





# **Unbalanced Tourism Growth**

### Rural Destinations Workshop – Day 1

17 March 2022

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





### Welcome!

- Ms. Marija Turkalj, Plitvice National Park
- 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
12:45	Opening of the meeting room for the online participants
13:00	Welcoming
	Ms. Marija Turkalj (Plitvice National Park)
	Mr. Bernd Schuh (ÖIR GmbH)
	Ms. Ramune Genzbigelyte (DG GROW)
	Ms. Laura Kasnauskaite (EISMEA)
13:15	Introduction of participants (position/background)
	Format: round of introduction in plenary session
13:45	Part 1: Presentation of the project findings (Tasks A to D)
	Format: discussion in plenary session
14:15	Break
14:25	Part 2: peer-to-peer learning
	Presentations of the challenges and problems faced as well as identified solution approaches from different perspectives (destination management organisations, infrastructure providers,
	residence groups, etc.)
	Format: participants presentations and open discussions in plenary session
16:25	Conclusions, summary of discussions and next steps in plenary session
16:40	End of the workshop







### Let us know who you are...

Overtourism in rural destinations | 5







### Part 1: Presentation of the project

Overtourism in rural destinations | 6



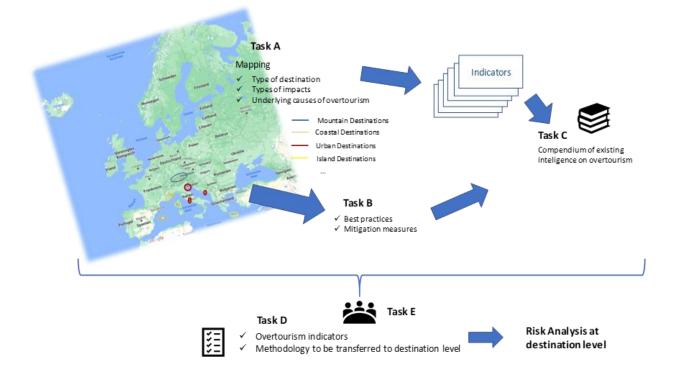


# Objectives of the project

- 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**





- 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".

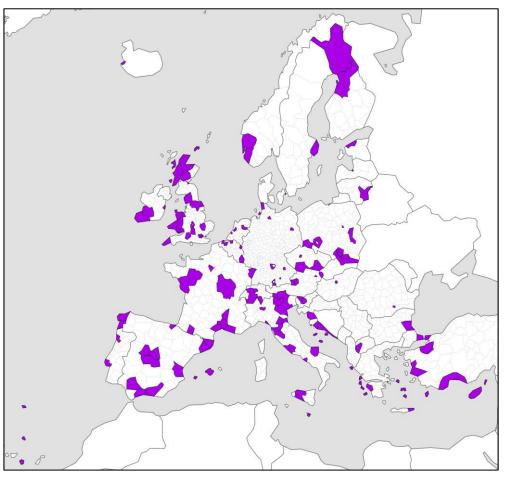
(Peeters et al. 2018)



