

Tourism destinations under pressure

Challenges and innovative solutions

2017

Fabian Weber, Juerg Stettler, Julianna Priskin,
Barbara Rosenberg-Taufer, Sindhuri Ponnappureddy, Sarah Fux,
Marc-Antoine Camp, Martin Barth

Lucerne University of Applied Sciences and Arts
Institute of Tourism ITW
Roesslimatte 48
6002 Lucerne, Switzerland

Lucerne, May 2017

**Study conducted by Lucerne University of Applied Sciences and Arts in collaboration with
WTFL university partners.**

Contributions and Authors

Case & country	University	Authors
Baku, Azerbaijan	Azerbaijan Tourism and Management University	Prof. Shalala Mammadova
Cozumel, Mexico	Universidad de Monterrey	Dr. Blanca Alejandra Camargo
Great Barrier Reef (GBR), Australia	University of Queensland	Dr. Gabby Walters Karen Hofman
Juist, Germany	Harz University of Applied Sciences	Prof. Dr. Louisa Klemmer Prof. Dr. Sven Gross
Kasane, Botswana	Botho University	Simon Lloyd Dr. Kgosietsile Velempini
Lombok, Indonesia	Sekolah Tinggi Pariwisata Bandung (STP)	Beta Budisetyorini Pita Ratna Sari Dicky Arsyul Salam
Muskoka, Canada	University of Waterloo	Ashley Gallant Dr. Karla Boluk
Ohrid, Macedonia	University of St. Kliment Ohridski, Faculty for Tourism and Hospitality	Prof. Dr. Ivanka Nestoroska Prof. Dr. Naume Marinoski Prof. Dr. Sasho Korunovski Prof. Dr. Simona Martinoska Prof. Dr. Katerina Angelevska-Najdeska Prof. Dr. Risto Reckoski Prof. Dr. Danijela Miloshoska
Rigi, Switzerland	Lucerne University of Applied Sciences and Arts	Barbara Rosenberg-Taufer Julia Huilla
Soweto, South Africa	University of Johannesburg	Dr. Milena Ivanovic Maisa Adinolfi Vyasha Harilal
Vienna, Austria	MODUL University Vienna	Igor Gula Prof. Dr. Dagmar Lund-Durlacher

Project team

Lucerne University of Applied Sciences and Arts (HSLU)	Dr. Fabian Weber Prof. Dr. Juerg Stettler Prof. Dr. Julianna Priskin Barbara Rosenberg-Taufer Sindhuri Ponnappureddy Sarah Fux Prof. Dr. Marc-Antoine Camp Prof. Martin Barth
--	--

Content

Management Summary	5
1. Introduction	7
1.1. Aims & research questions.....	7
1.2. Method	8
1.3. Project phases	11
2. Literature review	12
2.1. Overtourism/ Overcrowding	12
2.2. Carrying capacities.....	12
2.3. Challenges & solutions.....	13
3. Cases	15
3.1. Overview of cases.....	15
3.2. Baku (Azerbaijan).....	18
3.3. Cozumel (Mexico)	27
3.4. Great Barrier Reef (Australia).....	40
3.5. Juist (Germany)	50
3.6. Kasane (Botswana)	66
3.7. Lombok (Indonesia)	75
3.8. Muskoka (Canada)	93
3.9. Ohrid (Macedonia).....	107
3.10. Rigi (Switzerland).....	123
3.11. Soweto (South Africa)	139
3.12. Vienna (Austria).....	155
4. Results.....	174
4.1. Similarities & differences	174
4.2. Challenges & solutions.....	187
4.2.1. Drivers of overcrowding	188
4.2.2. Factors determining carrying capacity	190
4.2.3. Challenges of overtourism.....	192
4.2.4. Solutions	194
4.3. Limitations of the study	197
4.4. Conclusions & recommendations.....	198
4.4.1. Summary of results	198
4.4.2. General conclusions	200
4.4.3. Recommendations	201
5. References	203
6. Annex.....	206
6.1. Analysis framework	206
6.2. Technical Appendix.....	211

List of figures

Figure 1: Comparative case study design	9
Figure 2: World map with cases analysed	15
Figure 3: Different aspects of overtourism	187
Figure 4: Basic model of a tourism destination.....	188
Figure 5: Drivers of overcrowding	189
Figure 6: Factors determining carrying capacity.....	190
Figure 7: Challenges of overtourism	192
Figure 8: Solutions	194
Figure 9: Components analysed	198

List of tables

Table 1: Overview of cases.....	16
Table 2: Key figures of tourism in countries	175
Table 3: Country rankings	175
Table 4: Tourism demand in destinations analysed (2015)	177
Table 5: Carrying capacity affected	180
Table 6: Drivers of overcrowding	189
Table 7: Factors determining carrying capacity.....	190
Table 8: Challenges of overtourism.....	192
Table 9: Solutions	194
Table 10: Citations (Factors determining carrying capacity)	211
Table 11: Citations (Challenges of overcrowding).....	212
Table 12: Citations (Solutions)	213

Management Summary

Tourism is a rapidly growing industry with a far-reaching economic, social and environmental impact across the world. The rapid growth of tourism and how to manage it sustainably is a challenge for many destinations. In recent years media reports on destinations facing challenges with high tourism intensities and overcrowding problems have increased a lot and have created the new term overtourism for this phenomenon. The study analyses destination case studies with (too) high tourism intensities from all over the world in order to identify important challenges and innovative solutions.

The study is a result of cooperation between eleven partner universities from all over the world. It focuses on tourism destinations under pressure in several countries on different continents. The aim of the study was to analyse cases in countries with different tourism contexts and to derive principles for the successful management of tourism destinations under pressure. A special focus is laid on the drivers of tourism development, on the factors determining tourism carrying capacity as well as on challenges and innovative solutions.

A comparative case study approach was chosen for the study. Each participating university contributed with a case from their country and submitted a report of the analysis. The following eleven destinations could have been considered: Baku (Azerbaijan), Cozumel (Mexico), Great Barrier Reef (GBR) (Australia), Juist (Germany), Kasane (Botswana), Lombok (Indonesia), Muskoka (Canada), Ohrid (Macedonia), Rigi (Switzerland), Soweto (South Africa), Vienna (Austria).

Overtourism can be seen as a function of the numbers of tourists as well as of the carrying capacity of the tourism system. Major challenges occur when carrying capacity is exceeded. Therefore, solution approaches can proactively aim at increasing carrying capacity and influencing the drivers of tourism growth as well as at better managing the challenges.

All the cases have been analysed based on a common framework. Similarities and differences between the cases have been examined. Even though the cases analysed were very different in many perspectives, the analysis allowed deriving interesting patterns and factors that could be generalised. It is interesting that many conditions and challenges are similar in many places all over the world.

The findings of this cross comparative case study were summarised and categorized into drivers of overcrowding, factors determining carrying capacity, challenges of overtourism and solutions. These categories were then assigned to a simplified model of a tourism destination. Based on the categories and reflecting the differences and similarities in the cases analysed, some general conclusions were drawn:

- It's a matter of perspective

Perception and assessment of challenges and of the urgency for regulating measures depends on the perspective and varies between stakeholders. Only through a broad participation of all stakeholders can it be guaranteed that all perspectives are considered.

- There's no one-size-fits-all solution

The cases analysed are very diverse in many respects. To adapt to the specific situation in the best way and to find the most suitable solution approaches it is necessary to constantly evaluate and monitor changes.

- It's not only about tourism

Many of the factors leading to a higher vulnerability of tourism cannot be managed by tourism destination management organisations alone. A constant dialogue between industry representatives and public authorities is needed to cope with the challenges of overtourism.

- Tourism is an opportunity for community development

In the same way tourism is influenced by contextual setting, tourism itself has an important impact on the community in many respects. It is only when many different stakeholders benefit from tourism that challenges from overtourism can effectively be managed.

- Courageous solutions are necessary

The fear of overreacting and bad press sometimes seems to paralyse tourism authorities and make them neglect critical voices. More courageous solutions could improve the situation in the destination and create new chances to attract new more interesting visitor segments.

There are numerous aspects other destinations can learn from the experiences reported in the case studies. Some key insights can be generalised and seem to apply for all destinations.

- Think outside the box

There are many important factors that can only be influenced with an overall strategic approach. Tourism authorities have to think outside the box and maintain a continuous dialog with all stakeholders including decision makers and higher-ranking authorities.

- Stakeholder participation is key

The case study analyses showed that lack of tourism awareness is a problem in many places. Only when people are involved and networks to maintain the dialog are established, tourism awareness can be raised and tolerance increased.

- Diversification means resilience

A central strategy to prevent negative effects of overcrowding is to reduce dependency on tourism and to diversify the tourism product. Diversification allows to reduce vulnerability of a destination.

- It's all about responsibility

The tourism industry has to show a high degree of responsibility not only towards tourism business but also towards environment, social community and future generations. Tourism masterplans can be considered good instruments to determine strategic goals for tourism development.

- You can't manage what you don't measure

Potential negative impacts have to be recognised at an early stage. Evaluation and monitoring are crucial to understand the current and future state of development and to assess current and potential future impacts of tourism on a destination.

1. Introduction

Tourism is a rapidly growing industry with a far-reaching economic, social and environmental impact across the world. The rapid growth of tourism and how to manage it sustainably is a challenge for many destinations.

The need for sustainable tourism development worldwide is underlined by the United Nations who declared 2017 as the International Year of Sustainable Tourism for Development. Tourism can play an important role in the achievement of the Sustainable Development Goals (SDG) of the United Nations. The SDG are an intergovernmental set of aspiration goals with 169 targets. While there are linkages to tourism in all the SDG, tourism is explicitly featured in goals 8, 12 and 14:

- SDG Goal 8: Promote sustained, inclusive and sustainable economic growth, full and productive employment and decent work for all.
- SDG Goal 12: Ensure sustainable consumption and production patterns.
- SDG Goal 14: Conserve and sustainably use the oceans, seas and marine resources for sustainable development.

A tourism sector that adopts sustainable consumption and production (SCP) practices can play a significant role in the achievement of SDG goal 12. To do so, it is imperative to "develop and implement tools to monitor sustainable development impacts for sustainable tourism which creates jobs, promotes local culture and products" as set in target 12.b of Goal 12. (UNWTO, 2016)

The study contributes to this discussion by analysing destination case studies with (too) high tourism intensities from all over the world in order to identify important challenges and innovative solutions.

This study is one in a series on sustainable tourism commissioned by the World Tourism Forum Lucerne (WTFL).

World Tourism Forum Lucerne (WTFL)

The World Tourism Forum Lucerne is the leading interactive platform in the industry, where CEOs, Ministers, Academia, Finance, Start-Ups, the Next Generation and Young Talents become a strong community addressing the future challenges of the travel, tourism and hospitality industry and shape a more sustainable future.

The platform allows the global Leaders in Tourism, Travel and Hospitality to discuss the challenges and opportunities of the tourism industry and to meet the next generation.

1.1. Aims & research questions

The study focuses on tourism destinations under pressure in several countries on different continents. The aim of the study was to analyse cases in countries with different tourism contexts and to derive principles for the successful management of tourism destinations under pressure.

For the analysis of the case studies a framework was developed that considered all the dimensions of sustainable tourism. The study examines what the main challenges are in places with (too) high tourism intensities and what could be promising and innovative approaches to manage such destinations. There was a particularly strong focus on the different conditions relating to the economic, political, environmental, social, and cultural setting of each tourism destination under pressure, as well as on the drivers of tourism development and innovative solutions.

The principal research question of the study is:

What are the challenges and innovative solutions at tourism destinations with (too) high tourism intensities?

The research question was also divided into two sub-questions to address challenges and solutions to these:

Challenges

- What are the main challenges and problems in destinations under pressure?
- What past and present developments and underlying conditions lead to overcrowding?

Reaction to challenges

- What are the successful solutions that are being discussed and/or implemented?
- How do destination setting contexts influence tourism management?

To answer these research questions the participating universities conducted a common decentralised study using a standardised methodology.

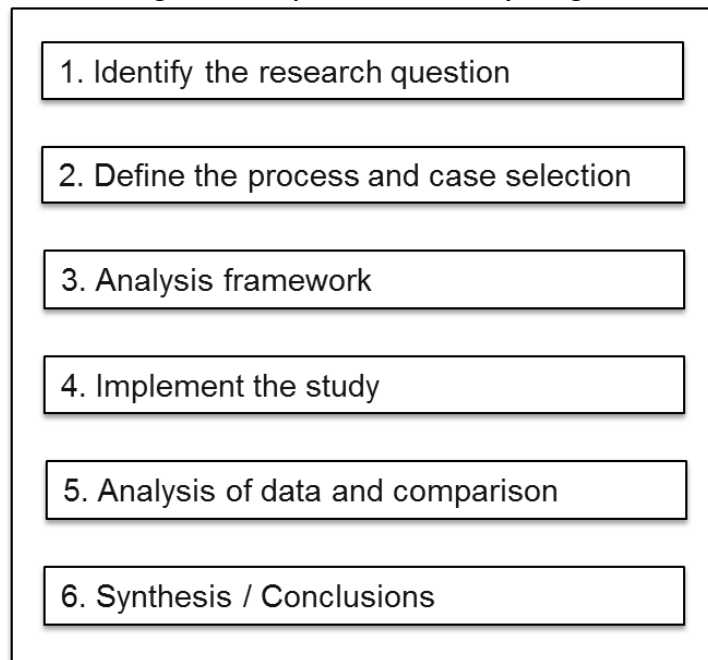
1.2. Method

A comparative case study approach was chosen for the study since case studies are a useful and appropriate method to deal with complex phenomena such as the one under investigation here. As this study was a special project involving numerous universities from around the globe, a comparative case study design allowed for a decentralised implementation of the research using a standardised methodology.

Comparative case studies emphasize comparisons within and across contexts (Yin, 2014). They involve the analysis and synthesis of similarities, differences and patterns across two or more cases that share a common focus or goal. (cf. Goodrick, 2014; Ragin, Berg-Schlosser & Meur, 1996; Stake, 2000; Stake, 1995).

The implementation of case studies has specific advantages and disadvantages. Disadvantages are the limitations of generalisation from the findings and the danger of overrating details and specifics (Sartori, 1994). Advantages include a better investigation of complex variables, the possibility of developing new hypothesis in an inductive way and the opportunity of formulating contingent generalisations and typological theories. (Muno, 2009) Yin (1984) argues that theoretical generalization is to the domain of case study what statistical generalization is to the true experiment.

There are different approaches to conduct a case study (cf. Goodrick, 2014; Kaarbo & Beasley, 1999; Mayring, 2002; Muno, 2009). A comparative case study involves several steps, as shown in Figure 1.

Figure 1: Comparative case study design

Source: Authors, based on Yin, 1994; Soy, 1997

After determining and defining the research questions (1), the cases were selected and the process of data gathering determined (2). Next, a framework for the analysis was developed (3), before the mostly qualitative data was collected and the study was executed (4). The final steps included data analysis and cross-comparison of the cases (5) that enabled for conclusions to be drawn and presented in this report (6). (cf. Yin, 1994; Soy, 1997)

1. Research question

The research question was determined in cooperation with the project team and in consultation with the WTFL.

2. Selection of the cases

The rationale for selecting the specific cases was directly linked to the key evaluation questions and thus to what needed to be investigated. An understanding of each case was important in establishing the foundation for the analytic framework that was used in the cross-case comparison (Goodrick, 2014). The cases were selected according to the following criteria:

Selection criteria:

- Site/destination/attraction (public or private) in country of participating university
- Fast growth of tourism and/or high importance of tourism
- Challenges due to tourism intensity have occurred or still exist
- Measures to face these challenges have been discussed and/or implemented
- Accessibility to data, existing studies, literature, etc.
- Suitability in regard to answering the research questions

3. Analysis Framework

In order to ensure a joint approach and the comparability of the different cases, the analysis of the case studies was based on a common framework (cf. annex). The framework was developed based on the Global Sustainable Tourism Criteria (GSTC) and the Sustainable Development Goals

(SDG), as well as on other indicators sets and scientific literature (cf. Coccossis, Mexa, Collovini, Parpairis & Konstandoglou 2002; Coccossis, Mexa, Collovini, Parpairis & Konstandoglou, 2001; Lim, 1998, and others). The framework considers all the relevant dimensions of sustainable tourism. It is divided into the following sections and served as a guideline for the analysis.

- General information (e.g. title, region, area size, population)
- Tourism development in the country of the case study (e.g. statistics, GDP, employment)
- Tourism supply of the site (e.g. access, main attractions, accommodation, service providers)
- Tourism demand at the site (e.g. statistics, length of stay, motives, activities, seasonality)
- Framework conditions (e.g. history & background, political, economic, environmental and social situation, bottlenecks and constraints)
- Challenges / impacts (e.g. tourism intensity, carrying capacity, physical, economic, social and environmental impacts, beneficiaries and sufferers)
- Measures / responses (e.g. economic, social and environmental measures, restrictions, distribution of tourists, organisational Measures, new innovative solutions)
- Outlook (important future trends, prospects for tourism development, expected changes)
- Conclusion (e.g. what makes this case special? What are the main barriers? Which measures seem to be the most promising?)
- Additional data
- References

4. Implementation of the study

Based on the analysis framework described above data was collected using desktop research and qualitative interviews. Of course, it was possible to apply additional methods if deemed necessary. Each case was submitted as a report in English based on the framework and was submitted to the project team at the Institute of Tourism (Lucerne University of Applied Sciences and Arts) to be integrated for analysis.

Desk research: The main method was the collection and the analysis of existing data. Desk research could include: literature review, articles in journals and newspapers, existing studies, internet, brochures and marketing material, newspaper reports and general statistical data.

Expert interviews: To deepen and enrich the information collected through desk research qualitative interviews with key stakeholders were conducted in some destinations. This could be site managers, tourism organizations, representatives of the local community, NGOs or others. The analysis framework could serve as a guideline for the interviews. Where interviews were conducted a short description of the methodology and the interview partners can be found in the respective report.

5. Data analysis

All the reports were analysed to determine whether key patterns occurred in each and possibly surprising findings. (Goodrick, 2014). As a first step, all case reports were read by at least three scientists. Sections of interests were marked and coded in relation to factors determining tourism carrying capacity, challenges and solution approaches).

A cross-case comparison allowed detecting similarities and differences, while the selection of citations from the reports made it possible to find common topics and to determine common factors.

In an iterative coding process a first coding frame was developed based on the framework for the analysis. The frame was then expanded by topics that were mentioned in the cases reports in the process of the analysis. After the finalisation of the coding frame the reports were reviewed a second time and citations from the reports were assigned to the codes. Some examples of citations underpinning the categories and subcategories can be found in the appendix (6.2).

