



# Unbalanced Tourism Growth at Destination Level

Brussels Workshop

20 May 2022

Bernd Schuh, Dagmar Lund-Durlacher, Wolfgang Strasdas, Fabian Weber, Julianna Priskin, Arndt Münch

# Welcome!

- ▶ Ms Marie-Helene Pradines Head of Unit, GROW.G1 - Tourism & textiles
- ▶ Ms Natalia Martinez Páramo, Head of Unit, EISMEA, Unit I.02 – SMP / COSME
- ▶ Mr Bernd Schuh, Director, Austrian Institute for Regional Studies

## Aim of the workshop

- ▶ Discussion of causes and drivers of unsustainable tourism growth
- ▶ Bring together tourism stakeholders to foster exchange on problems and solutions to unsustainable tourism
- ▶ Discuss the potentials to move to more sustainable tourism management, i.e. the EU Transition Pathway for Tourism initiative

# Agenda of the workshop

| Timing | Sessions   |
|--------|--|
| 08:45  | Arrival onsite, health and safety, and registration – Coffee/tea   |
| 09:00  | Welcoming and introduction: <ul style="list-style-type: none"> <li>▪ Ms Marie-Helene Pradines Head of Unit, GROW.G1 - Tourism &amp; textiles</li> <li>▪ Ms Natalia Martinez Páramo, Head of Unit, EISMEA, Unit I.02 – SMP / COSME</li> <li>▪ Mr Bernd Schuh, ÖIR GmbH</li> </ul>   |
| 09:15  | Introduction of participants   |
| 09:40  | <b>Part 1:</b> Presentation of the project findings and recommendations<br><i>Format: Presentation of the key project findings followed by a Q&amp;A session</i>   |
| 10:15  | <b>Part 2:</b> Comparative analysis of overtourism per destination type<br>Cross-analysis of causes, impacts and solution approaches found in island, rural, mountain, urban, and coastal destinations. This analysis highlights similarities and differences across the various types of destinations.<br><i>Format: Presentation and open discussions in plenary session</i>   |
| 11:00  | Coffee/tea break   |
| 11:10  | <b>Part 3: Transition pathways for tourism</b><br>Presentation of the Transition Pathway for Tourism – policy context, with a word from Valentina Superti, DG GROW Director.<br>Panel discussion: how more sustainable destinations can contribute to and benefit from the Transition Pathway for Tourism <ul style="list-style-type: none"> <li>▪ Ramune Genzbigelyte-Venturi, DG GROW.G1 - Tourism &amp; textiles</li> <li>▪ Bastiaan Overeem, Netherlands Board of Tourism &amp; Conventions - Program Manager Destination Development</li> <li>▪ Almudena Cruz Yábar, Spanish Ministry of Culture</li> <li>▪ Carolina Mendonça, Azores regional government</li> </ul> <i>Format: Presentation followed by panel discussion</i> |
| 12:45  | Conclusions and introduction to FUTURIUM   |
| 13:00  | End of the workshop  |

## Let us know who you are...

What does sustainable  
tourism mean to you?



