Unbalanced Tourism Growth

Urban Destinations Workshop – Day 1

20 January 2022

Bernd Schuh, Dagmar Lund-Durlacher, Fabian Weber, Helene Gorny, Arndt Münch, Melanie Wyss

Welcome!

▸ Ms Ulrike Rauch-Keschmann (Federal Ministry for Agriculture, Regions and Tourism)

▸ 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
	Mr. Bernd Schuh (ÖIR GmbH)
	Ms Ulrike Rauch-Keschmann (Federal Ministry for Agriculture, Regions and Tourism)
	Ms. Ramune Genzbigelyte (DG GROW)
	Ms. Laura Kasnauskaite (EISMEA)
13:15	Introduction of participants (position/background)
	Participants' expectations regarding the workshop
	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…

Your expectations…

What are the three main aspects you hope to learn about by the end of this workshop?

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
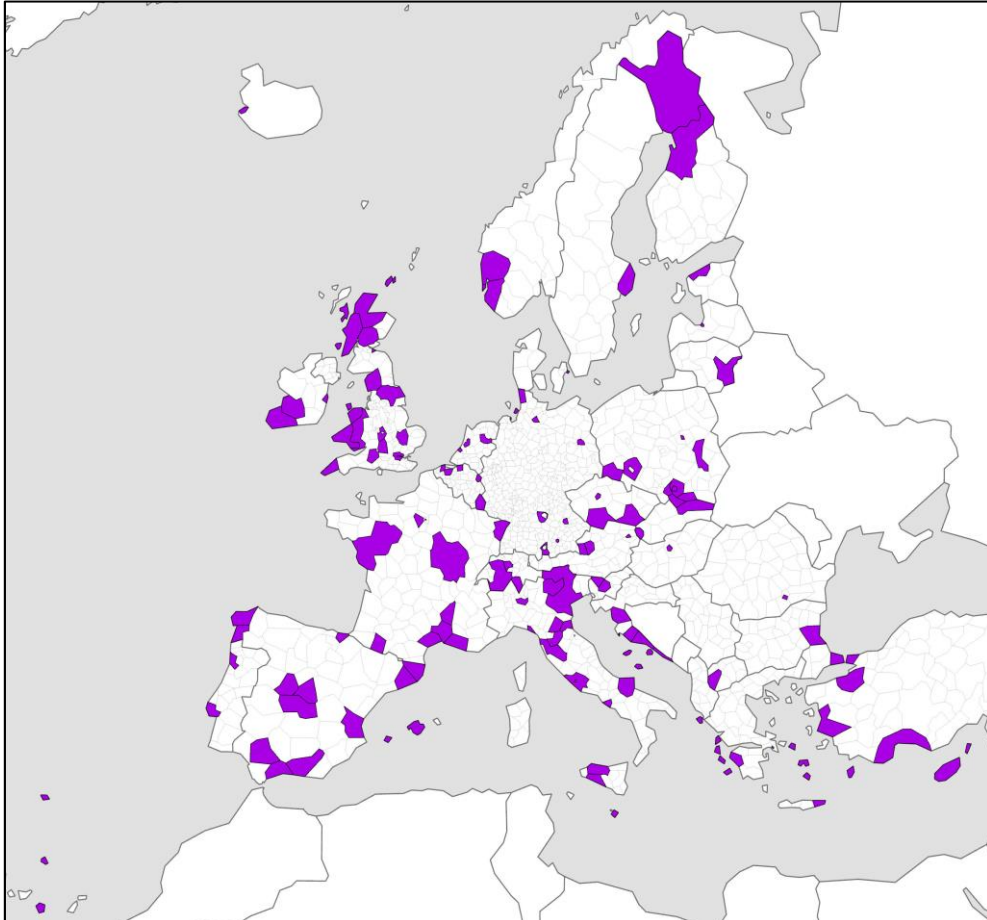
Project Tasks
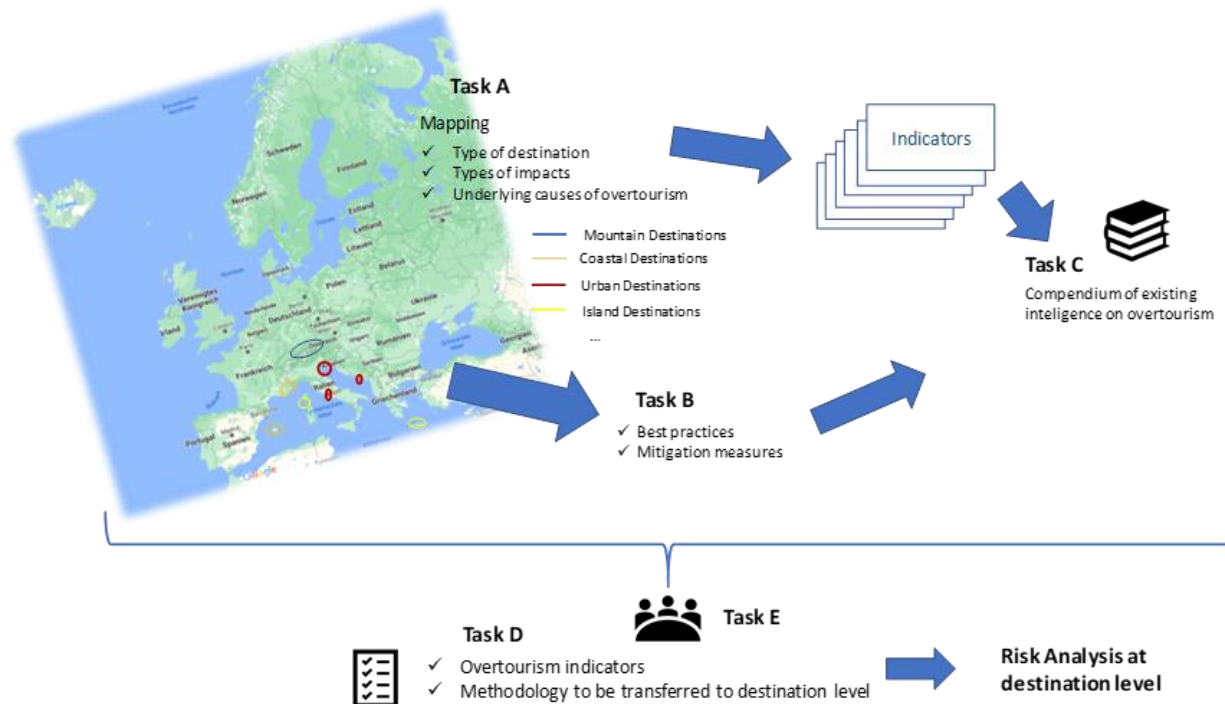
▸ Task A: Mapping and analysis of the root causes of overtourism at destination level and the evident impacts at economic, environmental and socio-cultural level

