



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
	 Presentation of the discussion format
	 Group work: Assessment of overtourism impacts in rural areas via a systemic picture
	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
	 Selection of main overtourism impact indicators (as per systemic picture)
	 Maps and illustrations of overtourism indicators
	 Discussion of solution approaches
	Format: Interactive application of the methodology in plenary session
15:15	Part 4: Validation and key challenges
	 Group discussion 1: overtourism indicators, data availability and measurement
	 Group discussion 2: solution approaches and governance
	 Plenary discussion: Pathways to sustainable tourism destination and future developments
	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

Overtourism in mountain destinations | 6





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



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- Task A: Mapping and analysis of the root causes of overtourism at destination level and the evident impacts at economic, environmental and sociocultural 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



Spatial level where overtourism occurs







Task A: Inventory of overtourism



Affected destination types before Covid

Affected destination types during Covid









Source: ESPON Tourism, 2021





Root causes General long-term developments Higher standard of living Technological advances Wider access to media and information												
Dem Tourism-specific developments				nographic shifts	ographic shifts Economic gro			growth Increased number Larger scale a of holidays frequency of tr		her rt		
The falling cost of travel Short-term focus of touris decision makers			rism	m Rise of new competitors			Public and unique tourism a products t			ad working conditions in he tourism sector		
Growth-focused mindset of the tourism sector Performance measure of in international tourist and			of DMOs rrivals		Marketing o established	f already well- destinations	Sea con	asonality (temporal centration of tourists nur	nbers)	Easen restric	nent of travel tions	
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Resulting effects Greater number and rapid growt	Resulting effects Imbalances in the number of visitors and rapid growth and residents		the itors	Concentration of visitor Changes in visitors' beh		Distribution of visitors to new places ehaviour		ors s (Short-term focus of tourists (undertaking and arranging travel)		Extreme weather events (due to climate change) Safety/ Terrorist attacks	
Destination facto General characte	ors intensi eristics	ifying overtour	ism Diversity	of stakeholders		Local	ourism secto	or De	estination branding strate	gy t	High deper ourism	ndency on
Lack of facilities	Lack of facilities Greater accessibility Specific la		and tourism- laws & regulations		Inadequate implementation of strategies		n L re	Lack of a balance of responsibilities and power		Insufficient involvement of local population		
Existing pressure through other sectors Poor governance Unequal dispension benefits				al distribution of s	distribution of Lack of the awareness of overtourism/ importance of sustainable tourism development				e I	e Lack of current tourism statistics		
Degr infra	Impacts Degradation of local infrastructure Degradation of the environment Imbalances in the local economy Disturbance of the social environment Declined quality of the visitor experience											





Root causes General long-term developments				Higher standard of living			Technological advances Wider access to media a			a and i	nformation		
Tourism-specific dev	nographic shifts Economic			ic growth Increased number Larger scale and hig of holidays frequency of transpo		highe sport	r						
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Root causes General long-term developments				B Higher standard of living			Technological advances Wider access to media an			nd infor	mation			
Tourism-specifi	ic devel	lopme	ents	Dem	ographic shifts	Eco	nomic	growth	Increased of holidays	number	Larger scale and hig frequency of transpo	iher ort		
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Lack of facilities	Greater	acces	sibility	General a specific la	ind tourism- iws & regulatio	ns	Inac Ins of s		Inadequate implementatio of strategies		h Lack of a balance of responsibilities and power		Insufficient involvement of local population	
Existing pressure through other sectors Poor governance (e.g., corruption) Unequal distribution of benefits Lack of the awareness of overtourism/ importance of sustainable tourism development							ce	Lack of cu statistics	rrent tourism					
Impacts Degradation of local infrastructure Degradation of the environment Imbalances in the local economy Disturbance of the social environment Declined quality of the visitor experience														





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

Compiled by project team, 2021





Task A: Measuring overtourism

Metric	McKinsey	Peeters	Schuh	ETIS	DPSIR type
Tourism intensity	х	x (+ TPR)	x	х	Pressure
Tourism density	x	x (+ TDR)	x		Pressure
Attraction concentration (based on visitor reviews)	х				Pressure
Historic site prevalence (based on visitor reviews)	x				Pressure
CO ₂ emissions from tourist transportation			х	х	Pressure
Energy use per tourist			х	х	Pressure
Waste production per tourist			х	х	Pressure
Water consumption per tourist					Pressure
Air pollution	х				Impact
Residents' satisfaction; identity			х	х	Impact
Visitor satisfaction: Negative reviews, complaints	x		x	x	Impact
Waste management by tour- ism enterprises				x	Response
Sewage treatment				х	Response
Water management by tour- ism enterprises				х	Response
Energy efficiency and re- newable energy use				x	Response
Biodiversity conservation by tourism enterprises				х	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 km² 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 reponsible 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
- \rightarrow 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: Identification of relevant causal loops between tourism and the territorial context – i.e. islands	Systemic pFirst overvStorylines	Systemic picture First overview of context and tourism indicators Storylines				
• STEP 2: Measurement of tourism flows	• Ic 5 • D • V	 Identification of specific indicators Data collection Visualisation of tourism territorial information 				
STEP 3: Combining tourism territorial context – i.e. ru	effects and ral areas	Setting up of the indicator combination matricesOptional: verification of indicator combination				

STEP 4: Identification of means to fight overtourism/paths towards sustainable tourism and discussion of robustness/ practicability of solutions





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



40 60

80 100 120

Bedplaces per 1.000 inhabitants

20 25 30 35 40 45 50 55 60

Bedplaces per 1.000 inhabitants





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)

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







Leaflet | © OpenStreetMap contributors, CC-BY-SA











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







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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!

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Additional information

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