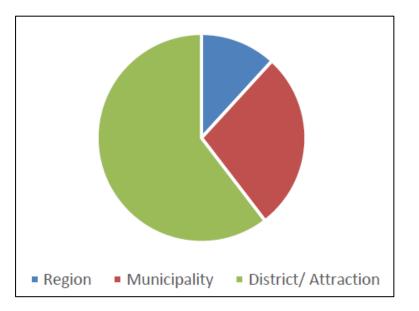




### Task A: Inventory of overtourism



Spatial level where overtourism occurs

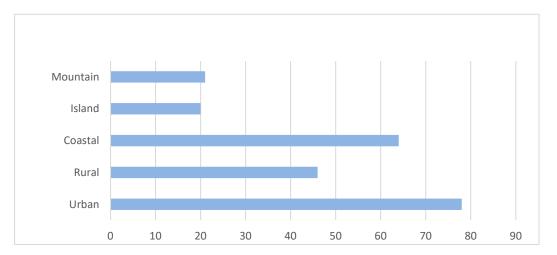






# \*\*\*\*

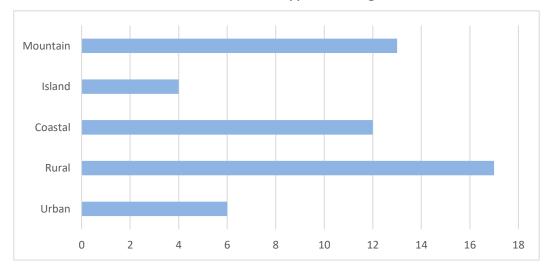
### Task A: Inventory of overtourism



Affected destination types before Covid

Source: Project team, 2021

### Affected destination types during Covid

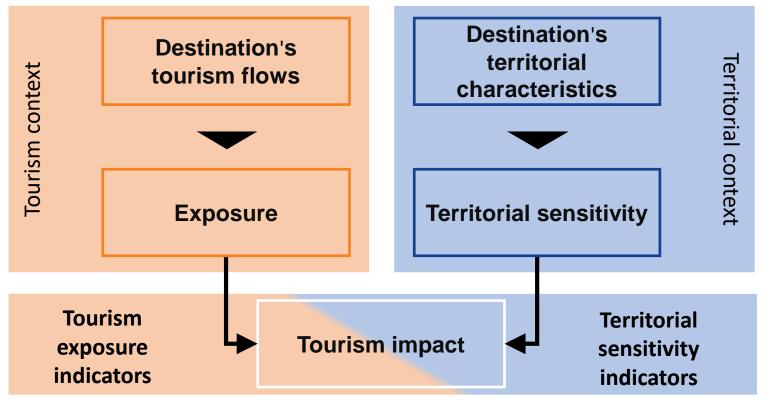






### \*\*\* \* \* \*\*\*

### Task A: Root causes and impacts of overtourism



Source: ESPON Tourism, 2021







### Task A: Root causes and impacts of overtourism

Root causes General long-term developments Higher standard of living Technological advances Wider access to media and information												
Tourism-specifi	Tourism-specific developments Demographic shifts Economic growth Increased number of holidays Increased number of holidays frequency of transport											
The falling cost of travel Short-term focus of to decision makers				rism		Rise of new	competitors	Pub	ic and unique tou ucts	rism		king conditions in sm sector
Growth-focused mindset of the tourism sector Performance measurements in international tour						Marketing of a established do			sonality (tempora entration of touri			Easement of travel restrictions
New trends Social media											Sudde	n, unpredictable
Prioritisation of trav and leisure experies		Sharing economy and New segments & Promotion of					Health Status					
Devilling offects						Dist	1		hort-term focus		Curre	nt travel regulations
Resulting effects Greater numbe		Imbalances i		Concentration of	of visite	bistribution of visitors to new places			of tourists			ne weather events o climate change)
Greater number of tourists number of visitors and rapid growth and residents				Changes in visitors' behaviour					(undertaking and arranging travel)			// Terrorist attacks
Destination facto	rs intens	sifying overtou	rism								High	n dependency on
General characte	eristics	Social disparity	Diversity	of stakeholders		Local to	urism secto	r De	stination branding	strateg	y tour	ism
Lack of facilities	General and		and tourism- aws & regulations		Inadequate of strategie	implementatio S		ick of a balance of sponsibilities and			fficient involvement cal population	
Existing pressure through other sectors Poor governance Unequal distribution benefits							ack of the awar sustainable to		f overtourism/ imp evelopment	portance		k of current 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												







### Task A: Root causes and impacts of overtourism

Root causes Gene	eral long-1	term develop	oments	Higher standar	d of liv	ving	Techno	logical advance	es W	ider access to media a	nd info	rmation	
Tourism-specific	developm	nents	Dem	ographic shifts	Ecor	nomic ç	prowth	Increased no of holidays	umber	Larger scale and his frequency of transp	-		
The falling cost of travel Short-term focus of tou decision makers				urism								Bad working conditions in the tourism sector	
			measure of DMOs al tourist arrivals			Marketing of already well- established destinations			Seasonality (temporal concentration of tourists number		mbers)	Easement of travel restrictions	
New trends Social media						Transition from "3S touris		irism" to			Sudden, unpredictabl		
Prioritisation of trave and leisure experience	Prioritisation of travel Sharing economy and		Bucket-list touris New source mar	ew source markets New segmen						World Health Status			
Resulting effects Imbalances in the number of visitors and rapid growth and residents			itors	Concentration of visit Changes in visitors' be		to new places		ors Short-term focus of tourists (undertaking and arranging travel)		(0	Extreme weather events (due to climate change) Safety/ Terrorist attacks		
Destination factors General characteri	-	ving overtour		of stakeholders		L	ocal to	urism secto	De	stination branding strate		High dependency on tourism	
Social disparity General			nd tourism- ws & regulations			dequate i trategies	implementation		ick of a balance of sponsibilities and powe		Insufficient involvement of local population		
Existing pressure through Poor governance Unequal distribution other sectors (e.g., corruption) benefits							ck of the award sustainable to		f overtourism/ importan evelopment		Lack of current tourism statistics		
other sectors	(e.g.,	, corruption)		s Imbalan			of Dis		urism de				