6. Synthesis/ Conclusions

In a comparative case study, the synthesis across cases extends beyond the comparison of similarities and differences to using these similarities and differences to support or refute propositions as to whether measures succeed or fail (Goodrick, 2014).

The different case reports were analysed based on the study's research questions. A cross-case comparison was made and challenges and response measures were evaluated and categorized where possible. Similarities and differences were identified (see section 4.1), challenges and solution approaches were categorized (see section 4.2), limitations recorded (see section 4.3) and general conclusions were drawn (see section 4.4).

1.3. Project phases

The research project can be divided into the following phases:

Preparation

- Desk research on general literature and methodology
- Specification of research questions
- Definition of the criteria for the selection of the case study
- Development of an analysis framework (draft)
- First contact with partner universities

Phase 1 Framework

- Selection of case studies (partner universities)
- Feedback to framework (partner universities)
- Development of final analysis framework
- Definition of task for partner universities

Phase 2 Analysis (Aug – Dec 2016)

- Collection of data (partner universities)
- Analysis of the case studies (partner universities)
- Submission of the reports (partner universities)

Phase 3 Final report

- Reading the reports, adding questions and comments
- Feedback (partner universities)
- Analysing and deriving similarities and differences
- Drawing conclusions
- Editing & writing final report
- Feedback (partner universities)
- Finalisation
- Presentation at WTFL 2017 (May 2017)

Phase 4 Dissemination

- Further dissemination in media, on conferences and in scientific journals

2. Literature review

2.1. Overtourism/ Overcrowding

Assessing and maintaining the crowd at the destination has been considered as a major indicator for sustainable tourism (Lee & Hsieh, 2016). (Shelby & Heberlein, 1984) defined “crowding as the individual’s perceived evaluation of density levels in a specific physical environment”. More specifically, there are various broad dimensions that can influence the level of crowding. (Neuts & Nijkamp, 2012) proposed a research model of three influencing dimensions such as personal characteristics of the visitor, situational characteristics of the environment and characteristics of other tourists.

Some other factors which can influence how crowding is perceived vary based on demographic variables such as age and gender (Zehrer & Raich, 2016). The study also summarized the influence of the frequency of travel and how perceptions toward overcrowding vary between first time visitors and repeated visitors. Crowding can also occur in different situations. Visitors might face crowding with locals and, another phenomenon, amongst the visitors themselves (Neuts & Nijkamp, 2012).

Qualitative and quantitative research carried out according to (Neuts & Nijkamp, 2012) established that crowding is not only related to the cognitive (i.e. perceiving a situation as being crowded) but also to the respective component (i.e. valuing a certain crowding level as unacceptable). Visitors might try to anticipate the congestion in the destination and even consider it is an additional negative characteristic (Eugenio-Martin, 2011).

Tourism growth and other drivers led to an intensification of overcrowding problems in many destinations. In recent years media reports on destinations facing challenges with high tourism intensities have increased a lot and have created the new term overtourism for this phenomenon (e.g. Goodwin, 2016; Jordan 2016; Clampet 2017; Byers 2016 and others).

2.2. Carrying capacities

In order to avoid overtourism, it is necessary to know the carrying capacity of a tourism system. Assessing carrying capacity is considered to be one of the major developments for sustainable tourism, since it is crucial for maintaining ecological conservation and meeting visitor expectations (Lee & Hsieh, 2016). The World Tourism Organization defines carrying capacity as: “the maximum number of people that may visit a tourism destination at the same time, without causing destruction of the physical, economic and socio-cultural environment and an unacceptable decrease in the quality of visitors’ satisfaction’ (as cited in (Klaric, Mangion, Satta, & Travis, 2003)). Previous research uniformly agrees that carrying capacity not only pertains to the visitors but also a combination of other factors such as tourism infrastructure. There exists no fixed and clearly defined way of approaching the problem of managing the capacity, since it stays highly dynamic (Simón, Narangajavana, & Marqués, 2004). Additionally, carrying capacity in a particular destination is strongly related to perceived crowding which can be divided into different dimensions (Saveriades, 2000).

The three basic dimensions that make up the tourism carrying capacity are: physical-ecological, socio-demographic and political-economic dimension (UNEP/MAP/PAP, 1997). They are important for the identification of problems that a destination faces. According to Maggi (2010) the importance of these three issues differs according to the different characteristics of the tourist destination, the characteristics of the tourists and of the existing different types of tourism in destination (European Commission, 2002; O’Reilly, 1986; Martin and Uysal, 1990).

(Simón et al., 2004) conducted qualitative research and highlighted the major problems faced in measuring the carrying capacity: approaching in different ways, no particular standard way of measuring the capacity. Few other studies also discussed the problems encountered in measuring

the carrying capacity. (Saveriades, 2000) noted that carrying capacity is more of a dynamic and fluid concept which is evolving and diverting from a sustainable development. Besides the measurement issue, the impact of the carrying capacity varies according to the destination and also depends on the destination management process (Simón et al., 2004).

One of the most difficult types to measure is the social carrying capacity since it is highly related to the psychological component of visitors and/or the local community. The major components of the social carrying capacity for tourists are the quality of the experience that visitors will accept before seeking alternative destinations while balancing the degree of tolerance of the visitors related to the destination.

Also, the psychological component of the visitors varies based on different factors. (Lopez, 2007) measured how the perceptions of tourists significantly influences the tolerance levels of the visitors of the tourist destination with respect to the tourist season. This study had found that the tourist season not only influences tourist satisfaction with the destination but also changes according to a particular season. Carrying capacity discusses mainly how at a particular point the destination becomes unsustainable (Neuts & Nijkamp, 2012). Overall, there are different ways of how the carrying capacity is measured based on the type it involves. Some authors recommend measuring elasticity while increasing congestion (Eugenio-Martin, 2011; López Bonilla & López Bonilla, 2008; Navarro Jurado, Damian, & Fernández-Morales, 2013).

The factors determining the carrying capacity vary based on the different dimensions (as described above: social, physical and political). There are different individual factors for each dimension. However, in general, seasonality, whether it is off-peak or on-peak, could be helpful to understand the carrying capacity (Saveriades, 2000). (Navarro Jurado et al., 2013) explained three perspectives for determining the carrying capacity: tourism activity, resources required managing the destination and a third determinant that is strongly related to the local community of the destination. A balanced social-psychological perspective is of major importance because of the high level of involvement of the local residents in this situation. A low tolerance of the local community towards accommodating tourists can lead to dissatisfaction. In relation with the physical dimensions of carrying capacity, designing the urban planning to increase the usability of the location and evaluating the environmental capability of the destination are important measures. (Rahmani, Fakhraee, Karami, & Kamari, 2015).

2.3. Challenges & solutions

An effective assessment of the carrying capacities is one way of understanding the acceptance limit of a destination (Eugenio-Martin, 2011). Estimating capacity helps manage the value of the destination to the tourist. Previous research agrees that assessing social capacity is highly difficult, since it is related to the value dimensions and is highly dependent on the psychology of the tourists (López Bonilla & López Bonilla, 2008).

However, there are different ways of assessing the carrying capacities. (Santana-Jiménez & Hernández, 2011) recommends estimating population density based on the level of tourism. Another method to evaluate the environment and social carrying capacity is to measure the demand elasticity with respect to the congestion in the destination.

(Eugenio-Martin, 2011). (Navarro Jurado et al., 2013) also points out that carrying capacities can be increased by the marketing and by improving infrastructure which is more focused on the developmental approach.

Alternative ways to handle overcrowding is a solution from a visitor perspective because it is highly accepted that crowding perceptions varies based on individual preferences (Neuts & Nijkamp, 2012; Zehrer & Raich, 2016). (Zehrer & Raich, 2016) found that the coping behaviour which can regulate the emotions, perception and behaviour can reduce the negative impact caused due to perceived crowding and has a positive effect on visitor satisfaction. Designing

tourism destinations by their vacation preferences and customer profile characteristics is one of the accepted approaches to deal with the social carrying capacity (Navarro Jurado et al., 2013; Shelby & Heberlein, 1984).

(Stem, Lassoie, Lee, & Deshler, 2003) highlights that eco-tourism in a conservation area could offer more economic benefits to the local communities and that it could be achieved with effective management of resources in the local communities and planning. Additionally, eco-tourism can increase conservation at the same time as balance the development potential at a particular destination economically. An increase in sustainable tourism can effectively solve the problem of carrying capacity. (Stem et al., 2003).

Apart from the problems of natural capacity, managing social capacity is strongly related to the individuals and introducing more environmental friendly strategies can respond to crowding and substantially increase the environmental awareness of the individual (Huang, Lin, Lai, & Lin, 2014). When individuals are more aware and educated about the environmental practices, capacities can be managed for efficiently and overcrowding be better balanced. (Simón et al., 2004; Stem et al., 2003). Managing social capacity leads to a better tourist experience. Communication with visitors can be through the use of images and interpretative text (De Urioste-Stone, Scaccia, & Howe-Poteet, 2015).

Visitor management has to be effectively spread over time and space. Then, it can create a good experience for the tourist and leads to sustainable tourism management (Weber & Taufer, 2016). (Simón et al., 2004) argues based on previous studies (Cooper et al., 1998, p. 186) that factors such as length of the stay, characteristics of the tourist and host, the geographical concentration of tourism, the degree of seasonality, the types of tourism activity, the accessibility of specific sites, the level of infrastructure use and possible spare capacity must be taken into account. Certainly, implementing technology could be more useful not only to plan and manage the capacity but also to increase the visitor experience. Predictive analytics can help calculate the preferences and visitors needs effectively and plan accordingly. New technologies such as virtual reality can help the visitors to plan their trip before they arrive at the destination and can help management to design the visitor's preferences and meet the expectations while managing the crowd (Simón et al., 2004).

3. Cases

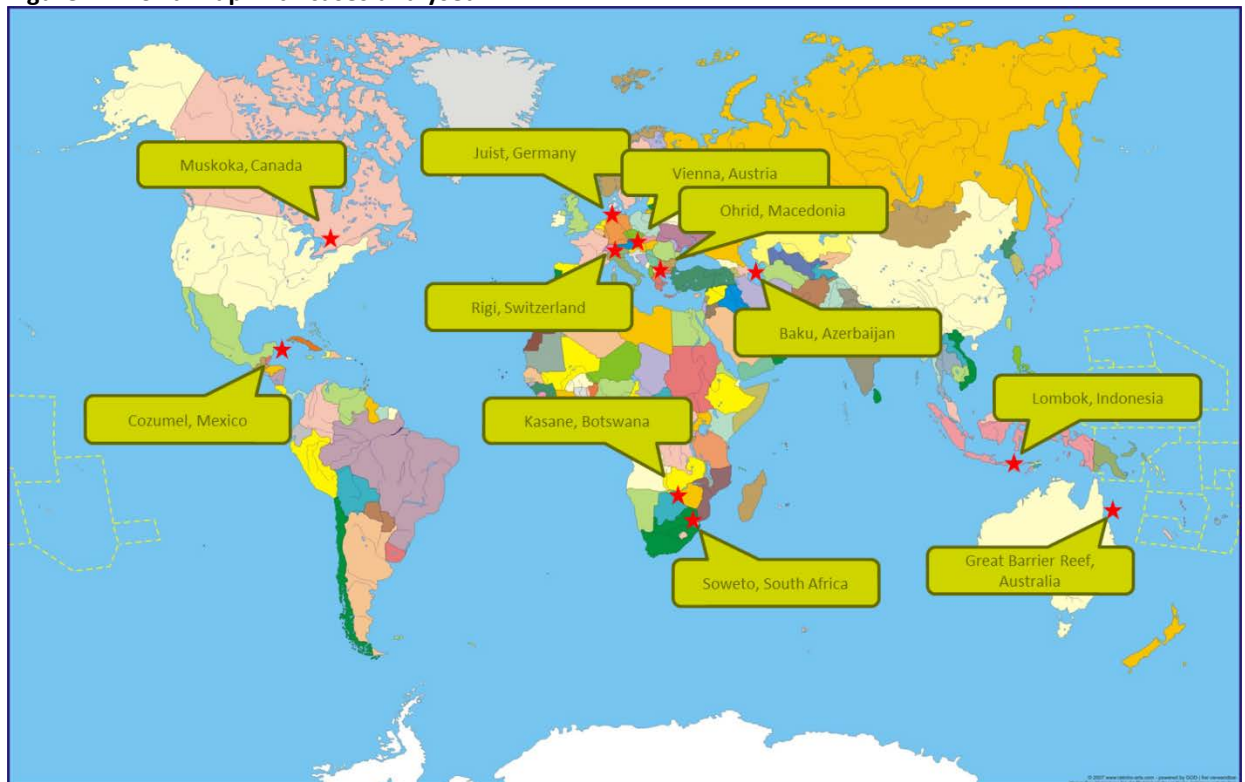
This chapter contains all the cases that were analysed by the partner universities according to the same framework. Following a brief overview of cases (see section 3.1) all individual reports are presented in alphabetical order (3.2-3.12).

All the reports contain data collected and analysed by the authors of the case studies and reflect their assessment. Data presented in the case study reports have not been cross-checked or commented by the authors of the study.

3.1. Overview of cases

All participating university partners reported a case from their country. Figure 2 and Table 1 summarise cases, countries, participating universities and authors involved in the study. The cases selected for analysis by the partner universities are very diverse and most of them do not represent classical overtourism destinations. While Cozumel seems to resemble the most classical overcrowded tourism examples in this report, other places such as Rigi, Juist or Kasane are much less crowded in comparison to destinations under pressure such as Venice, Barcelona or Mallorca. Some of the destinations analysed are confronted with temporal aspects of overcrowding at peak times only, such as certain attractions in Vienna. Other destinations including Soweto and the Great Barrier Reef (GBR) have less impact from visitors per se at this stage, but these are still important, since they are combined with other impacts caused by other user groups and by the effects of climate change.

Figure 2: World map with cases analysed



Although there were certain common criteria for the selection of the cases, each one had its special characteristics and illustrates different aspects of the phenomenon of destinations under pressure.

Table 1: Overview of cases

Case	Country	University	Authors
Baku	Azerbaijan	Azerbaijan Tourism and Management University	Shalala Mammadova
Cozumel	Mexico	Universidad de Monterrey	Blanca Alejandra Camargo
Great Barrier Reef (GBR)	Australia	University of Queensland	Gabby Walters Karen Hofman
Juist	Germany	Hochschule Harz	Louisa Klemmer Sven Gross
Kasane	Botswana	Botho University	Simon Lloyd Kgosietsile Velempini
Lombok	Indonesia	Sekolah Tinggi Pariwisata Bandung	Beta Budisetyorini Pita Ratna Sari Dicky Arsyul Salam
Muskoka	Canada	University of Waterloo	Ashley Gallant Karla Boluk
Ohrid	Macedonia	University St. Kliment Ohridski Faculty of Tourism and Hospitality	Ivanka Nestoroska Naume Marinoski Sasho Korunovski Simona Martinoska Katerina Angelevska- Najdeska Risto Reckoski Danijela Miloshoska
Rigi	Switzerland	Lucerne University of Applied Sciences and Arts	Barbara Rosenberg-Taufer Julia Huilla
Soweto	South Africa	University of Johannesburg	Milena Ivanovic Maisa Adinolfi Vyasha Harilal
Vienna	Austria	MODUL University Vienna	Igor Gula Dagmar Lund-Durlacher

Baku, Azerbaijan

The Baku case shows how important tourism-friendly setting conditions are in an environment with a fast growing tourism industry and what challenges occur when political, legal or cultural developments cannot keep pace.

Cozumel, Mexico

The case of Cozumel shows the ecological, social, economic and aesthetic challenges a small island with a fragile ecological and cultural heritage has to deal with. Due to the strong economic dependence on cruise tourism a special challenge is to provide stable and equitable economic prospects for all.

Great Barrier Reef, Australia

In relation to other contributors (especially climate change) the effects of tourism on the damage to the GBR are minimal. On the contrary, tourism is a positive resource to the sustainability of the reef as operators access the reef daily and provide live monitoring of the reefs visited in order to ensure a future for their business. The case shows how limited access to reefs and the implementation of policies and procedures for tourists and tour operators can contribute in the minimisation of negative impacts by tourism.

Juist, Germany

In response to the various negative tourism impacts experienced by the community of Juist, a new long-term vision for the island was developed based on sustainable tourism development principles. Juist aims to become the first climate-neutral island of Germany by 2030 and this vision is shared by all stakeholders including the municipality, residents and even many of the guests.

Kasane, Botswana

Tourism in Kasane is currently facing diverse pressures that range amongst others from increasing population to lack of effective manpower, poor waste management, climate variability and financial leakages. These pressures lead to land degradation and to overuse of limited municipal infrastructure such as sanitation.

Lombok, Indonesia

The case of the island of Lombok in Indonesia shows a fundamental conflict between a fast growing economy oriented towards tourism development and the goal of sustainable tourism that also integrates the needs of society and the environment.

Muskoka, Canada

The case of Muskoka in Canada shows the challenges at a tourist destination that struggles with issues pertaining to seasonality such as congestion, overcrowding, overworking, and on the flip side, lack of employment opportunities and service offerings in the off season.

Ohrid, Macedonia

In the case of Ohrid, rapid growth of tourism together with inadequate infrastructure leads to overcrowding in the high season. The main reasons for the problems relate to a lack of strategic approach and the low awareness of the local population about the importance of sustainable tourism development.

Rigi, Switzerland

The case of Mount Rigi shows how fast tourism growth and changing guest segments can lead to overcrowding issues, traffic problems and intercultural challenges that include complaints from local residents and domestic visitors about the noise and undesired visitor behaviours.

Soweto, South Africa

The case shows how rapid tourism growth around Vilakazi Street in Soweto, a historically underdeveloped township with limited infrastructure, leads to special challenges for the community with regards to participating in and benefitting from tourism.

Vienna, Austria

Other than many European cities Vienna is not (yet) confronted with general negative impacts of overcrowding. Nevertheless, challenges of overcrowding occur in some of the city's major attractions, in particular during high season and peak times.

3.2. Baku (Azerbaijan)

Azerbaijan Tourism and Management University
Shalala Mammadova

The Baku case shows how important tourism-friendly setting conditions are in an environment with a fast growing tourism industry and what challenges occur when political, legal or cultural developments cannot keep pace.

