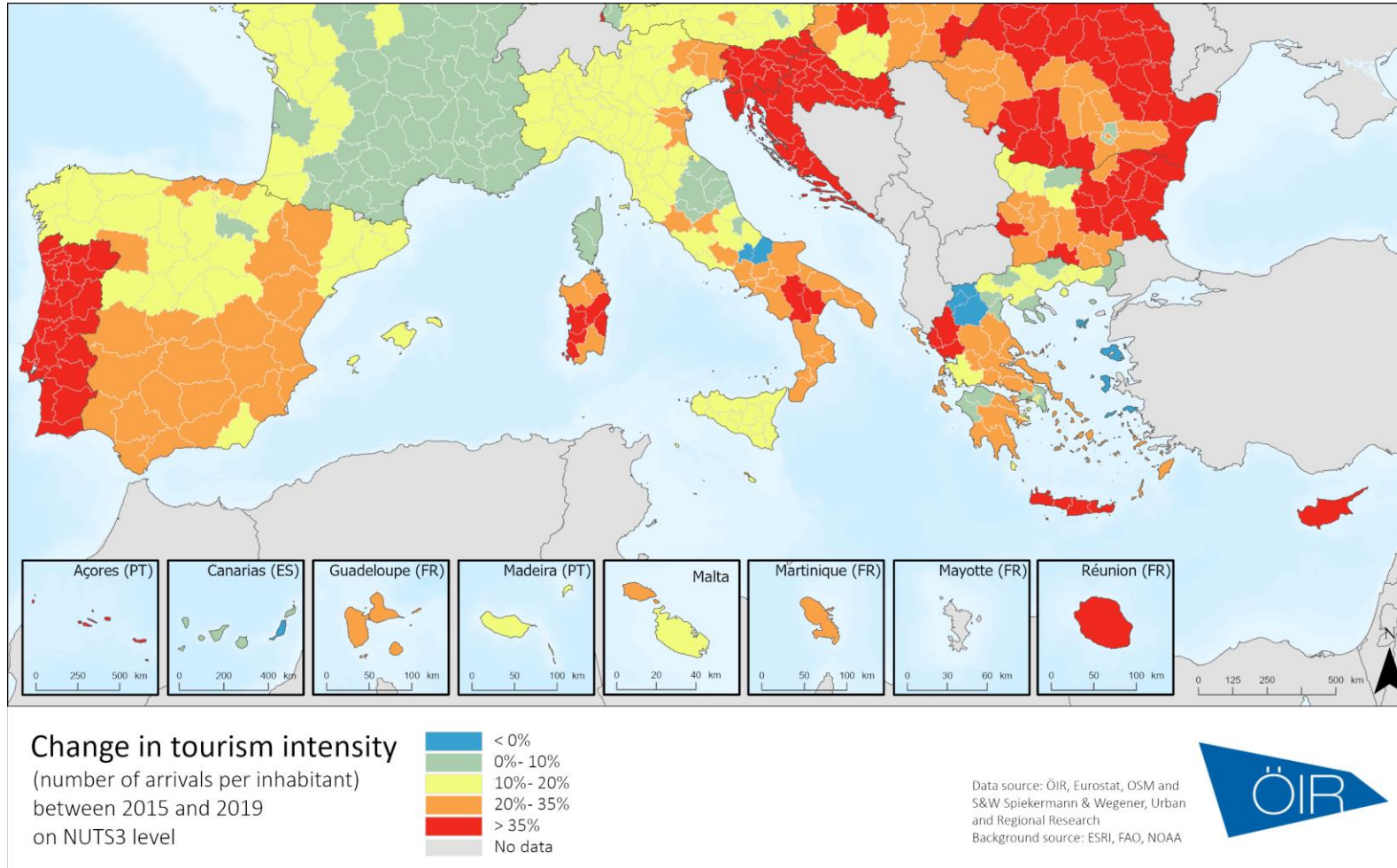


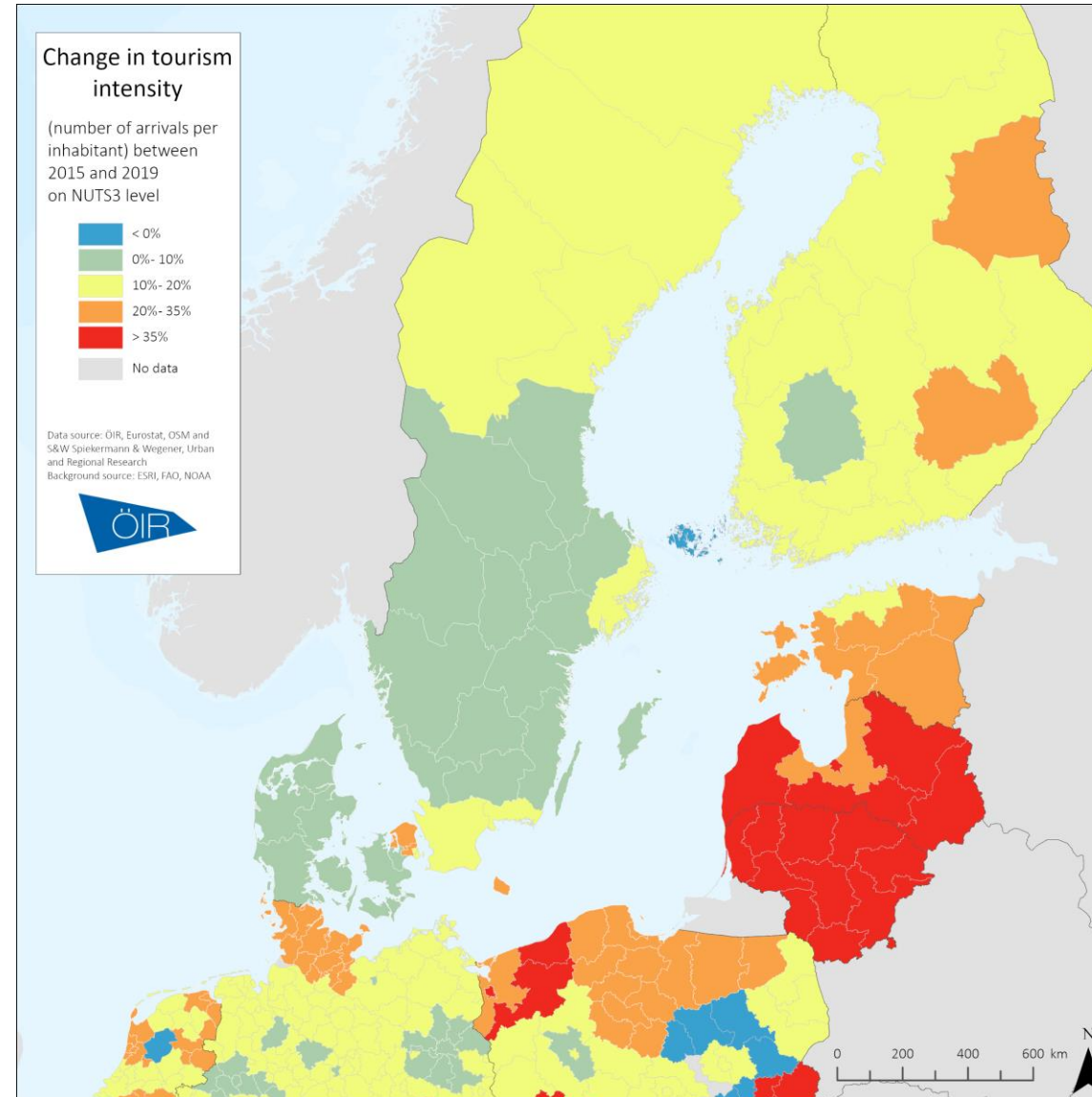


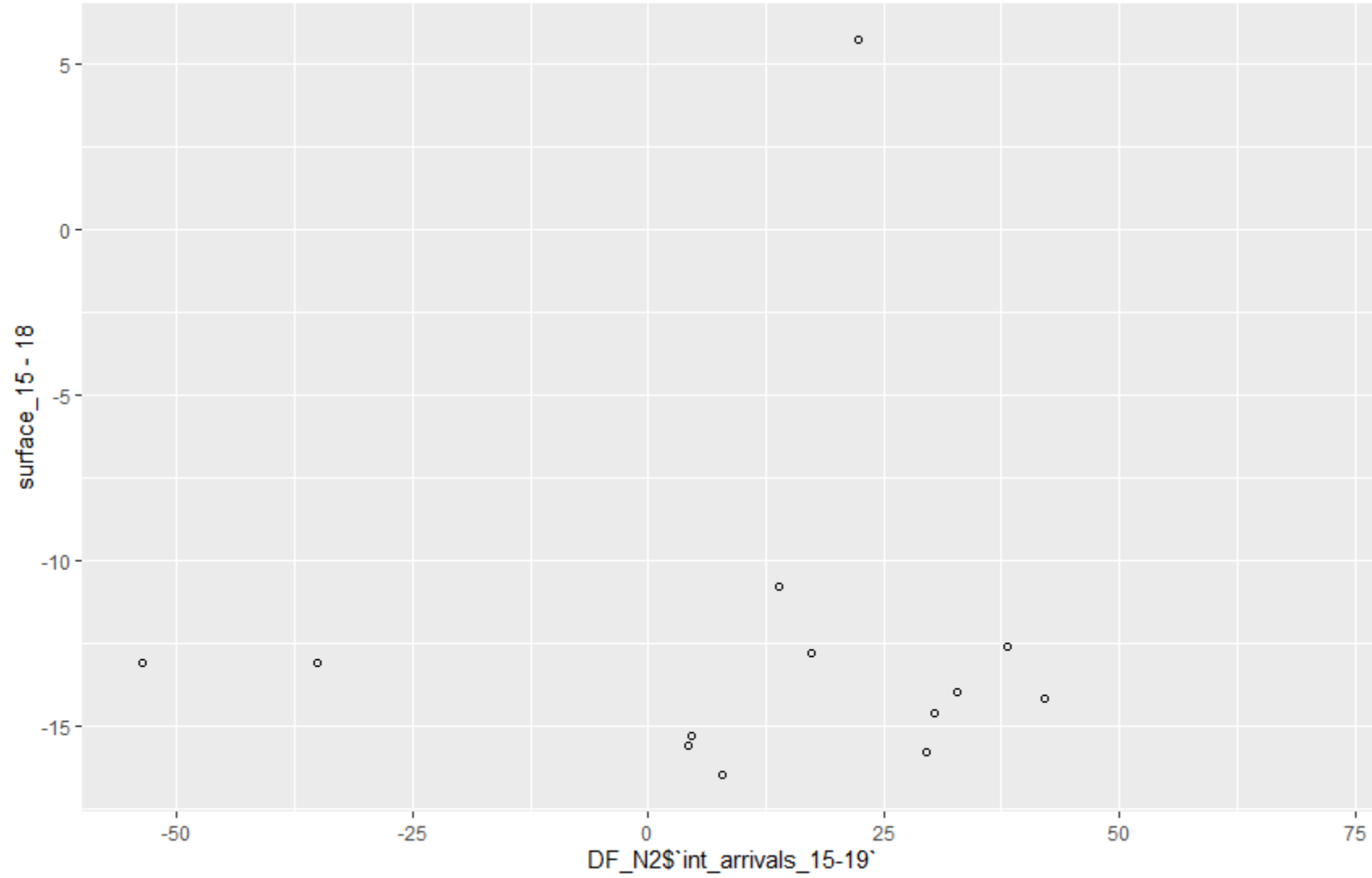
Step 2: Measurement of tourism flows

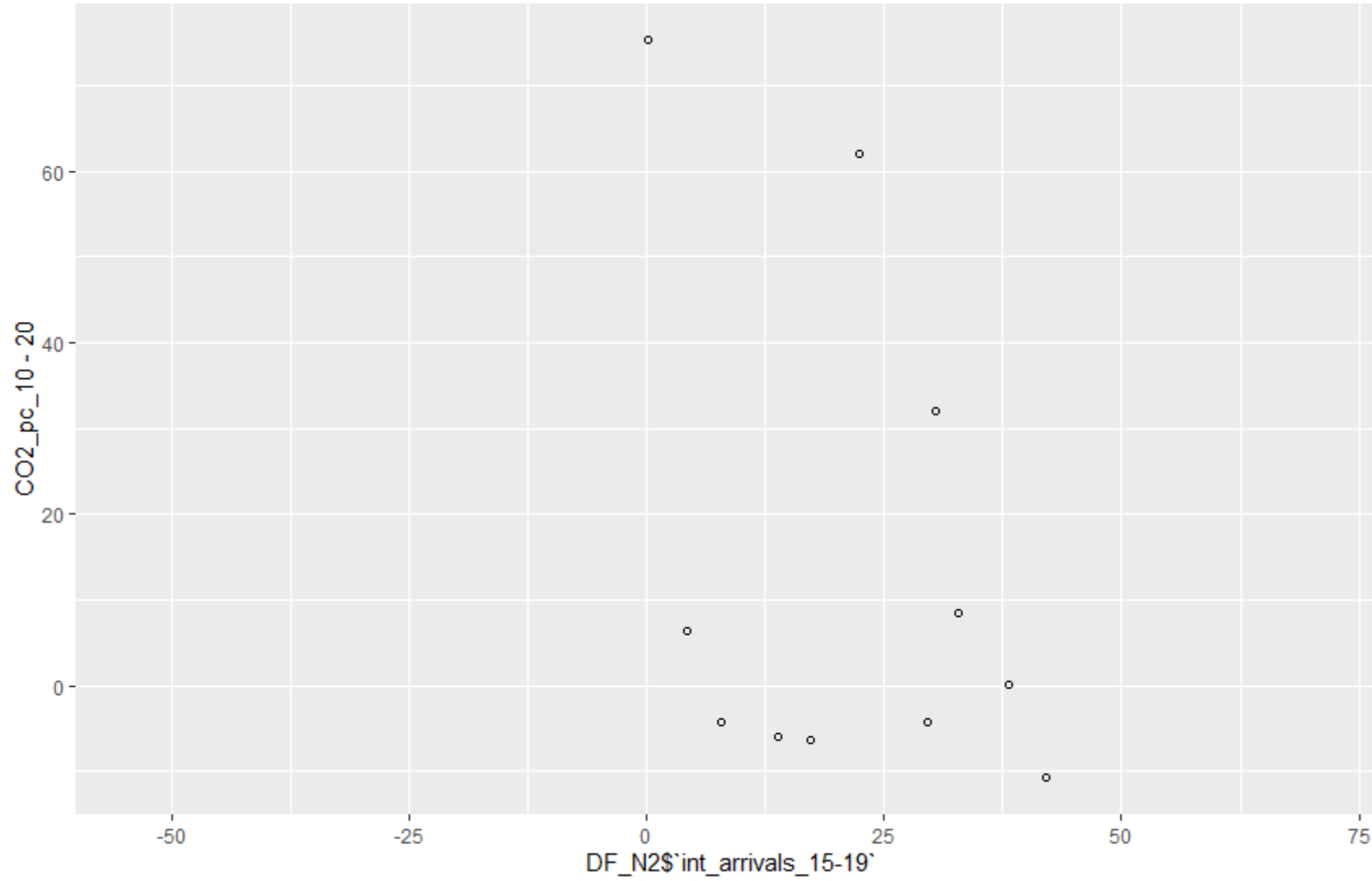


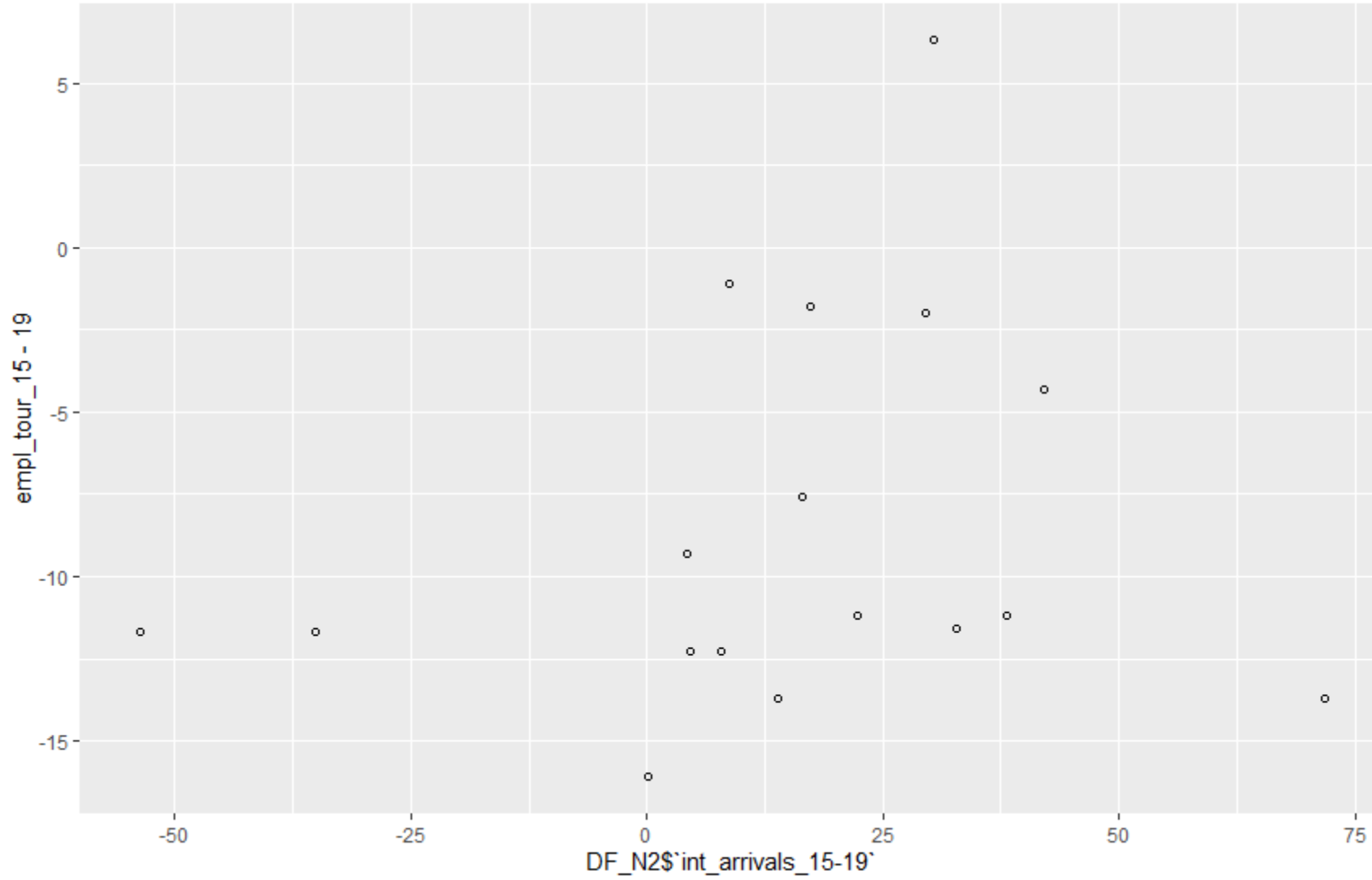












Step 3: Combining tourism effects and territorial context

