



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...

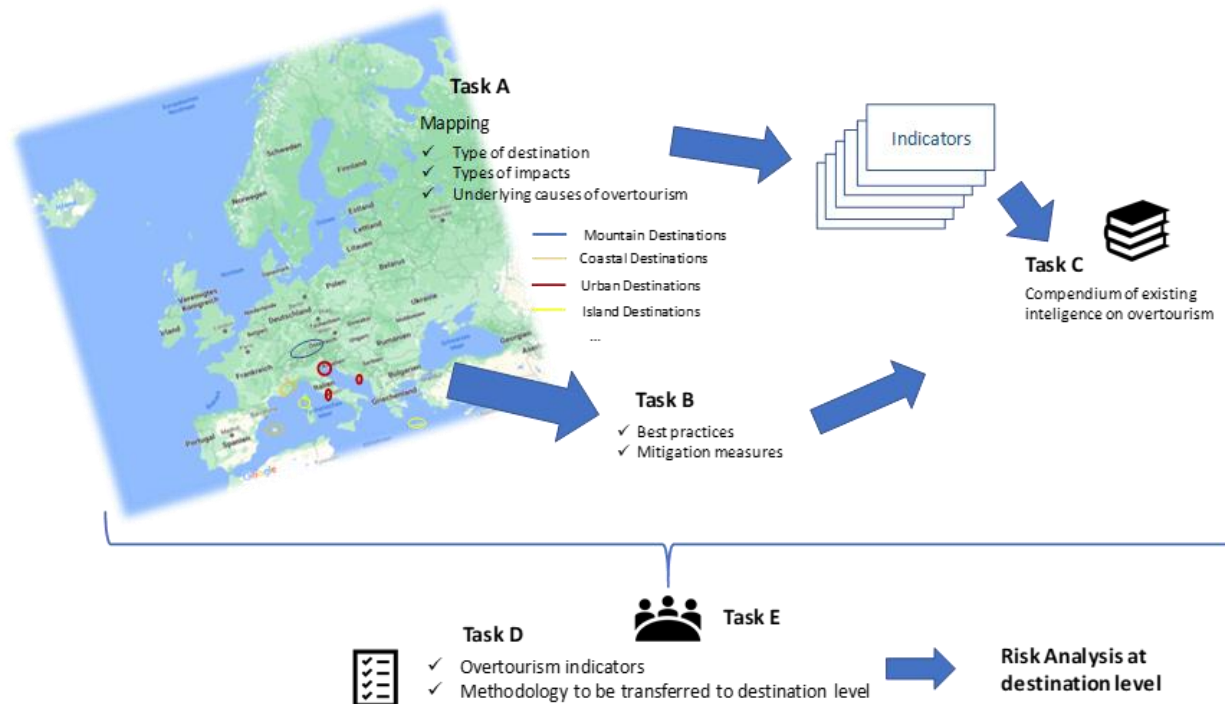


Part 1: Presentation of the project

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



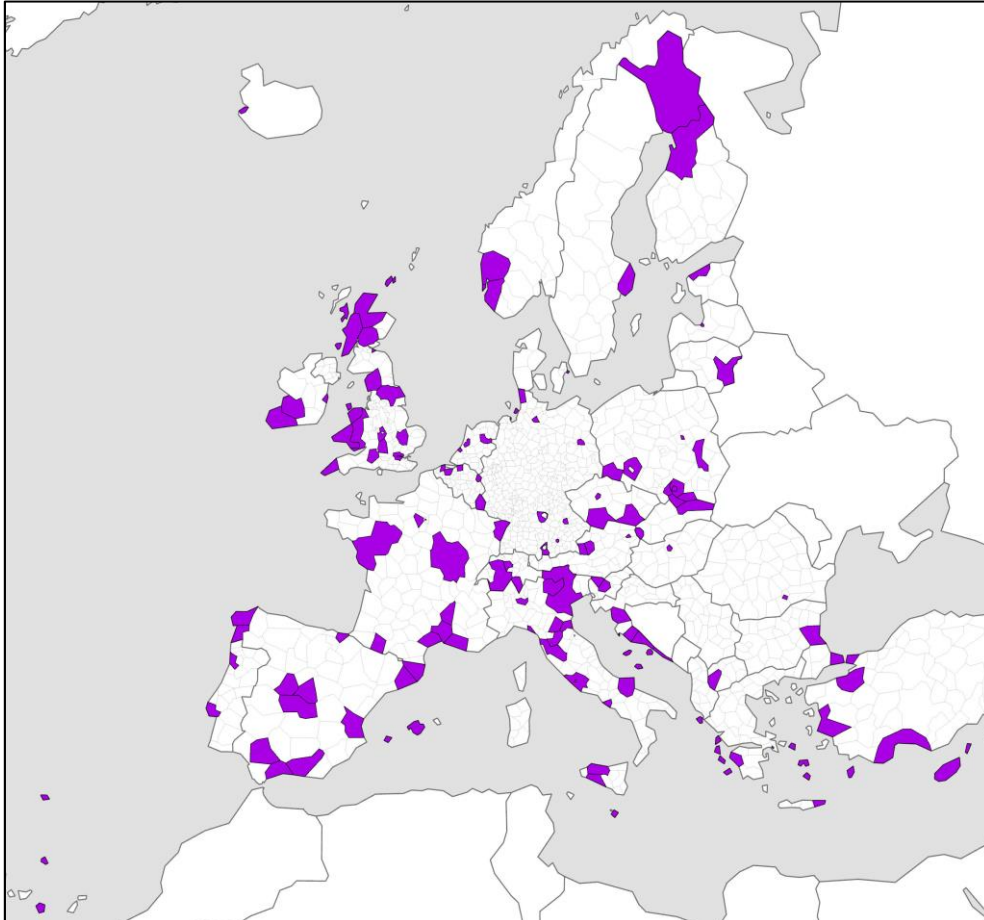
- ▶ Task A: Mapping and analysis of the root causes of overtourism at destination level and