General information	
Title / Name of the site/destination	Baku, Caspian Seashore
Region, country	Azerbaijan
Area size (km²)	2.130 km ²
Geographic coordinates	Latitude 40°22'39" N, Longitude 49°53'31" E
Population and scope	2'204'200 Estimate 01.01.2015
Short description of the case	
<p>Baku is the capital city of the Republic of Azerbaijan, located on the Caspian Seashore. It is the biggest city of the Caucasian region. Recently the city became the centre of the country's tourism industry. During the last 10 years, Baku experienced big progress in its development from funds obtained thanks to a booming oil industry. Several new modern and amazing constructions, brand hotels, restaurants, and entertainment centres have appeared in the city; various international conferences, sport games, cultural events have been organized. Baku has become a centre of entertainment, attractions, and also a crowded city. At the same time, there's a lack of tourism-friendly framework conditions and the development of infrastructures/utilities cannot keep pace. The main barriers for sustainable development in the case of Baku are economic monopoly, absence of free market conditions, lack of transparency, high level state regulations and corruption.</p>	
Tourism development in the country of the case study	
Short description of the importance of tourism in the country	
<p>Azerbaijan has rich resources for tourism development. Bazardyuzy (4466 m), Shahdag (4243 m), Babadagh (3629 m) high peaks, flowing rivers from the southern slopes of the Greater Caucasus and numerous waterfalls, clear Goy Gol, Maral Lake, Gobustan's hard and at the same time picturesque volcanoes, unique reserves of Lankaran, fine sandy curative beaches of Absheron and Nabran are an important integral part of Azerbaijan's rich tourism potential. Azerbaijan is a country with rich history and ancient culture. There are more than 6000 historical and architectural monuments in Azerbaijan. Most of them are located on the Great Silk Road passing through the territory of Azerbaijan, along the ancient caravan routes, and it is amazing in itself. During 2003-2013 nearly 2 million tourists visited Azerbaijan; the tourism sector made more than 1.5 billion US\$ incomes. Overall, the country has the great potential in the eco, heritage, cultural, zoo, medical, geo, etc. tourism.</p>	
Arrivals, Overnight stays	
<p>In 2014: 92'305 international tourist arrived and departed tourists; overnight stays 1'687'457 (source: <i>stat-yearbook.2015</i>, p.318, 327)</p>	
Gross Domestic Product (GDP)	4.1 (2014)

Tourism value added (% of GDP)	Year	Income (US\$, million)
	2013	2'666.93 (3.6%)
	2014	3'082.30 (4.1%)
Employment in tourism (%)	Year	Employment (thousand)
	2012	1'473 (1.1%)
	2013	1'515 (1.1%)
	2014	1'567 (1.2%)
	2015	1'586 (1.2%)
Further remarks		
Investment to the tourism sector in 2014 according the State Statistical Committee of the Republic of Azerbaijan is 2.8225.64 (US\$, million)		

Tourism supply of the site	
Short description of tourism on the site	
<p>Baku's tourist attractions range from important historic sights to fashionable cultural hotspots. The historical centre of Baku reveals its tumultuous past, from its roots as a Persian capital, through its oil boom during the Soviet occupation. The 12th century Maiden Tower is the city's most recognisable monument, attracting thousands of tourists every year. Nearby is the Palace of the Shirvanshahs, an expansive building that is a testament to Azerbaijan's impressive architectural heritage. Bibi Heybat Mosque is also spectacular landmark in Baku and the striking Hajinski Mansion, where former French President Charles de Gaulle once stayed, is worth a visit too. There are a few very nice sandy beaches on the Caspian. The Petroglyphs of Gobustan are nearby to the south part of the city, and date back as far as the 12th century BCE. The invading armies of Alexander the Great and Trajan also left some interesting graffiti.</p>	
Access (how to get there?)	
By plane, by train (from Russia and Ukraine), by car (from Iran and Georgia), by boat (from Turkmenistan and Kazakhstan)	
Main attractions	Old Town, Absheron peninsula, museums and galleries, Baku boulevard, Oil Rocks
Accommodation offer (number, type, quality)	535 hotels, resorts, hostels; Budget, mid-range, splurge (5 stars)
Restaurants (number, type, quality)	Ca. 185 restaurants, former USSR-, Western-, Asian-types, budget, mid-range, splurge (high)
Other tourism service providers (Museums, tour guides, souvenir shops etc.)	Antiques, rugs, traditional/national dolls' shops, History Museum, Carpet Museum, Baku Nobel heritage Fund, Baku City Tour, Day Trip Baku, etc.
Stage of the tourism life cycle	Growth/development stage
Further indicators/ remarks	It's the city where East meets West, where Eastern culture organically connects with the Western traditions.

Tourism demand at the site	
Short description of tourism demand	
<p>Business/professional, leisure/holiday, traveling to visit relatives, friends, youth tourists; Russia, Georgia, Iran, Turkey, Ukraine, UK, Kazakhstan, US, Uzbekistan, Germany. Travel purposes for 2014 year: leisure tourism 32.9%, business tourism 31.0%, visiting relatives 31.4%, medical care and treatment 2.1%, pilgrimage 0.6%, shopping 0.2%, transit 0.3%, other purposes 1.5% (Statistic</p>	

Committee of the Republic of Azerbaijan; stat-yearbook_2015, p.324)	
Volume of tourists Number of arrivals and departures, 77'560, overnights 688'532 for Baku, 2015 (sources statistic yearbook_2015, p.132)	
Development of tourist numbers	
Year	Numbers of arrivals and departures of tourists in Baku
2009	53297
2010	57416
2011	71268
2012	88238
2013	77987
2014	77560
Length of stay	1-3 days (average)
Origin countries of tourists Number of tourists arrivals by countries in 2013 Russian Federation- 21 448, Georgia- 1 147, Turkey-22 940, UAE- 10 057, Iran- 4 490, Ukraine- 1 158, UK-2 284, Germany-1 420, Kazakhstan- 706, US- 143	
Motives / target groups Business/professional, visit for relatives (VFR), cognitive; businessmen, professionals, youth	
Visitors' activities, activity patterns	sightseeing, boat trip, events
Seasonality (peaks)	Spring, summer, fall
Visitors' opinions, attitude and behaviour, expectations and preferences, satisfaction (if possible) Mostly satisfied, food, environment, hospitality are at high level, Caspian sea is polluted and not good for swimming. Tripadvisor ranking: historical and heritage tours (4 stars); beaches (3 stars), SPAs (5 stars), restaurants (3-4 stars)	
Further indicators/ remarks Total expenditure for foreign travellers was 1.642.5 US \$ in Azerbaijan in 2014.(Statistic Committee, tourism-2015)	

Framework conditions

What are the framework conditions that might influence the impact and/or the management of the site?

History and background

Baku located on the Absheron Peninsula, as evidenced by archaeological finds, has been inhabited since at least 8,000 years ago making this one of the oldest continuously inhabited places in Europe. In the 12th century a massive fortress was built and within it there were a palace and residential area. The historic Old Town now is a UNESCO World Heritage Site. After being at onetime part of the great Mongol empire and several Turkish-speaking states, Baku came under the influence of both Russian and Ottoman empires before becoming a semi-independent principality known as the Baku Khanate in 1747. In 1823 the world's first Paraffin factory was built in Baku to process the oil which not only naturally occurred near the surface around Baku but were also brought up from wells. Since 1918, Baku is the capital of the Azerbaijan Democratic Republic, between 1922 and 1991 the Soviet of the Azerbaijan Republic and the capital of the independent Azerbaijan. Baku is the largest city in Azerbaijan and the centre of commerce and culture. It is also the largest city in the Caucasus region as a whole. The population is estimated to be a little over two million, and around 25% of all inhabitants of Azerbaijan live in Baku's metropolitan area. Baku is located in the far east of Azerbaijan, on the shores of the Caspian Sea. The city is broadly divided into two

districts: the old town Inner City and the more modern downtown area. Demographically, more than 90% of Baku's population is ethnic Azerbaijanis, but the city does have something of a cosmopolitan feel to it. Russians make up around 5% of the remainder.

Political situation

The political situation in Baku is stable, and demonstrations are infrequent. Foreign citizens are encouraged to exercise caution about travel into Nardaran, 30km from Baku on the Absheron Peninsula. The police presence in Baku is significant. However, most officers are not experienced in dealing with Westerners. All citizens and visitors must present an official form of identification (such as a passport, driver license, or a certified copy thereof) to an officer upon request. Baku has been and is a centre for several international events and cultural projects; the city successfully hosted Eurovision song contest (2012), First European Games (2015), F1 (2016), Korean Cuisine Festival (2016), Jazz festival (annual). The government actively supports all progressive programs and plans for development the city as a tourist hotspot.

Legal issues

The most contentious issue to date in this country is the separatist republic of Nagorno-Karabakh. If you travel to Nagorno-Karabakh get your passport stamped, you will not be able to enter Azerbaijan, even with a valid visa. Border officials can be sensitive about any guidebooks or travel books that include information about Nagorno-Karabakh. People who participate in "unregistered" religious practices may also be apprehended.

Organisation

Ministry of Culture and Tourism and its regional branches are responsible for all cultural and tourist events and programs. Historical sites are under the state control. Baku City Cultural and Tourism Administration are responsible for the site's marketing.

Physical setting

Water supply and sanitation system is in good conditions but tap water is not drinkable. Gas and electricity are also in good conditions. Banks offer wide range of services and bank products are offered to customers via the latest technologic means as internet-bank, mobile-bank, automated bank corners. Exchange foreign currency for the Azerbaijanian Manat is possible only at the banks. ATMs are ubiquitous. Internet is also developing rapidly. Access prices range from 0.4 to 0.8 euros per hour, depending on location, and have a tendency to decrease. Mobile communication network covers almost the entire country. Baku has a wide public transportation network, including bus and metro, which is very inexpensive.

Economic situation

Azerbaijan's strong economic growth has been driven mainly by development of the energy sector. Openness to global trade and some improvements in regulatory efficiency have aided the transition to a more market-based system. Unemployment rate is high. IT Engineering, Teaching, Auditing, Medical caring, Business Administration are most wanted jobs in the job market. Investments: 2015 year Inward Direct Investment was 13'750; Outward Direct Investment was 9'005 (US\$, million). Tourism expenditure: in 2010 was 751'3 (US million), 2013 – 3'190.0 (US million). Living wage-89 US\$, Cost of living: 294 US\$; Cost of tourism services: 150-200 US\$ (per day) (Statistic Committee)
The volume of investments in tourism industries, million manats: 2204,0 (2014) (Source: tourism-2015, Statistic Committee)

Social/cultural situation

Baku is multicultural city with high respect to all religions and nationalities. Most popular holidays are New Year and Novrooz. There are 120 mosques, several churches (Orthodox, Catholic, Lutheran, Armenian Grigorian), and two Synagogues in Baku. Every year Baku hosts a jazz festival. There have been several international events, like Eurovision song contest, European Sport games, F1 Grand Prix, etc. hosted in Baku in the last several years. Down town as well as other part of the city are full of craft and souvenirs shops with national dolls, carpets, rugs, copper, silk manufacture, etc. Azerbaijanis is always characterized as a nation of warm/high hospitality. Baku has an excellent

selection of international restaurants, from Japanese fusion to Italian, in most rural restaurants the kebab is most definitely king.

Environmental situation

Azerbaijan experienced rapid development of all spheres of economics and human activity, which led to an all-round negative impact on the environment, including the inefficient usage of natural resources. The semi-desert and dry, subtropic, temperate and frigid types of climate dominate in the city. Due to the oil industry air and water pollution on the beaches are quite high in Baku. Summer is hot, winter is soft. More favourable seasons are spring and fall. Baku has beautiful parks (Absheron National Park) with traditional and infused trees, flowers, and vegetation. There are unique marine animals, birds. There are several mud volcanoes in Absheron peninsular. Semi-desert plane Qobustan is near Baku city. There are several mineral waters in Baku (Surakhany and Shikh) which use as a treatment of number of diseases. Caspian Sea has unique physical and geographical properties. One of the visible conflicts is Caspian Sea where oil production damages Caspian ecosystem. Another problem is enclosed Caspian seashores and restricted seashores for public using. Air pollution is high, tap water is not drinkable, and summer is quite hot (degree is 40 ° C above during July and August). Baku is a windy city.

Bottlenecks and constraints

Visa procedure is quite tough in Azerbaijan, however, this year authorities have simplified visa procedure for Gulf countries and continues to work in this direction. Transportation, hotels, restaurants are expensive and not affordable for middle class. Utilities, rest rooms are not in good conditions. High monopoly, tax policy provides bad circumstances for doing business in tourism sector. Frequent monitoring of the tour operators' activities by different state organisations, central and local administrations also creates difficulties (unofficial payments, some restrictions, groundless stiff fines, etc.)

Challenges / Impacts

What are the most important challenges resulting from high tourism intensity on the site?

Short description of main challenges

Due to the favourable state policy for sustainable tourism in the country, Baku has become more visible and popular destination for tourists last several years. As stated above, there are many new buildings; interesting constructions appeared in the city. However, Baku has limited places for tourists. Hotels' capacity is not enough. There are also not enough hostels, inns and motels in the city. Some historical parts of the city have been deeply destroyed in the last several years due to the new constructions. Some historical buildings, private houses have been demolished for the creation new hotels or entertainment places.

Tourism intensity

Relation day tourists vs. overnight stays:

Total number of overnights, citizens of foreign countries: 802'549 (2014)

Number of accommodated country and foreign citizens by duration of stay:

1-3 days- 561'185

4-7 days- 76'141

8-28 days- 32'000

29-91 days- 2'837

92-182 days- 40

183-365 days-142 (Source: tourism_2015, p.87)

Influencing factors

International, regional, and local events, festivals, conferences, etc. deeply influence the impact of tourism. Also spring and summer are more overcrowded periods due to the sea, beach, and sun factors.

<p>Classification of carrying capacity affected</p> <p>We cannot speak about real overcrowding of tourist attractions in Baku. Sometimes there social and psychological carrying capacity is visible on the beaches, Baku boulevard, and National Park. Local people show their intolerance toward tourists' behaviour in the social places Recently it happens towards Arabs due to the high number of tourists from Gulf countries.</p>
<p>Type of capacity affected</p> <p>Seasonal CC.</p>
<p>Physical impacts</p> <p>All hotels in Baku right now are crowded with Arabian and Iranian tourists. Shopping Centres, Entertainment places are also crowded. Local people are worried and think that Arabs are threat for stability in the city</p>
<p>Economic impacts</p> <p>Economic benefit as well as opportunities for the Baku community and local investments in businesses is not high. Because nearly all touristic and entertainment places, Shopping Centres, etc. belong to the oligarchs.</p>
<p>Social impacts on residents</p> <p>Social impact (on quality of life, traditions) mostly is a result of not travellers' activity but law enforcement officers' high level security/compulsory measures during international events, festivals, holidays: closing the highways and main roads, movement restrictions, prohibiting using devices, etc.</p>
<p>Social impacts on tourists</p> <p>Visitors' complaints to restrictions, police and other law enforcement officers' activity, prohibitions, etc. Arabian tourists' behaviour, the noise crowd, littering, soiled swimming pools are widely discussed in the social media.</p>
<p>Environmental impacts</p> <p>Very little, mostly city becomes more noisy</p>
<p>Development of impacts/ Changes over time</p> <p>During international and regional events impacts are more noticeable</p>
<p>Summary: Beneficiaries and sufferers from tourism in the case study</p> <p>Beneficiaries of economic carrying capacity are local communities; tourists are also beneficiaries; Sufferers (social and physical impact) are mainly also local communities because of restrictions, changing life conditions, etc. During international events the city is being more noise, the roads close local transports' route change, roadside litters are more visible</p>

<p>Measures / Responses</p> <p><i>What are the solutions that have been or are being discussed and/or implemented to reduce conflict between competing uses and to manage tourist masses? How can the challenges successfully be faced, managed and/or avoided?</i></p>
<p>General measures</p>
<p>Social measures</p> <p>Social measures are usually taken by public organisation (Ministry of Culture and Tourism and its regional branches) by special decrees, laws, acts, and orders on the national and local levels. The Ministry regulates all procedures concerning facilities, integration and promotion local culture; private tourism organisations deal with consideration of specific guest needs, working conditions for employees.</p>
<p>Economic measures</p> <p>Tourism sector severely suffers from high level of corruption and monopolistic economy. Economic measures in the tourism sector are public organisations' responsibilities. The Government and the Ministry of Culture and Tourism are responsible for measures for strengthening of the regional economy, for improving economic efficiency. There have several important improvements happened</p>

in the tourism sector last five years. The Number of enterprises increased from 126 in 2010 to 218 in 2014; The Number of employees engaged in tourism sector also increased: 1'418 (2010) and 1'794 (2014); Gross income of enterprises from tourism services grew from 19'065,3 manats in 2010 to 31'107,1 manats in 2014 (in 2014 100 US\$ was 78 Azerbaijani manat); Number of package tours sold to population increased from 34'121 units and reached 66'233 units in 2014; Income from tourism activity was 14'755,5 manats in 2010 and reached 26'031,0 in 2014; Share of tourism industries in GDP increased from 3.6% to 4.1%; the The volume of investments in tourism industries increased from 949,2mManats in 2010 to 2204,0 manats in 2014 (Source tourism-2015, pp.15, 20, 32)

Environmental measures

Environmental measures are taken by the several Ministries, e.g. Ministry of Culture and Tourism, Ministry of Ecology and Natural Resources, Ministry of Emergency Situation, Ministry of health by special regulations, acts, laws, and orders on the national and regional level. There are several state reserves rebuilt, renewed, and created for the protection of typical and rare natural complexes, flora, fauna, and their ecosystem last ten years in the country: Eldar Pine State Reserve (2004), Gara-Yaz State Reserve (2003), Shahbuz State Reserve (2003), Turian-Chay State Reserve (expanded in 2003), Zagatala State Reserve (renewed and expanded in 2007) Last years the government has done much for protection flora, fauna and ecosystem of Caspian Sea. A special coordination commission created for cooperation with Caspian Sea countries, especially with Russian Federation and Islamic Republic of Iran.

Specific measures

Expand and improve the capacities and infrastructure

Capacities and infrastructure issues regulate by the Government, Ministries and state organisations, e.g. Ministry of Transportation, Azersu (water supply and sewage), Azergaz (gaz supply), Azerishiq (electricity) with the legal documentations on the national and local level. There is no private sector in utility services, except transport sector.

Disperse tourist attractions

Disperse tourist attractions also regulate and direct by the Government, Mayoralty of Baku and several Ministries (Ministry of Emergency Situation, Ministry of Health, Ministry of Ecology and Natural Resources) by the legal documentations on the national and local level.