### Task A: Root causes and impacts of overtourism

Tourism-speci	fic devel	opments	Der	nographic shift	6 Eco	nomic ç	growth	Increased no of holidays	umber	Larger scale and his frequency of transp			
The falling cost of travel decision makers											d working conditions in tourism sector		
Growth-focused mindset of the tourism sector Performance mininternational								ready well- stinations		onality (temporal entration of tourists nu	mbers	Easement of travel ) restrictions	
lew trends		S	ocial media	Bucket-list tou	riem		Transitio	n from "3S tou	rism" to	"3E tourism"		dden, unpredictable ents	
	Prioritisation of travel Sharing economy and nd leisure experiences peer-to-peer platforms			New source markets						romotion of estinations in media		World Health Status	
Resulting effects Imbalances in th Greater number of tourists and rapid growth and residents			of visitors	Concentration of visit			to new places		s Short-term focus of tourists (undertaking and arranging travel)		E (4	Current travel regulations Extreme weather events (due to climate change) Safety/ Terrorist attacks	
Destination fact			Diversit	y of stakeholde	rs	L	ocal tou	irism secto	Des	tination branding strat	egy	High dependency on tourism	
		General	and tourism- aws & regulation	ons		dequate i trategies	mplementation		ck of a balance of sponsibilities and powe		Insufficient involvement of local population		
Existing pressure to other sectors	-	Poor governan (e.g., corruption		ual distribution (	of			ck of the awar sustainable to		overtourism/ importan velopment	ice	Lack of current tourism statistics	
	acts gradation ( astructure		egradation o ne environme	-	ances in econom			turbance of th ial environme		Declined quality of the visitor experient	се		





## Particularities of rural destinations

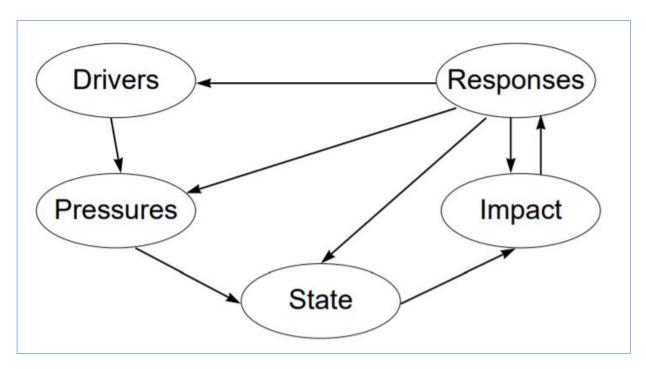
- Low population numbers/density
- Typically high tourism intensities, leading to overtourism phenomena even with rel. low visitor numbers
- Rel. low tourism densities overall, but sometimes with high spatial concentrations in historic towns and villages
- Inappropriate visitor behaviour
- Often weather-dependent outdoor activities, leading to pronounced seasonality and temporary overtourism
- High biodiversity and vulnerable ecosystems in natural areas with different levels of protection
- Sometimes high dependence on tourism (for lack of alternative economic opportunities)





# \*\*\*\*

### 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	<b>x</b> (+ TPR)	х	х	Pressure
Tourism density	x	<b>x</b> (+ TDR)	x		Pressure
Attraction concentration (based on visitor reviews)	х				Pressure
Historic site prevalence (based on visitor reviews)	x				Pressure
CO2 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; iden- tity			Х	x	Impact
Visitor satisfaction: Nega- tive reviews, complaints	x		x	x	Impact
Waste management by tour- ism enterprises				x	Response
Sewage treatment				х	Response
Water management by tour- ism enterprises				x	Response
Energy efficiency and re- newable 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: Rural Destinations – Visitors