the evident impacts at economic, environmental and socio-cultural level
- ▶ Task B: Identifying best practice solutions, successfully applied by tourism destinations in the EU and globally
- ▶ Task C: Establishing 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”.

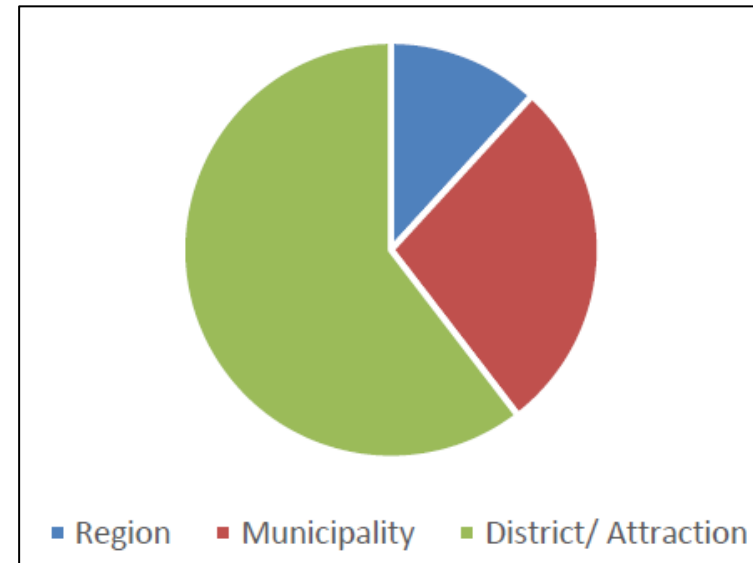
(Peeters et al. 2018)