Restrictions

Each attraction has its own restrictions policy; meanwhile there are also clearly defined legal regulations for all types of attractions. There are several age, time, seasonal, health, and behavioural restrictions for the tourist attractions. Approximate restrictions: crowding level, some places (Koala Park, Aqua park) have no more than 200 places, some (Park Cinema, Baku Boulevard) has more than 1000 places; age restrictions 5-7 or older, under age 7 must be accompanied by a person age 14 or older; Prohibits: alcoholic beverages, the sale of goods, feeding animals, unauthorized events, demonstrations, speeches, engaging in any unsafe acts, etc. Police doesn't allow to organise any unauthorised performance, any flash mobs, etc. Mobs nearly every time arouse suspicion. Police also doesn't allow sitting or lying down on the meadow/greenland.

Information and communication

Information mainly provide by the Ministry of Culture and Tourism. Communication to guests and to residents also provides by the private tourism organisations. There are web-sites of local tour operators where gaining need information on tours and possible traveling directions, facilities, transportation, restaurants, and leisure centres is possible. Ministry of Culture and Tourism has dozens of Information centres in Baku and the regions that are responsible for providing necessary information.

Optimize temporal distribution of tourists

Regulated by the Ministry of Culture and Tourism.

<p>Optimize spatial distribution of tourists Regulated by the Ministry of Culture and Tourism and CEO of the private tourist organisations</p>
<p>Organisational Measures The Ministry of Culture and Tourism (management plans and zoning, measuring and monitoring tools), Ministry of Ecology and Natural Resources (protection areas), Ministry of Emergency Situation (certifications), Ministry of Health (sanitation)</p>
<p>Reflection on measures implemented and/or discussed Some experiences are successful because they provide information/opportunities for improving tourist services. Recently there are several Web/Internet portals and sites that provide useful information for travellers, present Baku sightseeing, hotels, restaurants, and attractions. In some cases, these measures create barriers for private organisations. As taxes are very high in the country in some cases private organisations are not interested in providing true information of their economic and financial situation. So, they prefer to keep silence and hidden real information in order not to pay high taxes.</p>
<p>New innovative solutions New innovative solutions (creating new websites, printing information in foreign languages, opening new tours, changing price policy, providing new sporting, cultural offers, etc.) come both from public and private organisations. There are several projects the Ministry of Culture and Tourism works on them, for example, UNESCO's Creative Cities project which will provide good opportunities for developing tourism sector in Baku. Pricing policy mainly depends on the economic and financial situation of the country, and also under tax regulation pressure.</p>

<p>Outlook <i>How will tourism on the site develop in future? What are the expected changes?</i></p>
<p>Important future trends To improve legal base for tourism sector, lessening visa regime (e-visa system), innovative technology (electronic marketing, data portals, websites, microsites, blogs, social media, mobile-check-in, etc.), e-tourism, providing communication media in relevant languages; ensuring better and cheap air connections, qualified employees' development, creating travelling with a mission (volunteering, humanitarian actions, learning languages, exploring new culinary techniques), attending seminars, events, etc.</p>
<p>Prospects for tourism development Improving tourism infrastructure, increasing perspectives for winter tourism, promotion resorts, hotels and hostels for middle class and low-income travellers, improving conditions for youth tourism, eco-tourism, medical tourism, MICE tourism, improving quality of tourism services, diversifying tourism products, inbound destinations, initiating in-depth studies on tourists' travel needs, improving alternative transportation trends for purchasing tourists, healthy food and drink trends, etc.</p>
<p>Expected changes? Improving tourism legislation, softening economic, financial, and tax regulations, flexible visa regime, providing good conditions for tourist organisations' activity and innovative ideas, implementing appropriate educational policies for tourism organisations, etc.</p>

<p>Conclusion <i>What are the central conclusions that can be drawn?</i></p>
<p>What makes this case special? Baku, a city with a long tourism tradition, is a centre of oil and gas industry of the Republic of Azerbaijan. Offshore oil and gas production began here more than a century ago and crucially affected city's economy, infrastructure, architecture, and environment. Today Baku is a city of contrasts, with "East meets West"-style structures, where historical sites, monuments, buildings, and architecture present several stratum of history, introduce culture and atmosphere of Imperial</p>

Russia, Soviet regime, and modern-globalized stage which make the city suitable for international, global scientific, cultural, business, and sport events; for cultural and heritage tourism. The Caspian Seashore, healthy beach sands, thermal spring/lakes make this destination useful for health/medical tourism. The city's infrastructure is valid for tourism for special purposes (studying, cultural events, internship, sporting, etc.) The main difficulties are the monopoly, absence of free market conditions, high level state regulations, bribes, corruption, etc.

How do the framework conditions affect impact and management?

Economic, social, and political conditions deeply influence the city's tourist industry and management. In some cases, it's not a positive but a negative impact. Absence of economic and financial transparency and tough state control don't allow tour operators to properly organise their activity.

Why are these measures successful/ not successful?

Information, analytical reviews provided for official structures and organisations are useful for the critical evaluation of the current situation and to create new directions, approaches, and conceptions to improve tourism industry. State organisations are the main structures do benefit from this information.

What are the main barriers that hamper a sustainable development in the case?

Economic situation, corruption, absence of transparency, monopoly are the main barriers for sustainable development in the case.

Tough state control over any business as well as on tourism sector creates additional barriers and obstacles that hamper the flourishing and development of tourism.

Which measures seem to be the most promising? What are the most important findings for the industry/ for politics?

Technology, pricing.

What are the findings/conclusions other destinations could learn from?

Baku case is not extraordinary and probably typical for developing countries or transition period's societies.

References

- Azerbaijan Travel Blogs, Photos and Forum. <https://www.travelblog.org/Asia/Azerbaijan/> Retrieved from June 22, 2016
- Information from organisations (Aquapark, Caponess, Jumeirah Bilgah Beach Hotel, Koala Park, Park Cinema, Metro Park, Baku Boulevard, Baku Venice)
- Legislative Documentation. Cabinet of Ministers of the Republic of Azerbaijan. <http://www.cabmin.gov.az/>
- Ministry of Culture and Tourism. <http://mct.gov.az/tourism-infrastructure>. Retrieved from June 16-20, 2016
- Things to do in Baku. Tripadvisor. https://www.tripadvisor.com/Attractions-g293934-Activities-Baku_Absheron_Region.html Retrieved June 17, 2016
- Tourism Statistics in Azerbaijan. Presentation of the Ministry of Culture and Tourism of the Republic of Azerbaijan. Baku, 2010
- Tourism. The State Statistical Committee of the Republic of Azerbaijan. <http://www.azstat.org/MESearch/search?departament=23&lang=en> Retrieved June 20, 2016
- Travel and Tourism in Azerbaijan. Travel and Tourism. Euromonitor International. <http://www.euromonitor.com/travel-and-tourism-in-azerbaijan/market-research-report> Retrieved June 16, 2016

3.3. Cozumel (Mexico)

Universidad de Monterrey, Mexico
Blanca Alejandra Camargo

The case of Cozumel Island shows the ecological, social, economic and aesthetic challenges a small island with a fragile ecological and cultural heritage has to deal with. Due to the strong economic dependence on cruise tourism a special challenge is to provide stable and equitable economic prospects for all.

General information	
Title / Name of the site/destination	Cozumel Island
Region, country	Quintana Roo, Mexico
Area size (km²)	684 km ²
Geographic coordinates 20° 31' 00" N, 86° 50' 51" W (INEGI, 2015a)	
Population and scope 86,415 (2015) (INEGI, 2015b)	
Short description of the case The present case provides information about the pressures and challenges of an island that is highly dependent on cruise tourism, and the innovations and strategies that can be developed to overcome such challenges, diversify its tourism offering and promote the sustainable development of the island.	

Tourism development in the country of the case study	
Short description of the importance of tourism in the country Tourism is the 4 th most important economic activity in the country. In 2015, with 32.1 million of arrivals, Mexico ranked number 9 in international tourism arrivals in the world. It ranked 16th in international tourist receipts (US 17,734 million). The main destinations are Cancun and the Riviera Maya, located in the Caribbean Coast, and its capital, Mexico City. (Datatur, 2017)	
Arrivals, Overnight stays (2015) 32.1 million international tourist arrivals (3) 55 million one-day visitors (3) (Datatur, 2017)	
GDP	US\$ 1.144 trillion (2015) (World Bank, 2016)
Tourism value added (% of GDP)	8.7 % (2015) (INEGI, 2015c)
Employment in tourism (%)	5.8 % (2015) (INEGI, 2015c)

Tourism supply of the site	
Short description of tourism on the site Cozumel is Mexico's largest island located 18 kilometres off the coast of Playa del Carmen in the Yucatan Peninsula in the state of Quintana Roo. Its number one economic activity is tourism. It is a world recognized destination for scuba diving and snorkelling and the number one cruise destination in the world (2.6m cruise passengers per year on average) with sport tourism emerging in the last years.	

<p>Access (how to get there?)</p> <p>Cozumel can be reached by air, through commercial (direct flights from 13 North American destinations) and charter flights, by a 40 minute ferry ride from Playa del Carmen offered hourly. (4), and by cruise (3 international cruise ports). (Isla Cozumel, 2017)</p>
<p>Main attractions</p> <p>Cozumel Reefs National Park: Home of the world's second largest coral reef barrier (scuba diving tourism)</p> <p>Punta Sur Ecological Reserve: Home of unique biodiversity (eco and nature tourism)</p> <p>Archaeological site of San Gervasio: Mayan temples and home of the Sanctuary of the Mayan goddess Ixchel (cultural and archaeological tourism)</p> <p>Town of San Miguel: music, crafts, restaurant, small town vibe (cultural tourism)</p> <p>Chankanaab National Park (ecotourism)</p> <p>Beach clubs (rest and relaxation tourism)</p> <p>Souvenir and jewellery stores (for shopping tourism).</p>
<p>Accommodation offer (number, type, quality)</p> <p>45 hotels (4,098 rooms) in 2015: 26% 3-stars; 24% 4-stars; 20% 2-stars; 18% 5-stars, and 9% 1-star. (SECTUR, 2013)</p>
<p>Restaurants (number, type, quality)</p> <p>90 food and beverage establishments of which 71 are restaurants (Mexican and international cuisine), 2 are cafeterias, 3 are nightclubs, and 14 are bars. (INEGI, 2015a)</p>
<p>Other tourism service providers (museums, tour guides, souvenir shops etc.)</p> <p>3 museums¹</p> <p>1 aquarium¹</p> <p>7 travel agencies</p> <p>33 car and scooters rentals</p> <p>3 scuba dive operators¹</p> <p>14 beach recreational areas</p> <p>3 beach clubs¹</p> <p>1 golf course</p> <p>1 convention center</p> <p>1 tourism school</p> <p>2 marinas</p> <p>3 cruise ports</p> <p>2 tourist information modules</p> <p>2 tourist transportation companies</p> <p>7 post offices</p> <p>18 banks</p> <p>Tour operators, Souvenir shops, Taxis</p> <p>(SECTUR, 2013; INEGI, 2015a)</p>
<p>Stage of the tourism life cycle (exploration stage, growth/development stage, mature/consolidation stage, decline stage)</p> <p>Based on an analysis of tourist demand and infrastructure, Segrado Pavón, Amador Soriano, Jiménez Jiménez, and Arroyo Arcos (2011) determined that Cozumel was a destination in decline, in particular, with respect to cruise tourism.</p> <p>Currently, Cozumel can be considered a mature destination for cruise tourism and, due to several strategies to attract a different type of tourists (development of sport tourism, honeymoon tourism), the destination is rejuvenating stage. In 2014 it had record numbers in overnight visitors.</p>

Tourism demand at the site		
Short description of tourism demand		
<p>In 2015, 85% of Cozumel's visitors are cruise passengers who stayed 8-9 hours on average on the island and spent on average US\$ 89. The rest are overnight tourists who stayed an average of 3.4 nights and spent on average US\$ 538¹. Their main purpose of travel is leisure. (SEDETUR, 2017a)</p> <p>96% of the international tourists who stay overnight are North American: In 2015, 84% of all arrivals by air were from the United States and 12% from Canada (SEDETUR, 2017b).</p>		
Volume of tourists		
<p>On average, the island receives 9,000 day-visitors from cruise ships. In 2015, the total of cruise passengers was 3,391,241 cruise passengers (SEDETUR, 2017a).</p> <p>575,000 overnight visitors in 2015. 1,788,682 overnight stays in 2014.</p>		
Development of tourist numbers		
	Cruise passengers	Overnight tourists
2007	2,488,190	553,327
2008	2,569,433 (+3.2%)	924,451 (+67%)
2009	2,221,728 (-13.5%)	572,153 (-38.1%)
2010	2,908,424 (+30.9%)	526,151 (-8%)
2011	2,871,097 (-1.2%)	475,837 (-9.5%)
2012	2,744,952 (-4.3%)	445,974 (-6.2%)
2013	2,753,608 (+0.3%)	447,747 (+0.3%)
2014	3,404,500 (+23.6%)	585,086 (+30.6%)
2015	3,391,241 (-0.3%)	575,055 (-1.7%)
<p>There were some drastic changes in tourism numbers. In 2009 there was a decrease of 13.5% in cruise passengers and of 38.1% in overnight tourists due to the H1N1 health crisis with a strong recovery the year after. In 2014, Cozumel had a record number of cruise passengers due to the opening of new cruise routes as well as of overnight tourists. (SEDETUR, 2017a)</p>		
Length of stay		
3.4 nights in 2015 (SEDETUR, 2017a)		
Origin countries of tourists		
<p>Overnight tourists (2015)¹: 84% United States, 12% Canada, 4% other countries (SEDETUR, 2017b)</p> <p>Cruise passengers (2015): United States, UK and Canada (96%) (Florida-Caribbean Cruise Association, 2015)</p>		
Tourism image		
<p>Scuba diving and snorkelling Sun, sand, and sea destination Honeymoon and romance Recently sport tourism</p>		
Motives / target groups		
<p>75% rest and relaxation 13% business/work related 7% visiting friends and relatives 3% honeymoon/romance 2% other (Cestur-Sectur, 2010)</p>		

Visitors' activities, activity patterns

Cruise tourists arrive to the island early in the morning. Approximately 85% of them disembarks and visits the island between 5 and 8 hours. However, many of the passengers do not venture beyond the cruise terminals where they find restaurants, bars and souvenir stores; only 51% of passengers tour the island and visit key tourist attractions. (Florida-Caribbean Cruise Association, 2015)

Seasonality (peaks)

There are three important tourism peaks in a year: Winter (December-March), Summer (June-August), and Holy week (March-April), when most Mexican people have vacations.
The slowest months are April, May, September, and October

Visitors' opinions, attitude and behaviour, expectations and preferences, satisfaction

A study conducted in 2010 to **tourists** visiting Cozumel reports the following information:

Travel behaviour

- 38% of tourists travelled with their family, 29% with their spouse/partner, 17% by themselves, 14% with friends, and 2% with co-workers
- 78% of tourists stayed in hotels, 13% with friends and/or relatives, 4% in a rented home, 3% in a timeshare, and 2% in other types of lodging
- The average length of stay was reported to be 6 nights
- 68% of tourists arrived by air, 18% by cruise, 6% by bus and 3% by car
- 78% of tourists used local transportation
- 59% of tourist had visited Cozumel before: domestic tourists 2.4 times and international tourists one time on average.
- Cozumel was part of a travel package for 56% of all tourists

Satisfaction with the destination

- Overall, tourists were satisfied with the destination. On a scale of 0-10, tourists reported 8.8. International tourists reported a level of satisfaction of 9.0 while domestic tourists 8.7.
- The destination attribute with which tourists were most satisfied was the airport (9.0); customs was the attribute with which tourists were least satisfied (7.5).
- 86% of tourists would be willing to return to Cozumel.
- 94% of tourists would recommend Cozumel to others.
- 60% of repeat tourists evaluated the last experience was better than the previous one, 32% the same, and 6% worse. (Cestur-Sectur, 2010)

A more recent study (Florida-Caribbean Cruise Association, 2015) about cruise shows the **travel behavior and satisfaction** of cruise passengers

- For 40% of passengers it was the first visit to Cozumel; the average time on the island was 4.8 hours
- 94% of passengers disembarked in the island
- 72% of cruise parties made at least one purchase and spent on average US\$198
- 51% of passengers that went ashore purchased a shore excursion; 82% of them through the cruise line, 11% through their travel agent, and only 7% purchase their tour onshore.
- 43% of tours purchased were visits to historical or cultural sites and 29% were marine based activities.
- Cruise passengers were satisfied with their overall visit to Cozumel (8.1. in a scale of 1 to 10); however, the item "meeting expectations" got a score of 7.5.
- Satisfaction with "guided tours" was the highest (8.8) while "satisfaction with overall shopping experience" obtained the lowest level of satisfaction (7.4)
- Cozumel scored very low in the "likelihood to return for a land based visit" (5.1) and "likelihood to recommending to a friend (5.9).

Additional data

Cozumel is designated as a Traveller's Choice destination by tripadvisor. It was also designated as "Island of Peace" by the International Committee for the Banner Peace (affiliated with the UN) in 2009 because, among others, the island had no record of any warlike conflict since the Mayan times.

