



# Unbalanced Tourism Growth

## Mountain Destinations Workshop

26 April 2022

Bernd Schuh, Dagmar Lund-Durlacher, Fabian Weber, Arndt Münch

## Welcome!

- ▶ Mr. Escheu, Bavarian Ministry for Economic Affairs, Regional Development, and Energy
- ▶ 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 (day 1)
- ▶ Present solution approaches to better understand the interlinkages between tourism and the territories (day 1)
- ▶ Identify challenges and bottlenecks hindering the mitigation of unbalanced tourism growth (day 1 and 2)
- ▶ Test the practical application of proposed indicators for overtourism risk assessment (day 2)
- ▶ Develop concrete steps for destinations to move towards more sustainable practices and mitigate the impacts of unbalanced tourism growth (day 2)

# Agenda of the workshop

Timing	Sessions
09:45	Arrival onsite, health and safety, and registration – Coffee/tea
10:00	Welcoming
10:15	Introduction of participants (position/background) Participants' expectations regarding the workshop Format: round of introduction in plenary session
10:45	Part 1: Presentation of the project findings (Tasks A to D) Format: discussion in plenary session
11:15	Part 2: peer-to-peer learning Presentations of the challenges and problems faced as well as identified solution approaches from different perspectives Format: participants presentations and open discussions in plenary session
12:30	Lunch break
13:30	Part 3: Identifying, assessing and addressing tourism growth imbalances <ul style="list-style-type: none"> <li>▪ Presentation of the discussion format</li> <li>▪ Group work: Assessment of overtourism impacts in rural areas via a systemic picture</li> </ul> Format: Interactive application of the methodology in plenary session
14:30	Coffee/tea break
14:45	Part 3 (cont.): Identifying, assessing and addressing tourism growth imbalances <ul style="list-style-type: none"> <li>▪ Selection of main overtourism impact indicators (as per systemic picture)</li> <li>▪ Maps and illustrations of overtourism indicators</li> <li>▪ Discussion of solution approaches</li> </ul> Format: Interactive application of the methodology in plenary session
15:15	Part 4: Validation and key challenges <ul style="list-style-type: none"> <li>▪ Group discussion 1: overtourism indicators, data availability and measurement</li> <li>▪ Group discussion 2: solution approaches and governance</li> <li>▪ Plenary discussion: Pathways to sustainable tourism destination and future developments</li> </ul> Format: World café – group work
15:50	Conclusions, summary of findings and next steps in plenary session
16:00	End of the workshop



Let us know who you are...

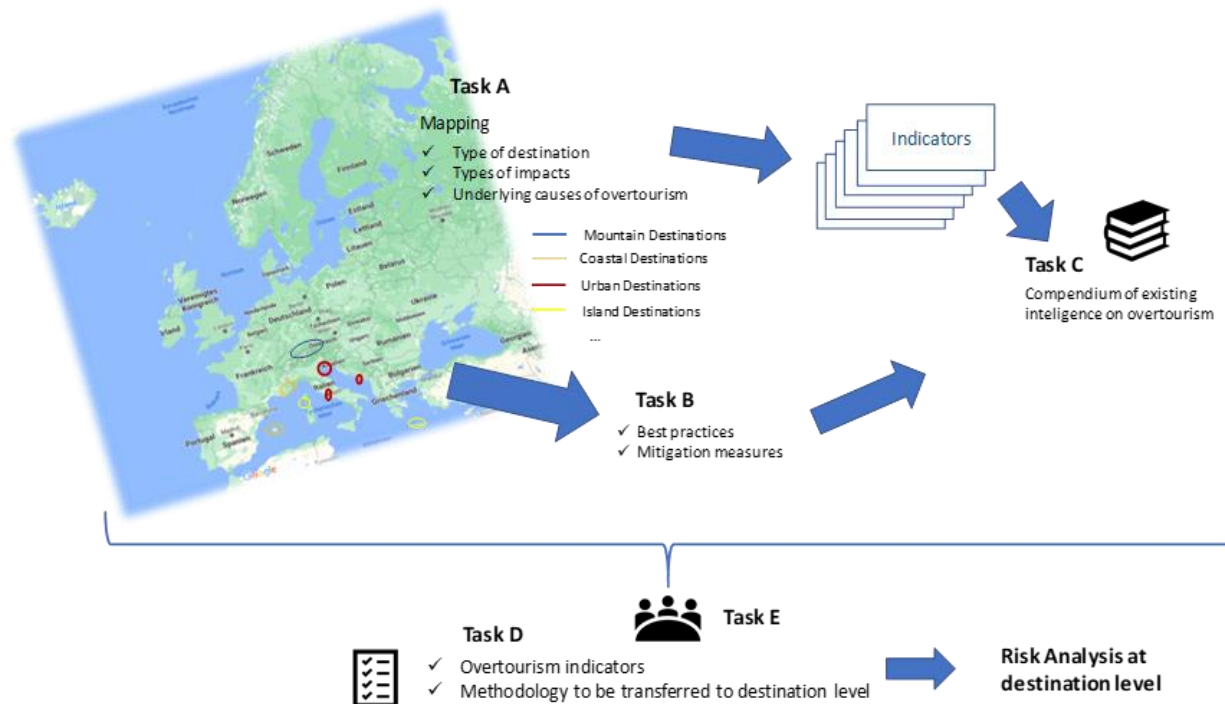


## Part 1: Presentation of the project

## 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

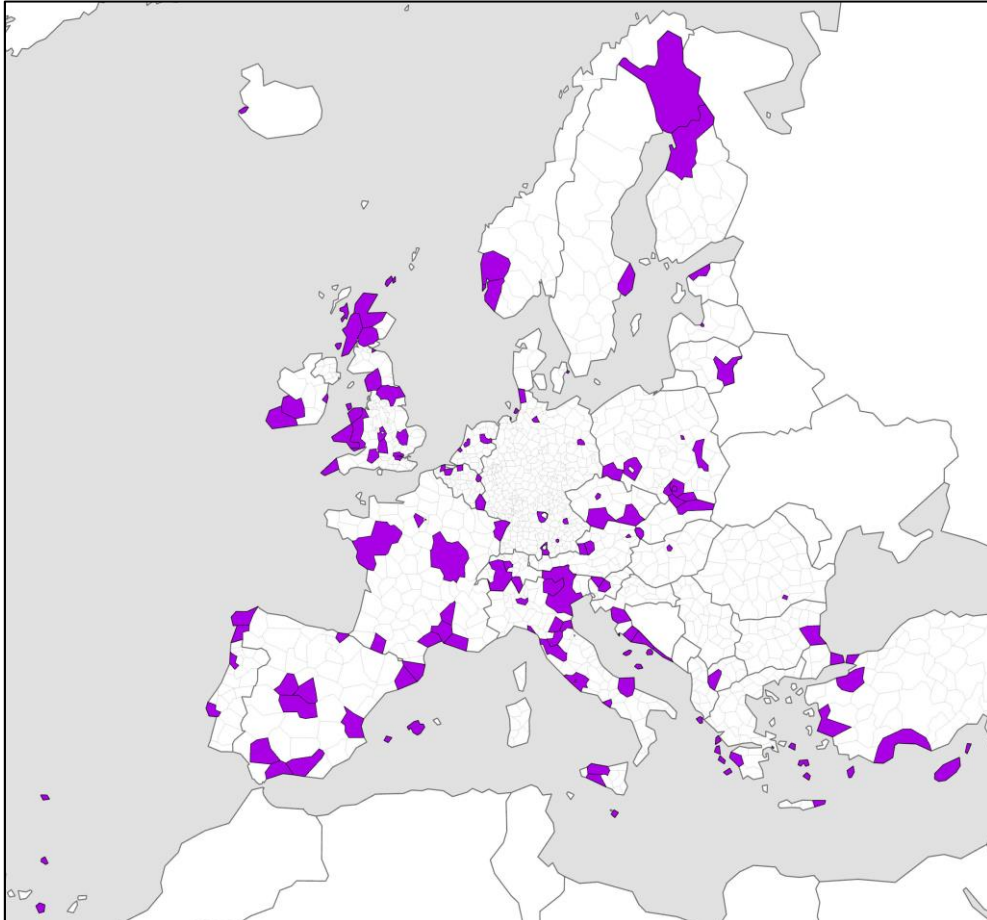


## Task A: Definition of overtourism

“(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”.

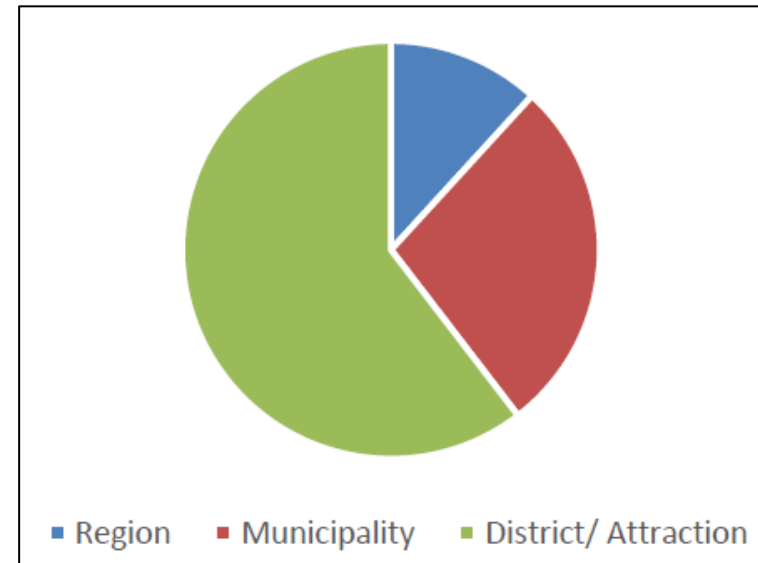
(Peeters et al. 2018)