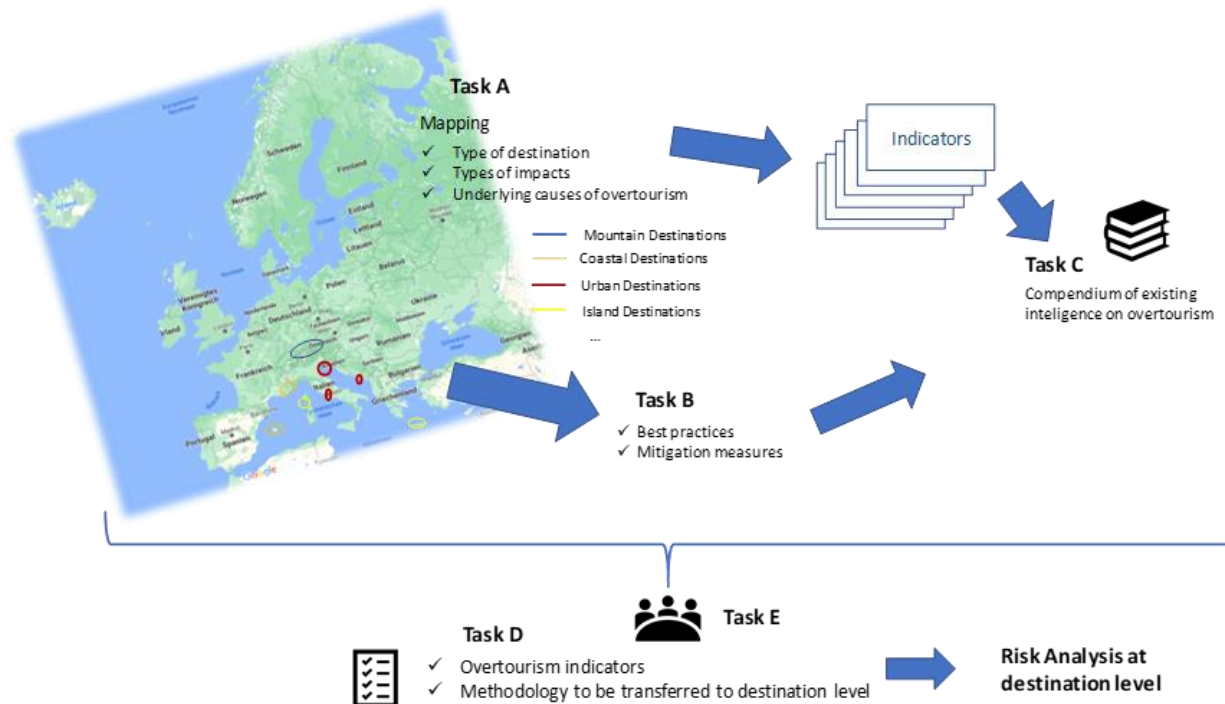


## Part 1: Presentation of the project findings and recommendations

## 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

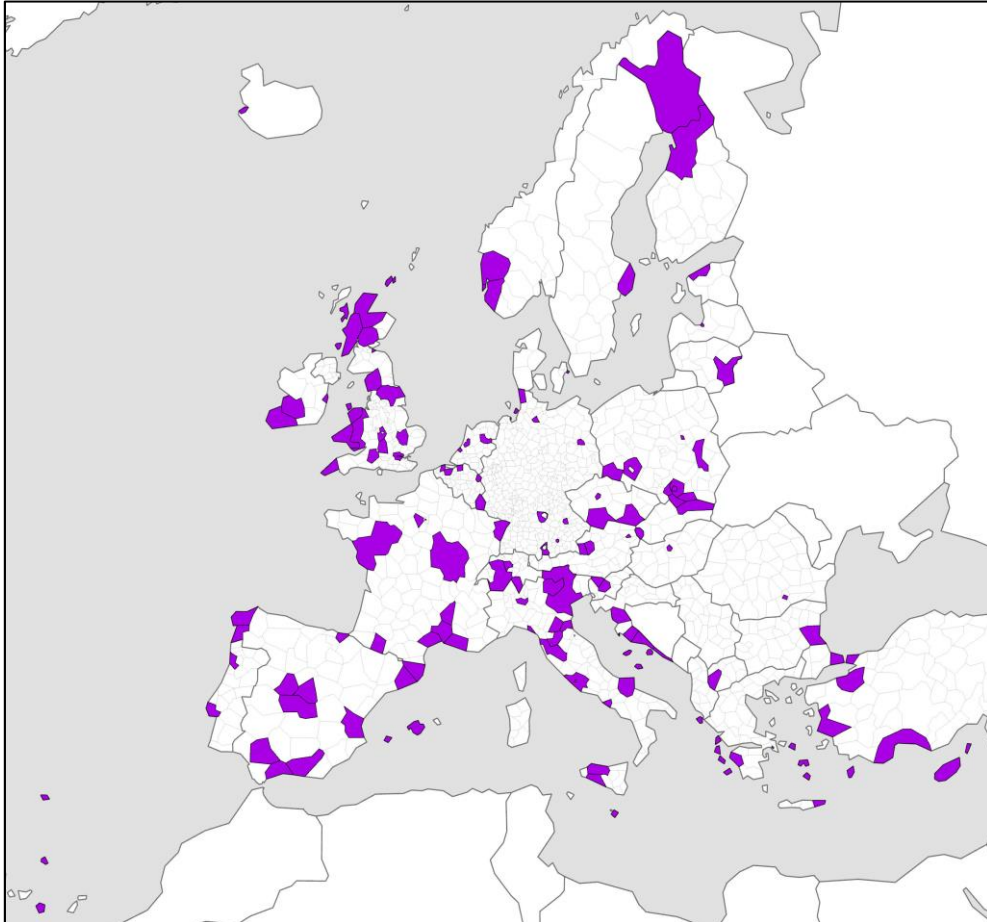


## Task A: Definition of overtourism

“(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”.

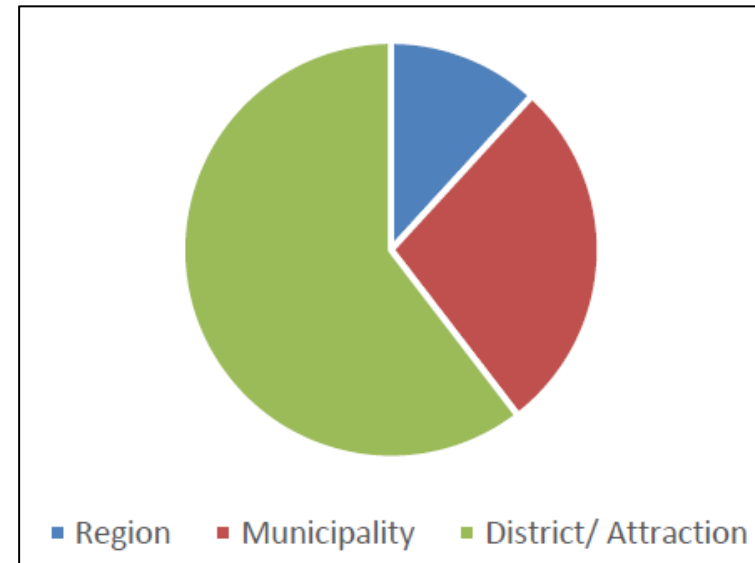
(Peeters et al. 2018)