Framework conditions
<p><i>What are the framework conditions that might influence the impact and/or the management of the site?</i></p> <p>History and background</p> <p>Known to the Maya as Cuzamil or “the land of the swallows”, Cozumel was occupied by the Mayan as early as 300 A.D. It was one of the most important trade and religious centers of the Yucatán Peninsula and worshipping place for Ixchel goddess of the moon, medicine, and fertility. In 1518, Cozumel was discovered by Spanish explorer Juan de Grijalva, who declared it as the property of the Kings of Spain. The island soon became the starting point for the colonization of Mexico. During this period, Spanish colonizers destroyed several of the Mayan temples, blocked Mayan trade, and suppressed religious practices. The Spanish colonization together with an outbreak of smallpox left the Mayan civilization in ruins. Between 1519 and 1570, the population on the island declined from 30,000 to only 70, and the island became uninhabited by 1700.</p> <p>The modern history of Cozumel started in 1848, when a group of white Yucatecan families escaping from the Caste War in Yucatán, migrated to the island. By 1850, the population had grown to 324 residents. The migration from mainland Mexico made Cozumel, once again, an important port with a booming economy derived from the extraction of gum and fishing. Tourism activities in Cozumel started in the late 1920s as an alternative economic activity to the declining gum industry (Arguelles, Bellos, Romero, Cupul, & Coral, 2003). However, tourism did not take off until three decades later because of the economic depression post-World War II and the increasing loss of traditional activities. During the late 1950s and early 1960s, Cozumel gained popularity as a tourism destination due in part to the positive comments from the French explorer Jacques Cousteau about its coral reefs and a subsequent documentary in 1961. The island soon became a world-recognized destination for scuba diving and snorkelling. The first hotel opened in 1960 followed by several other locally-owned lodges and restaurants. By the late 1970s, foreign capital started to flow reflecting the tourism boom on the island.</p> <p>The 1970s marked the birth of the cruise ship industry in Cozumel. During this time, tourism development focused primarily on the construction of cruise ports, hotels, stores, and infrastructure to satisfy the needs of the tourists and cruise passengers. The employment prospects and investment opportunities deriving from tourism attracted many people to the island. Due to this second migration, the population in Cozumel grew from 10,000 in the 1970s to 86,000 in 2015 (INEGI, 2015a). (Camargo, 2011)</p> <p>Political situation</p> <p>Tourism is one of the national priorities in Mexico and Cozumel. There have been several plans and programs that seek to make the country and its destinations more competitive and sustainable:</p> <ul style="list-style-type: none"> - National Agreement for Tourism (Acuerdo Nacional para el Turismo) -National Development Plan -State Development Plan (2011-2016), which seeks the balanced development of the state destinations. -Cozumel Development Plan (2013-2016), which includes the Tourism Development Master Plan. <p>However, it is important to note that tourism is a highly political activity in Mexico. Its development orientation plans and policies, and leaders change every political term (every six years).</p> <p>Legal issues</p> <p>There are several laws that influence tourism development in Cozumel. At the top is the Federal Constitution, followed by federal legislation (federal laws) that apply to any and all tourism businesses and organizations. They include the General Tourism Law, General Health Law, General Labor Law, Foreign Investment Law, and Consumer Protection Law, among others.</p> <p>There are also specific laws that apply to air transportation, ground transportation and water transportation; lodging establishments; food and beverage establishments; tourist attractions; and natural and archaeological sites. At the state level, tourism in Cozumel is regulated by the state laws of which The State Law of Tourism of 2010 is the most important.</p>

Organisation

At the federal level:

Secretariat of Tourism (SECTUR): SECTUR is the federal government organization in charge of Mexico's tourism promotion and development. Among other functions, it dictates development policies and promotes tourism development in conjunction with the states. Its Secretary is appointed by the President.

Mexico's Tourism Board (CPTM): Carries out the country's tourism promotion abroad to increase tourists' knowledge of Mexico, increase tourist arrivals, and boost regional development and creation of well-remunerated jobs.

FONATUR (Fondo Nacional de Fomento al Turismo): Institution responsible for the planning and development of sustainable tourism projects of national impact.

At the state level:

Secretariat of Tourism of Quintana Roo (SEDETUR): State tourism office that is in charge of establishing, implementing, and supervising tourism development and promotion of the state destinations and serve as a link with other tourism related organizations in the state.

Fideicomiso de Promoción Turística de la Riviera Maya: The official organization in charge of positioning the Riviera Maya (Cozumel is part of the Riviera Maya) worldwide through the promotion of its rich cultural heritage and its natural features. It represents its destinations in national and international fairs, events, tradeshows, roadshows and produces printed and electronic materials to attract more visitors (<http://rivieramaya.com/>)

At the municipal level (Cozumel), the main stakeholders are:

Government

- Township of Cozumel: Which oversees tourism development and management in the island
- National Parks
- Parks and Museums Foundation

Private Sector

- Cozumel Hotel and Motel Association (AHC): AHC groups 21 hotels and its main objective is to improve the tourist experience and contribute to increase Cozumel's competitiveness as a destination by, among others, promoting diving, ecotourism, sports, and culture tourism.
- Tour operators represented by the Tour Operators Association of Cozumel
- Food and beverage establishments
- Cruise companies
- Ferry companies
- Taxi drivers union
- Airport

Civil society: There are more than 40 non-governmental organizations in the island many of which work towards cultural and environmental protection.

Physical setting

63 public and 20 private buses

71 kilometres of paved roads

1 airport, 3 international cruise ports, 1 freight port

3 public hospitals (40 beds) and 22 public medical office

Education establishments at all levels (3 universities, 5 high schools, 11 middle schools, 32 primary schools, 22 pre-kindergartens, 1 technical school)

116 fresh water wells (174 litres/second), 1 water treatment plant and sewage system (95% coverage)

Communications systems: landline, mobile coverage and wireless
(INEGI, 2015a; SECTUR, 2013)

Economic situation

Cozumel is highly dependent on tourism. There is a small scale agricultural production (tomatoes, lemons, habanero pepper, among others) fishing and service oriented enterprises.

Tourism expenditure in 2015 were US\$ 611.2 million. The average tourist expenditure in the same year was US\$ 538 by overnight tourists vs. US\$ 89 (cruise visitors) (SEDETUR, 2017a)

A study by FCCA reports that cruise tourism in Cozumel generated US\$365.5 in tourist expenditure and 9,727 jobs in 2014 (the highest level of employment in 35 cruise destinations analysed) (Florida-Caribbean Cruise Association, 2015).

Social/cultural situation**Indigenous environment**

Cozumel was an important trade and ceremonial centre for the Maya. The island has two archaeological sites, San Gervasio and El Cedral.

Currently, 12% of the population is indigenous Maya

Cultural attractions

-Cozumel island museum: which feature stories of the past and provides a complete overview of the island's anthropology, along with an in-depth examination of the native eco-system.

-Casa de la Cultura (Culture Center): a popular hangout for natives and expats, offers events, demonstrations, theatre, language classes, music and dance.

-San Miguel: Cozumel's only town; its downtown features restaurants, cafes, souvenir shops, and handicrafts and its boardwalk offers the opportunity to take nice walks and see several sculptures and monuments.

Festivals and celebrations

-El Carnaval (mardi grass) in February

-Santa Cruz and El Cedral Fair at the end of April- beginning of May: A five-day, 150 year old fair, it celebrates the anniversary of the first catholic mass in Mexico

-Sacred Maya Journey (established 2007; every May): Event that recreates of the oldest traditions of the Maya Culture: the annual canoe pilgrimage to worship the goddess Ixchel. (INEGI, 2015d)

Gastronomy

Cozumel has the food heritage of the Yucatan peninsula which consists of fresh seafood and the cuisine of the indigenous Maya with Spanish and Caribbean influence.

Environmental situation

Cozumel is a flat island with fragile natural systems. Its highest point is 20 meters above sea level. It has the following environmental characteristics:

Climate: Cozumel has a tropical savannah weather (Amw in Koppen climate classification) with abundant rain in summer. The average temperature is 25°C: August is the hottest month (28°C average temperature; highest 34-36°C) and January the coldest month (24°C average temperature).

Vegetation

Mangrove forest. Cozumel's soil is poor in organic matter.

Wetlands with high organic matter.

Biodiversity

Cozumel has important and unique ecosystems: 115 species of birds, 30 species of mammals, reptiles and amphibious. In addition, it has 26 endemic species, among them: the Cozumel fox (nearly extinct), the Cozumel raccoon (critically endangered), the Cozumel coati (endangered), and the splendid toadfish.

<p><u>Protected areas</u></p> <p>There are four protected areas in Cozumel:</p> <ol style="list-style-type: none"> 1. Cozumel Reef National Park (11,988 hectares, federal protection) 2. Chankanaab lagoon National Park (14 hectares, state protection) 3. Colombia Lagoon (1,131 hectares, state protection) 4. Northern jungles and wetlands of Cozumel (Selvas y humedales de Cozumel) (37, 829 hectares, federal protection) (Conacyt, n. d.) <p><u>Water</u></p> <p>There aren't any above-ground aquifers (streams, rivers, lakes) in Cozumel due to the high porosity of its surface. Most of the fresh water comes from water wells in the centre of the island, which availability increases or decreases in relationship with the rain seasons. There are several fresh water sink holes in the island. (Hajovsky, 2011)</p>
<p>Bottlenecks and constraints</p> <p>Access capacity: During high season, the ferries are at full capacity; they have increase the number of trips from 300/ month on average (15,000 passengers) to 400/month during the high season (22,000 passengers). (SECTUR, 2013)</p> <p>Transport capacity: During high seasons, the number of cars that arrive by ferry to Cozumel produce traffic congestions and inability of park on the streets. (SECTUR, 2013)</p>

<p>Challenges / Impacts</p> <p><i>What are the most important challenges resulting from high tourism intensity on the site?</i></p>
<p>Short description of main challenges</p> <p>Cozumel is a small island that does not have the capacity to host thousands of cruise passengers, second-home owners, and local and temporary residents who have moved there to work in tourism. One of the main challenges is the capacity of the island to provide fresh water to satisfy the residents and tourists needs.</p>
<p>Tourism intensity</p> <p>The relation of tourists vs permanent population has reached 36:1 over one year (UNWTO, 1999)</p>
<p>Influencing factors</p> <ul style="list-style-type: none"> - Rapid growth of cruise tourism - Economic dependence on cruise tourism - Oversupply of duty free stores - Lack of innovative tourism offerings and infrastructure - Lack of environmental impacts monitoring systems - Lack of environmental awareness and certifications of tourist guides, in particular dive instructors - Lack of environmental certifications for tourism sites and establishments - Lack of information systems that inform the tourists about site conditions - Lack of studies or surveys that examine local residents attitudes towards tourists - Poor public transportation system that prevents tourists to disperse throughout the island and concentrate in a few places - Lack of parking lots which make tourists and residents park on the streets creating congestion
<p>Classification of carrying capacity affected</p> <p>Physical carrying capacity:</p> <ul style="list-style-type: none"> - On a normal day, there are at least 3,000 cruise passengers walking or moving around the main town during 5 to 8 hours. <p>Ecological carrying capacity of protected areas and coral reefs:</p> <ul style="list-style-type: none"> -Chankanaab national Park which has a carrying capacity of 3,500 visitors per day, receives up to 10,000 during high season (UNWTO, 1999)

<p>Type of capacity affected Daily capacity during heavy cruise arrival days. Seasonal capacity during the high seasons.</p>
<p>Physical impacts -Urban sprawl_(38 hectares per year): caused the migration of people attracted by the job prospects offered by tourism - Aesthetic changes: American-style business with English signage and hotels and second homes are dramatically changing the traditional island architecture. (Pavón et al., 2007)</p>
<p>Economic impacts Cozumel's economy depends almost totally on tourism. There are no other industries in the island. On the positive side, tourism has created thousands of jobs, local business, and revenue from taxes, port fees, and navigation services. However, there are several negative impacts, which include: - Displacement of traditional economic activities (e.g. fishing and farming) for seasonal jobs in tourism - Dependence of cruise tourism, which has a very low economic impact (US\$ 89 per passenger) compared with overnight tourists (US\$ 538) - Displacement of local entrepreneurs and economic Leakage: It is estimated that 10.2% of all businesses in Cozumel are owned by foreigners - Increase in cost of life and utilities - Increase in cost of land (SECTUR, 2013; Pavón et al., 2007; UNWTO, 1999)</p>
<p>Social impacts on residents - Social exclusion from participating in tourism business opportunities - Social exclusion from recreation and tourist sites - Residential segregation - Lack of local participation in tourism planning - Overcrowding on heavy cruise arrival days - Tourism providers (e.g. cab drivers) favouritism towards tourists instead of residents - Traffic jams - Loss of Maya culture and language and adoption of foreign culture - Loss of island feeling - Servilism - Discrimination of local people in tourism related establishments: Upper level positions are mostly occupied by foreigners (Jamal, Camargo, Sandlin & Segrado, 2010; UNWTO, 1999)</p>
<p>Social impacts on tourists - Tourist crowding during high season (December-April) - Satisfaction levels: Scores for "likelihood to return to the island" and "likelihood to recommend to friends" were low in the last cruise passenger survey in 2015. (Florida-Caribbean Cruise Association, 2015)</p>
<p>Environmental impacts - Environmental stress on reef and marine ecosystems - Increase in garbage (on average 94,000 kilograms daily) - Water scarcity that leads to water rationing during high tourist season - Biodiversity loss due to construction and illegal logging. It is estimated that more than 70% of the island biodiversity has been lost in the last decade. Endemic species are at the verge of extinction, if not extinct already - Migration to the island - Increase in the number of vehicles that are used to visit the island during high season - Illegal fishing and introduction of foreign species (INEGI, 2015a; UNAM, 2012; UNWTO, 1999; SECTUR, 2013)</p>

<p>Development of impacts/ Changes over time</p> <p>The impacts have developed over the past 15 years as Cozumel has become more popular as a cruise destination as more cruise terminal have been built.</p>
<p>Summary: Beneficiaries and sufferers from tourism in the case study</p> <p><i>Winners:</i> In general, tourism in Cozumel has provided jobs and economic development to the island residents as well as some revenue for the government. However, the biggest winners have been those who are directly involved in cruise tourism, in particular the owners of the cruise terminals and the establishments inside them such as restaurants, bars and shops, in second place, foreign and local hotel chains and diving operators. Politicians have also greatly benefited since they are in many cases investors in tourism businesses.</p> <p><i>Losers:</i> The physical and ecological environment and the local people. The island has suffered severe aesthetic changes due to uncontrolled tourism growth and the pressure of tourists has almost depleted its fresh water reserves. Local people work in entry-level positions in a destination which cost of life has increased dramatically in the past years. Their traditional culture has been slowly changing in order to adapt to the way of life of a tourist destination.</p>
<p>Measures / Responses</p> <p><i>What are the solutions that have been or are being discussed and/or implemented to reduce conflict between competing uses and to manage tourist masses? How can the challenges successfully be faced, managed and/or avoided?</i></p>
<p>General measures</p>
<p>Social measures</p> <p>Participation of stakeholders in the monitoring and management of tourism impacts of Cozumel <i>Who:</i> Representatives from several sectors of the tourism industry <i>How:</i> By creating a NGO called Intersectorial Group Cozumel Island (GI) that implements several strategies to make tourism more sustainable.</p> <p>Participation of stakeholders in the Agenda 21 program <i>Who:</i> Representatives from several sectors of the community <i>How:</i> 15 workshops where people expressed their concerns and their vision of Cozumel</p>
<p>Environmental measures</p> <p>Cozumel Ecological Zoning Plans (2002, 2005), establishment of protected areas.</p>
<p>Specific measures</p>
<p>Expand and improve the capacities and infrastructure</p> <p>- Development of first accessible beach in Mexico</p>
<p>Disperse tourist attractions</p> <p>Diversification of tourism products to attract diverse market segments, in particular, sport tourism, incentive travel, luxury tourism <i>Who:</i> Cozumel Tourism Promotion Board <i>How:</i> Hosting sport events such triathlons, Ironman competitions, Ironkids, the High Diving World Cup (2015), Scuba Fest, golf tournaments, fishing tournaments</p>
<p>Historic downtown renovation</p> <p><i>Who:</i> Federal and state government</p>
<p>Construction of Cozumel Aquarium: With an investment of US\$50 million, this is planned to be the biggest aquarium in the world) <i>Who:</i> Federal and state government; private industry</p>

<p>Restrictions None so far.</p>
<p>Information and communication - Implementation of tourism information modules in cruise ports to provide passengers information about the island (SECTUR, 2013). -Development of a tourism observatory to serve as a tourism data and trends repository. It will support tourism decision-making and the monitoring of tourism impacts (state level) <i>Who:</i> Federal and state government; local universities</p>
<p>Optimize spatial distribution of tourists Guest segmentation: By diversifying the tourism offer, Cozumel hopes to attract higher paying and more conscious tourists such as sport tourists, cultural tourists, and honeymooners.</p>
<p>Organisational Measures Management plans devised to enhance the competitiveness and sustainability of Cozumel tourism:</p> <ul style="list-style-type: none"> - Destination Competitiveness Study in 2013 by the Secretariat of Tourism (federal), the state Secretariat of Tourism and the Universidad of Quintana Roo (local) - Sustainable Tourism Strategic Plan 2012-2032 - Agenda 21 Cozumel Island - Cruise Destination Shared Management Action Plan: To manage the environmental impacts caused by cruise tourism and identify priorities for sustainable tourism management of the island.
<p>Certifications -Clean Beach Program Certification: 17 beaches certified by 2013 -Health and hygiene certification for food and beverage establishments (Distintivo H): 19 certified establishments by 2013 - Service quality certification (Distintivo M): 16 restaurants, 1 hotel, 9 travel agencies and 24 other tourism establishments certified by 2013 - Tourist guide certifications: 31 local tour guides had been certified by the federal tourism office- SECTUR by 2013 (SECTUR, 2013)</p>
<p>Training programs -24 tourism human resources training through federal and state programs by 2013 (SECTUR, 2013)</p>
<p>Measuring and monitoring tools - Implementation of monitoring tools such SIST (Sustainability Indicators System for Tourism)</p>
<p>New innovative solutions Cozumel is set to be the first Smart Destination in Mexico <i>Who:</i> Secretariat of Tourism- SECTUR (federal level) in cooperation with the Ministry of <i>How:</i> Using ICTs to make tourism mobility more sustainable (proposal)</p>

<p>Outlook <i>How will tourism on the site develop in future? What are the expected changes?</i></p>
<p>Important future trends There are two trends that will affect tourism development in Cozumel in the future. Climate change, the main one, will affect the ecological health of the coral reef which is one of Cozumel's main tourist attractions. In addition, higher temperatures will increase the number of extreme weather events (e.g. hurricanes, droughts) that might endanger tourists and residents alike. Another trend is the lift of travel restrictions and opening of Cuba to tourism. Cuba will be the new and hottest destination for cruise companies and they might divert thousands of passengers from Cozumel to Cuba, leaving the island abandoned with expensive cruise tourism infrastructure and loss of thousands of jobs.</p>

<p>Prospects for tourism development</p> <p>With an investment of US\$40 million, a fourth cruise terminal is being built in Cozumel. Besides the dock area, it will have commercial areas (restaurants, shops, bars, etc.), parking spaces, and some open green areas for tourists. It will occupy 13,545 square metres in the northern part of the island. (APIQROO, n.d.)</p>
<p>Expected changes?</p> <p>This will attract thousands of more cruise passengers that will put even more pressure on the island's fragile resources.</p>