# Task A: Inventory of overtourism

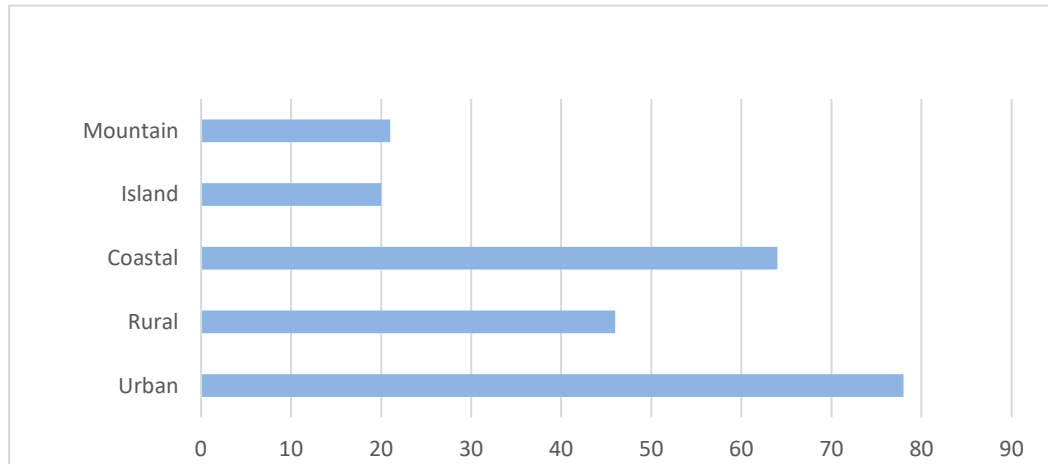


Source: Project team, 2021

Spatial level where overtourism occurs



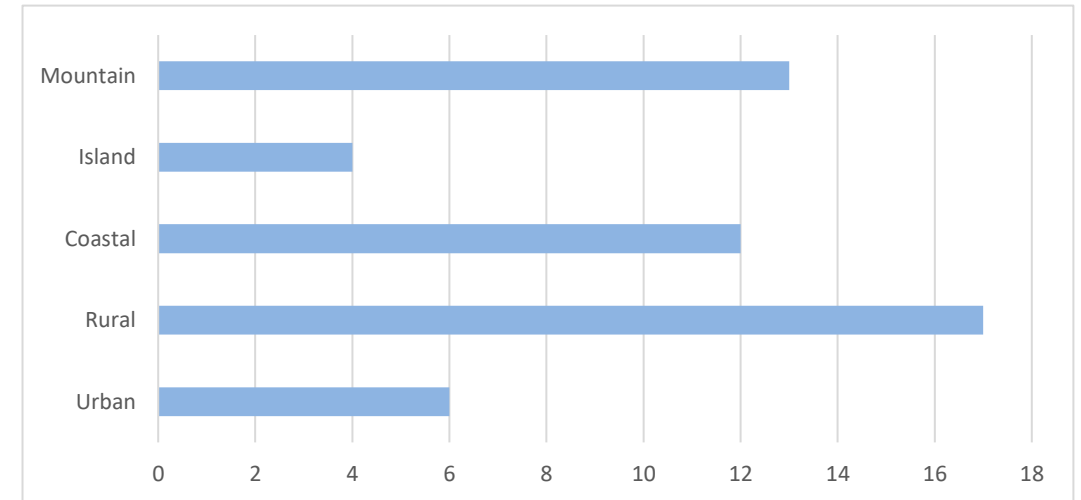
# Task A: Inventory of overtourism



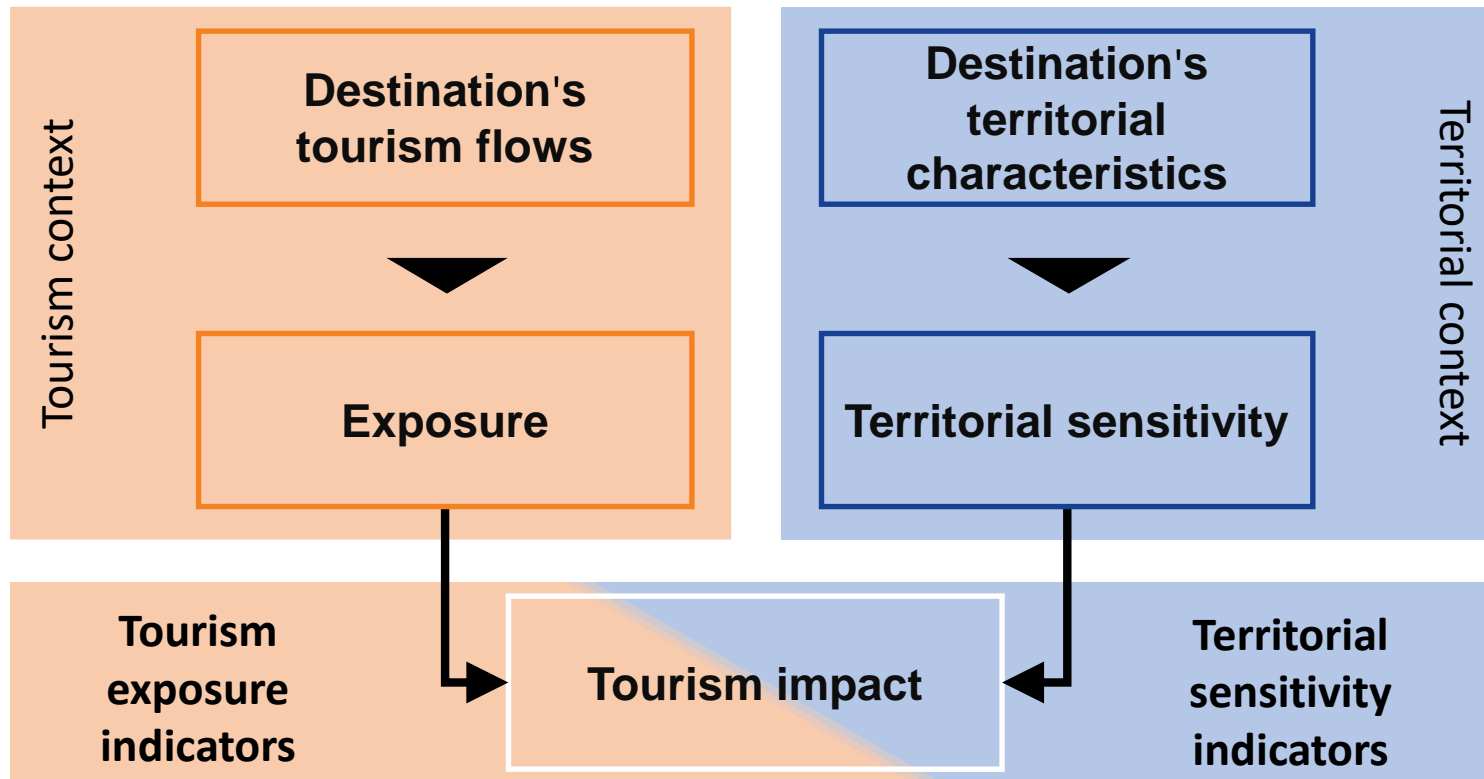
Affected destination types before Covid

Source: Project team, 2021

Affected destination types during Covid

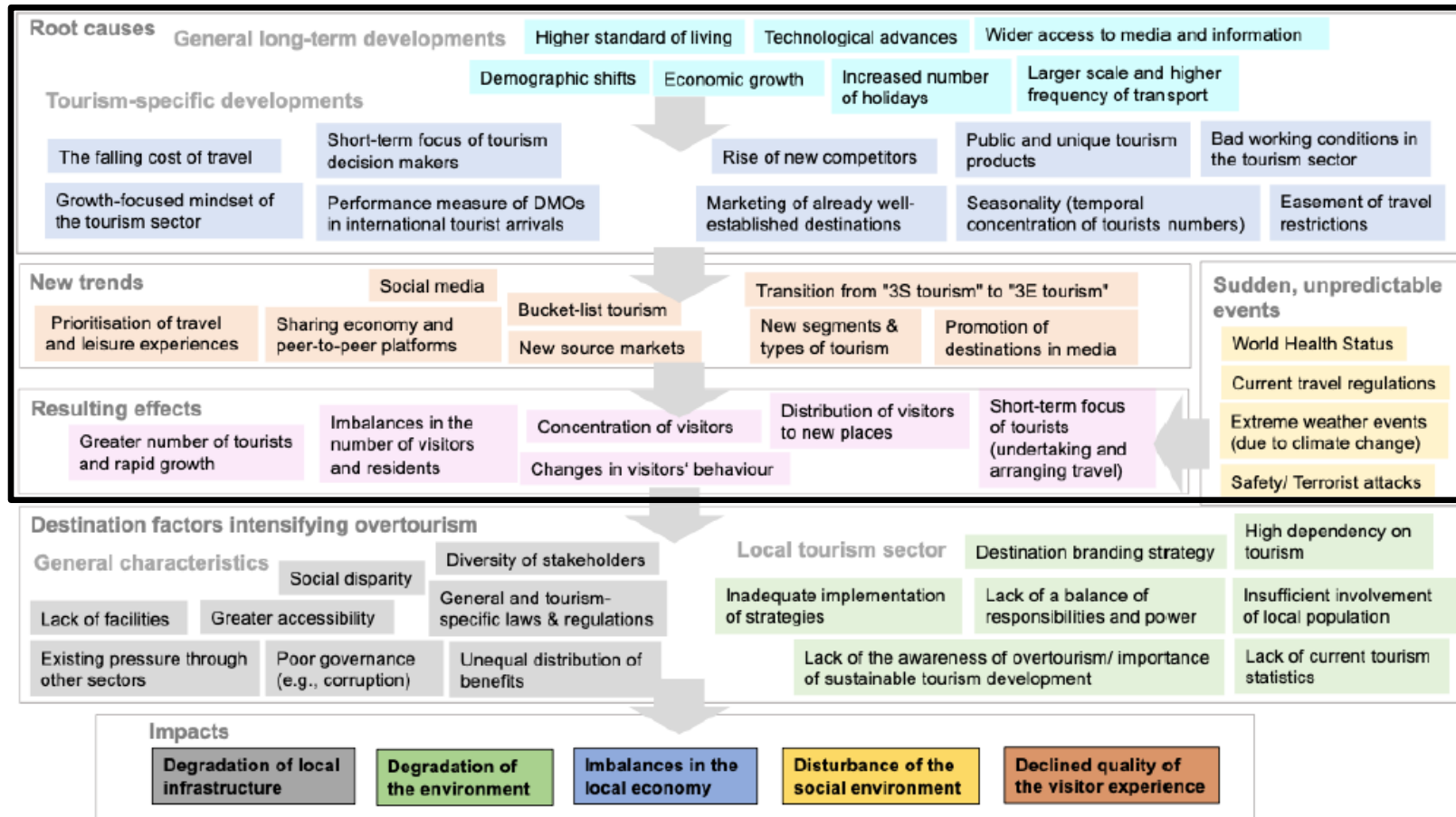


## Task A: Root causes and impacts of overtourism



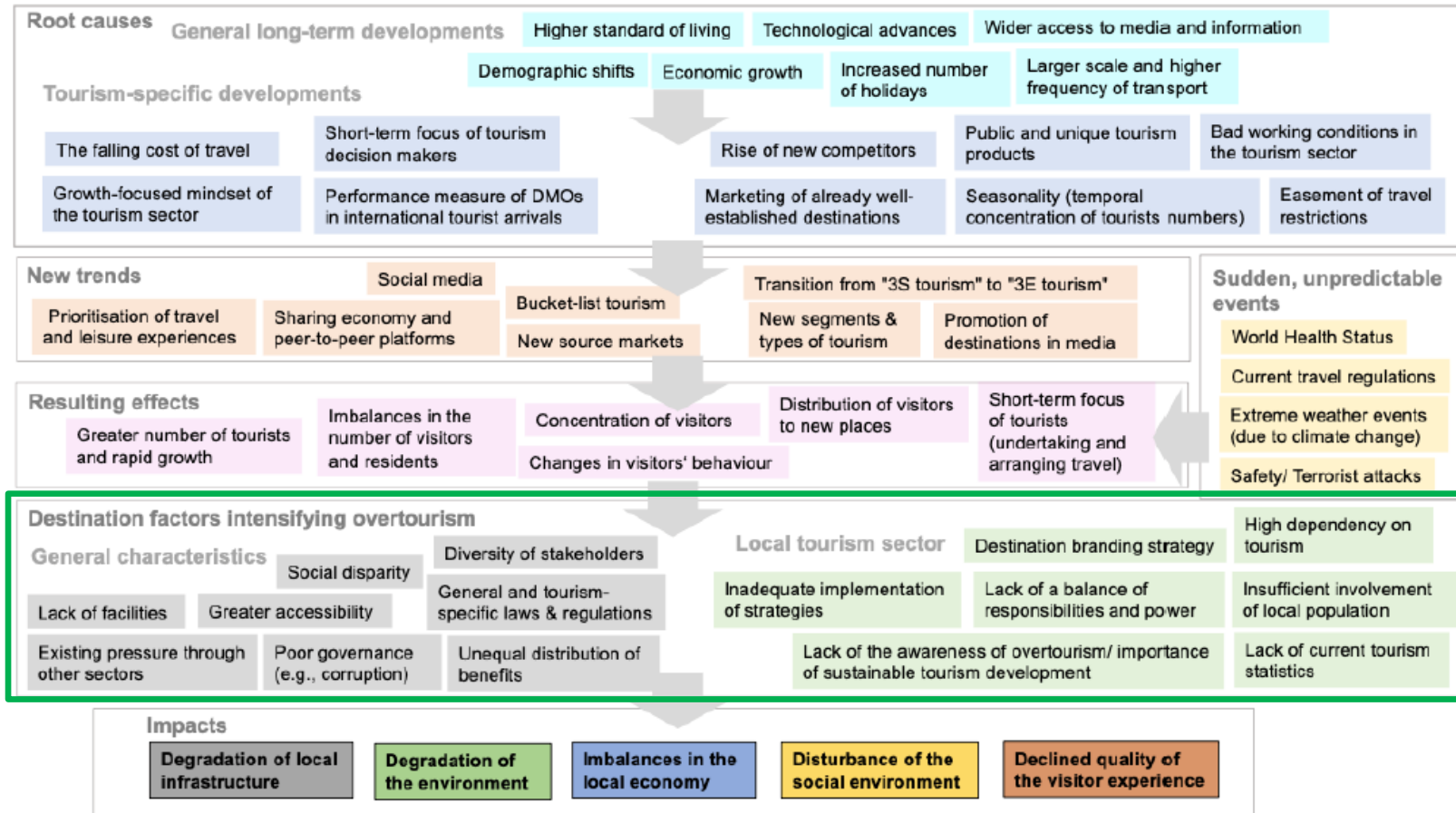
Source: ESPON Tourism, 2021

# Task A: Root causes and impacts of overtourism



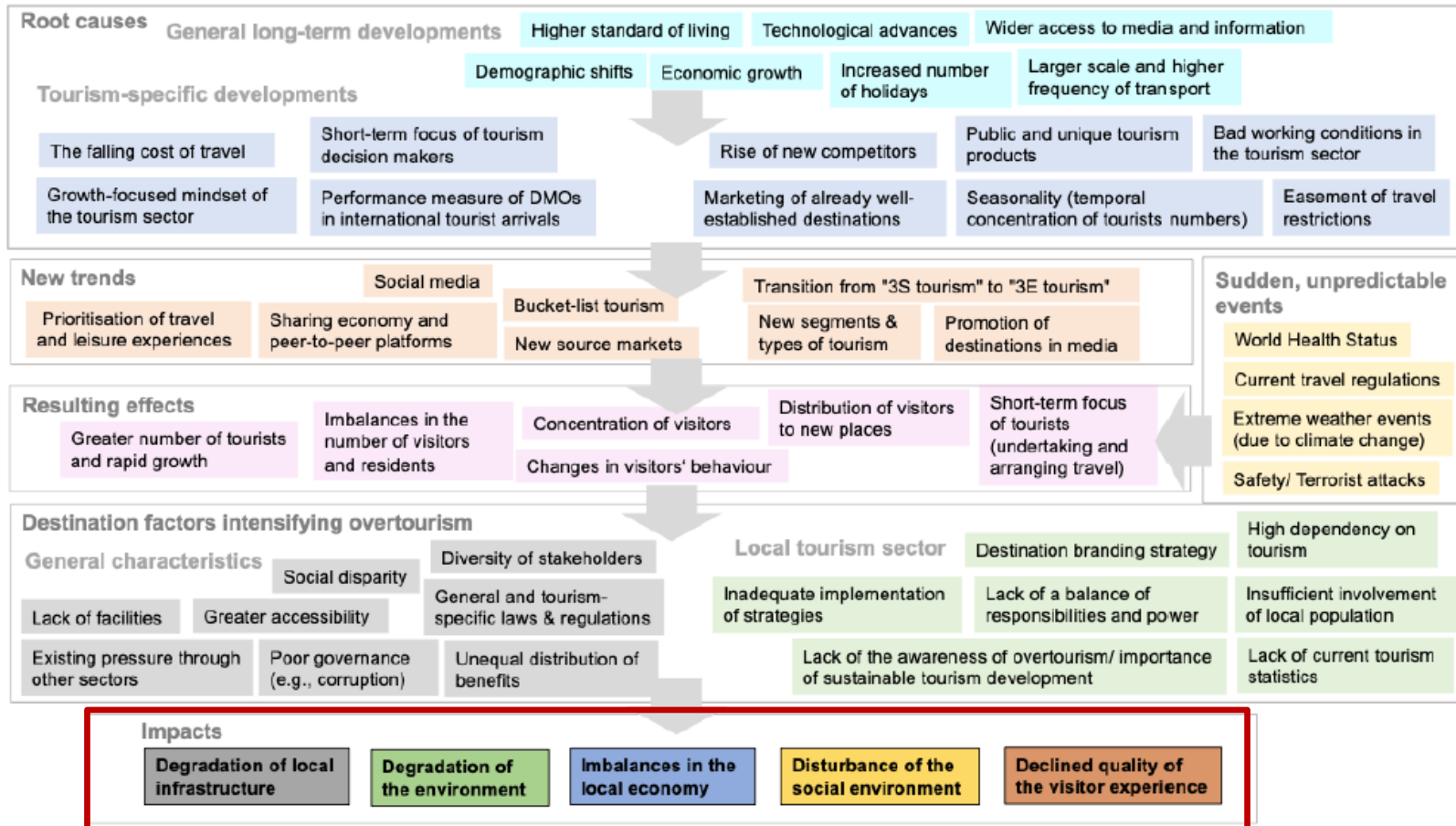
Source: Project team, 2021

# Task A: Root causes and impacts of overtourism



Source: Project team, 2021

# Task A: Root causes and impacts of overtourism



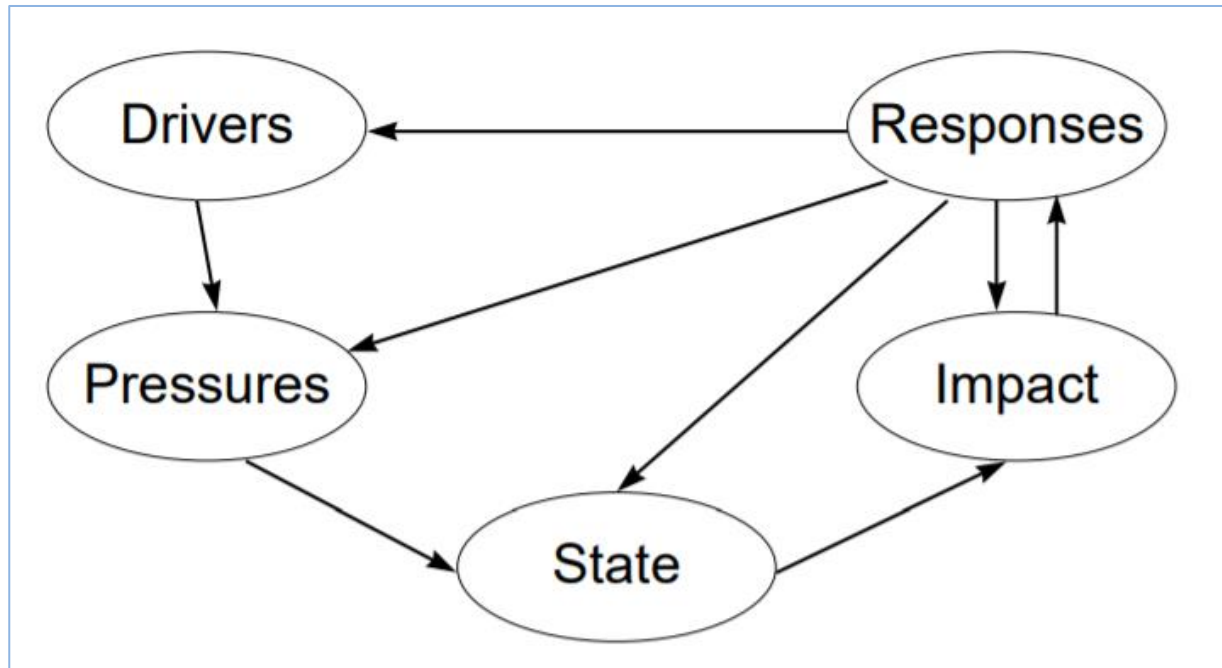
Source: Project team, 2021

## Particularities of mountain destinations

- Low population numbers/density
- Typically, high tourism intensities, leading to **overtourism phenomena**
- **Environmental degradation** tends to be more pronounced in **sensitive high-altitude ecosystems**
- Often **weather-dependent fair weather tourism** in summer and **ski tourism** in winter, leading to pronounced **temporal and spatial concentration** of tourists
- In general, **summer** and **winter outdoor leisure activities** put pressure on natural ecosystems (soil erosion, habitat and biodiversity loss, and noise pollution)