## Task A: Inventory of overtourism

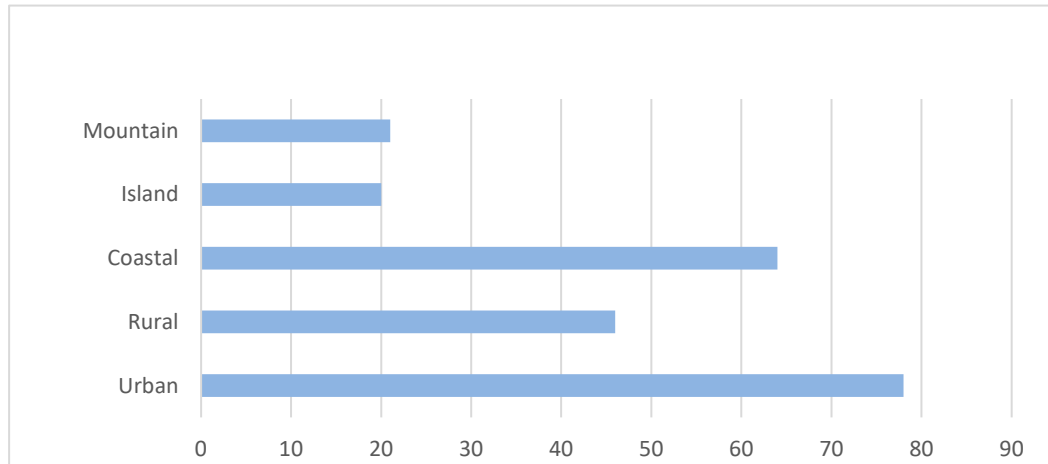


Source: Project team, 2021

Spatial level where overtourism occurs



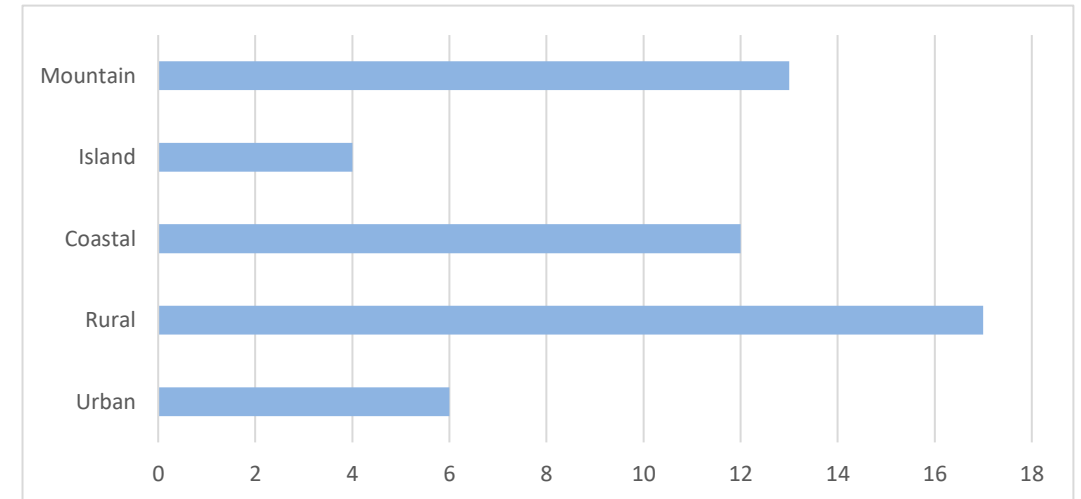
# Task A: Inventory of overtourism



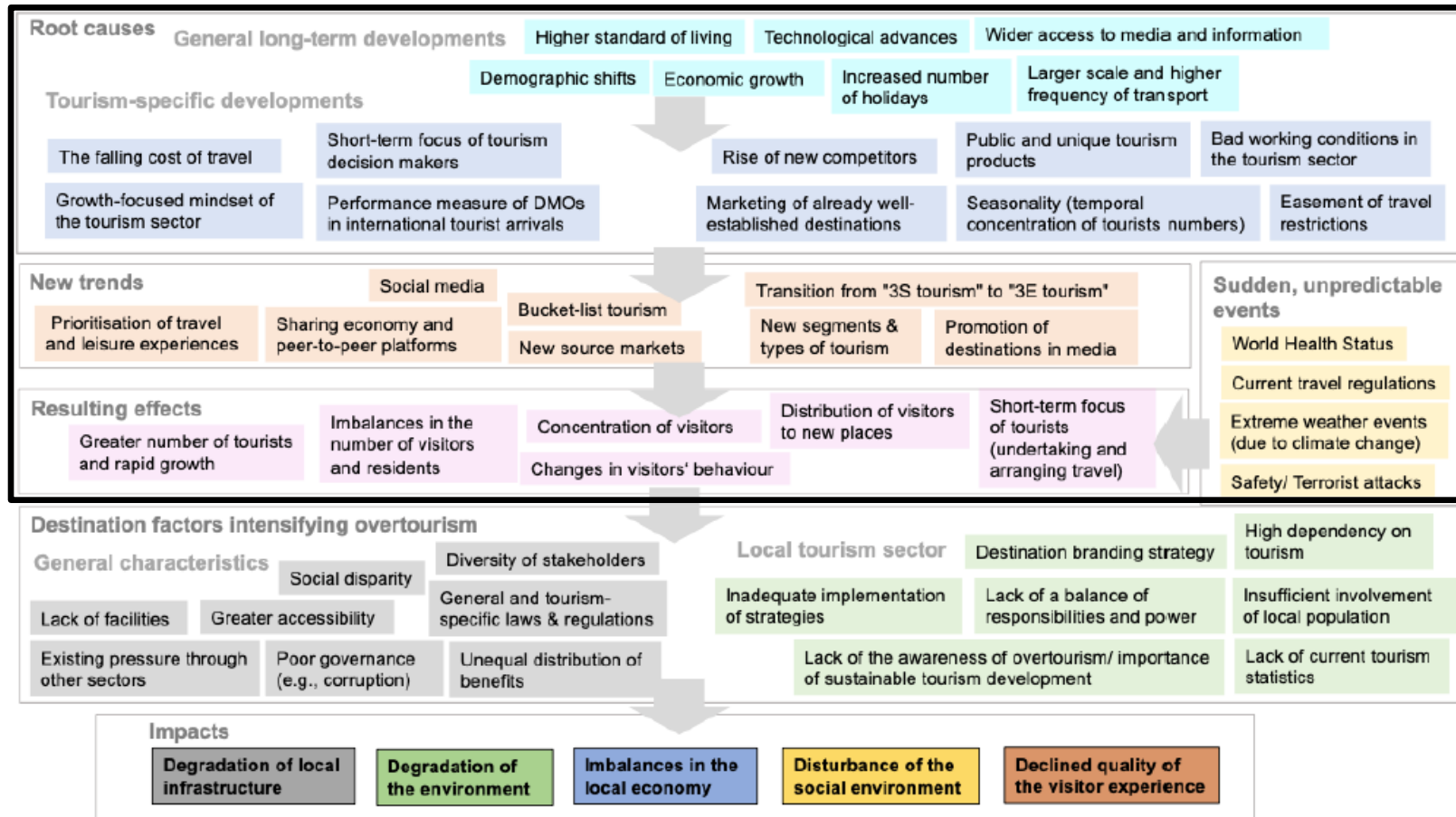
Affected destination types before Covid

Source: Project team, 2021

Affected destination types during Covid

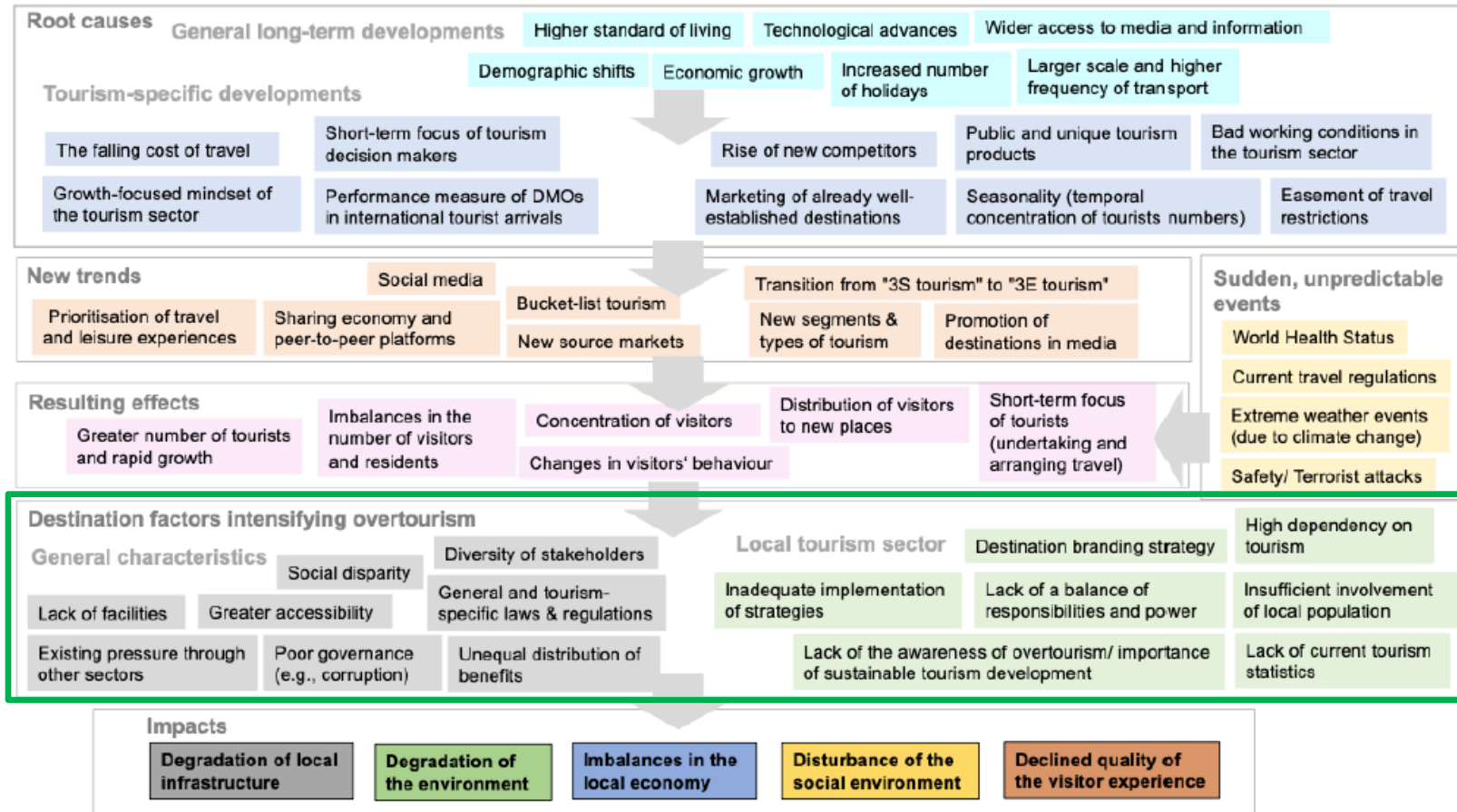


# Task A: Root causes and impacts of overtourism



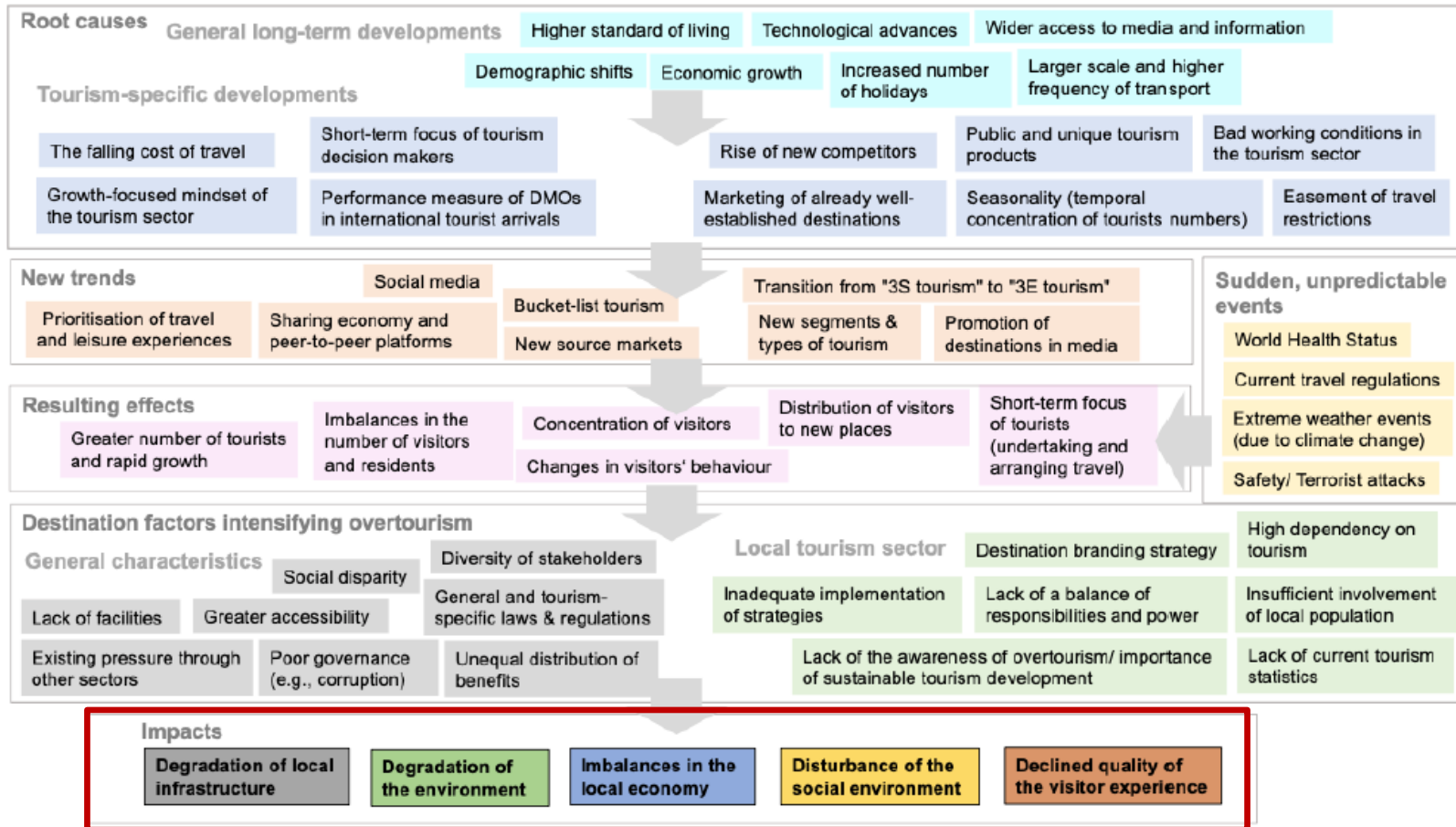
Source: Project team, 2021

# Task A: Root causes and impacts of overtourism



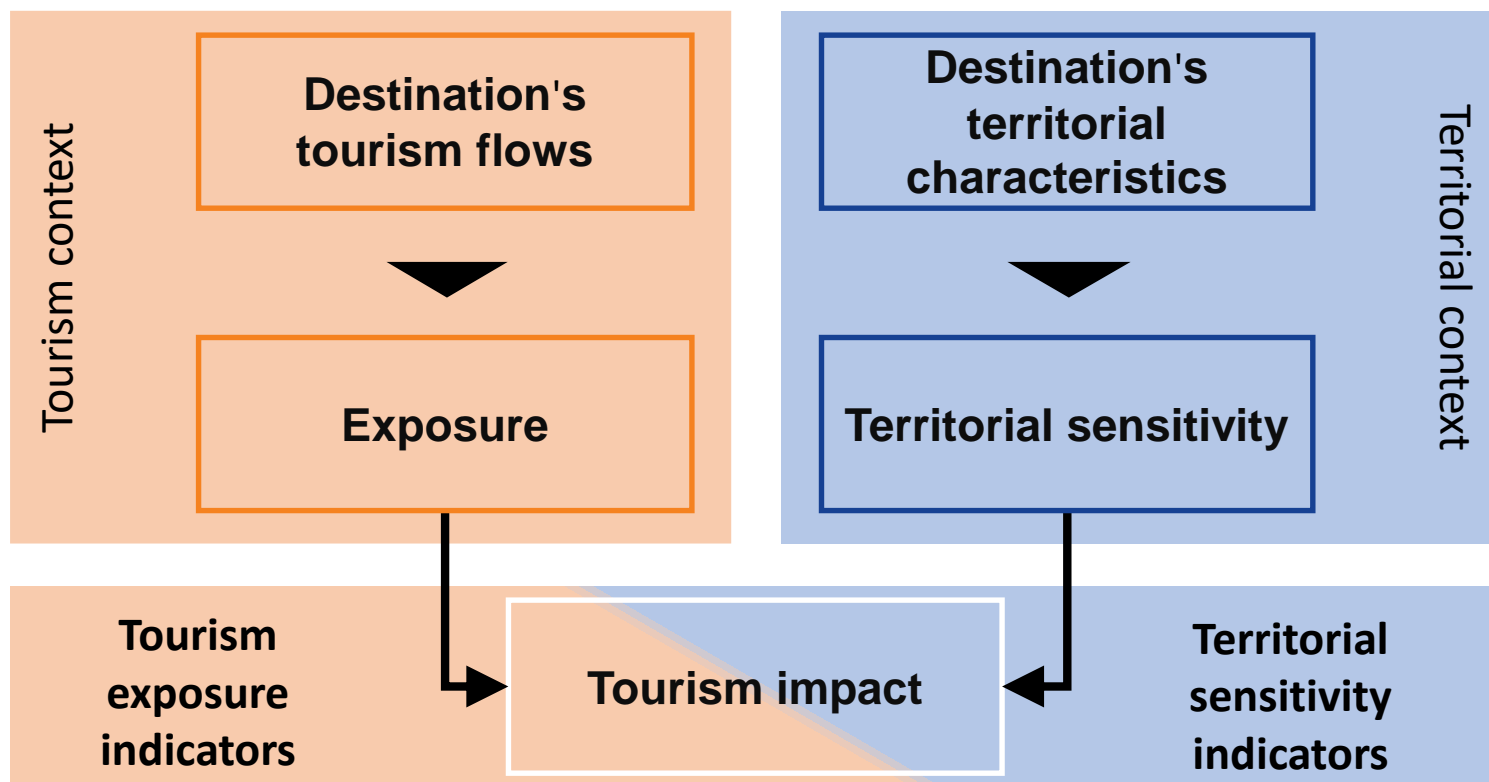
Source: Project team, 2021

# Task A: Root causes and impacts of overtourism



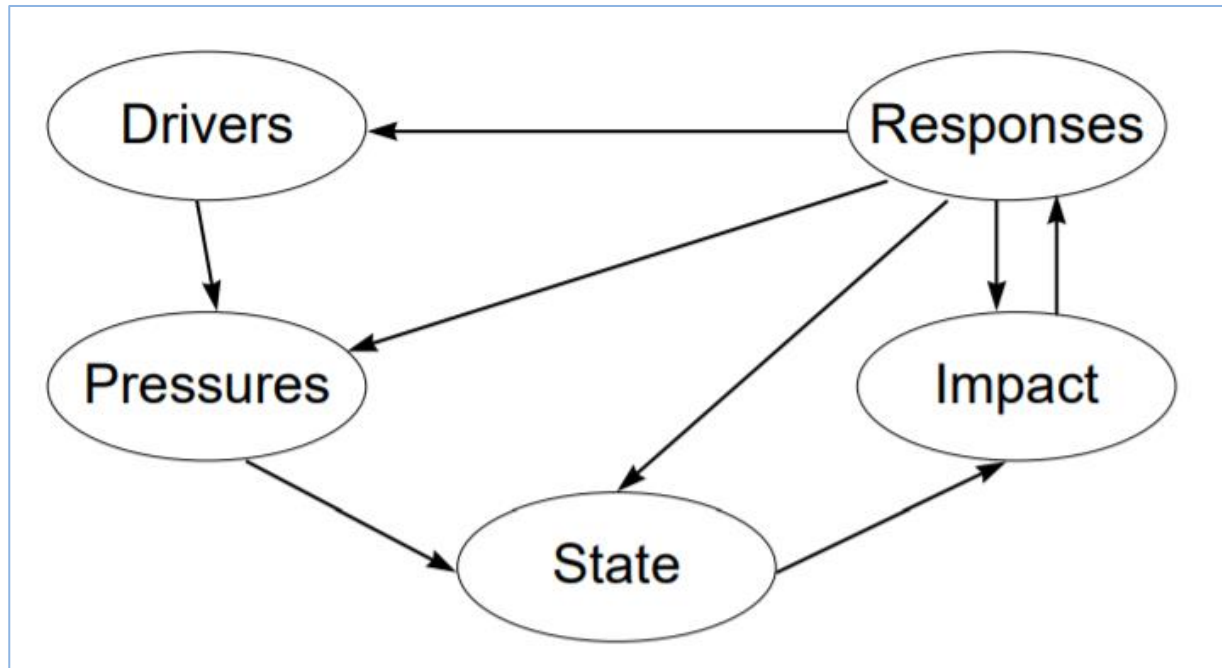
Source: Project team, 2021

## Task A – Measuring overtourism



Source: ESPON Tourism, 2021

# Task A: Measuring overtourism



The DPSIR Framework, Source: European Environment Agency 1999



## 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: General Case study approach

- ▶ Comprehensive long-list of possible case studies based on desk research
- ▶ Developing of an **inventory of potential case** studies for different geographical areas (urban, rural, mountain, coastal, island)
- ▶ Development of **assessment grid** for the inventory

| Destination/<br>Country/<br>Region | Type of destination |   | Protected Areas and Heritage Sites |                            | Spatial level overtourism arises |              |                     | Key facts tourism situation and development | Solution Approaches (Measure taken) | Case Study available | General sources and further information |