<p>Conclusion</p> <p><i>What are the central conclusions that can be drawn?</i></p>
<p>General conclusions</p> <p>Cruise tourism might seem like an attractive option of island destinations but it has more costs than benefits. A destination should not depend on one type of tourism, in particular one that brings so little economic benefits and with low probability to return to the destination. The main lesson is to diversify the tourism offer to attract different market segment and involve the community stakeholders in the monitoring of tourism impacts and devising ways to make tourism more sustainable.</p>
<p>What makes this case special?</p> <p>This is an island that depends exclusively on tourism and which has fragile ecological and cultural heritage that is at risk.</p>
<p>Why are the measures implemented successful/ not successful?</p> <p>Current measures are successful because they have been part of tourism stakeholder consultations.</p>
<p>What are the main barriers that hamper a sustainable development in the case?</p> <ul style="list-style-type: none"> - Political instability: Plans and policies change every six years according to the political party elected. - Corruption and economic interests that tends to favour cruise tourism vs. other types of tourism. - Lack of monitoring systems for tourism impacts
<p>Which measures seem to be the most promising? What are the most important findings for the industry/ for politics?</p> <p>The most promising measures are those that aim to develop tourism products and events to attract a different type of tourist, in particular, sport events and luxury tourism. They stay longer and spend much more on the island than cruise passengers.</p>
<p>What are the findings/conclusions other destinations could learn from?</p> <p>The importance of not depending on one type of tourism.</p> <p>The importance of having adequate monitoring systems for tourism impacts.</p> <p>The need to involve tourism stakeholders in all phases of tourism planning and development.</p>

<p>References</p>
<p>APIQROO (n.d.). Manifestación de ambiental modalidad particular del proyecto Terminal Marítima Banco Playa. Retrieves February 6, 2017 from http://consultaspublicas.semarnat.gob.mx/expediente/qroo/estudios/2016/23QR2016V0006.pdf</p> <p>Camargo, B. A. (2011). Justice and fairness in tourism: A grounded theory study of cultural justice in Quintana Roo, Mexico. (Doctoral dissertation). Texas A&M University, College Station, TX, USA.</p> <p>Cestur-Sector (2010). Perfil y grado de satisfacción del turista: Reporte de Cozumel. Retrieved January 14, 2016 from http://ictur.sectur.gob.mx/pdf/estudioseinvestigacion/calidadycompetitividad/reportesdetallados/playas/COZUMEL.pdf</p> <p>Conacyt (n. d.). Áreas naturales protegidas del estado de Quintana Roo. Retrieved January 19, 2017 from http://www.conacyt.gob.mx/cibiogem/index.php/anpl/quintana-roo</p> <p>Datatur (2017). Cuenta de Viajeros Internacionales. Retrieved January 13, 2017 from http://www.datatur.sectur.gob.mx/SitePages/VisitantesInternacionales.aspx</p>

- Florida-Caribbean Cruise Association (2015). Economic contribution of cruise tourism to the destination economies Volumen II. Retrieved February 6, 2017 from <http://www.f-cca.com/downloads/2015-cruise-analysis-volume-2.pdf>
- Hajovsky, R. (2011). Geology, pedology, and hydrology of Cozumel. Retrieved January 19, 2017 from <http://www.everythingcozumel.com/naturalhistory/GeologyPedologyHydrology.pdf>
- INEGI (2015a). Anuario estadístico y geográfico de Quintana Roo 2015. Retrieved January 21, 2017 from http://www.datatur.sectur.gob.mx/ITxEF_Docs/QROO_ANUARIO_PDF15.pdf
- INEGI (2015b). Información por entidad. Quintana Roo. Población. Retrieved January 16, 2017 from <http://cuentame.inegi.org.mx/monografias/informacion/qroo/poblacion/>
- INEGI (2015c). Producto Interno Bruto Turístico. Retrieved January 16, 2017 from <http://www.inegi.org.mx/est/contenidos/proyectos/cn/tur/default.aspx>
- INEGI (2015d). Mexico en cifras: Cozumel, Quintana Roo. Retrieved January 16, 2017 from <http://www.beta.inegi.org.mx/app/areasgeograficas/?ag=23001>
- Isla Cozumel (2017). ¿Cómo llegar?. Retrieved January 13, 2017 from <http://cozumel.travel/como-llegar/>
- Jamal, T., Camargo, B. A., Sandlin, J., & Segrado, R. (2010). Tourism and cultural sustainability: Towards an eco-cultural justice for place and people. *Tourism Recreation Research*, 35(3), 269-279.
- Pavón, R. S., Muñoz, A. P., & Arcos, L. A. (2007). Medición de la capacidad de carga turística de Cozumel. *El Periplo Sustentable: revista de turismo, desarrollo y competitividad*, (13), 33-61.
- SECTUR (2013). Agendas de competitividad de los destinos turísticos de México: Cozumel. Retrieved January 16, 2017 from [file:///srvctxfiles/dvdoc\\$/bcamargo/Downloads/PDF-Cozumel.pdf](file:///srvctxfiles/dvdoc$/bcamargo/Downloads/PDF-Cozumel.pdf)
- SEDETUR (2017a). Indicadores turísticos 2015. Retrieved January 14, 2017 from <http://sedetur.qroo.gob.mx/index.php/estadisticas/indicadores-turisticos>
- SEDETUR (2017b). Visitantes internacionales por vía aérea por principal nacionalidad (Excel data file). Retrieved January 18, 2017 from <http://www.datatur.sectur.gob.mx/SitePages/Visitantes%20por%20Nacionalidad.aspx>
- Segrado Pavón, R. G., Amador Soriano, K., Jiménez Jiménez, J., & Arroyo Marcos, L. (2011). Etapas del ciclo de vida del destino turístico de Cozumel (Mexico). *Seminario Internacional Renovación y Reestructuración de Destinos Turísticos Consolidados del Litoral* (pp. 1-16). Universidad de Alicante.
- UNAM (2012). Biodiversidad de Cozumel, tesoro natural en peligro. Retrieved from http://www.dgcs.unam.mx/boletin/bdboletin/2012_428.html
- UNWTO (1999). Taller sobre indicadores de turismo sostenible para el Caribe y Centroamérica: Informe final. Retrieved February 1, 2016 from http://sdt.unwto.org/sites/all/files/docpdf/mexico_0.pdf
- World Bank (2016). Mexico. Retrieved January 21, 2017 from <http://data.worldbank.org/country/mexico>

3.4. Great Barrier Reef (Australia)

University of Queensland, Australia
Dr Gabby Walters, Karen Hoffman

In relation to other contributors (especially climate change) the effects of tourism on the damage to the GBR are minimal. On the contrary, tourism is a positive resource to the sustainability of the reef as operators access the reef daily and provide live monitoring of the reefs visited in order to ensure a future for their business. The case shows how limited access to reefs and the implementation of policies and procedures for tourists and tour operators can contribute in the minimisation of negative impacts by tourism.

General information	
Title / Name of the site/destination	The Great Barrier Reef (GBR)
Region, country	Queensland, Australia
Area size (km²)	344'400km ²
Geographic coordinates	18° 9' 22.6440" S 147° 29' 9.4632" E
Population and scope (if inhabited)	2900 individual reefs, 900 islands stretching over 2'300 km off the coast of Queensland. As Cairns is a major gateway to the reef it will be the focus for statistics and services. Cairns has a population of 160'285 including 10% Indigenous Australians.
Short description of the case	The Great Barrier Reef is recognised as a multiple use area, including recreational, commercial, research and traditional activities. Measures to protect this fragile environment through zoning have been in place since 2003. Consequently, tourism (and other noted uses) has had minimal impact on any damage to the GBR. External factors such as rising sea temperatures as a result of global warming and reduced water quality from land-based run-off and coastal developments have been a large contributor to ecological damage to areas of the GBR that are commonly utilised for tourism purposes. On the contrary, tourism is a positive resource to the sustainability of the reef as operators access the reef daily and provide live monitoring of the reefs visited in order to ensure a future for their business. The case shows how limited access to reefs and the implementation of policies and procedures for tourists and tour operators can contribute in the minimisation of negative impacts by tourism.
Further remarks	UNESCO World Heritage Site (the only place where 2 World Heritage listed sites meet – Reef to Rainforest)

Tourism development in the country of the case study	
Short description of the importance of tourism in the country	Tourism in Australia represents 3% of Australia's GDP contributing to AUS \$38.1 billion (~29 billion USD) to the national economy, employing around 600'000 people (5% of workforce). Coastal capital cities of Sydney, Melbourne and Brisbane and regional areas such as the Gold Coast, The Great Barrier Reef, Uluru and the Tasmanian wilderness rank highest in tourist visitor numbers. The holiday and education segments accounted for 66% of total trip spend by international visitors. China, UK, USA, NZ and Japan are the top 5 markets to Australia.
Arrivals, Overnight stays (year)	8.07million arrivals (Year ended Sep 2016), 248 million nights
GDP	AUS \$38.1billion
Tourism value added (% of GDP)	3% of GDP

Employment in tourism (%)	5% of the work force
Further remarks:	Source: Tourism Research Australia (TRA) to year ending 30/6/16

Tourism supply of the site

<p>Short description of tourism on the site</p> <p>Tourism on the GBR is concentrated in Cairns and the Whitsundays due to their accessibility. The GBR can be accessed from many other ports along the Queensland coast by boat and 27 islands support resorts. Over 2 million people visit the GBR each year. Cairns has two-thirds of the tourism related jobs in the Tropical North Queensland tourist region which equates to nearly 11'000 jobs. The reefs between Cairns and Mackay (734KM stretch) have experienced 33% severe coral bleaching. This is less than northern regions (81%) and more than southern regions (1%).</p> <p>As Cairns is the most visited area as a gateway to the GBR, the following information will reflect that area.</p> <p>Access (how to get there?)</p> <p>Most access to the GBR is by boat. If staying on an island resort there may be access immediately off the beach especially coral cay islands.</p> <p>Main attractions</p> <p>The GBR is the largest barrier reef in the world. The reef hosts 400 coral species, numerous whale, dolphin, sea snake and turtle species, over 1500 species of fish, 215 species of sea birds. Coral cay and continental islands.</p> <p>Accommodation offer (number, type, quality)</p> <p>Large selection of all types of accommodation available at all gateways to the GBR, from camp grounds, backpacker to 5 star accommodations on the mainland and on Islands.</p> <p>Cairns, as a major gateway, has in excess of 50 hotels and apartments, 10 Backpacker hostels, 10 caravan / camp sites within 10km of the centre of Cairns.</p> <p>Restaurants (number, type, quality)</p> <p>Cairns: more than 100 options ranging from snack bars, pizzerias, cafes and diverse cuisine and standards on offer.</p> <p>Other tourism service providers</p> <p>Cairns: 300 trips to choose from including snorkelling, scuba diving, glass bottom boat, fishing, kayaking, parasailing. As Cairns region also boasts rainforest World Heritage listed sites there are many other tours and activities that can be undertaken in addition to visiting the GBR. Indigenous culture is strong in this region with many related tourist activities on offer.</p> <p>Stage of the tourism life cycle</p> <p>Mature / consolidation stage but fear of decline if the reef is not protected.</p>
--

Tourism demand at the site

<p>Short description of tourism demand</p> <p>Domestic / International visitors approximately 50/50%.</p> <p>Domestic – 51% from Queensland (same state) 49% from interstate.</p> <p>Purpose – Holiday 56%; VFR 21%; Business 17%</p> <p>International – Asia 34%; Continental Europe 25%; North America 16%</p> <p>Purpose – Holiday 90%; other 10% - VFR, education, employment, business</p> <p>Volume of tourists</p> <p>Domestic Day trip – 1,189,000 visitors / AUS\$126,000,000 spend</p> <p>Domestic visitors – 5,325,000 nights.</p> <p>International – 5,100,000 nights.</p>
--

<p>Development of tourist numbers Domestic visitation has remained steady. Domestic day visitors have fluctuated the most over the years however has more recently increased steadily. International visitors – significant decline 2006-11 followed by steady increase over the past 3 years.</p>
<p>Length of stay Domestic - average stay 5 nights. International - average stay 7.9 nights.</p>
<p>Origin countries of tourists Domestic; Asia; Continental Europe; North America</p>
<p>Tourism image 'Last chance to experience' was the first or second concern of 235 visitors to the reef in a recent study.</p>
<p>Motives / target groups To discover new places and things; to rest and relax; and to get away from the demands of everyday life. The GBR and Northern Beaches. Target groups – very broad due to extent of activities available in the region. International visitors - couples and single travellers (70%) 18-34 years (49%). Domestic visitors – couples and family groups (57%), 35-54 years (42%).</p>
<p>Visitors' activities, activity patterns 2.2 million visitor days ex Cairns participate in coral viewing / scenic flights over GBR.</p>
<p>Seasonality (peaks) School holidays are peak periods. Winter months are peak visitation especially from southern Australian states and northern hemisphere visitors. Summer (wet season) is the most unattractive time to visit Cairns due to weather instability and stinger season. Some areas of the GBR are best to visit during this time due to prevailing winds.</p>
<p>Visitors' opinions, attitude and behaviour, expectations and preferences, satisfaction Opinions on the state of the GBR in terms of coral bleaching ranged depending on whether the person had previously been to the reef, how long ago and how conservation minded they were. General reviews about visitation to the GBR are high. Tour operators rate highly. If tourists had been to the GBR previously some found the coral to have deteriorated. 61/62 reef tour operators ex Cairns rated 4-5/5 on Trip Advisor.</p>

<p>Framework conditions <i>What are the framework conditions that might influence the impact and/or the management of the site?</i></p>
<p>History and background The GBR has played an important role in the livelihood of Australia's aboriginal people providing food through fishing and hunting. They moved their settlements up and down the coast for thousands of years before the coming of Europeans. Louis de Bougainville, a French commander encountered Bougainville Reef near Cooktown in 1768. Captain Cook was the first person record the existence of the reef in 1770 as he sailed up the coast of Australia when his vessel ran aground on a small reef located south of the town known as Cooktown. Between 1801 and 1803, Matthew Flinders named the reef the Great Barrier Reef and he created a safe passage through to sound depths. There are 30 shipwreck sites, numerous lighthouses and WWII sites of historic importance that exist on the GBR. In 1975 the Great Barrier Reef was declared a marine park and in 1981 inscribed on the World Heritage List.</p>
<p>Political situation Under the Great Barrier Reef Marine Park Act 1975 and given the vulnerability of the GBR there are many policies and continual fights for more policies to be approved to assist with the protection of this unique resource. Currently policies fall under the areas of Tourism, Scientific Research, Protected species and Environmental. The Great Barrier Reef Marine Park Authority (GBRMPA) provides position statements outlining</p>

<p>their position on issues where the Marine Park Authority has a strong interest. The Federal and State governments have an intergovernmental agreement in place (The 2015 Agreement¹) sharing a vision for the future of the GBR.</p>
<p>Legal issues</p> <p>There are a variety of enforceable laws and regulations that apply to operators and users of the GBR. Some of these include:</p> <p>Whale and dolphin watching regulations; Recreational vessel sewerage requirements; Commercial vessels, cruise ships and ships on international voyages; Sea dumping; Pollution prevention.</p>
<p>Organisation</p> <p>Legislation enacted by the State of Queensland relevant to the organisation of tourism includes: Transport Operations (Marine Pollution & Marine Safety) Acts (1995 & 1994); Nature Conservation Act 1992; Environmental Management Charge under GBRMP Act 1999. GBRMPA have Responsible Reef Practices related directly to operators and visitors enjoying the reef responsibly. Responsible Reef Practices in relation to: anchoring & mooring; Around turtles; Bird watching; Collecting; Diving & snorkelling; Fishing; Waste and Visiting islands & cays.</p> <p>OnBoard – the Tourism Operator’s Handbook² provides full guidelines.</p>
<p>Physical setting</p> <p>Access to the GBR is via boat or air only. Boat access to the GBR commercially is by Tour Operators ex many gateways along the east coast of Queensland. Of the 27 Islands with commercial resorts many can be reached by boat or aircraft (plane, seaplane or helicopter). Hamilton Island has the only operational airport in the GBR. Private marine craft and air craft can also access the GBR within the guidelines of GBR use.</p> <p>Pontoons are a fixed structure permanently moored on the outer GBR. These offer easy access snorkelling / diving, as well as underwater viewing options such as a glass bottom boat or semi-submarine. These are located on reefs accessible from gateways via the associated reef operator (10 in total between Port Douglas and Lady Musgrave Island).</p>
<p>Economic situation</p> <p>Tourism makes up 5% of the workforce in Australia. Tourism in Queensland employs 220,000 people directly and indirectly making up 9.4% of the workforce. Award wages apply to the service industries in Australia. The Queensland Government have committed AUS \$49.9 million to Tourism & Events Queensland for the promotion of destinations, including the GBR.</p> <p>Expenditure per person per night AUS \$144 on average.</p>
<p>Social/cultural situation</p> <p>Indigenous Australians, as part of the Native Title Act 1993, are permitted to fish and hunt in the GBR using traditional methods.</p>
<p>Environmental situation</p> <p>There are many threats to the GBR both natural and man-made. Coral bleaching, a naturally occurring event due to increasing water temperatures has been recorded as early 1870. Mass bleaching however was first recorded in 1979 with the global mass bleaching event of 1997/98 reaching scales never seen before. As long as water temperatures return to normal, the coral recovers. Due to global warming, the time between events has reduced often making it difficult or impossible for the coral to recover. Man-made issues such as chemical run off and mining further impact the quality of the water and consequently the health of the reef.</p> <p>Tourism has minimal impact on the GBR. As listed above, there are strict policies in place for the use of the GBR both commercially and recreationally.</p> <p>Commercial access to individual reefs is limited to allocated reefs within the GBR to reduce the impact of tourist activities. Fishing zones are in place throughout the GBR also.</p>
<p>Bottlenecks and constraints</p> <p>The main gateways to the GBR can be seen as bottle necks however this also reduces the impact to other areas by creating a carrying capacity.</p>

¹ <http://www.environment.gov.au/system/files/pages/7a85531d-9086-4c22-bdca-282491321e46/files/gbr-iga-2015.pdf>

² <http://www.gbrmpa.gov.au/onboard>

Challenges / Impacts
<i>What are the most important challenges resulting from high tourism intensity on the site?</i>
<p>Short description of main challenges</p> <p>The main threat to the GBR is climate change although land-based run off, coastal development contributing to poor water quality and fishing activities also have considerable impact. Although tourism and the use of commercial vessels also have a negative impact it is minimal.</p> <p>The biggest issue is the cumulative effects of many combined impacts. As the causes are quite broad, the challenge is knowing what to focus on to reduce these impacts.</p>
<p>Tourism intensity</p> <p>Given the size of the GBR (344'400 km²) the number of tourists visiting the reef each year (2'200'000) would equate to 6 people per m². However, as access is restricted for commercial use to specific areas, the impact of this number of tourists to those areas increases. Particularly in the areas surrounding pontoons, there is considerably poorer water quality than areas not utilised as frequently and intensely.</p>
<p>Influencing factors</p> <p>The preconditions leading to the overcrowding of sections of the GBR include the limitation of access points on the reef and the development of specific gateway ports to access the reef. By limiting access to specific reefs, more pressure is placed on these reefs. In response to this, more attention is placed on the sustainability of these areas. An example of this is the Crown of Thorns Starfish (COTS) control program. Although COTS are prevalent on many of the northern reefs in the GBR, the focus is on the reefs accessed by tourism operations in order to protect these areas for continued use. Although pontoons have their benefits from a tourist perspective, from an environmental perspective they create some negative issues. Daily use significantly reduces the water quality due to the impact of the boats coming and going each day (fuel emissions etc.), hundreds of people entering the same area of water / reef (sunscreens, coral breakage due to accidentally kicking coral whilst snorkelling / diving, souveniring, touching marine life). Strict policies are in place for the use of the GBR to reduce negative impacts through misuse.</p>
<p>Classification of carrying capacity affected</p> <p>In Cairns, as a gateway to the GBR, the carrying capacity in terms of hotel beds and flights is not regularly reached due to a large supply of these services.</p> <p>Due to the fragility of the reef, the ecological carrying capacity is minimized through strict monitoring of use.</p>
<p>Type of capacity affected</p> <p>Any use of the reef by boats, commercially or private, affects the GBR, however as there are only a certain number of permits granted, use is limited to ecological capacity.</p>
<p>Physical impacts</p> <p>The environmental fragility of the GBR impacts all services to this area. Natural disasters such as cyclones affect the reefs (potentially severe damage to coral), but also infrastructure on the commercially used islands and on the mainland. This affects tourist access if damage is significant.</p> <p>Rising sea levels and altered weather patterns increase the risks to built structures such as lightstations in the area.</p>
<p>Negative Economic impacts</p> <p>The Cairns region is a well-established tourism destination and consequently has adjusted to the impacts seasonality presents.</p> <p>The impact of irreparable coral bleaching will have long term negative economic impacts on any services supplied to visitors to the GBR. Given 2.2 million of the 2.6 million visitors to the Cairns area visit the reef, not only would the reef tour operations not be sustainable, the businesses servicing these tourists would also no longer be sustainable. There are other points of interest to this area (e.g rainforest, Indigenous culture) however the main drawcard is the GBR.</p> <p>In the short term however, with the 'see it before it goes' mentality, more tourists are coming to see the reef without consideration that their visit contributes to the impacts on the GBR.</p>
<p>Social impacts on residents</p> <p>The Cairns region has a highly transient population with only 53% of residents having lived there for 5 years or more. As the industry is well established with a steady number of visitors annually, regional planning takes into</p>

account the impact on the provision and use of services and facilities, far beyond what use resident population numbers would suggest. As there are a high proportion of domestic tourists who access the region by road, this also places disproportionate road usage to that to be expected from the local population.