- Sometimes **high dependence on tourism** (for lack of alternative economic opportunities)
- While some popular ski destinations experience overtourism, particularly **remote valleys** partly suffer from a **lack or decline of economic activities**



## 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.)
<b>Importance of tourism</b> (% GDP, employment)	<b>x</b>	<b>x</b>	<b>x</b>	<b>x</b>	<b>Driver (int./ext.)</b>
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
<b>Tourism intensity</b>	<b>x</b>	<b>x (+ TPR)</b>	<b>x</b>	<b>x</b>	<b>Pressure</b>
<b>Tourism density</b>	<b>x</b>	<b>x (+ TDR)</b>	<b>x</b>		<b>Pressure</b>
Attraction concentration (based on visitor reviews)	x				Pressure
Historic site prevalence (based on visitor reviews)	x				Pressure
CO <sub>2</sub> 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
<b>Visitor satisfaction: Negative reviews, complaints</b>	<b>x</b>		<b>x</b>	<b>x</b>	<b>Impact</b>
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: Mountain Destinations – Visitors

### ▶ High recent tourism growth (arrivals)

- Bled: 204 837 - 509 247 = +149% (2009-2019)
- Dolomites /Val Pusteria): 1 620 584 - 2 247 110 = +39% (2009-2019)
- Mount Rigi: railway travel frequencies: 1.11 m. - 1.87 m. = +68% (2009-2019)
- International visitors: 95% of overnights (Bled), 40.5% of arrivals (Dolomites), 40% of arrivals (Mt. Rigi)

-> Lack of data!