▸ 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".
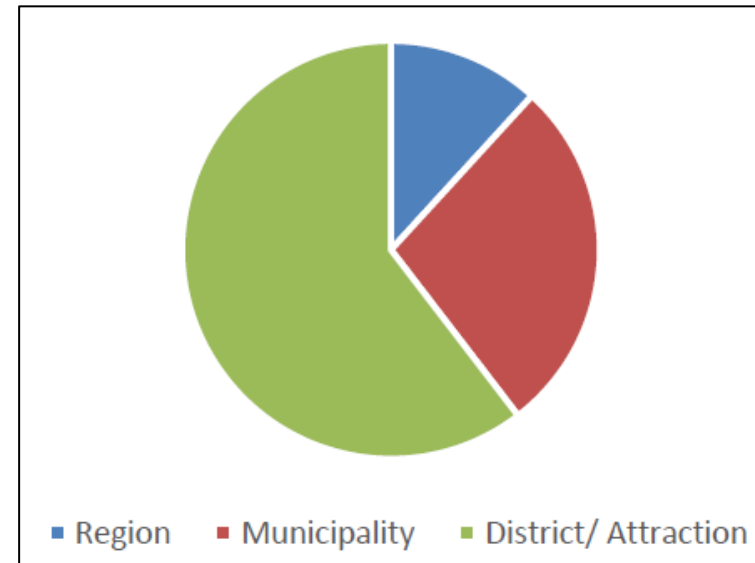
(Peeters et al. 2018)
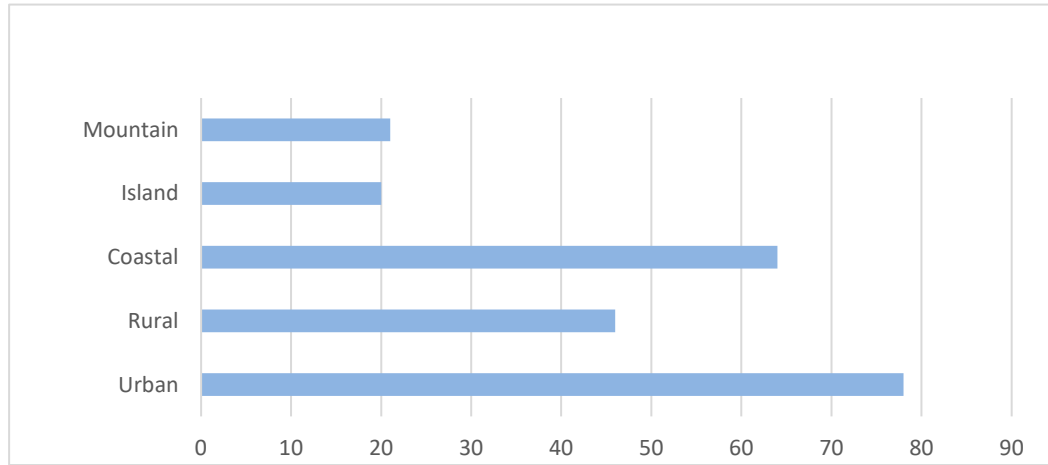
Task A: Inventory of overtourism