|------------------------------------|---------------------|---|------------------------------------|----------------------------|----------------------------------|--------------|---------------------|---|-------------------------------------|----------------------|---|
|                                    | NUTS 3 Level        | Urban/<br>Rural/<br>Coastal/<br>Island/<br>Mountain | Protected Areas                    | UNESCO World Heritage Site | Regional                         | Municipality | District/Attraction |   |                                     |                      |   |
|                                    |                     |   |                                    |                            |                                  |              |                     |   |                                     |                      |   |

## Task B: Case study approach – selection of case studies

- ▶ A comprehensive set of **criteria for the selection** of the cases to be analysed was developed.
- ▶ The most important criteria were the existence of **successful solution approaches**, as well as a **balanced representation of the five destination types** and geographical distribution within Europe.
- ▶ In addition, **data availability, the diversity of root causes and impacts, and the informative value** of the cases were integrated as important aspects considered.
- ▶ Based on these insights, three cases per destination type (urban, rural, mountain, coastal, island) were defined and the **final selection** was then discussed in the project team.

## Task B: Case study approach – case studies

| 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: Case study approach – methodological design

- ▶ Selected case studies were analysed using a [case study framework](#) (template)
- ▶ Based predominantly on [secondary data](#) compilation from published academic and industry reports
- ▶ [Interviews](#) with persons from the respective destinations for complementation and validation
- ▶ The method for recruiting interview partners was organisation based, the views expressed may not represent multi-stakeholder views from each destination
- ▶ The framework contains [quantitative as well as qualitative criteria](#)
- ▶ The finalised analysis framework served as a structure for the [cross-comparison](#) of all case studies as well as an [interview guideline](#) for the researchers.

## Task B: Case study approach – framework

- ▶ Destination specific data (area, population, arrivals, overnights etc.)
- ▶ Description of the case
- ▶ Tourism development & visitors (segments, distribution, etc.)
- ▶ Tourism management in the destination
- ▶ Description of overtourism phenomenon (root causes, impacts, stakeholders, bottlenecks etc.)
- ▶ Solution approaches (challenges, success factors, transferability)
- ▶ Monitoring & indicators
- ▶ Management of the pandemic
- ▶ Outlook