▶ **Tourism intensity:** 144 (Bled) | 125 (Dolomites/Val Pusteria) | n.a. (Mount Rigi)  
overnights per inhabitant

▶ **Tourism density:** 15,730 (Bled) | 5,037 (Dolomites/Val Pusteria) | n.a. (Mount Rigi)  
overnights per km<sup>2</sup> of administrative tourism area

## Task B: Mountain Destinations – Drivers

### ▶ General Drivers

- Growth of tourism, new emerging markets
- High accessibility, low-cost carrier expansions
- Expansion of privately rented accommodations / Airbnb
- Increased social media representation (“must-see” iconic destinations)

### ▶ Specific Drivers

- Nature as a key attraction
- Pandemic situation (e.g., Dolomites, Mount Rigi)
- film or series (e.g., popular Italian TV Series Un passo dal cielo at Lake Braies in the Dolomites)
- Social media (e.g., iconic Lake Bled)
- General shift in tourism markets (e.g. growth in international (Asian) tourism markets in Central Switzerland)

## Task B: Mountain Destinations – Impacts

### ▶ Socio-economic

- Pressure on infrastructure, congestion, overcrowding
- Reduced visitor experience quality
- Low value added
- Undesirable visitor behaviour
- Reduced quality of life for locals

### ▶ Ecological

- Traffic (congestion, parking capacities, air pollution)
- Waste management issues
- Landscape, Biodiversity and wildlife
- Water use



## Task B: Mountain Destinations – Solutions

- ▶ Restrictions for conservatory purposes
  - Dolomites: In high season the road to the popular Lake Braies is closed for private cars and a shuttle bus with prior reservation must be taken. Ticketing system for parking spaces around natural attractions.
- ▶ Dispersion strategies - soft approaches such as marketing strategies to balance out seasonal bottlenecks, address new visitor segments or better distribute visitors to less iconic locations
- ▶ Off-season promotion of attractions (e.g. Bled)
- ▶ New understanding of DMO & marketing measures:
  - Bled reinvented the role and profile of the DMO enabling for clearer alignment between municipal and tourism development goals.
  - Positioning as “sustainable and green” – based on the Green Destinations Standards. From “must see” to “must experience”, more responsible marketing, which includes a variety of goals, such as increasing the length of stay.

## Task B: Mountain Destinations – Solutions

- ▶ Infrastructure development:
  - Investments in public infrastructures (transport, parking lots, waste management, visitor facilities).
- ▶ Participative process in tourism planning and management
  - Rigi: stakeholders of diverging interests and levels of power can find ways and mechanisms to find solutions to unbalanced tourism at the destinations.
- ▶ Code of conduct for visitors
  - “Dolomeyes” in the Dolomites (CoC to achieve more responsible visitor behaviours)
- ▶ Monitoring
  - Cooperation with scientific institutions to assess visitor flow patterns (e.g. Dolomites, Rigi) and derive measures.
  - Dolomites: monitoring system of the “Sustainable Tourism Observatory of South Tyrol”. 29 specific indicators relating to visitors, residents, and the environment.

## 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

## Part 2: Peer-to-peer learning

- ▶ Oliver Tamme, BAB
- ▶ Bernd Schuh, ÖIR



Lunch break

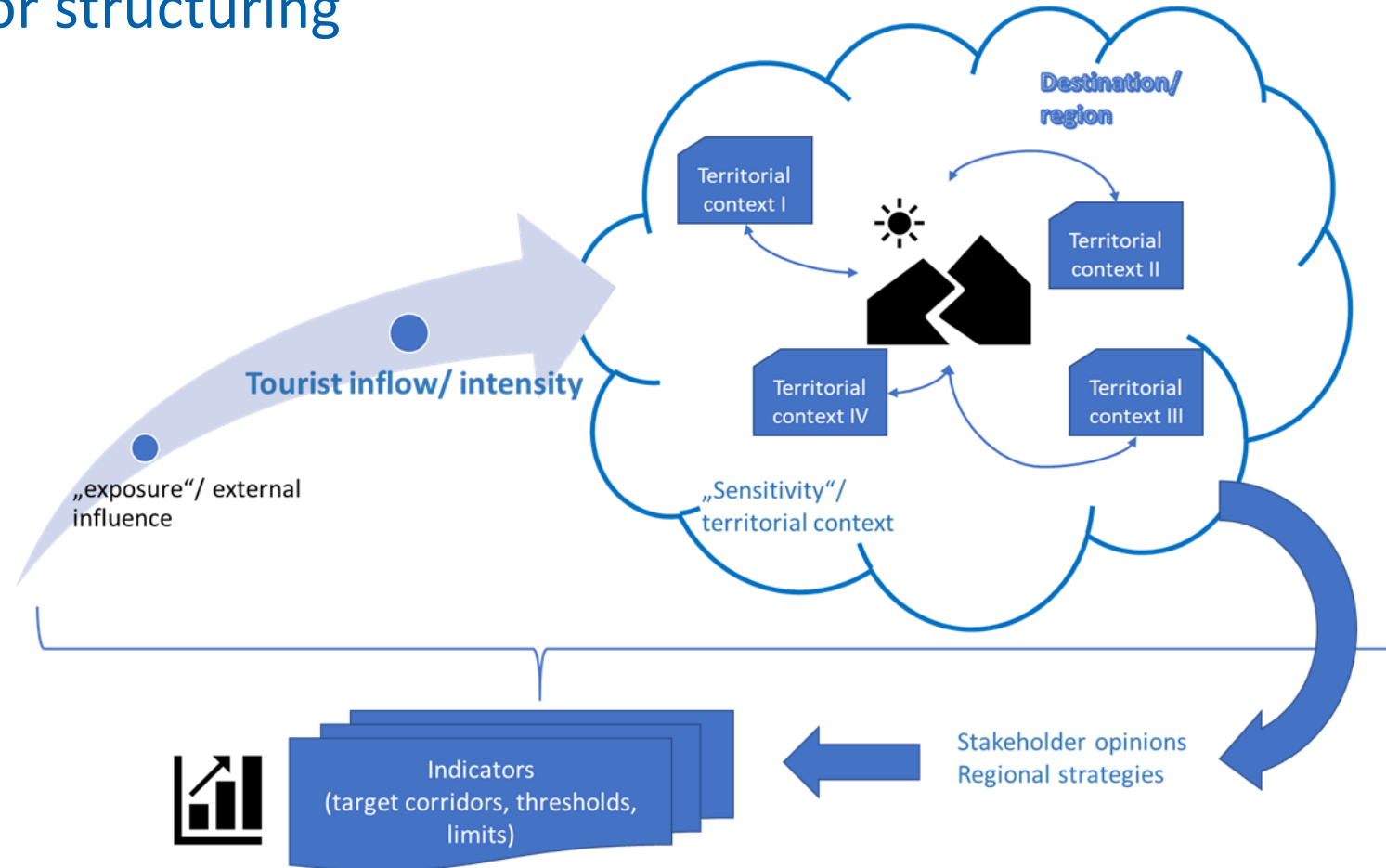
Session resumes at 13:30



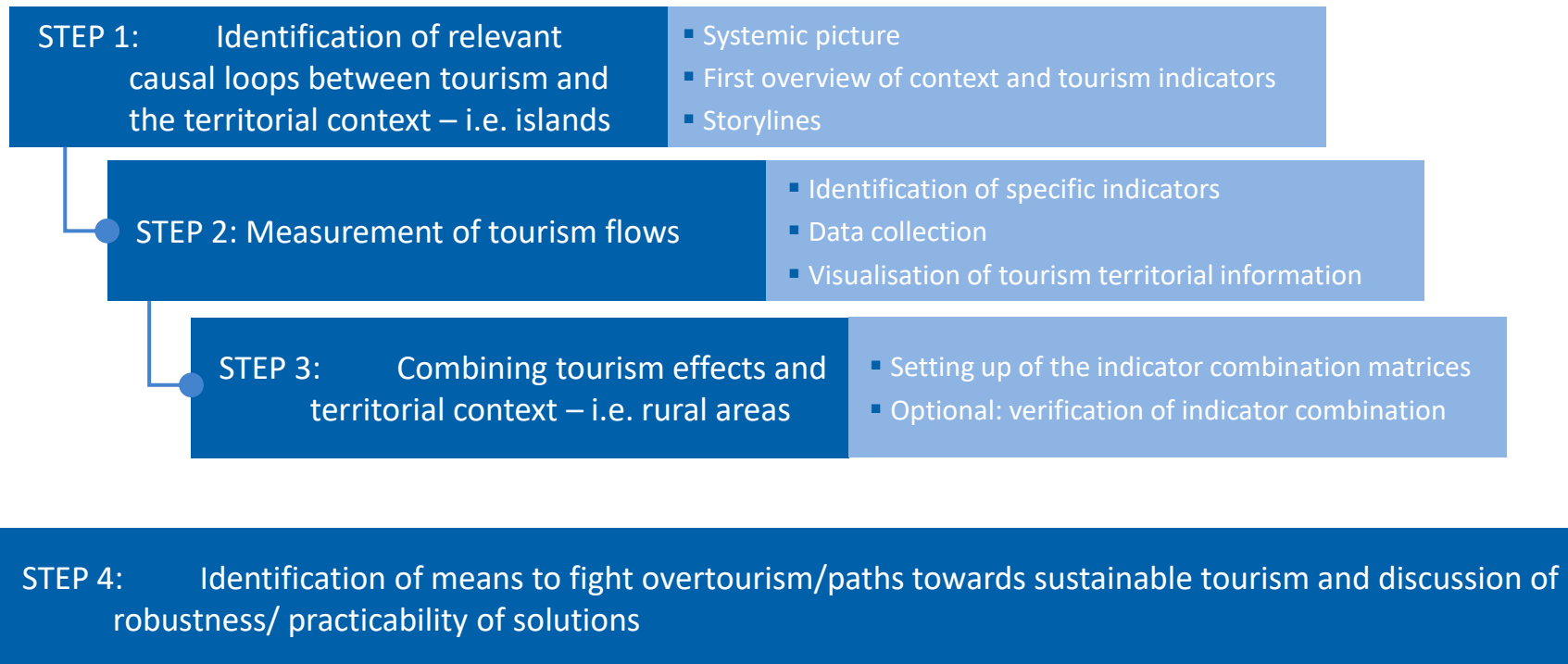
## Part 3: Identifying, assessing and addressing tourism growth imbalances