Source: Project team, 2021

Spatial level where overtourism occurs

- Region
- Municipality
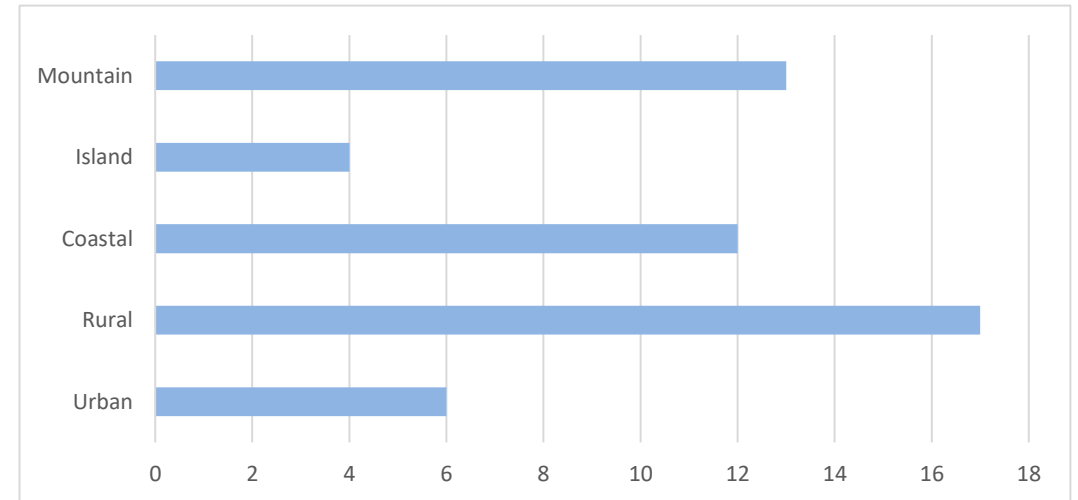- District/ Attraction