## 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. It is important to have reliable, scientific data.

## 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*

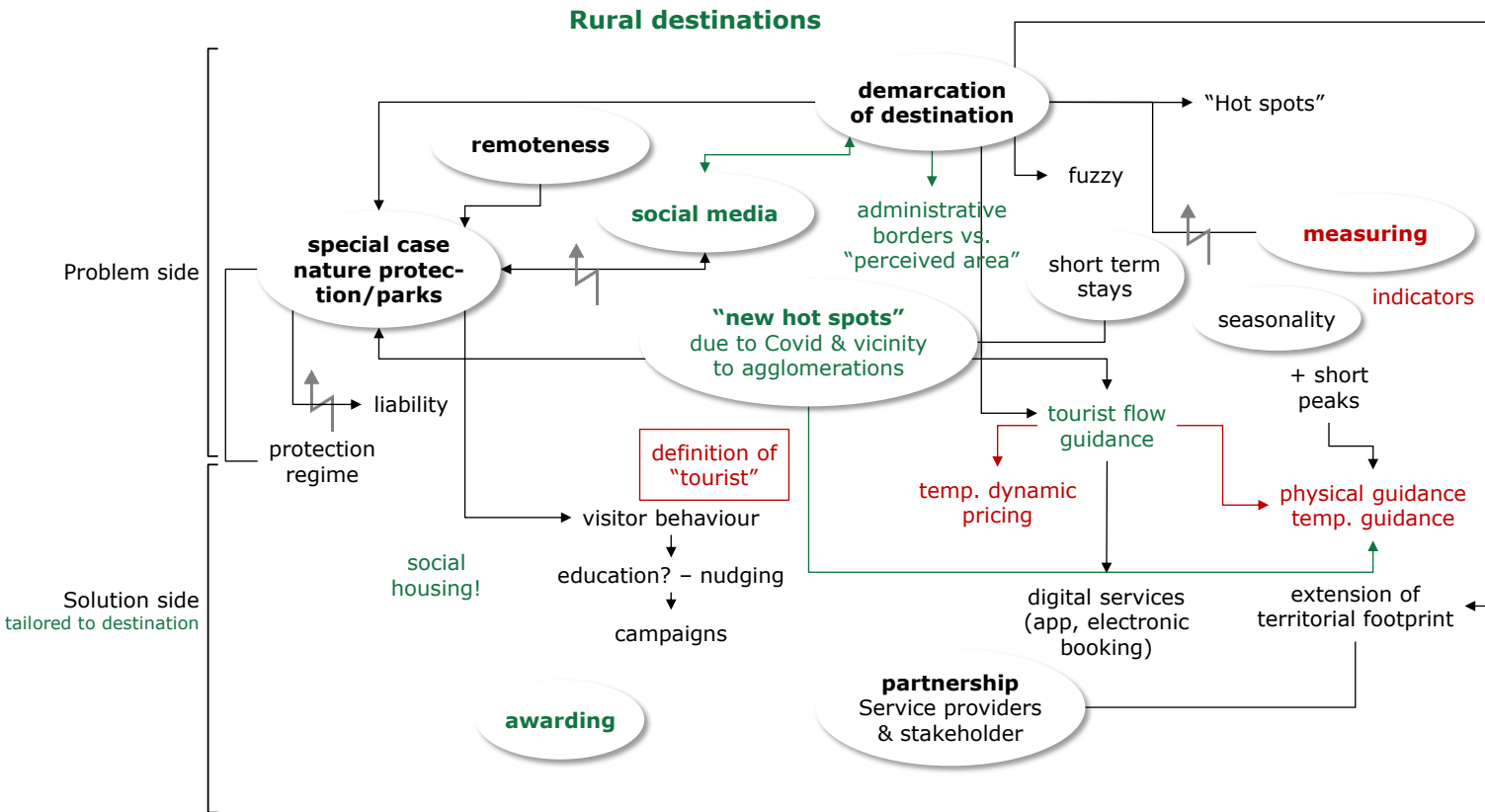
### 2. Measuring tourism pressure on the regional & local levels (NUTS-3 or lower)

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

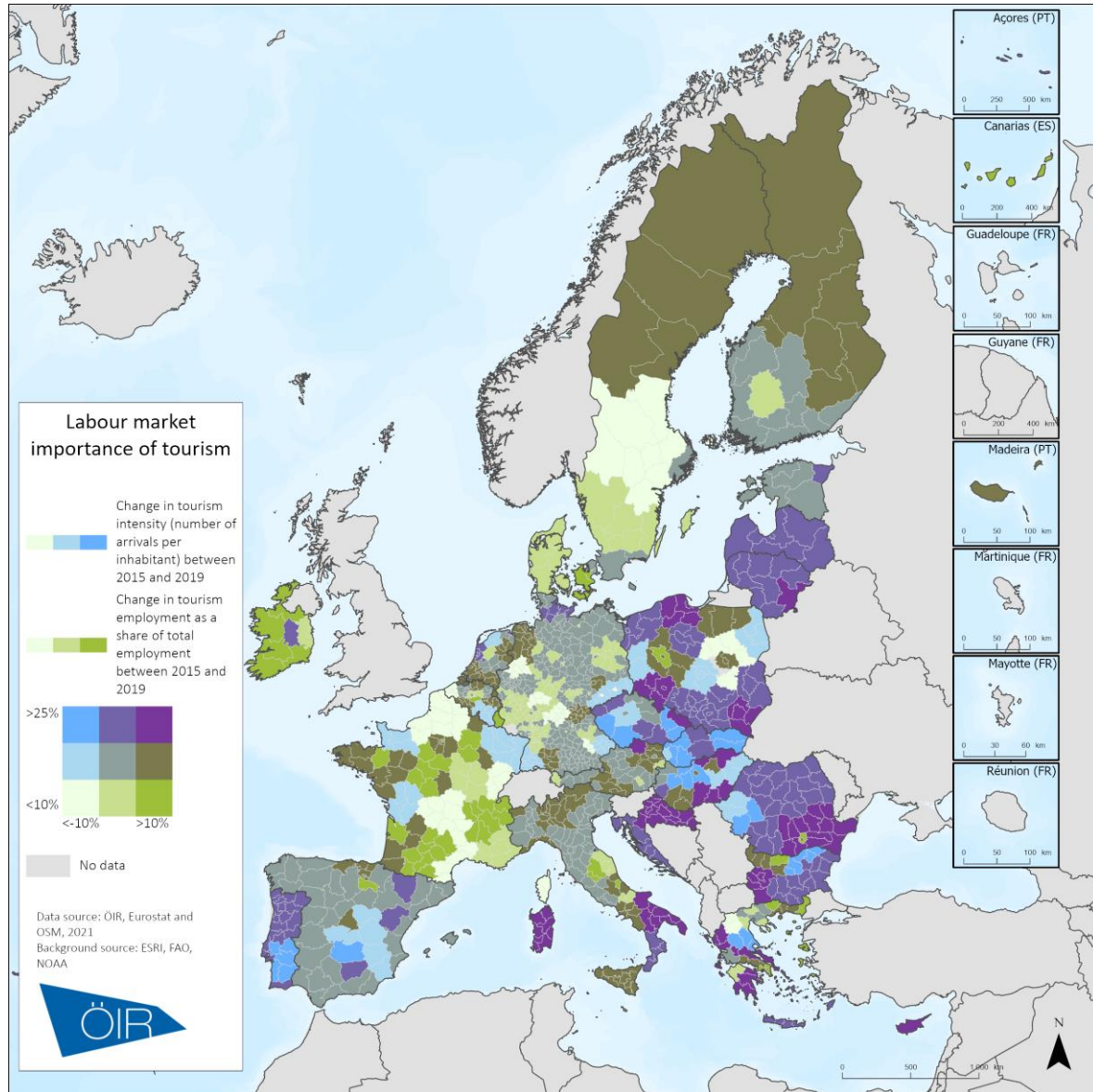
### 3. Measuring tourism pressure and actual impacts locally