Task A: Inventory of overtourism

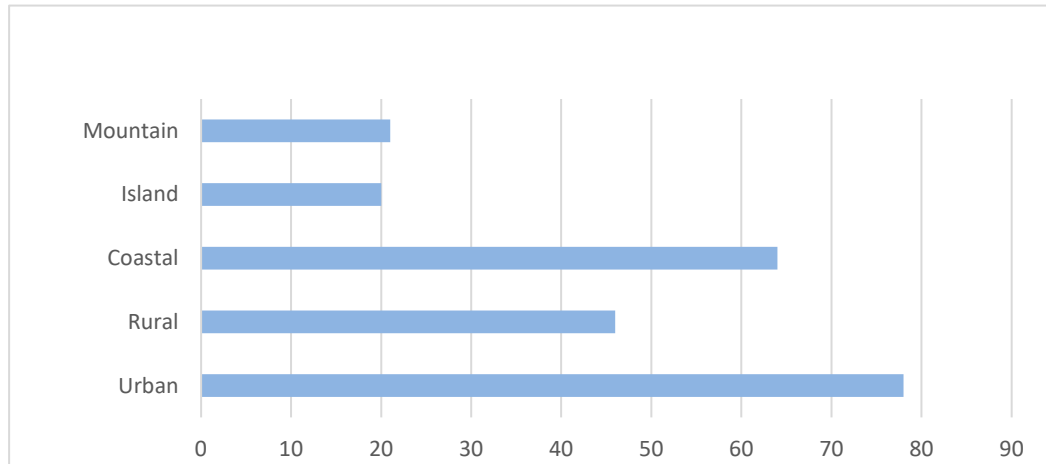


Source: Project team, 2021

Spatial level where overtourism occurs



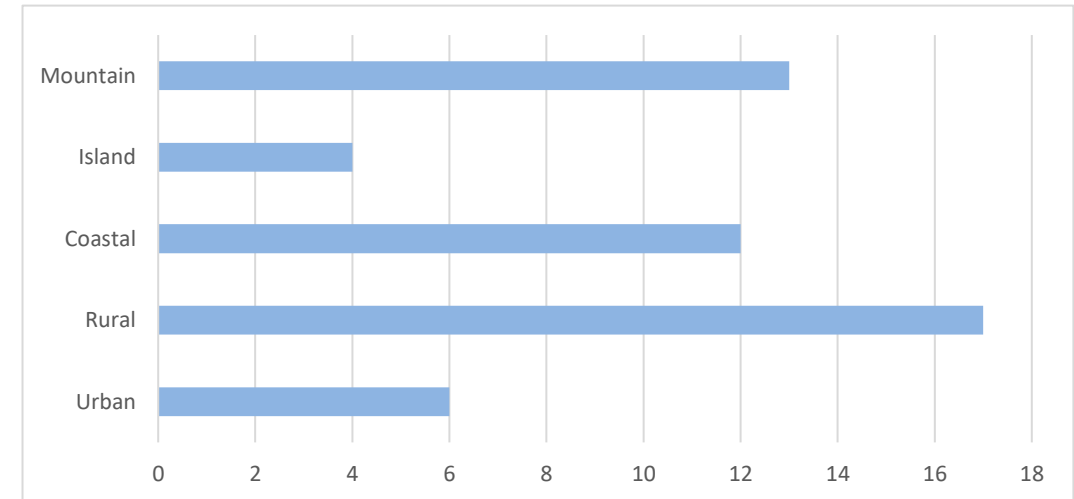
Task A: Inventory of overtourism



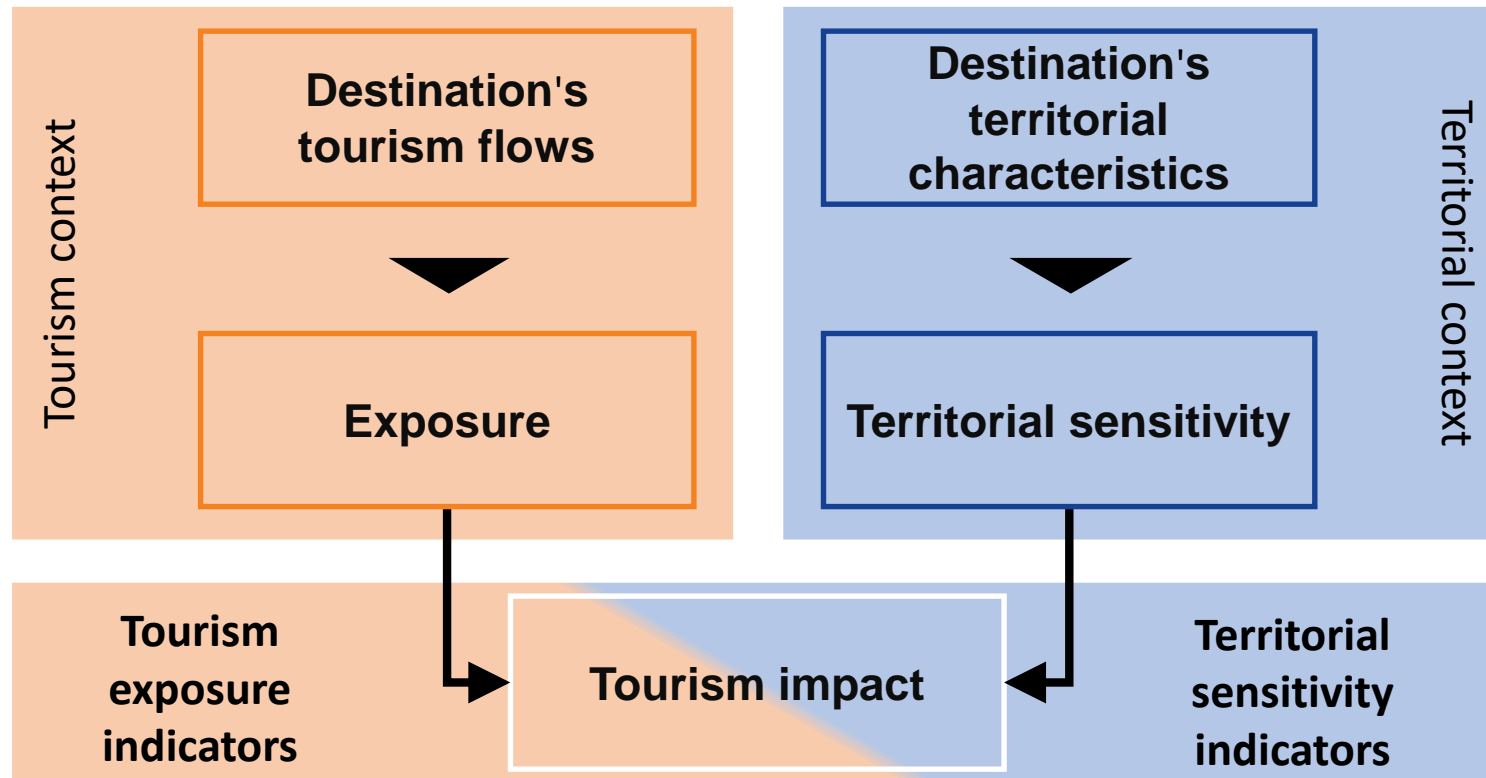
Affected destination types before Covid

Source: Project team, 2021

Affected destination types during Covid

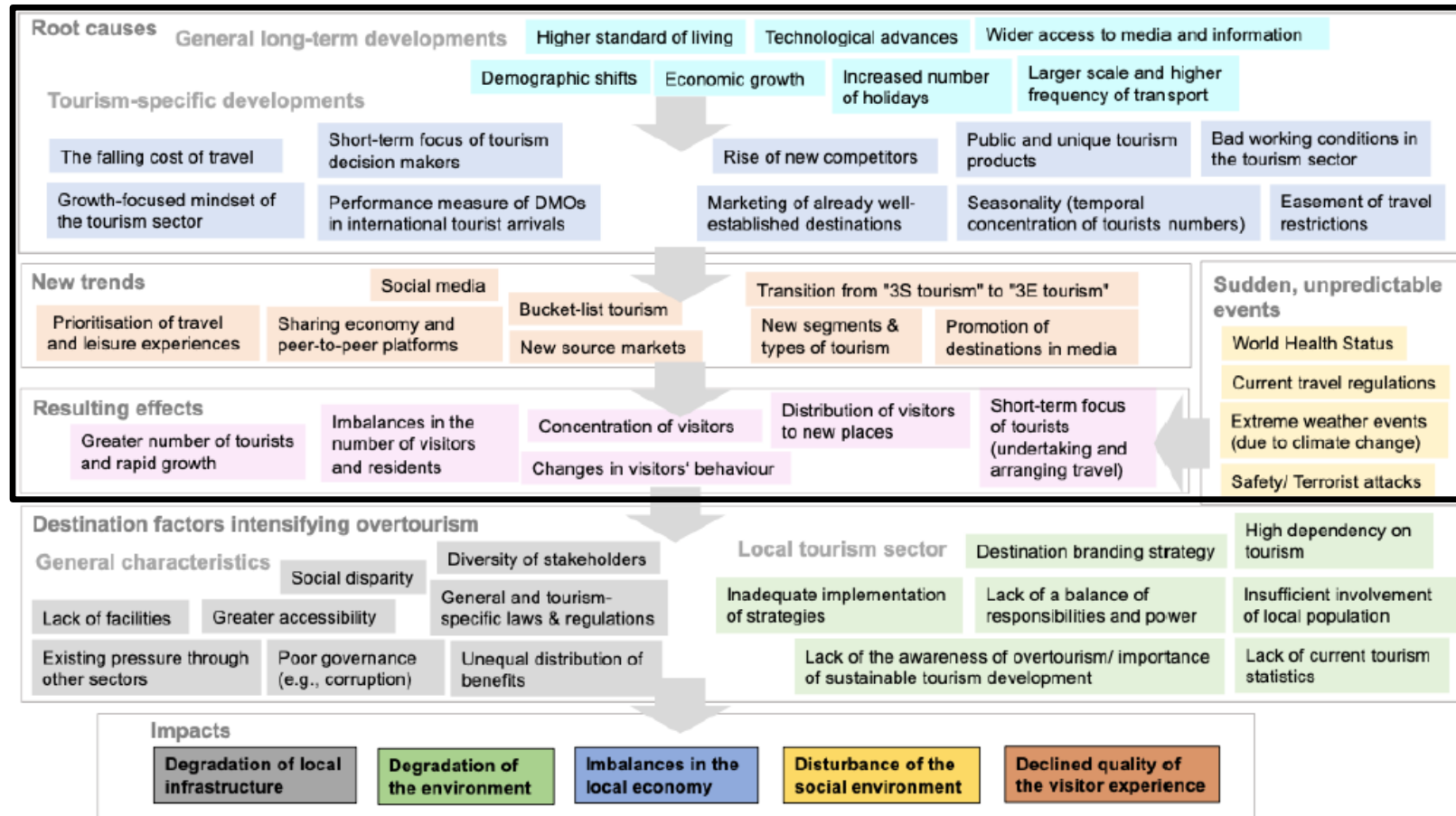


Task A: Root causes and impacts of overtourism