Task A: Inventory of overtourism

Affected destination types before Covid
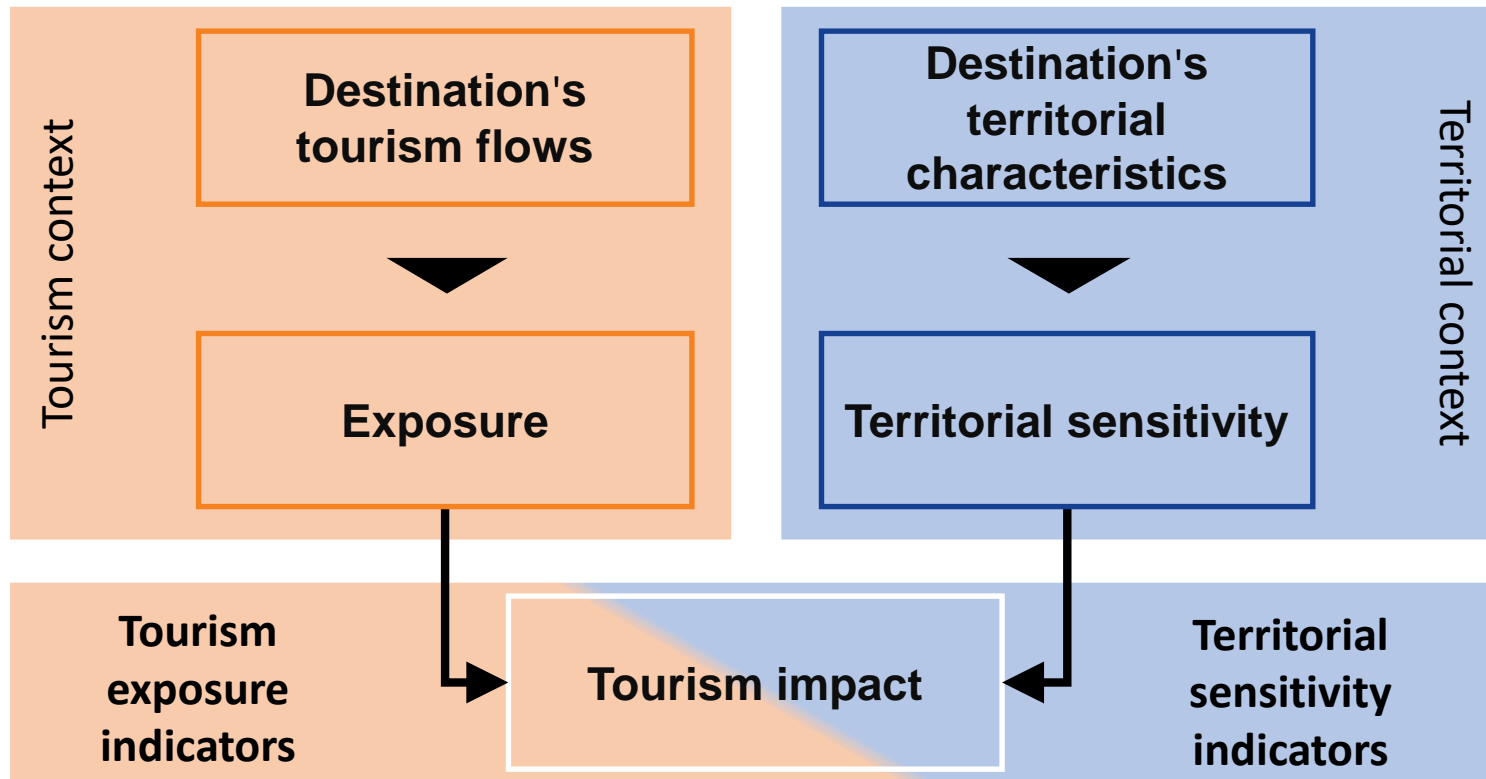