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

# Task D – Measuring overtourism

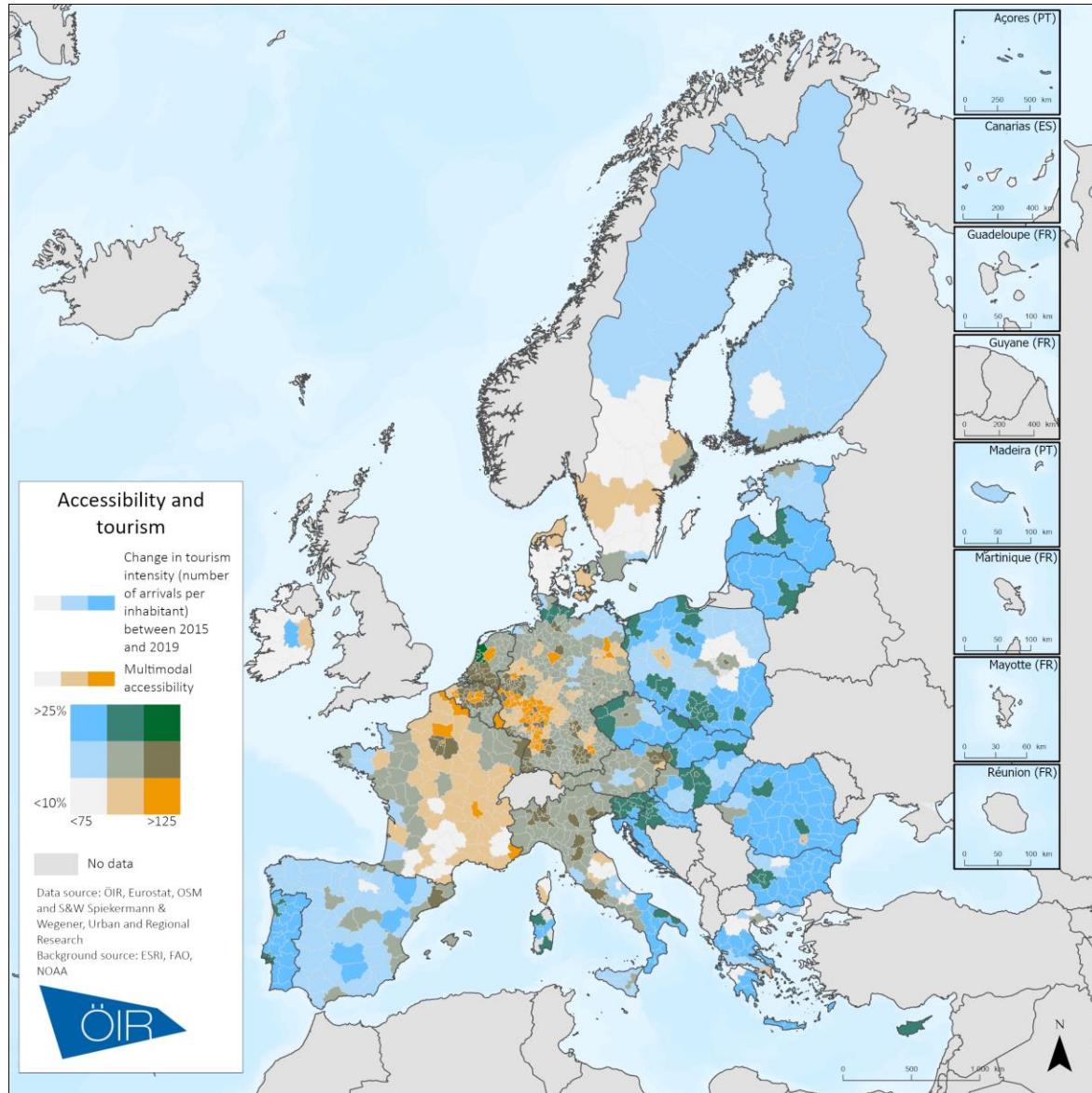


- ▶ Development of systemic pictures in workshop setting
  - Identification of causes and impacts specific to the destination type
  - Development of hypotheses between tourism exposure and tourism/territorial impacts
  - Definition of indicator pairs



## Labour market importance of tourism

- ▶ Component 1: number of arrivals per inhabitant
  - Change 2015 to 2019
- ▶ Component 2: Employment in tourism (accommodation, hospitality, gastronomy etc.)
  - Change 2015 to 2019



## Accessibility and change in intensity of tourism

- ▶ Component 1: number of arrivals per inhabitant
  - Change 2015 to 2019
- ▶ Component 2: Multimodal accessibility (access by car, train, and plane)



## Questions and answers



## Part 2: Comparative analysis of overtourism per destination type and key recommendations

# Comparative analysis of overtourism per destination type

## Urban destinations

- ▶ **Specifics:** Growing popularity of urban destinations and short weekend breaks, increased destination accessibility and expansion of privately rentable accommodation
- ▶ **Drivers:** Bus tours / coaches (Lucerne), cruise tourism (Florence, Vienna), seasonal attractions / events (Florence, Vienna)
- ▶ **Impacts:** Increased real estate prices, cost of living, touristification, changes in neighborhood structures, reduced visitor experience, reduced quality of life for locals, exodus of local residents in historic centers
- ▶ **Solutions:** Various controls and limits embedded in laws, regulations and policies (e.g. extending opening hours, monitoring and regulating short-term rental economy), marketing strategies to balance out seasonal bottlenecks, address new visitor segments, digital solution approaches (FeelFlorence App “pop up info”, Lucerne: Digital visitor card, iParking App for coach busses, Vienna: Ivie App digital bus management system)



# Comparative analysis of overtourism per destination type

## Coastal destinations

- ▶ **Specifics:** Popular and classic beach destinations (e.g. Palma, Bay of Lübeck), growth of cruise passengers, high visitor concentration during summer months
- ▶ **Drivers:** Nature as a key attraction, cruise tourism (e.g. Palma, Geirangerfjord), film tourism (“Frozen-effect” in Geirangerfjord)
- ▶ **Impacts:** Pressure on infrastructure, congestion, overcrowding, increased real estate prices, cost of living, touristification, reduced visitor experience quality, reduced quality of life for locals, noise and waste issues, decreased air and water quality due to intensive cruise tourism
- ▶ **Solutions:** Laws, regulations and policies (e.g., only zero-emission ships are allowed to enter the UNESCO heritage Fjords from 2026 onwards, definition of a max. touristic density of 8 beds per hectare (Palma)), dispersion strategies, digital solution approaches (e.g. Beach Ticker App - Bay of Lübeck measuring visitor numbers at parking lots and at certain beach sections, Welcome Palma App with a real-time heat map showing most congested zones, chat-bot recommending alternative sights)



# Comparative analysis of overtourism per destination type

## Island destinations

- ▶ **Specifics:** Biophysical fragility (beaches, dunes etc.), limited geographic space resulting in challenges with respect to further tourism growth.
- ▶ **Drivers:** Foreign investments (Malta), increased residential tourism/ second homes (Mallorca), social media and effect of films (Iceland), cruise tourism
- ▶ **Impacts:** Increased real estate prices, touristification and changes in neighbourhood structures, reduced visitor experience, reduced quality of life for locals, noise, air quality issues (from cruise ships), waste management, water use (Mallorca and Malta), insufficient nature recovery (Iceland and Mallorca)
- ▶ **Solutions:** Various controls and limits embedded in laws, regulations and policies: Mallorca Intervention Plan for Tourism; Sustainable Tourism tax, marketing strategies: balance out seasonal bottlenecks, address new visitor segments, advantages in monitoring arrivals from outside, monitoring frameworks (Majorca, planned in Malta)