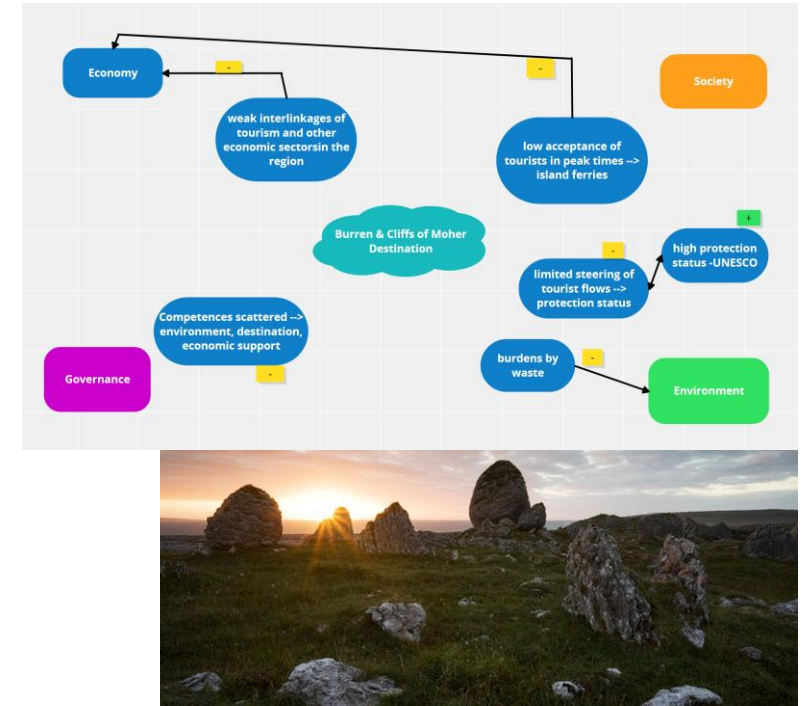
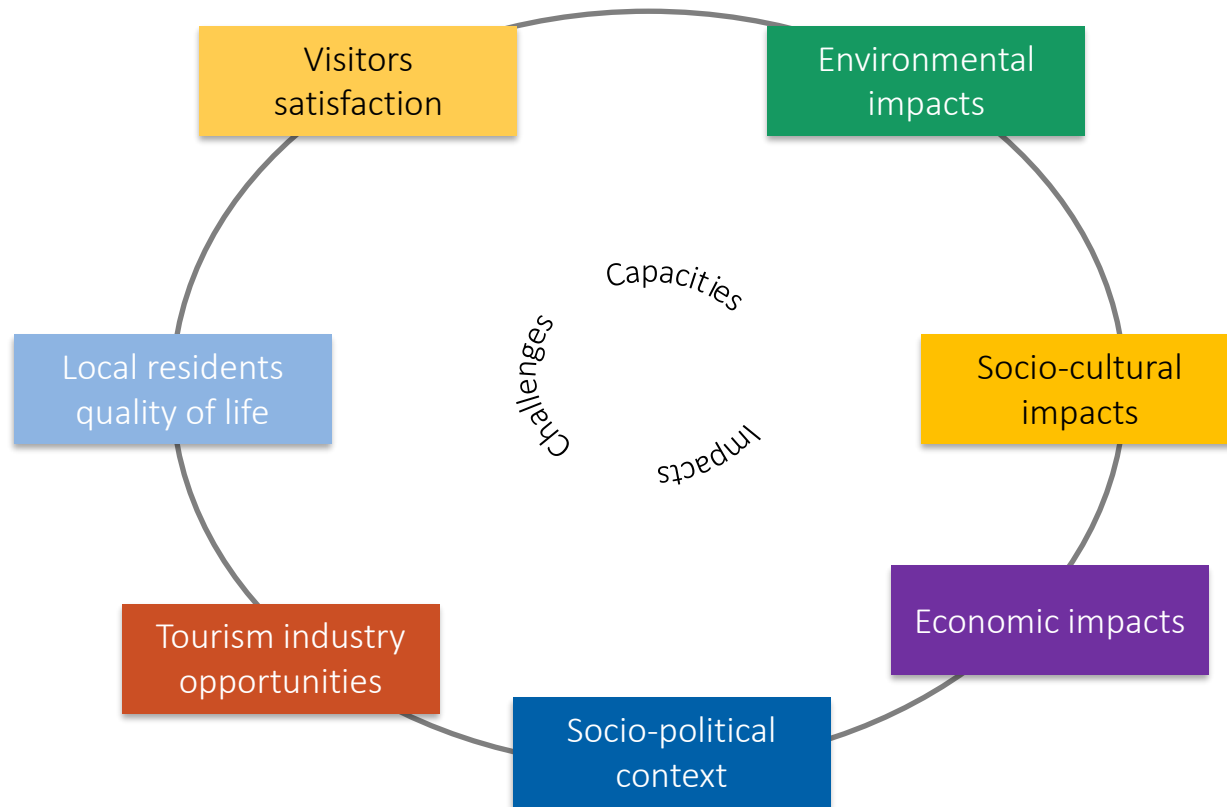
# Bringing the P2P learning into a common perspective and adding to it – an attempt for structuring



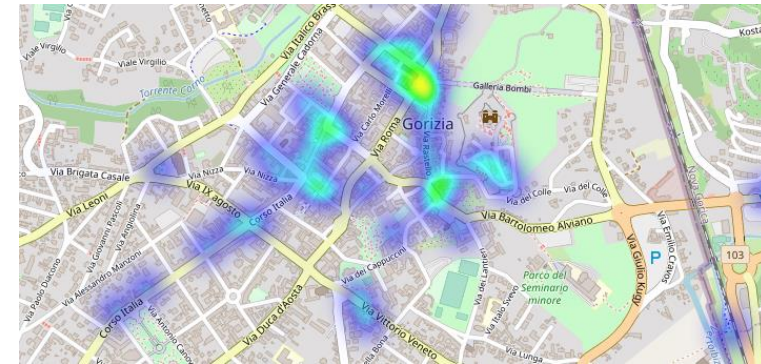
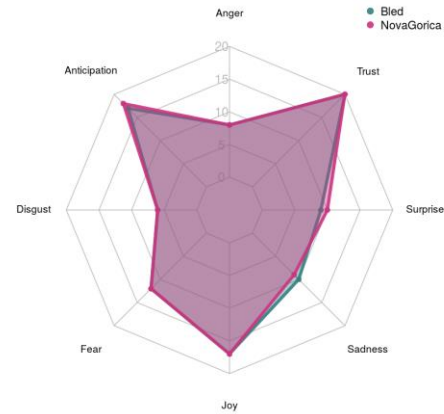
# Introduction to the methodology – or how will we structure our rural approaches



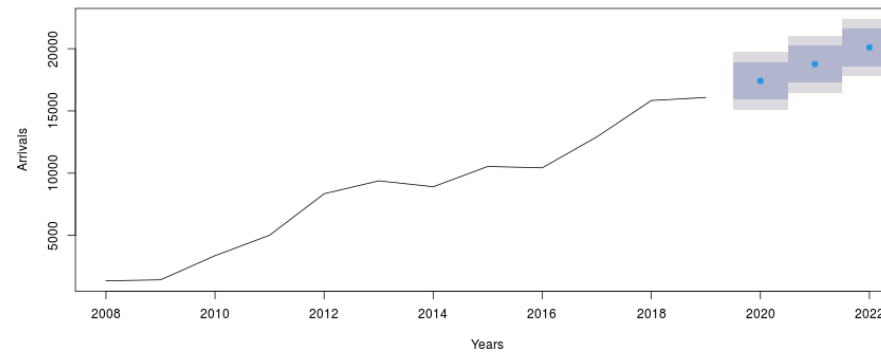
# Step 1: Systemic picture



# Step 2: Measurement of tourism Flows



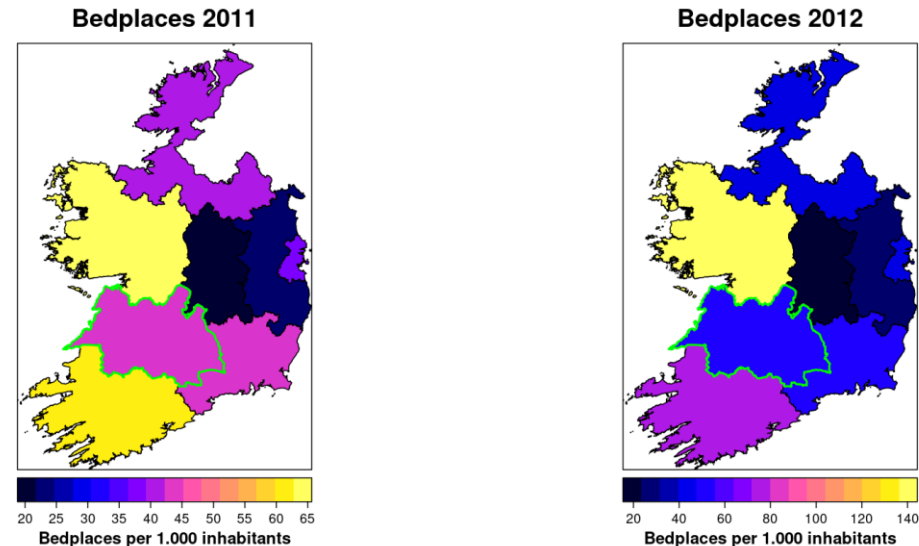
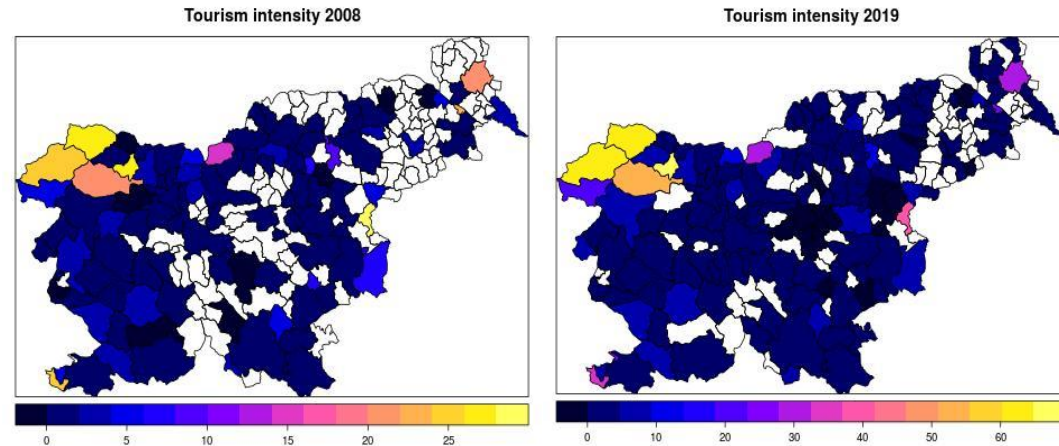
Divača