Source: Project team, 2021
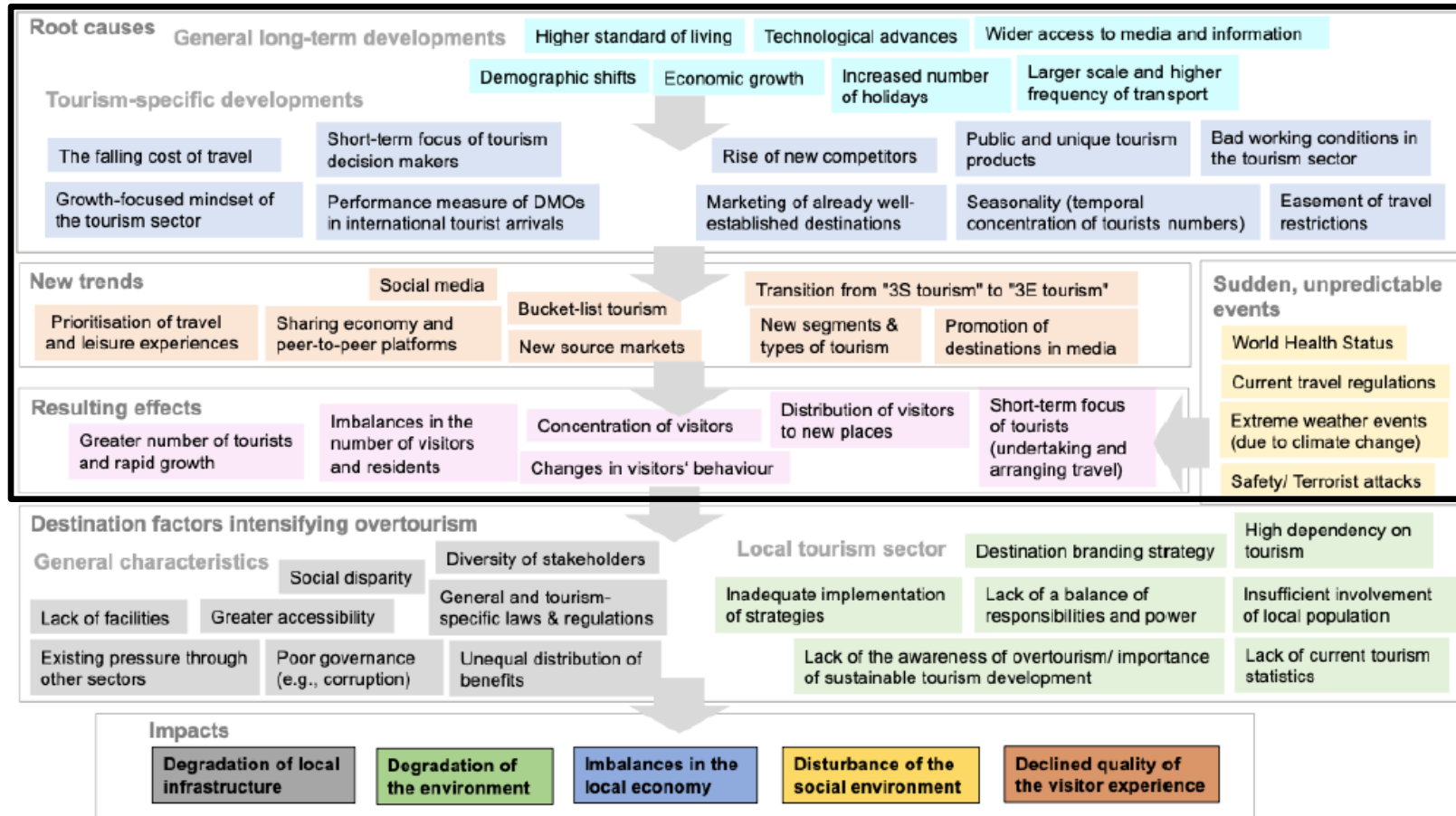
Affected destination types during Covid