# Comparative analysis of overtourism per destination type

## Rural destinations

- ▶ **Specifics:** High dependency, high concentration at few attraction points, contradiction (Economic development vs. resource protection) especially in protected areas, numerous municipalities within their geographic boundaries (e.g., Geirangerfjord, Dolomites, Rigi) representing complex structures that demand extra coordination.
- ▶ **Drivers:** Nature as a key attraction, pandemic situation, day visitors, social media a. o.
- ▶ **Impacts:** Pressure on infrastructure, congestion, overcrowding, reduced visitor experience quality, low value added, traffic, waste management, landscape, biodiversity
- ▶ **Solutions:** develop new attractions and infrastructure to disperse visitors to less iconic locations, restrictions for conservatory purposes (i.e. Burren and Cliffs of Moher), dispersion strategies - marketing strategies to balance out seasonal bottlenecks, dynamic prices, guidelines for tour operators, education of both locals and visitors, monitoring & digital solution approaches (e.g. app Monts d'Ardèche)

# Comparative analysis of overtourism per destination type

## Mountain destinations

- ▶ **Specifics:** Fragility (biophysically or socially), often high concentration of visitors in certain attractions, general lack of data (e.g. day visitors, second homes)
- ▶ **Drivers:** Nature as a key attraction, pandemic situation (e.g., Dolomites, Mount Rigi), film or series (e.g., Dolomites), social media (e.g., iconic Lake Bled), general shift in tourism markets (e.g. growth in international (Asian) tourism markets Mt Rigi), high share of day visitors
- ▶ **Impacts:** Pressure on infrastructure, congestion, overcrowding, reduced visitor experience, low value added, undesirable visitor behaviour, reduced quality of life for locals, traffic (congestion, parking capacities, air pollution), waste management issues, landscape, biodiversity, water use
- ▶ **Solutions:** Restrictions for conservatory purposes, dispersion strategies, off-season promotion of attractions and increasing length of stay (e.g. Bled) , infrastructure development (transport, parking lots, waste management, etc.), participation (e.g. Mt Rigi), code of conduct for visitors (e.g. Dolomeyes)

## Comparative analysis of overtourism per destination type

- ▶ **Soft steering approaches** found across all destination types as main vehicle to reduce burden of overtourism
- ▶ **Diverse stakeholder groups** are affected but not always representatively included: economic actors (cruise ship providers, low-cost carriers) may exert disproportionate significant influence in tourism planning/management decisions
- ▶ Common issues across all destination types are **conflicts between residents and tourists** (undesirable behaviour, overcrowding etc.). These issues tend to be lower in areas with high absorption capacities (e.g. areas in urban areas) and where the destination demarcation is wide enough
- ▶ **What is a tourist?** Common definitions are lacking and vary significantly, depending on destinations. How do we treat second home owners, cross-regional shoppers, family visits, business travellers etc?
  - ▶ Implications on crowding out local population in case of SGEIs and land-use conflicts

## Comparative analysis of overtourism per destination type

- ▶ **Governance:** competences to *effectively* steer tourism generally not at DMO, rather at level regional or national authorities (e.g. regulation of incoming tourists by plane, management of land-use conflicts etc.) → in some cases no relevant steering/management competences are at DMOs
- ▶ **Shifting from marketing to active management:** DMOs often act as marketing organisation together with (very limited) steering functions. In areas with significant conflicts around overtourism (e.g. land use conflicts in islands, cross-regional traffic issues in urban areas etc.) DMOs need to be politically supported to manage these conflicts
- ▶ **Capacity and support:** DMOs and key tourism management actors (e.g. municipalities), particularly in rural areas, often lack financial and human resources to effectively steer tourism flows and/or monitor impacts of tourism

## Comparative analysis of overtourism per destination type

- ▶ **Path dependency:** High upfront investments particularly in mountain destinations (modern ski lifts, snow cannons etc.) and coastal/island destinations (hotel infrastructure and services) with little alternative uses limit potentials for destinations to embrace sustainable tourism/limit overtourism.
  - ▶ High reliance on conventional “mass tourism”, continuing with conventional tourism approaches along established infrastructure
  - ▶ EU funding in existing logic may risk supporting this path dependency – i.e. continued funding for increased capacities
- ▶ **Fundamental rethinking** of type of tourism necessary for these destinations – although it comes at a significant economic cost
- ▶ **Evidence base:** Financial and technical capacities necessary for big data monitoring tools (GPS, mobile phone data etc.) not always available among DMOs
  - ▶ Availability of data
  - ▶ Privacy rights
  - ▶ Costs
  - ▶ Comparability between regions



## Questions and answers

## Key recommendations related to mitigating overtourism

- ▶ Destinations need to adopt a definition of overtourism to enable an objective understanding of the phenomenon in their local context to avoid subjective perceptions by various stakeholder groups, particularly residents.
- ▶ Destinations need to define ways to explore what medium and long-term balance of tourism means for their destination in order to avoid overtourism in their general planning and management framework and to acknowledge this phenomenon as an existing aspect of contemporary tourism development.
- ▶ Destinations may want to adopt a framework to oversee overtourism as a phenomenon beyond classical economic key performance indicators to enable a more data driven and systematic analysis of the sector in a holistic way.
- ▶ To oversee overtourism as a holistic process at a destination, the collection and analysis of data at a relevant scale, frequency and reliability on the economic, social and environmental facets of tourism in a systematic and continuous fashion is recommended. Ideally, this complements existing data collection frameworks, and not duplicates them.



## Key recommendations related to mitigating overtourism

- ▶ Inclusion and consultation of residents and other stakeholders in tourism planning frameworks to increase tourism acceptance. This is particularly crucial in areas with a high reliance on tourism as an economic sector and in vulnerable areas with low absorption capacities.
- ▶ Multi-level cross-regional cooperation is necessary to mitigate negative impacts of overtourism. This also applies to the coordination along the supply chain, including non-tourism actors, in affected regions.
- ▶ Big data solutions provide accurate monitoring of tourism inflows and hotspots. However, these systems are expensive and complex: DMOs lack capacities or financial resources to implement these systems. As such, EU support and provision of these data services can augment this gap.
- ▶ Steering systems (e.g., awareness campaigns, dynamic pricing and pre-booking) may be used to mitigating the burdens of visitors. This can be done in conjunction with big-data solutions to pin-point tourist hotspots.



## Questions and answers



## Part 3: Transition pathways for tourism

## Part 3: Transition pathways for tourism

Presentation of the Transition Pathway for Tourism – policy context  
**Valentina Superti, DG GROW Director.**

## Part 3: Transition pathways for tourism

- ▶ Ramune Genzbigelyte-Venturi, DG GROW.G1 - Tourism & textiles
- ▶ Bastiaan Overeem, Netherlands Board of Tourism & Conventions - Program Manager Destination Development
- ▶ Almudena Cruz Yábar, Spanish Ministry of Culture
- ▶ Carolina Mendonça, Azores Regional Government

## Part 3: Transition pathways for tourism

- ▶ What challenges are you encountering in your destination when building a more sustainable tourism model?
- ▶ You have heard the overview of the EU Transition Pathway for Tourism. What initiatives or strategies have you implemented (or intend to implement) in order to increase the sustainability of your destination, which in your view may contribute to the implementation of this Transition Pathway?
- ▶ How could EU further support you in building a more sustainable and more responsible tourism destination?

## Continuing the discussions... on FUTURIUM

You can find the group using this [LINK](#)



## Closing remarks

- ▶ Ms Ramune Genzbigelyte (DG GROW)
- ▶ Ms Laura Kasnauskaite (EISMEA)
- ▶ Mr Bernd Schuh





Thank you!



## Additional information

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