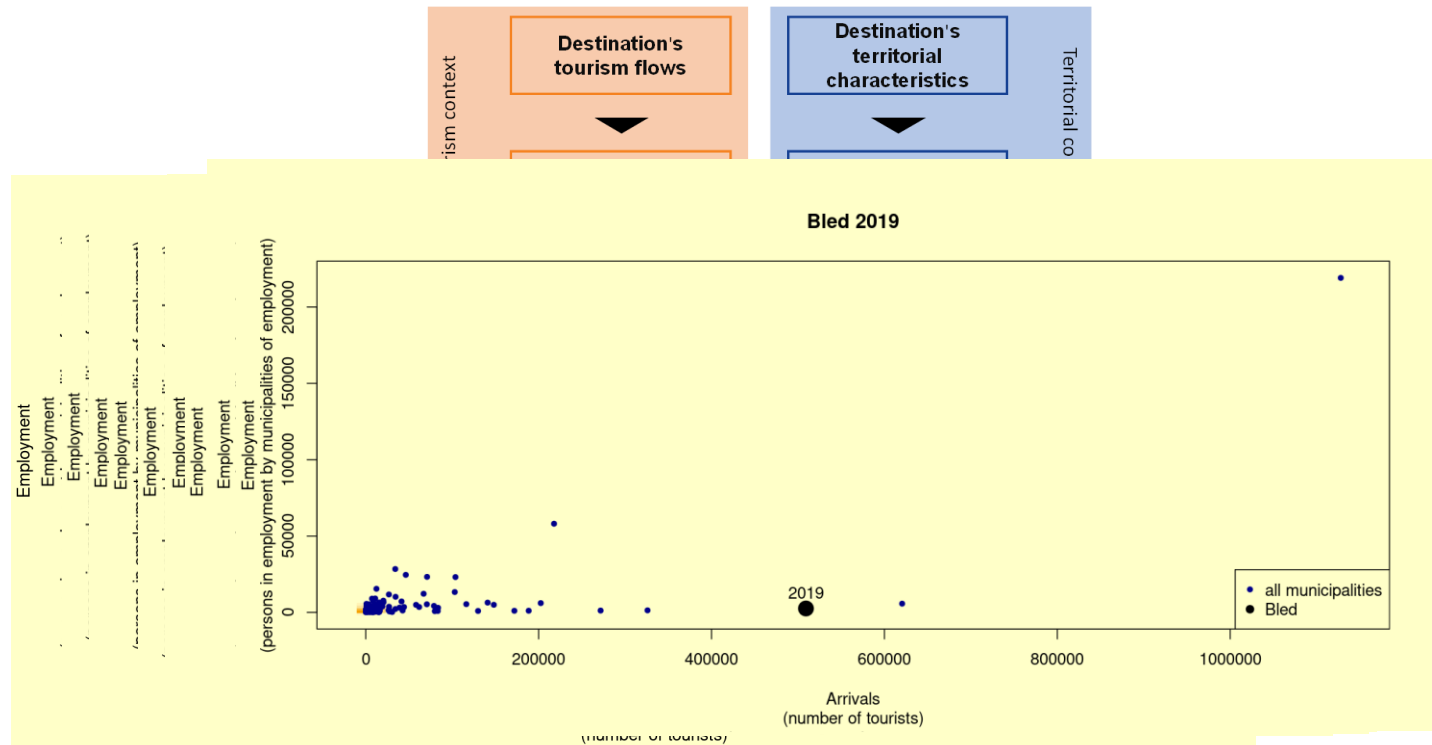
## Step 2 (cont.)

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



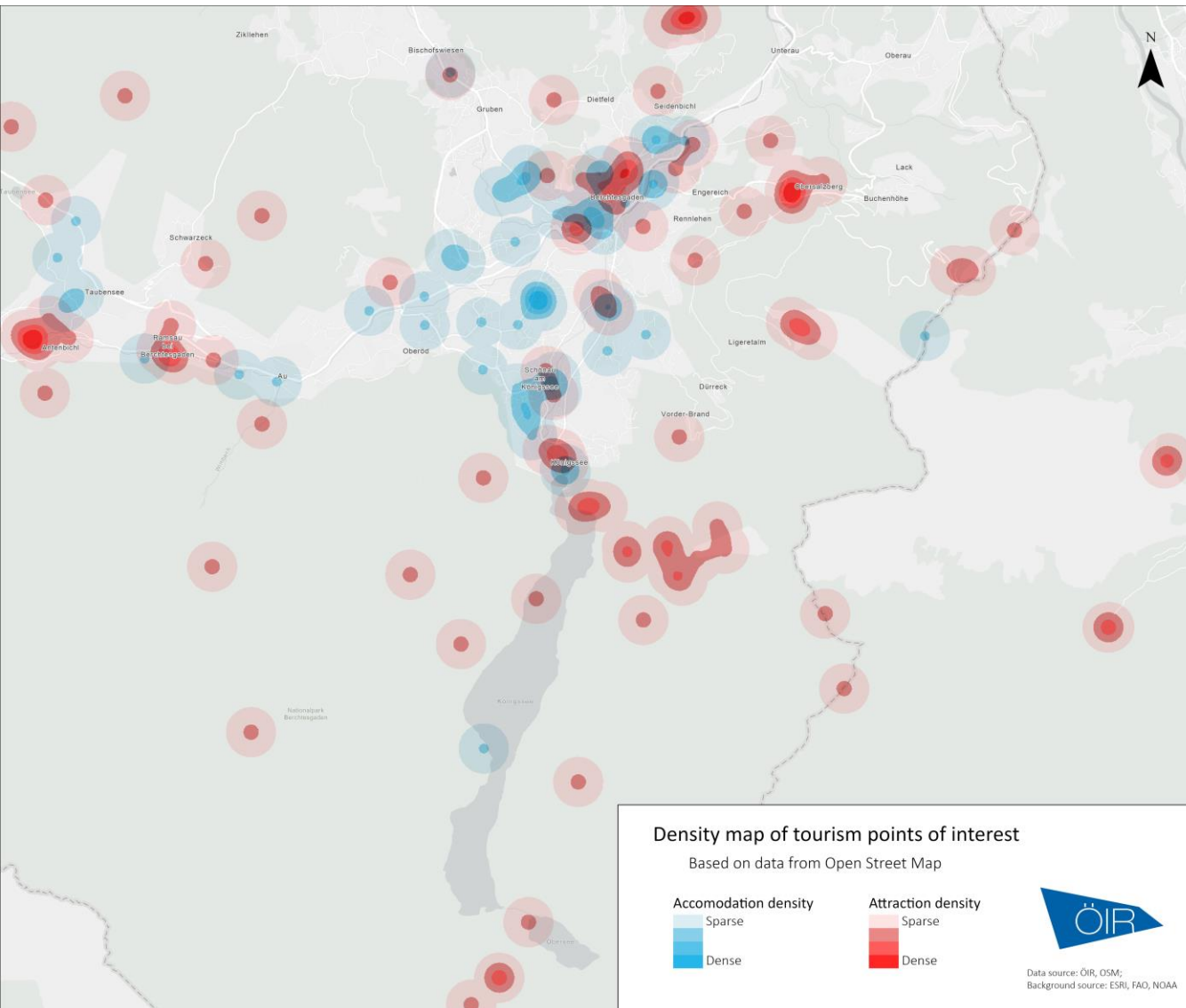
# Step 3: The concept of carrying capacity – or how to find a way towards sustainable tourism ...