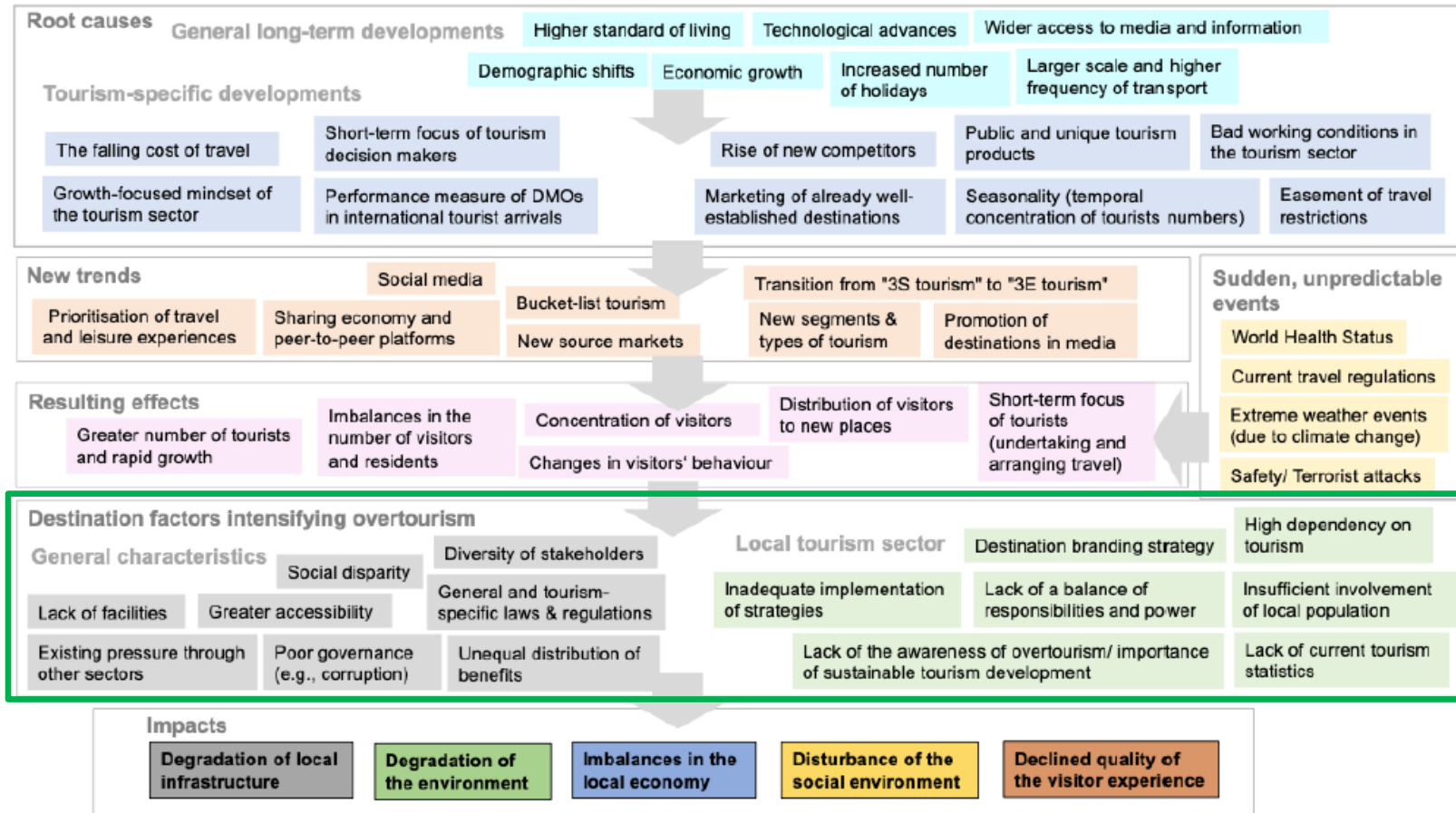# Task A: Root causes and impacts of overtourism