### High recent tourism growth

- Burren & Cliffs of Moher: Growth of visitors Cliffs of Moher of 28% (2015-2019)
- Plitvice Lake: Growth of arrivals 51%, of overnights 58% (2009-2019)
- PN Monts d'Ardèche: overnights 7 807 000
- International visitors: 25% (Ardèche), 59% (Burren & Cliffs of Moher)
- -> Lack of data!
- Tourism intensity: 93 (Ardèche) | n.a. (Burren/Moher) | n.a. (Plitvice Lake) overnights per inhabitant
- Tourism density: 3,424 (Ardèche) | n.a. (Burren/Moher) | n.a. (Plitvice Lake) overnights per km<sup>2</sup> of administrative tourism area





### \*\*\*\* \* \* \*\*\*

## Task B: Rural 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
- Social media







### Task B: Rural Destinations – Impacts

### Socio-economic

- Pressure on infrastructure, congestion, overcrowding
- Reduced visitor experience quality
- Low value added

### Ecological

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





# Task B: Rural Destinations – Solutions

- Restrictions for conservatory purposes (i.e. Burren and Cliffs of Moher).
- 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
- Further approaches (Burren and Cliffs of Moher)
  - Dynamic prices with reduced prices out of peak hours —
  - Package bookings and joint tickets to other fee-paying attractions
  - Mandatory overnight offering in packages
  - No license for day tour operator is given unless they engaged in the two previously cited measures. \_\_\_\_
  - Increased opening hours —
  - Capping of number of visitors by setting capacity.
  - Marketing to influence customer behaviour for longer stays, purchasing local and supporting the local economy. —
  - Off-season promotion of attractions (Lake Plitivce)





### Task B: Rural Destinations – Solutions

- Education of both locals and visitors to the particularities and conservation needs of the sites (e.g. Burren and Cliffs of Moher).
- Monitoring (Monts d'Ardèche):
  - Data gathering via locally placed sensors
  - Statistics gathered by key tourism businesses
  - Statistics gathered by the Ardèche department via the "Flux Vision Tourisme" tool to measure visitor flows via mobile phone signals
- Digital solution approaches
  - App with trekking routes to encourage visitors to explore less well-known parts of the mountains that allows to gather data on visitor flows in cooperation with a telecommunication company (Monts d'Ardèche)
  - Online Guide Training Programme under development, digital booking systems and site monitoring systems are becoming key to visitor management strategies to influence consumer behaviour. (Burren and Cliffs of Moher)





### 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-coat 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

- Ms. Marija Turkalj, Plitvice National Park
- Mr. Klaus Ehrlich, European Federation of Rural Tourism
- Ms. Ramune Genzbigelyte, DG GROW





# \*\*\*\*

### Continuing the discussions... on FUTURIUM





### Up-coming workshops

- Mountain destinations workshop in April 2022
- EU-level workshop hosted in Brussels, Belgium, in May 2022









### \*\*\*\* \* \* \*\*\*

### Follow-up session day 2

Timing	Sessions
08:45	Opening of the meeting room for the online participants
09:00	Welcoming and summary of Day 1
	Mr. Bernd Schuh (ÖIR GmbH)
09:15	Part 3: how to identify, assess, and address tourism growth imbalances: a structured approach
	Presentation of the discussion format
	Group work: Assessment of overtourism impacts in urban areas via a systemic picture
	Format: Interactive discussion
10:00	Break
10:10	Part 3 (cont.): how to identify, assess, and address tourism growth imbalances: a structured approach
	Selection of main overtourism impact indicators (as per systemic picture)
	Maps and illustrations of overtourism indicators
	Discussion of solution approaches
	Format: Interactive discussion
11:10	Break
11:20	Part 4: Validation and key challenges
	<ul> <li>Presentation and discussions on the outcomes of the methodology as well as the main issues encountered in regards to unbalanced tourism growth</li> </ul>
	Format: World café – group work
12:30	Conclusions, summary of findings and next steps in plenary session
12:40	Closing remarks
	Ms. Ramune Genzbigelyte (DG GROW)
	Ms. Laura Kasnauskaite (EISMEA)
	Mr. Bernd Schuh
13:00	End of the workshop







### Take away points from the workshop







# Thank you and see you tomorrow!

Overtourism in rural destinations | 35

Hochschule für nachhaltige Entwicklung Eberswalde

Lucerne University of Applied Sciences and Arts HOCHSCHULE LUZERN





Additional information

ÖIR GmbH

Bernd Schuh schuh@oir.at | +43 1 533 87 47 1010 Wien, Franz-Josefs-Kai 27

Subscribe to our e-letter: www.oir.at/e-letter