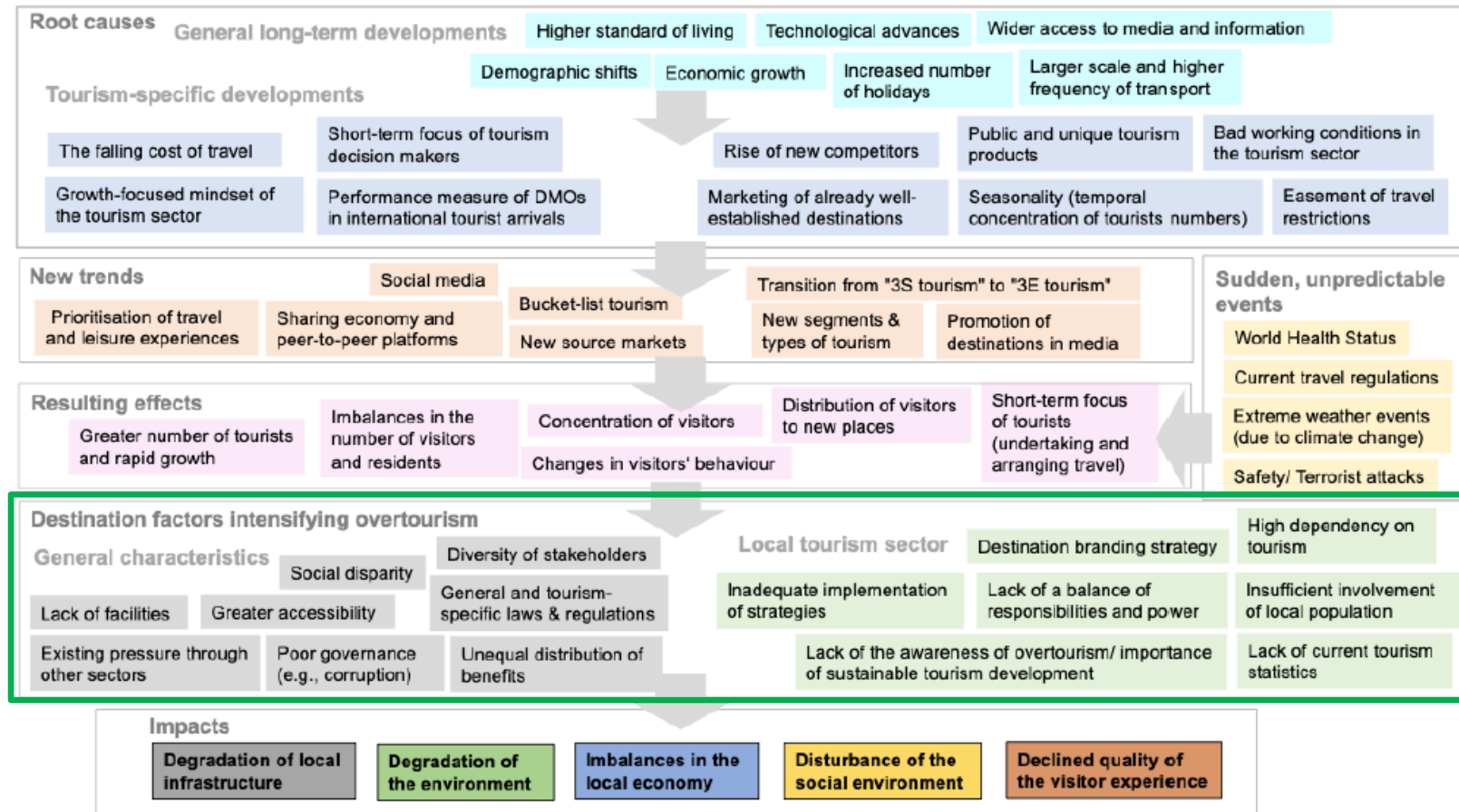
Source: ESPON Tourism, 2021

Task A: Root causes and impacts of overtourism



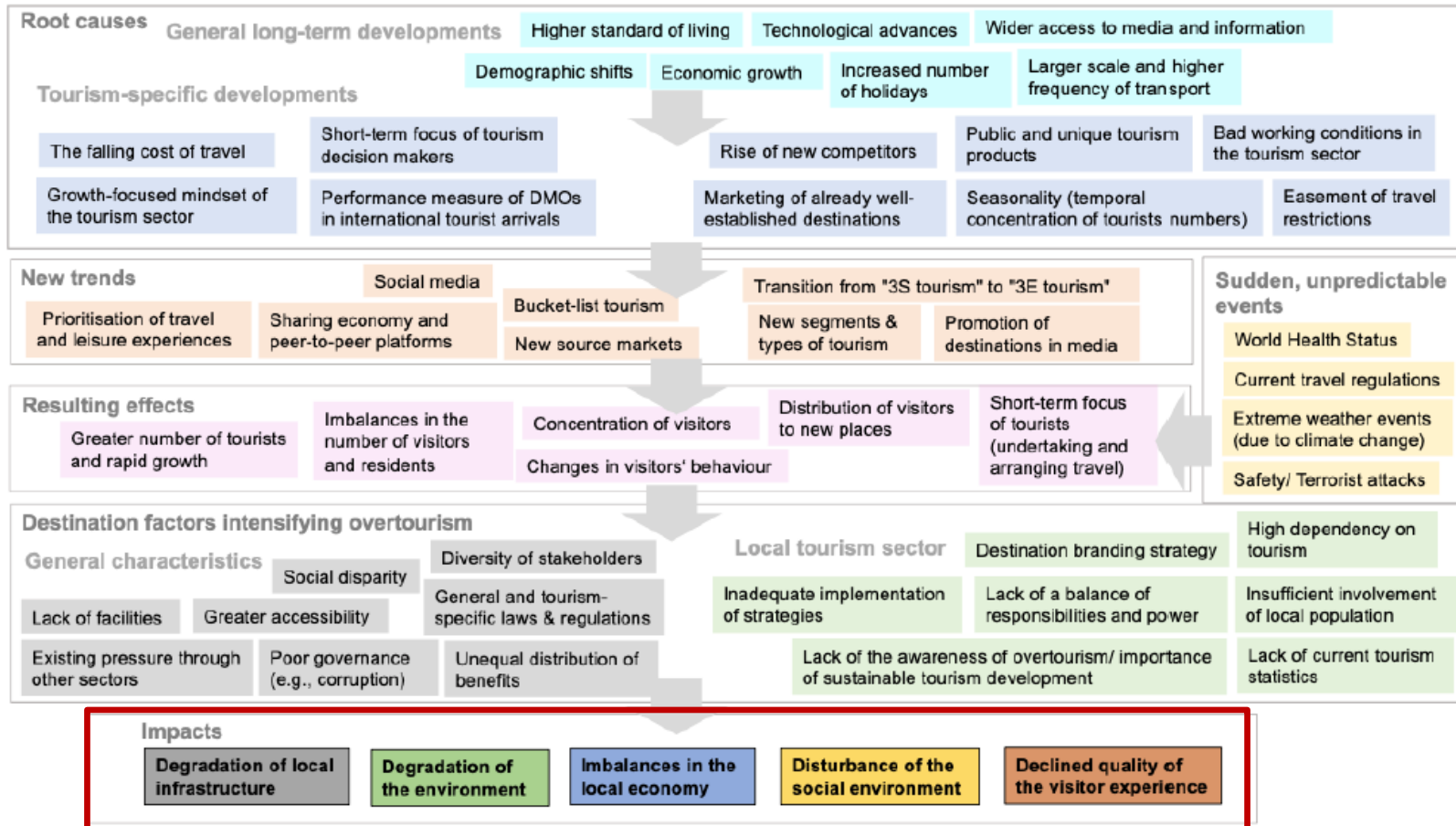
Source: Project team, 2021

Task A: Root causes and impacts of overtourism



Source: Project team, 2021

Task A: Root causes and impacts of overtourism

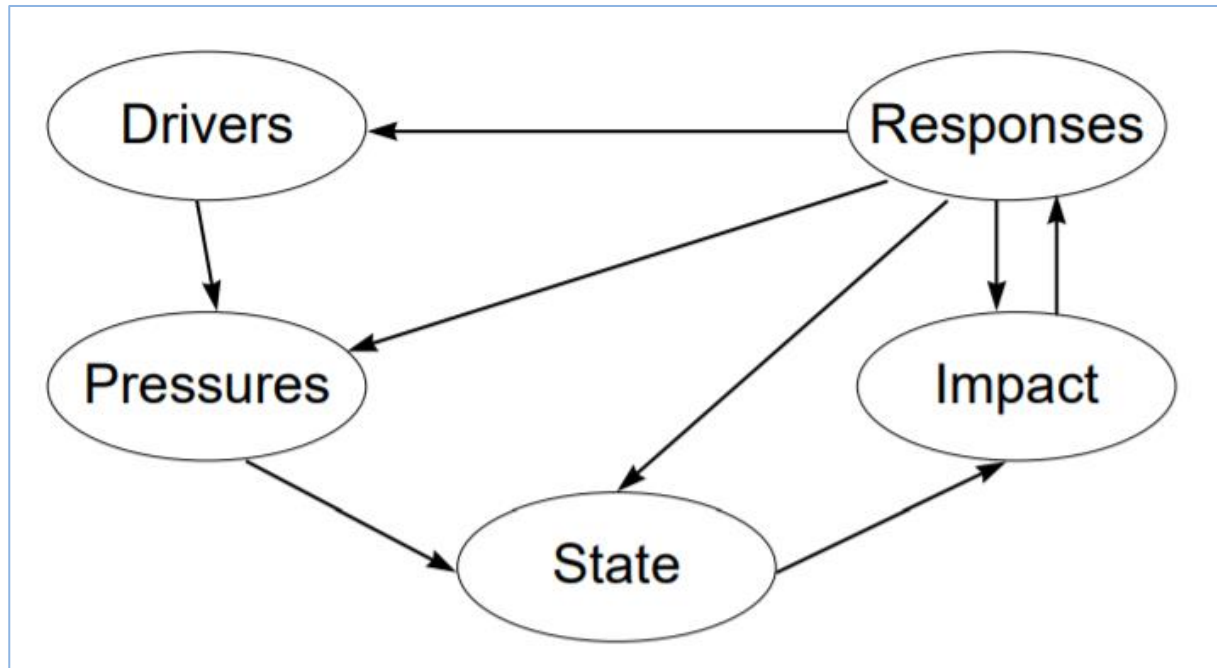


Source: Project team, 2021

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

Compiled by project team, 2021

Task A: Measuring overtourism

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

Compiled by project team, 2021

Task A: Measuring overtourism – Key local indicators

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

Task B: Selected Case Study Destinations

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

Task B: 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 km² 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 Plitvice)

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-cost airlines, charter flights and cruises
- Indicating *general risk of overtourism in sensitive destinations*

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

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

3. Measuring tourism pressure and actual impacts locally

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

Part 2: Peer-to-peer learning

- ▶ Ms. 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 <ul style="list-style-type: none"> ▪ 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 <ul style="list-style-type: none"> ▪ 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 style="list-style-type: none"> ▪ Presentation and discussions on the outcomes of the methodology as well as the main issues encountered in regards to unbalanced tourism growth Format: World café – group work
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!



Additional information

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