Source: ESPON Tourism, 2021

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Source: Project team, 2021

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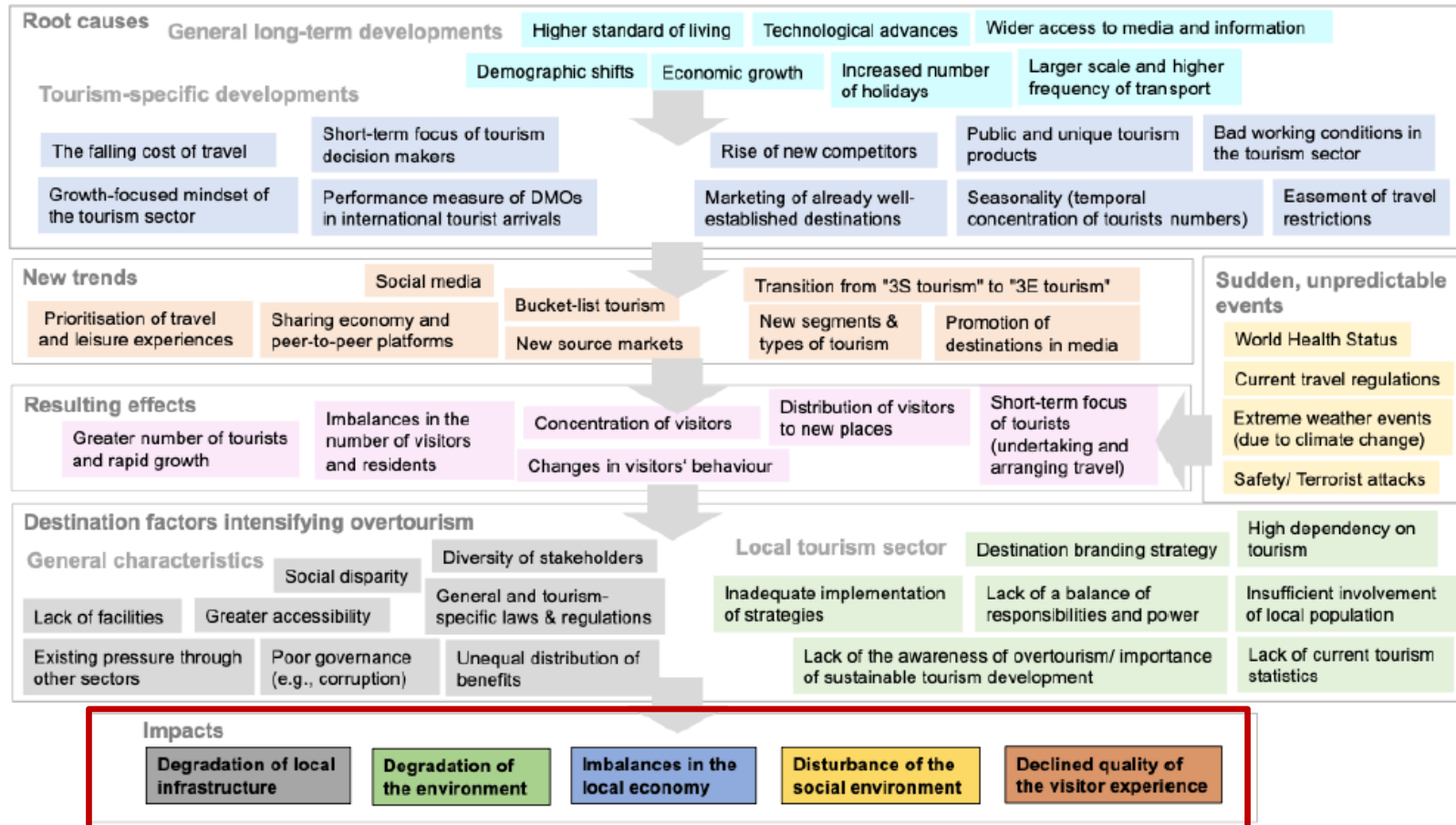
Source: Project team, 2021

Particularities of urban destinations

- **Concentration** of a multitude **of tourist attractions** in a relatively small area

- **Different types of tourists** attracted by diverse attractions

- **Mutual interaction between different types of urban users** (competing use of infrastructure)

- **Different types of economic activities** (less dependant on tourism)

- **Significant regional centers with well-developed infrastructure** (rising numbers of commuters, residents and day visitors)

- Less affected by **seasonality**

- Often, overtourism occurs at **certain times** or **under special circumstances** and is **limited to certain parts of the city**

Task A: Measuring overtourism
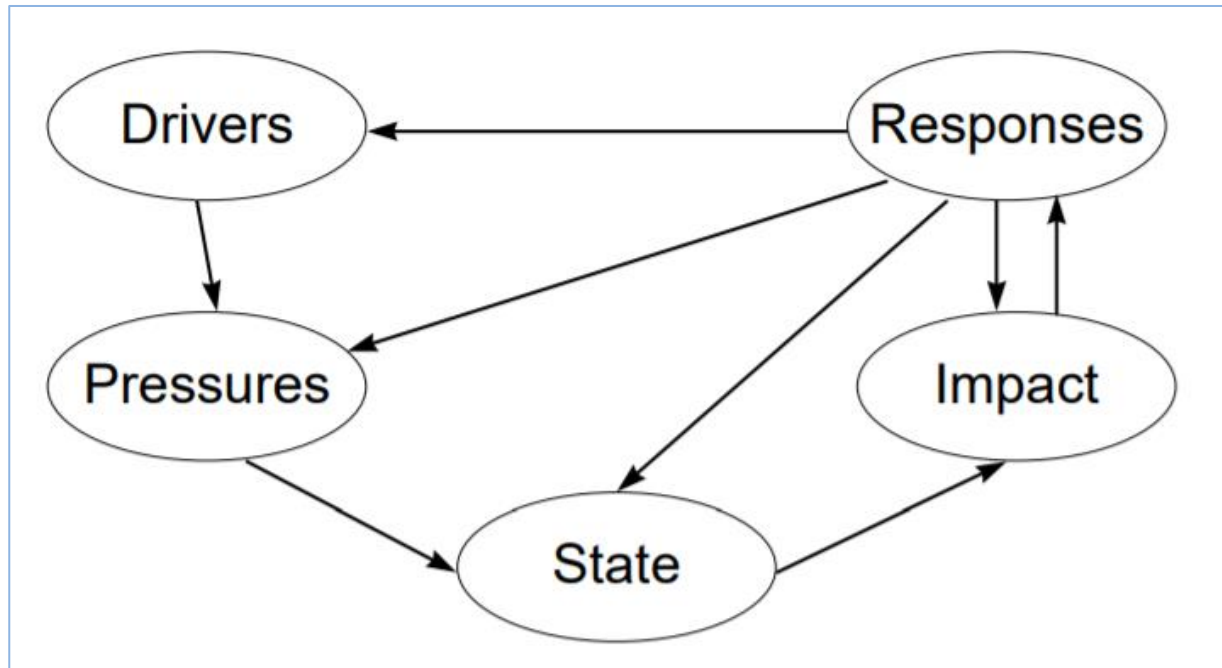
The DPSIR Framework, Source: European Environment Agency 1999