Social impacts re tourists

Given there are many ways to see the GBR – including large catamaran (up to 350 passengers) to smaller private charters, helicopter, sea plane and direct island access, visitors have the option to choose according to their needs and desires.

The impacts resulting from natural disasters such as cyclones can affect visitation to the area as potential tourists may believe the areas to be permanently damaged based on media reports.

As some areas are more affected by events such as coral bleaching, the tourists who visit these areas may be disappointed by the quality of the coral viewing. General feedback is positive however.

Environmental impacts

The environmental impacts on the GBR are a result of the combination of climate change, over fishing, land-based run-off, coastal development and tourism. Water quality decline is the direct result of all of these issues. Reduced water quality can affect corals, seagrass and other important habitats as well as the marine animals they support.

The Cairns and Townsville region (and GBR areas off the coast) has been exposed to severe cyclonic winds extensive flood plumes into the region. This causes an increase in freshwater inflows to the marine environment.

Development of impacts/ Changes over time

Degradation in water quality, the effects of over fishing, rising water temperatures has made considerable irreparable damage to the particular areas. The GBR Vulnerability Assessment³ outlines issues related to all areas of the GBR from flora and fauna on islands and cays to coral reefs to pelagic systems. Changes over the past 10 years are significant adding to the already vulnerable state of the GBR. Tourism is not considered a major contributor to negative impacts.

Summary: Beneficiaries and sufferers from tourism in the case study

Sufferers of the demise of the GBR would be tourism in the local gateways, the State of Queensland and Tourism Australia as a whole. The GBR is often listed as the first or second reason why tourists come to Australia.

Other reef destinations around the world, e.g. Belize with the second largest barrier reef in the world, may be beneficiaries of extra tourism should the GBR no longer be an attraction worth visiting.

As there is minimal damage to the southern end of the GBR, this part may benefit greatly with continued tourist appeal. Ecological capacity would need to be closely monitored.

Employees directly and indirectly employed by the tourism industry are also affected.

Other impacts/ Further remarks

It should be noted that only a relatively small part of the GBR is used for tourism purposes. Some of the reefs affected by bleaching are dead however, other unaffected reefs, may be opened up for tourism purposes in the future.

Measures / Responses

What are the solutions that have been or are being discussed and/or implemented to reduce conflict between competing uses and to manage tourist masses? How can the challenges successfully be faced, managed and/or avoided?

General measures

Social measures

The effects of tourism on the damage to the GBR are minimal in relation to other contributors. Tourism is often considered the cause of issues on the GBR as it is more overt than other issues such as land based run-off

³ <http://www.gbrmpa.gov.au/managing-the-reef/threats-to-the-reef/climate-change/how-climate-change-can-affect-the-reef/great-barrier-reef-vulnerability-assessment>

<p>and coastal development.</p> <p>Project Aware have guidelines available to reef tourists and GBRMPA have guidelines in place for tour operators to the GBR for sustainable business. The majority of tour operators follow these guidelines in order to help sustain their business.</p> <p>'Citizen scientist' projects, (e.g. Eye on the Reef, Reef Check, Coral Watch) allow reef tourists to monitor the coral through ecological surveying and report their findings to assist in the overall monitoring of coral and marine life health.</p>
<p>Economic measures</p> <p>Included in the cost to visit the GBR, as a tourist or otherwise, is the Environmental Management Charge. These funds contribute to the day-to-day management of the GBR marine park and its long term resilience. The southern GBR would have positive economic impacts as they have only 1% severe coral bleaching recorded to date and it remains an attraction for reef tourists.</p>
<p>Environmental measures</p> <p>Strict usage guidelines and policies are enforceable by GBRMPA for misuse of the GBR. This includes sewage dumping, anchoring and mooring, souveniring (eg removing pieces of coral from the reef as a souvenir) and fishing zones that restrict access and quantity of catches.</p>
<p>Specific measures</p>
<p>Disperse tourist attractions</p> <p>There are many other attractions for tourists visiting the Cairns region that do not directly involve visiting the GBR. With more development and marketing, these land-based and cultural attractions could continue to grow and become the new focus of the region.</p> <p>As mentioned the southern GBR could be further developed to carry an increase in reef visitors as this area is still relatively unharmed by the same issues as the northern sections of the GBR.</p> <p>Scuttling ships and other structures of interest to create artificial reefs in areas less affected by climate change and degraded water quality has begun to develop new tourist attractions in Queensland.</p>
<p>Restrictions</p> <p>A reduction in carrying capacity to the GBR accessed via Cairns could reduce some of the impacts however other changes need to be made, not related to tourism activity, to assist in the recovery and sustained health of the GBR. This includes the use of agricultural chemicals, coastal development and dumping of waste.</p> <p>Reducing carbon foot print would contribute to the sustainability of the GBR and the environment in general.</p> <p>Eco certification is available to all tourism operators who provide high quality nature-based tourism experiences and demonstrate a well-managed commitment to sustainable practices. Becoming eco-certified in Nature Tourism reflects tourism's practices that leave minimal impact on the environment.</p>
<p>Information and communication</p> <p>Providing information for tourists on board reef operations in the form of interpretation is currently variable on board each vessel. Information including best practice of reef visitors, in line with marine park standards, is available however more in depth information concerning the fragility of the reef plus actions tourists can take to reduce the impact they have on the reef could be strengthened.</p> <p>Accurate reporting to the general public is essential for the future of the GBR. The media provide information to the public however this is often misleading in its presentation. Given the scientific nature of the issues with the GBR it is important to provide information that the general public can easily understand. Visitors to the GBR are generally surprised at the inaccuracy of media reports when they see the reef themselves. Although the GBR attracts over 2 million visitors per year via Cairns, the media have access to many more people globally, often leading to incorrect conclusions. More widely spread information concerning the state of the GBR is starting to be communicated to the general public (who have perhaps not visited the GBR or other reefs)</p>

<p>through government agencies and other forms of less sensationalising media.</p> <p>The use of celebrities to promote the need for protecting vulnerable environments is also readily utilised including one off statements and documentaries highlighting for example, the need for changes in commercial fishing practices and distribution ('What's the Catch'⁴).</p> <p>The Federal Government Reef Program Awards recognises members of the agriculture industry in their efforts in protecting the GBR through the use of alternative methods of various farming elements that reduce the impact on marine environments.</p>
<p>Optimize temporal distribution of tourists</p> <p>As there are currently strict movement practices in place, a reduction in visitation could impede the sustainability and protection of certain areas of the GBR as regular site-stewardship would not be maintained.</p>
<p>Optimize spatial distribution of tourists</p> <p>An increase in marketing visitation to the southern GBR as an alternative would benefit public perception of the state of the reef and consequent sustainability of tourism utilising the GBR. Attempts have been made to do this however carrying capacity to these areas is still limited.</p>
<p>Organisational Measures</p> <ul style="list-style-type: none"> • Being a multi-use area, zoning helps to manage and protect the values of the Marine Park. The GBR Marine Park Zoning plan 2003⁵ provides for a range of ecologically sustainable recreational, commercial and research opportunities and for the continuation of traditional activities. • Tourism operators can apply for a 1 year operating permit on the GBR. Operators involved in GBRMPA High Standard Operator Program are granted a 15 year operating permit. Having the longer tenure contributes to the motivation of operators to reduce negative impacts in order to sustain their business. • Government allocation of marine sanctuaries in response to the need to protect these vulnerable environments is continuing. • Funding for ecological surveying and education has been allocated to selected recipients (e.g. Coral Watch and Reef Check) to assist with the determination of areas deemed necessary for increased monitoring and protection. • Increased funding has been allocated to continue the fight against Crown of Thorns Starfish in high tourist usage reefs. • Extensive scientific research is being undertaken globally to determine new ways to reduce the impact of global warming and climate change. • Since 2009, government and landholders have focussed on improving the quality of water that runs off land.
<p>Reflection on measures implemented and/or discussed</p> <p>The increased length of tenure through extended permits has been successful in tour operators reducing their impacts on the GBR.</p> <p>The implementation of policies and procedures by GBRMPA has been the biggest contributor in the minimisation of negative impacts by tourism. Had these not been implemented when they were, the impact of tourism operators could have been irreparable.</p> <p>Changes are gradually occurring in all industries related to the sustainability of the GBR.</p> <p>Change in government is seen to be one of the main barriers to success in the protection of the GBR.</p> <p>According to GBRMPA there is evidence that when there are concerted efforts to address damaging practices, impacts can be halted and reversed.</p>
<p>New innovative solutions</p> <p>Scientific research⁶ is currently being undertaken to compare the DNA of coral in the Red Sea compared to species living on the GBR. This study will show which species of coral are more resilient to climate change and those that are more vulnerable to help focus conservation efforts.</p>

⁴ <http://www.sbs.com.au/ondemand/video/343710275808/whats-the-catch-with-matthew-evans>

⁵ http://www.gbrmpa.gov.au/__data/assets/pdf_file/0015/3390/GBRMPA-zoning-plan-2003.pdf

⁶ <http://www.abc.net.au/news/2012-11-08/researchers-compare-red-sea-and-barrier-reef-coral/4360242>

<p>Outlook</p> <p><i>How will tourism on the site develop in future? What are the expected changes?</i></p>
<p>Important future trends</p> <p>An increase in population globally has a direct link to continued global warming. People's awareness of the potential effects of climate change is increasing their concern about future ecosystems. Due to the lag effect of changes already made, it is essential that education and awareness continues in order to see long term changes to factors affecting the GBR.</p>
<p>Prospects for tourism development</p> <p>Tourism development in the current major gateways to the GBR may not increase due to the more affected areas surrounding these gateways.</p> <p>The Southern GBR has great potential for careful development to continue tourist access to parts of the GBR in the future. Careful planning will need to take place in order to not negatively impact these areas to avoid experiencing similar issues as in the northern areas of the GBR.</p>
<p>Expected changes?</p> <p>Having all operators become eco-certified will create consistency amongst all operators' use of the GBR. Encouraging tourists to choose only eco-certified operations will contribute to consumer demand for a standard of operation that contributes to the sustainability of tourism on the GBR.</p>
<p>Further remarks</p> <p>GBR Outlook Report 2014⁷</p>

<p>Conclusion</p> <p><i>What are the central conclusions that can be drawn?</i></p>
<p>General conclusions</p>
<p>What makes this case special?</p> <p>The case of GBR is special as Tourism is not the major cause of the decline in this valuable resource. Tourism, in fact is a great positive resource to the sustainability of the GBR as operators access the reef daily and provide live monitoring of the reefs visited in order to ensure a future for their business. As there are many other 'silent' contributors to the impacts of the GBR, encouraging and continuing tourism to the reefs will provide a voice for changes needing to be made in order to sustain not only tourism to the GBR but all the other beneficiaries of a healthy reef ecosystem.</p>
<p>How do the framework conditions affect impact and management?</p> <p>Zoning, monitoring and evaluation are essential aspects of the reduction of negative impacts by all users of the GBR, not just tourism. The external factors leading to global warming and poor water quality that affect the health of the GBR affect the management of the area as some areas badly damaged due to these factors are no longer usable by the tourism industry.</p>
<p>Why are the measures implemented successful/ not successful?</p> <p>From the tourism industry perspective, current measures are successful due to strict monitoring and evaluation of tourism practices. The implementation of the GBRMPA High Standard Operator Program in order to gain the 15 year permit has also contributor to continued sea-stewardship by operators to assist in the sustainability of tourism on the GBR.</p>
<p>What are the main barriers that hamper a sustainable development in the case?</p> <p>The delayed introduction of restrictions involving other industries contributing to global warming and poor water quality could be considered the main barriers that hamper sustainable development of tourism on the GBR.</p>
<p>Which measures seem to be the most promising?</p> <p>Current zoning for all uses of the GBR; increased introduction of policies and procedures around coastal land use and agricultural run-off; public awareness through interpretation and accurate media reports.</p>
<p>What are the findings/conclusions other destinations could learn from?</p> <p>Recognising potential negative impacts through misuse or overuse of resources early and implementing restrictions of use, is a valuable lesson for other less developed tourism sites especially natural environments.</p>

⁷ <http://www.gbrmpa.gov.au/cdn/2014/GBRMPA-Outlook-Report-IN-BRIEF-2014/>

Creating a zoning plan to place restrictions of certain types of use in zoned areas, early on, will also provide a sustainable destination especially if the area is a multi-use area. This will help manage and protect the values of the location socially, economically and environmentally.

Making the tourism industry stakeholders take responsibility for the protection of natural tourism sites under threat via eco-accreditation schemes and permits that entail strict codes of conduct regarding its usage seems to be a successful protection measure for the GBR. This not only commands compliance but also acts as an educative and informative marketing tool that allows operators to pass on the relevant conservation messages to tourists when visiting the GBR.

References

The following websites were accessed to source the above information:

Australian Bureau of Statistics. "*Tourism Satellite Account 2014-15:Key Figures*".

<http://budget.qld.gov.au/budget-highlights/tourism-major-events-and-the-arts/>

<http://www.abc.net.au/news/2012-11-08/researchers-compare-red-sea-and-barrier-reef-coral/4360242>

<http://www.abc.net.au/news/2015-09-02/reef-program-awards/6743482>

<http://www.dilgp.qld.gov.au/resources/plan/far-north-queensland/background/tourism-report.pdf>

<http://www.environment.gov.au/topics/marine/marine-reserves>

<http://www.gbrmpa.gov.au/about-us/legislation-regulations-and-policies>

<http://www.gbrmpa.gov.au/cdn/2014/GBRMPA-Outlook-Report-IN-BRIEF-2014/>

<http://www.gbrmpa.gov.au/managing-the-reef/how-the-reefs-managed/water-quality-in-the-great-barrier-reef>

<http://www.gbrmpa.gov.au/zoning-permits-and-plans/environmental-management-charge>

http://www.tourism.australia.com/documents/Statistics/ABSarrivals_September_2016.pdf

<https://cdn-teq.queensland.com/~media/234fe2d7d91e4918b9cb9d27e7b6bb06.ashx?la=en-au&vs=1&d=20140509T084806>

<https://www.business.qld.gov.au/invest/investing-queenslands-industries/tourism-investment/market-profile>

https://www.destq.com.au/__data/assets/pdf_file/0020/116552/tourism-outlook-2020-report.pdf

<https://www.environment.gov.au/heritage/places/world/gbr>

<https://www.environment.gov.au/marine/gbr/publications/what-australia-is-doing>

https://www.tripadvisor.com.au/Attractions-g255069-Activities-c49-Cairns_Cairns_Region_Queensland.html

https://www.tripadvisor.com.au/Attractions-g255069-Activities-c49-Cairns_Cairns_Region_Queensland.html

Bibliography

Piggott-McKellar, A.E., & McNamara, K.E. (2016) Last chance tourism and the Great Barrier Reef, *Journal of Sustainable Tourism*, DOI: 10.1080/09669582.2016.1213849

3.5. Juist (Germany)

Harz University of Applied Sciences, Germany

Prof. Dr. Louisa Klemmer

Prof. Dr. Sven Groß

The authors would like to express their gratitude to their graduate student Ms Lena Rautenberg for her support.

In response to the various negative tourism impacts experienced by the community of Juist a new long-term vision for the island was developed based on sustainable tourism development. Juist aims to become the first climate-neutral island of Germany by 2030 and this vision is shared by all stakeholders including the municipality, residents and even many of the guests.

General information	
Title / Name of the site/destination	North Sea island of Juist
Region, country	East Friesland, Germany
Area size (km²)	16.43 km ²
Geographic coordinates	Degree of longitude: 7.008163 Degree of latitude: 53.681385
Population and scope (if inhabited)	1,710 inhabitants in 2015 Source: Kurverwaltung Juist (2016a). Nachhaltigkeitsbericht 2015.
Short description of the case	
As an island, Juist has major environmental problems due to rising sea levels and increasing storm surges. In addition, social problems such as labour shortages due to demographic changes are issues Juist currently has to deal with. Another challenge is the high seasonality and the strong dependence on the tourism sector. Due to the climate change and the increasing environmental pollution, Juist decided to become a climate-neutral island by 2030. Source: Kurverwaltung Juist (2016a). Nachhaltigkeitsbericht 2015.	
Further remarks	
Juist is just one of seven East Friesland Islands, but with 17 km length the longest one. The other islands are: Borkum, Norderney, Langeoog, Wangerooge, Baltrum, and Spiekeroog.	