Coffee/tea break

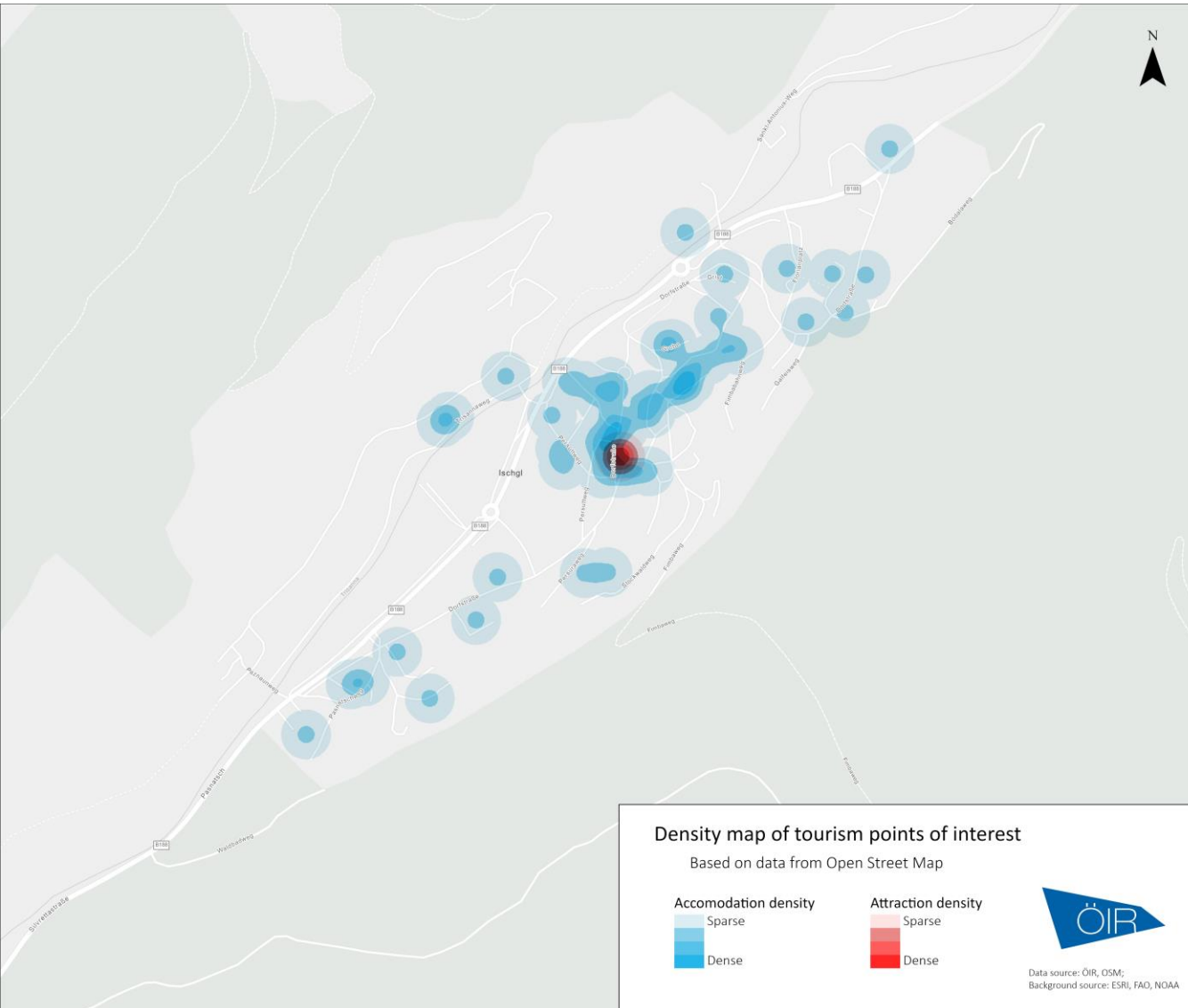
Session resumes at 14:30



## Density of tourism locations in Berchtesgaden (DE)

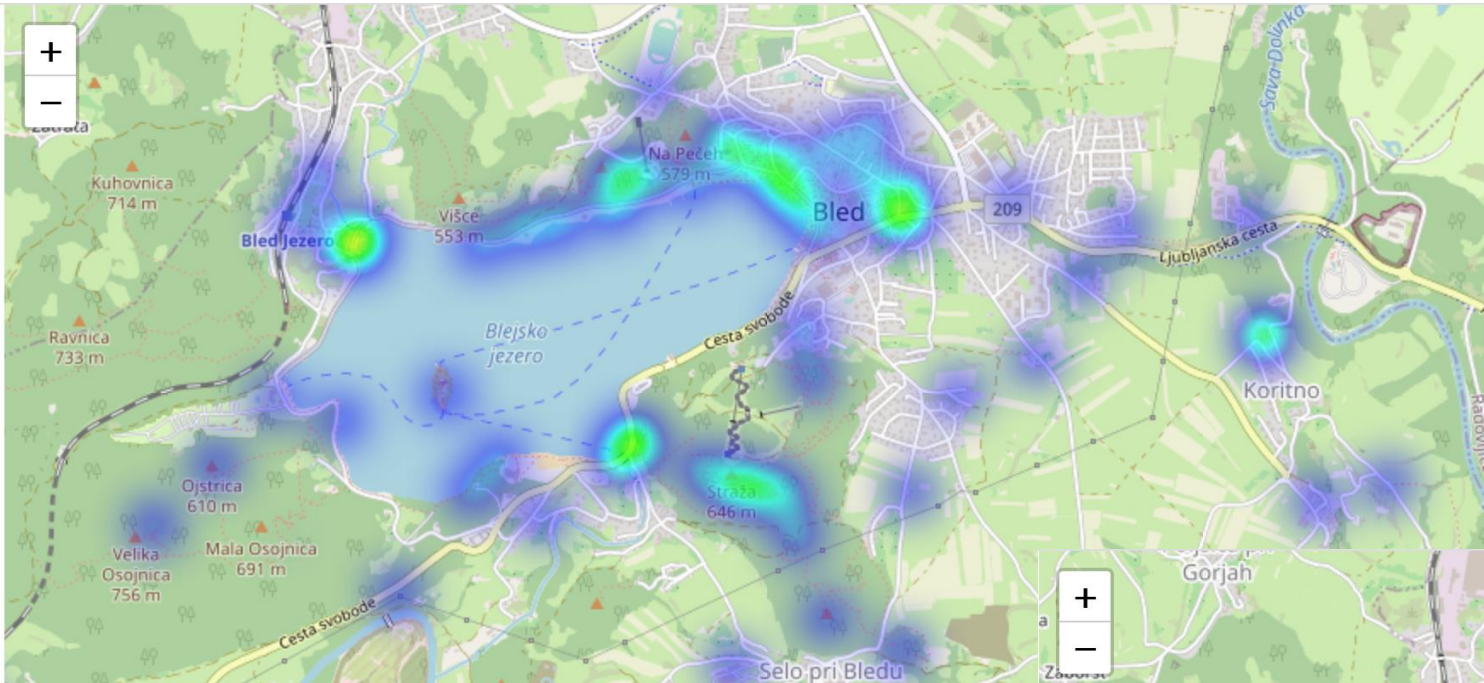
- ▶ Red: attractions (museums, parks, historic sites etc.)
- ▶ Blue: accommodations (hotels, apartments, hostels, etc.)
- ▶ Source: OSM data





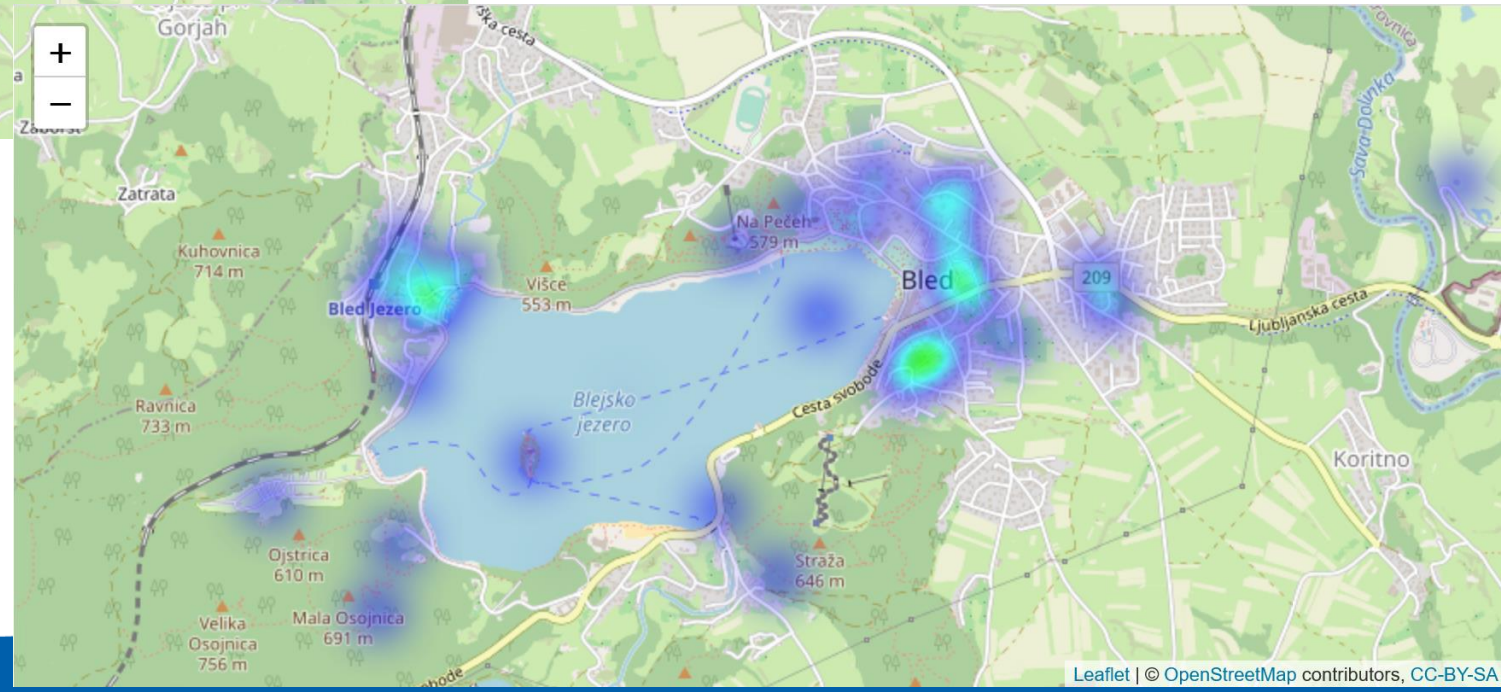
## Density of tourism locations in Ischgl (AT)

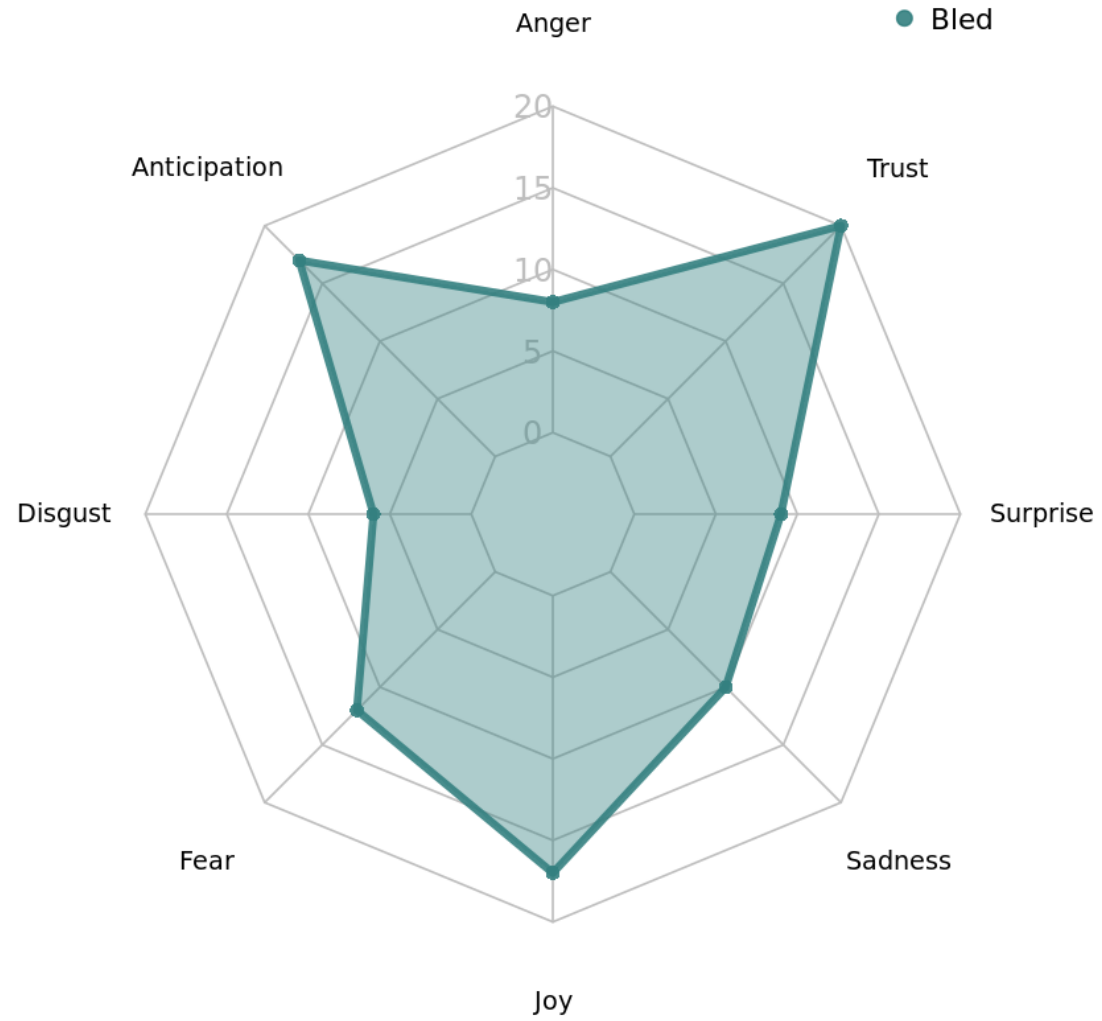
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- ▶ Source: OSM data