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: Urban Destinations

▶ **Unbalanced Tourism Developments**

– growing popularity of urban destinations and short weekend breaks, increased destination accessibility and expansion of privately rentable accommodation

– long history with traditionally "many" and particularly international tourists

– General popularity of urban destinations → rising numbers of commuters, residents and day visitors

▶ **Spatial Aspects of "Unbalanced Tourism"**

– Favourable geographic location (Lucerne)

– specific districts, historic-cultural sites

▶ **Temporal aspects**

– All year around tourism (Florence), accentuated in Spring and Summer

Task B: Urban Destinations – Visitors

▶ **Very high recent tourism growth 2009-2019 (arrivals)**

   – Florence: +26%   (2009: 4 248 818 | 2019: 5 372 412)

   – Lucerne: +39%   (2009:   679 642 | 2019:   945 903)

   – Vienna: +81%   (2009: 4 385 529 | 2019: 7 926 768)

▶ **Tourism intensity:** 16 (Florence) | 20 (Lucerne) | 10 (Vienna) overnights per inhabitant

▶ **Tourism density:** 4 508 (Florence) | 55 937 (Lucerne) | 42 434 (Vienna) overnights per km^2 of administrative tourism area

Task B: Urban Destinations – Drivers

▶ **General Drivers**

   – High accessibility (all modes)

   – Low-cost carrier expansions

   – Expansion of privately rented accommodations / Airbnb

▶ **Specific Drivers**

   – Bus tours / coaches (Lucerne)

   – Cruise tourism (Florence, Vienna)

   – Seasonal attractions / events (Florence, Vienna)

Task B: Urban Destinations – Impacts

▶ **Socio-economic**

- Increased real estate prices, cost of living

- Touristification

- Changes in neighborhood structures

- Reduced visitor experience quality

- Reduced quality of life for locals / exodus of local residents in historic centers

▶ **Ecological**

- Waste management issues

Task B: Urban Destinations – Solutions

▶ Various controls and limits embedded in laws, regulations and policies (e.g. extending opening hours, monitoring and regulating short-term rental economy)

▶ Soft approaches such as marketing strategies to balance out seasonal bottlenecks, address new visitor segments (e.g. LiLu Lucerne)

▶ Digital solution approaches

  – Florence: FeelFlorence App "pop up info"

  – Lucerne: Digital visitor card, iParking App for coach busses

  – Vienna: Pilot of the Ivie App digital bus management system, digital concierge for city explorers

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

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
   → 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

▸ Mr David Blanchard, European Commission, Deputy Head of Unit, DG for Internal Market, Industry, Entrepreneurship and SMEs Unit G/3 – Digital Transformation of Industry

▸ Mr Clemens Költringer, Vienna Info

▸ Ms Carlotta Viviani, FeelFlorence experience

Up-coming workshops

▸ **Virtual coastal** destinations workshop
hosted in **Palma de Mallorca,** Spain on **23.02.2022**

▸ **Rural** destinations workshop
hosted at the **Plitvice Lakes National Park,** Croatia on **17.03.2022**

▸ **Mountain** destinations workshop
in **spring 2022**

▸ **EU-level** workshop
hosted in **Brussels,** Belgium, in **spring 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 ▪ 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

Thank you and see you tomorrow!

Additional information

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