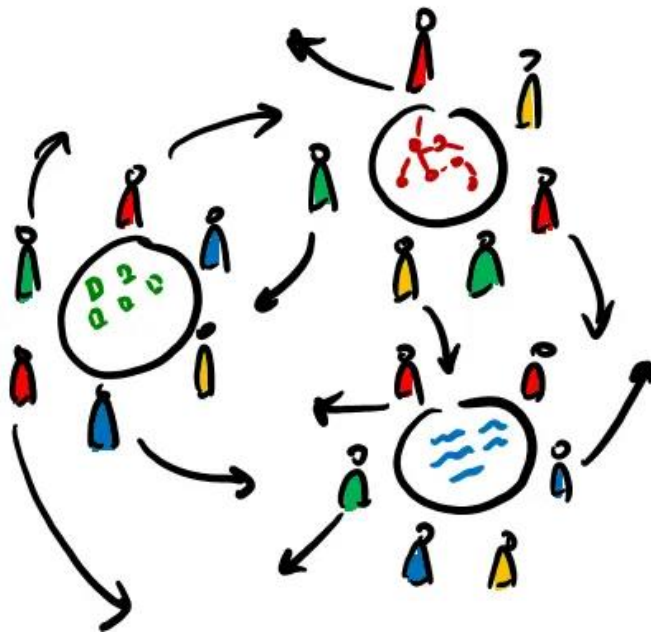
- ▶ Scatter plots to be added (during lunch break)



Coffee/tea break

Session resumes at 14:45

Part 4: World Café – rules of the game



- ▶ Four topics, four (online) breakout rooms
- ▶ Four rounds of discussions (20 min each)
- ▶ Use of an online whiteboard (Conceptboard.com) – link provided in the group chat

Part 4: World Café: Validation and key challenges

- ▶ Topic 1: Validation & improvement – solution approaches and expectations
- ▶ Topic 2: Issues of data availability and appropriateness of the territorial degree of resolution
- ▶ Topic 3: Governance and role of EU institutions
- ▶ Topic 4: Pathways towards sustainable tourism



Coffee/tea break

Session resumes at 14:45

Part 4: Findings and main conclusions

- ▶ Moderators' summaries and plenary discussions

Up-coming workshops

- ▶ **Urban** destinations workshop
hosted in **Vienna**, Austria on **20.01.2022**
- ▶ **Coastal** destinations workshop
hosted in **Palma de Mallorca**, Spain on **23.02.2022**
- ▶ **Rural** destinations workshop
hosted at the **Plitvice Lakes National Park**, Croatia on **17.03.2022**
- ▶ **Mountain** destinations workshop
in **spring 2022**
- ▶ **EU-level** workshop
hosted in **Brussels**, Belgium, in **spring 2022**





Thank you!



Additional information

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