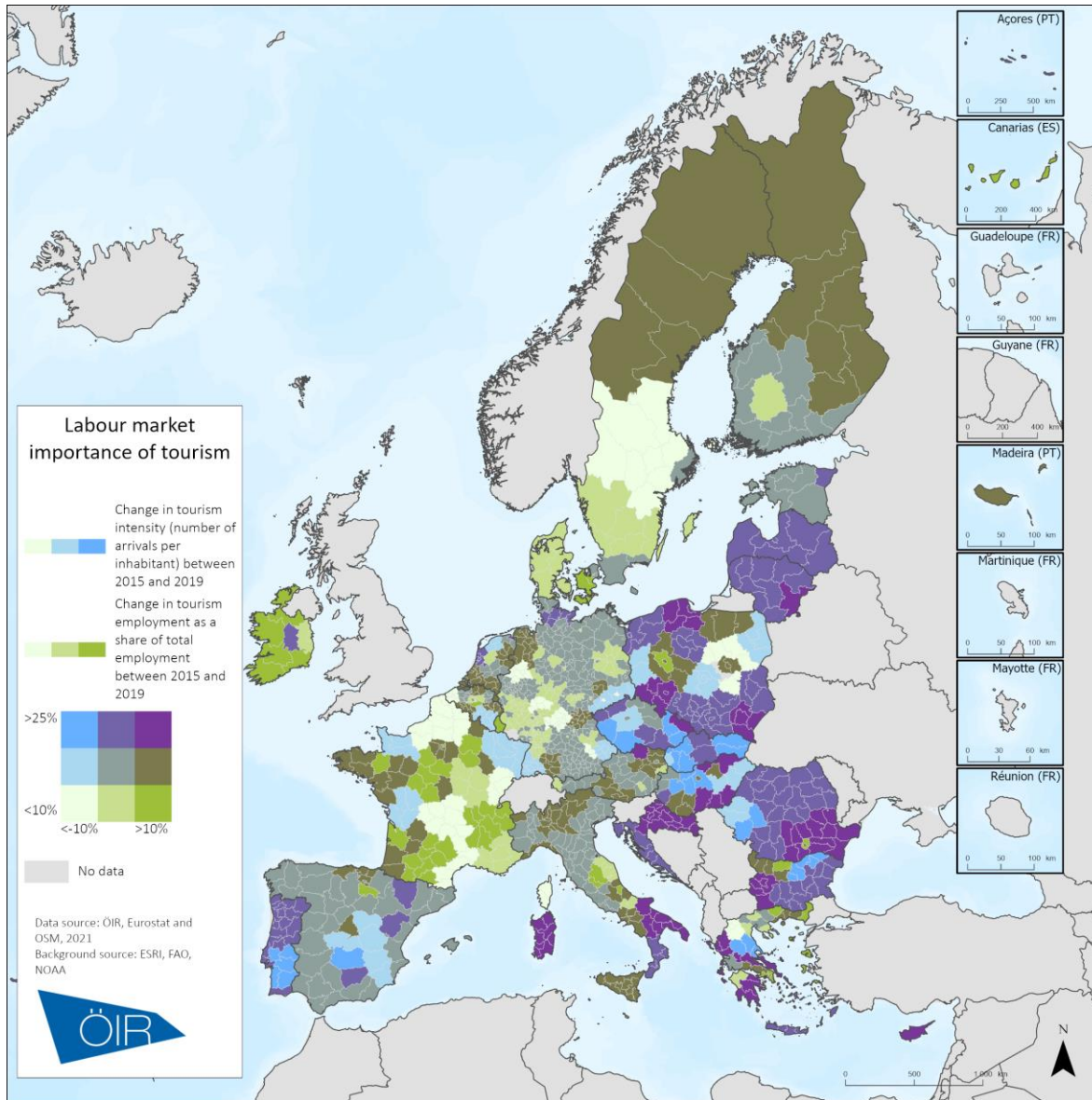


POI Open Streetmap

Instagram (02/2019-05/2020)

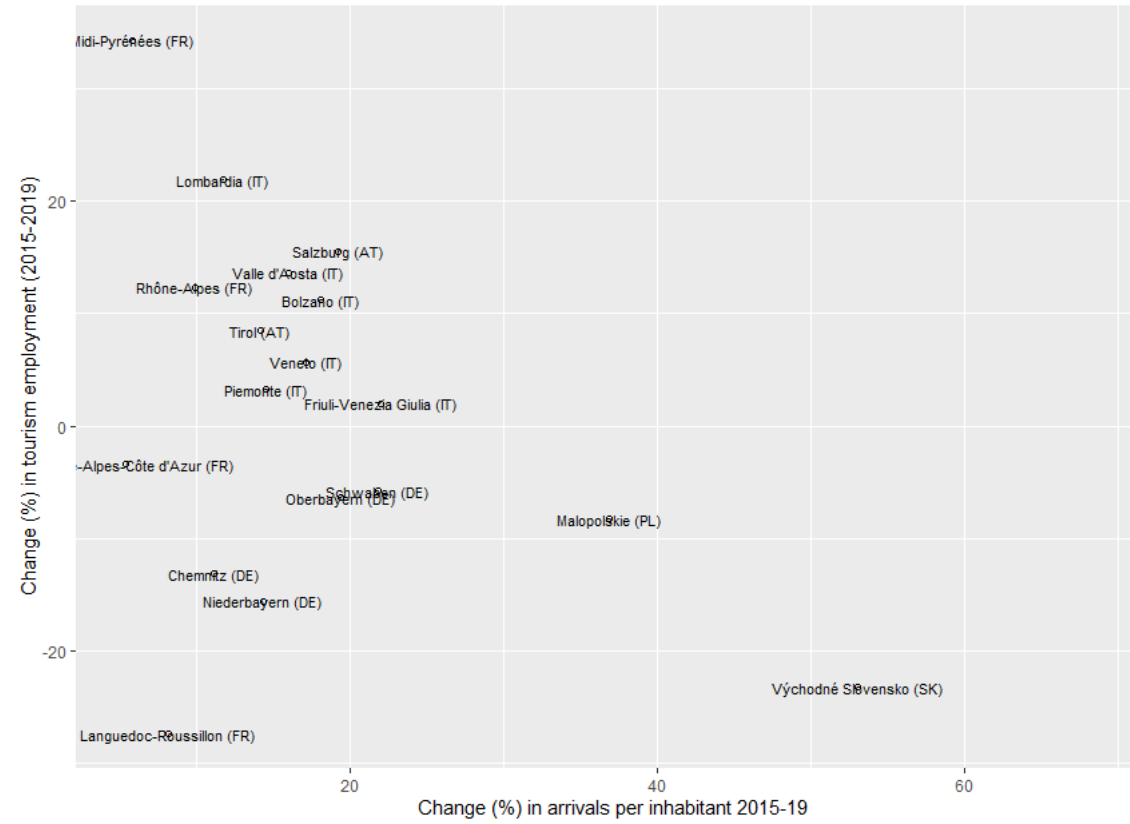


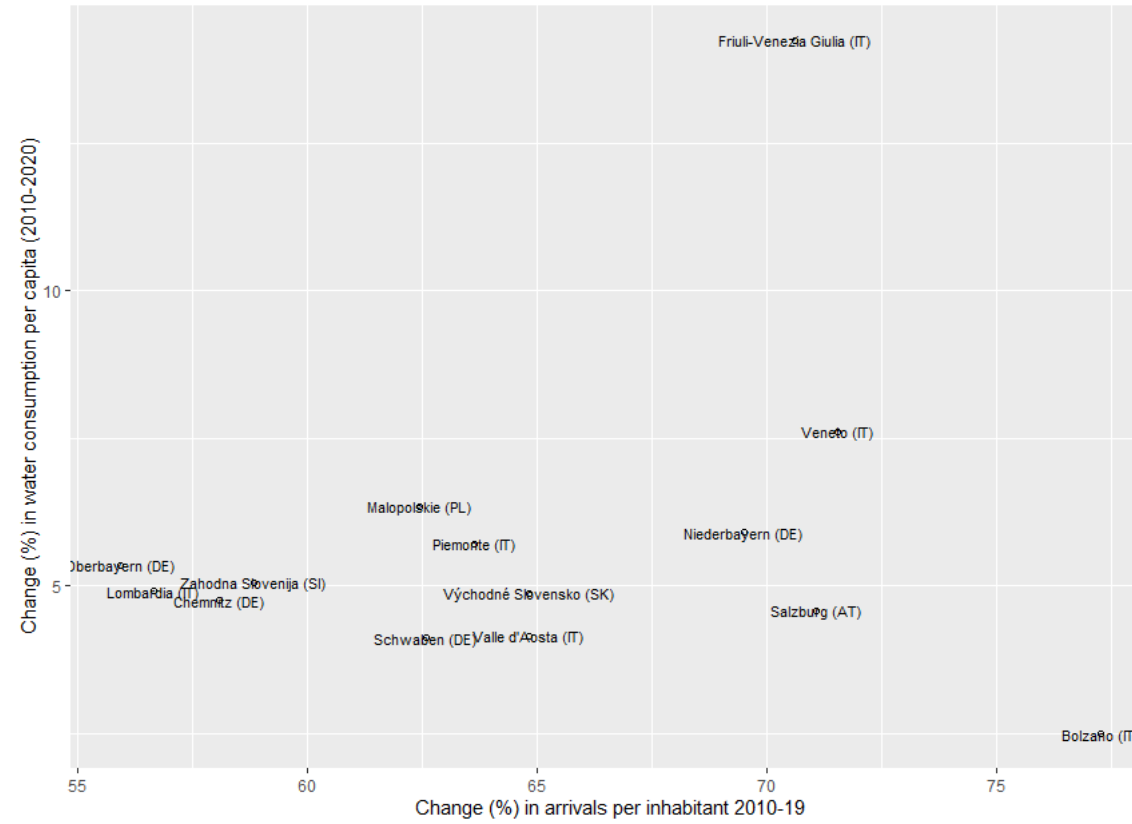




## Labour market importance of tourism

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





## Part 4: Validation and key challenges

- ▶ Group discussion 1: overtourism indicators, data availability and measurement
- ▶ Group discussion 2: solution approaches and governance



## Part 4: Plenary discussion on the topic of “pathways to sustainable tourism and future developments”



## Continuing the discussions... on FUTURIUM

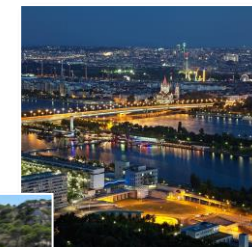
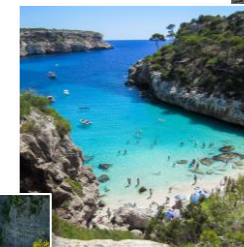
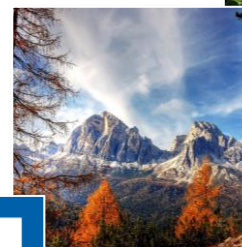


## Closing remarks

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

## Up-coming workshops

- ▶ EU-level workshop  
hosted in **Brussels**, Belgium, on 20 May 2022





Thank you!



## Additional information

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