Tourism development in the country of the case study
Short description of the importance of tourism in the country
31 % of the German tourists stay in Germany for their holidays Source: Forschungsgemeinschaft Urlaub und Reisen e.V. (2015). <i>Die Reiseanalyse 2015</i> , Hamburg.
The federal state with the most overnight stays is Bavaria. Source: Forschungsgemeinschaft Urlaub und Reisen e.V. (2015). <i>Die Reiseanalyse 2015</i> , Hamburg.
The tourism intensity of Germany was 5,372 in 2015. Source: Statistisches Bundesamt (2016a). <i>Tourismus in Zahlen</i> . Retrieved from https://www.destatis.de/DE/ZahlenFakten/Wirtschaftsbereiche/BinnenhandelGastgewerbeTourismus/Tourismus/Tourismus.html
In addition, Germany is in third place of the Travel & Tourism Competitiveness Index 2015 which compares 141 countries. Health and hygiene, safety, cultural resources and the infrastructure are the best-ranked aspects Source: World Economic Forum (2015). <i>The Travel and Tourism Competitiveness Report 2015</i> . Retrieved from http://www3.weforum.org/docs/TT15/WEF_Global_Travel&Tourism_Report_2015.pdf
Arrivals, Overnight stays (year)
Arrivals in 2015: 166.8 Mio. (+3,7 % to 2014)
<ul style="list-style-type: none"> • International tourist arrivals in 2015: 35.0 Mio. • National tourist arrivals in 2015: 131.8 Mio.

<p>Overnight stays in 2015: 436.2 Mio. (+ 2,9 % to 2014) Source: Statistisches Bundesamt (2016a). <i>Tourismus in Zahlen</i>. Retrieved from https://www.destatis.de/DE/ZahlenFakten/Wirtschaftsbereiche/BinnenhandelGastgewerbeTourismus/Tourismus/Tourismus.html</p>
<p>GDP 3,026.6 Billion € in 2015 Source: Statistisches Bundesamt (2016b). <i>Bruttoinlandsprodukt 2015 für Deutschland</i>. Retrieved from https://www.destatis.de/DE/PresseService/Presse/Pressekonferenzen/2016/BIP2015/Pressebrochure_BIP2015.pdf?__blob=publicationFile.</p>
<p>Tourism value added (% of GDP) 9.7 % of GDP in 2015 Source: Statistisches Bundesamt (2016b). <i>Bruttoinlandsprodukt 2015 für Deutschland</i>. Retrieved from https://www.destatis.de/DE/PresseService/Presse/Pressekonferenzen/2016/BIP2015/Pressebrochure_BIP2015.pdf?__blob=publicationFile.</p>
<p>Employment in tourism (%) 2.9 Mio. employments in tourism → 7 % Source: Bundesministerium für Wirtschaft und Technologie (2012). <i>Wirtschaftsfaktor Tourismus Deutschland</i>. Retrieved from https://www.bmwi.de/BMWi/Redaktion/PDF/Publikationen/wirtschaftsfaktor-tourismus-deutschland,property=pdf,bereich=bmwi2012,sprache=de,rwb=true.pdf.</p>

<p>Tourism supply of the site</p>
<p>Short description of tourism on the site Tourism is the main source of income for Juist's economy. The island especially attracts families and couples and offers not only health and wellness tourism but also many sport, nature and beach activities. The island has a pleasant climate due to the fresh and salty sea air and is a North Sea health resort. The island provides several hotels and a youth hostel. Moreover, many of the residents on the island offer rooms to tourists as a second income. The dunes and the beach are eroded by the sea in the western part of the island. A naturalistic feature of Juist is the natural monument "Hammersee" which is the largest freshwater lake on a North Sea Island. Furthermore, Juist has several tourist attractions like a National Park-House, a Coastal Museum, a seawater pool complex and the historical beach hotel "Kurhaus Juist". Source: Kurverwaltung Juist (2016b). <i>Inselurlaub</i>. Retrieved from http://www.juist.de/iniselurlaub.html</p>
<p>Access (how to get there?) By ferry (90 minutes) from Norddeich an der Mole to Juist (Reederei Frisia) By plane (5 minutes) from Norddeich an der Mole to Juist (FLN FRISIA-Luftverkehr GmbH Norddeich) Source: Kurverwaltung Juist (2016c). <i>Anreise mit dem Auto, der Bahn, dem Flugzeug und der Fähre zur Nordseeinsel Juist</i>. Retrieved from http://www.juist.de/zauberinsel/anreise.html</p>
<p>Main attractions</p> <ul style="list-style-type: none"> • Mudflat hikes • Carriage rides • Sightseeing flights • Water tower → landmark of the island • National Park-House • Freshwater lake "Hammersee" <p>Source: Kurverwaltung Juist (2016d). <i>Reiseführer und historisches auf Juist</i>. Retrieved from http://www.juist.de/zauberinsel/reisefuehrer.html</p>
<p>Accommodation offer (number, type, quality) Number of accommodations in 2015: 209 Number of guest beds in 2015: 6,003 Source: Kurverwaltung Juist (2016a). <i>Nachhaltigkeitsbericht 2015</i>. Types:</p> <ul style="list-style-type: none"> • Hotels • Cottages • Apartments • Pensions • Youth Hostel • Only 16 accommodations have a DEHOGA (Deutscher Hotel- und Gaststaettenverband) (for hotels) or DTV (for cottages & apartments) star classification • Average occupancy rate in 2015: 53, 94% <p>Source: Kurverwaltung Juist (2016a). <i>Nachhaltigkeitsbericht 2015</i>.</p>

<p>Restaurants (number, type, quality)</p> <p>31 restaurants and cafés</p> <ul style="list-style-type: none"> • One slow-food restaurant • Local fish restaurants • Cafés/ Bistros • Bars <p>Source: Kurverwaltung Juist (2016a). Nachhaltigkeitsbericht 2015.</p>
<p>Other tourism service providers</p> <ul style="list-style-type: none"> • Bike rental (3 providers on the island) • Wellness/Thalasso providers • Nature Park-House (guided mudflat hikes) • Coastal museum • Seawater pool complex
<p>Stage of the tourism life cycle</p> <p>Consolidation stage → The number of visitors remains relatively stable during the last years. Compared to 2014, the number of visitors in 2015 decreased slightly, but increased in the previous years (see: Development of tourist numbers (last 10 years)). 70 % of the tourists are loyal guests who come every year, so that the island already entered the consolidation stage.</p> <p>Source: Kurverwaltung Juist (2016a). Nachhaltigkeitsbericht 2015.</p>

Tourism demand at the site

<p>Short description of tourism demand</p> <p>70 % of Juist’s tourists are loyal guests. They are often in the third or fourth generation to frequent the island. The main target groups are Best Agers during the whole year and families with children who travel to Juist during the school holidays. Other target groups are couples without children and tourists who are interested in the Wadden Sea Nature Park and sustainable tourism.</p> <p>Source: Kurverwaltung Juist (2016a). Nachhaltigkeitsbericht 2015.</p>
--

<p>Volume of tourists</p> <p>129,184 tourist arrivals in 2015 983,971 overnight stays in 2015 25.000 day visits in 2015 (estimated value) → There is just one ferry to and from Juist per day and for that reason the day tourists are not that important for the island</p> <p>Kurverwaltung Juist (2016a): Nachhaltigkeitsbericht 2015</p>

<p>Development of tourist numbers</p> <p>Tourist number 2015: 129.184 Tourist number 2014: 129.681 Tourist number 2013: 124.176 Tourist number 2012: 110.791 Tourist number 2009: 110.545 (+ 9.5 % since 2004)</p> <p>Source: Kurverwaltung Juist (2016a). Nachhaltigkeitsbericht 2015.</p>
--

<p>Length of stay</p>	<p>7.62 days</p> <p>Source: Kurverwaltung Juist (2016a). Nachhaltigkeitsbericht 2015.</p>
------------------------------	---

<p>Origin countries of tourists</p> <p>Germany</p> <ol style="list-style-type: none"> 1. North Rhine-Westphalia 2. Lower Saxony & Bremen 3. Bavaria (especially Munich & Nuremberg) <p>Switzerland</p> <p>Source: Vodde, T.</p>

<p>Tourism image</p>	<p>Sustainable and nature-based tourism</p>
-----------------------------	---

<p>Motives / target groups</p> <p>Best Agers Families with children (during school holidays) Couples without children</p>
--

<p>Interested people in sustainability Nature interested tourists Health tourism</p> <p>Source: Kurverwaltung Juist (2016a). Nachhaltigkeitsbericht 2015.</p>
<p>Visitors' activities, activity patterns</p> <p>Mudflat hikes Carriage rides Wellness treatments (e.g. Thalasso) Sport activities (biking, walking, water sport activities, etc.)</p> <p>Source: Kurverwaltung Juist (2016e). <i>Sport und Aktivitäten auf der Nordseeinsel Juist</i>. Retrieved from http://www.juist.de/inselurlaub/sport-aktivitaeten.html</p>
<p>Seasonality (peaks)</p> <p>High season: Summer (June until mid September) Seasonal fluctuations → Many seasonal workers (26 % of Juist's employees in 2015)</p> <p>Source: Kurverwaltung Juist (2016a). Nachhaltigkeitsbericht 2015.</p>
<p>Visitors' opinions, attitude and behaviour, expectations and preferences, satisfaction</p> <p>For the loyal guests Juist is like a second home and for that reason they like to participate in developing the island's future. Many of them also want to achieve the goal to become a climate-neutral island.</p> <p>Source: Kurverwaltung Juist (2016a). Nachhaltigkeitsbericht 2015.</p>
<p>Additional data</p> <p>Rating portal Holidaycheck(93 assessments): 100 % recommendation rate Overall assessment: 5.9 of 6.0</p> <p>Source: HolidayCheck Group AG (2016). <i>Insel Juist</i>. Retrieved from https://www.holidaycheck.de/pi/inssel-juist/3a273b72-5301-347a-a27a-c2a75b428128</p>

<p>Framework conditions <i>What are the framework conditions that might influence the impact and/or the management of the site?</i></p>
<p>History and background</p> <p>23-79 AD: The chain of the East and West Frisian Islands arose 1398: Juist has been documentary mentioned for the first time 1687: The sea penetrated further south, houses had to be relocated 1840: First foundation of the seaside health resort Juist 1858: The seaside resort had to close because there were too few guests 1884: 700 bathers on the island 1900: Juist had 4,534 visitors and planed more hotel constructions 1902: The island got his first mayor and Spa director 1911-1914: First shipping line from Emden to Juist 1917: First connection to the island through air → Airship "Zeppelin 16" 1939-1945: The war events paralyzed tourism significantly From 1946: Tourism develops continuously</p> <p>Source: Kurverwaltung Juist (2016f). <i>Historisches – Aus der Gesichte der Insel Juist bis zum Jahr 1999</i>. Retrieved from http://www.juist.de/zauberinsel/reisefuehrer/historisches.html</p>
<p>Political situation</p> <p>Juist belongs politically to the district Aurich which is part of the federal state Lower Saxony. The island is an independent municipality and the current mayor is Dietmar Patron.</p> <p>The municipal council</p> <p>The municipal council is the main authority of Juist. Besides the major, the council has 10 more members who are citizens of Juist's municipality and who have been elected to council members.</p> <p>Source: Kurverwaltung Juist (2016g). <i>Allgemeine Infos über die Insel</i>. Retrieved from http://www.juist.de/vermieterseite/leitbild-neue-mitarbeiter/allgemein.html Inselgemeinde Juist (2016a). <i>Gemeinderat</i>. Retrieved from http://gemeinde-juist.de/gemeinderat/</p>
<p>Legal issues</p> <p>Juist is a car-free island →The transportation of goods and people is done by coaches →Only the doctors, firefighters and the Red Cross have the permission to drive a motor vehicle</p> <p>Source: Kurverwaltung Juist (2016h). <i>Auto-Freies Juist</i>. Retrieved from http://www.juist.de/zauberinsel/reisefuehrer/hafen/auto-freies-juist.html</p> <p>The Wadden Sea is part of the UNESCO World Natural Heritage so that the island has several obligations to maintain the Nature Park. For example, they have to work out a protection and conservation plan</p>

Source: Kurverwaltung Juist (2016i): *Juist im UNESCO Weltnaturerbe Wattenmeer*. Retrieved from <http://www.juist.de/inselurlaub/natur-umwelt/unesco-weltnaturerbe-wattenmeer/unesco-weltnaturerbe-wattenmeer.html>

Moreover, the nature conservation is regulated by the National Park Act

Kurverwaltung Juist (2016a): Nachhaltigkeitsbericht 2015

Organisation

- Die Nordsee GmbH (marketing organization for the North Sea → Juist is part of this organization)
- Nationalparkverwaltung Niedersaechsisches Wattenmeer (→ National Park-House Juist)
- Die Inselgemeinde Juist (municipality and tourism management organization of Juist)

The tourism management organization (Kurverwaltung) is an owner-operated company of the municipality Juist. The organization offers important infrastructure such as the seawater pool complex, the Thalasso and Wellness area, the Haus des Kurgastes, museums and others. Moreover, the tourism management organization is responsible for different services (events and sport activities, room rental, beach cleaning, animation for the children, etc.). All tourism activities are planned and organized by the tourism management organization (marketing, tourist information, etc.).

- Current mayor and tourism director: Dietmar Patron
- Marketing, Sustainability and Event Manager: Thomas Vodde

Sustainability Board → The sustainability board consists of 8 members:

- Representative of the renter council
- Representative of the retail trade
- Representative of the DEHOGA
- Representative of the AG Reederei Norden Frisa
- Representative of the National Park-House
- Representative of the Churches
- Climate Protection Representative
- Sustainability Manager Thomas Vodde

→ The sustainability board meets at least twice a year

Source: Kurverwaltung Juist (2016a). Nachhaltigkeitsbericht 2015.

Physical setting

Juist is a car-free island

→ All transportations of goods and people are done by coaches

→ The waste disposal is also done by coaches

→ Only the doctors, firefighters and the Red Cross have the permission to drive a motor vehicle

Source: Kurverwaltung Juist (2016j). *Zauberinsel*. Retrieved from <http://www.juist.de/zauberinsel/reisefuehrer/hafen/auto-freies-juist.html>

The island offers:

- A ferry port
- An airfield
- A waste disposal plant
- Several tourist accommodations
- A tourist information
- Shops & super markets
- A school & kindergarten
- Playgrounds
- Churches
- Waterworks
- Sewage works

Source: Inselgemeinde Juist (2016b). *Öffentliche Einrichtungen*. Retrieved from <http://gemeinde-juist.de/oeffentliche-einrichtungen/>

Economic situation

- Tourism is the main source of income for the island
- Juist does not have any other economic sector
- The island charges a visitor's tax (between 2.20 – 3.50 € per night)
- Problem: many seasonal workers (26 %)

Kurverwaltung Juist:

- Total turnover in 2014 : 4,100,067.00
- Total turnover in 2013 : 3,883,000.00

<ul style="list-style-type: none"> • Return on sales : 13.31 % <p>Source: Kurverwaltung Juist (2016a). Nachhaltigkeitsbericht 2015.</p>
<p>Social/cultural situation</p> <p>Juist organizes different festivals & events:</p> <ul style="list-style-type: none"> • Music festival • Thriller festival • Classical music days • Mai festival • Orchestra nights • The home club, the theater group, the folk dance group and other clubs organize special nights to inform the tourists about the islands culture in an entertaining way • The theater group performs theater plays in Low German <p>Moreover, Juist offers:</p> <ul style="list-style-type: none"> • The cinema "Filmtheater mitten im Meer" • Temporary exhibitions in the „Haus des Kurgastes“ • Several artists exhibit their artworks in different hotels (Haus Annatur, Hotel Atlantic, Galerie am Meer, Gaestehaus Sohn, ...) <p>Source: Kurverwaltung Juist (2016k). <i>Kultur und Veranstaltungen</i>. Retrieved from http://www.juist.de/vermieterseite/leitbild-neue-mitarbeiter/kultur.html</p>
<p>Environmental situation</p> <p>The island is part of the Wadden Sea National Park</p> <ul style="list-style-type: none"> • 17 km length of beach • Mud flats • Dunes • Salt Marsh <p>Hammersee: natural monument Die Bill: sandbank (important for many migratory birds) Der Kalfamer: rest area of the National Park (breeding area for birds) → The threat to nature and biodiversity posed by climate change and pollution of the natural environment</p> <p>Source: Nationalpark Niedersächsisches Wattenmeer (2010). <i>Nationalpark-Haus Juist</i>. Retrieved from http://www.nationalparkhaus-wattenmeer.de/juist</p>
<p>Bottlenecks and constraints</p> <p>Der Kalfamer: In summer, entering this area is only permitted with a guide of the National Park To protect the nature, tourists are not permitted to access the dunes or the rest areas of the National Park</p> <p>The island has not enough accommodation capacities to organize big events (like Sylt f.ex.) Transport capacity limited: the ferry to Juist just arrives once or twice a day because of the tides</p> <p>Source: Kurverwaltung Juist (2016a). Nachhaltigkeitsbericht 2015.</p>

<p>Challenges / Impacts</p> <p><i>What are the most important challenges resulting from high tourism intensity on the site?</i></p>
<p>Short description of main challenges</p> <p>As an island, Juist has huge problems due to rising sea levels and increasing storm surges. In addition, the demographic change and the skills shortage are also issues Juist has to deal with. Another challenge is the high seasonality and the strong dependence on the tourism sector.</p> <p>Source: Kurverwaltung Juist (2016a). Nachhaltigkeitsbericht 2015.</p>
<p>Tourism intensity</p> <p>Tourism intensity in 2015: 575,421.63 (overnight stays per 1,000 inhabitants)</p> <p>Source: Kurverwaltung Juist (2016a). Nachhaltigkeitsbericht 2015.</p>
<p>Influencing factors</p> <p>Seasonality – most of the tourists travel to Juist during the summer time so that there are too many tourists in a too short time</p> <p>Source: Kurverwaltung Juist (2016a). Nachhaltigkeitsbericht 2015.</p>

Classification of carrying capacity affected

- Ecological carrying capacity: 80 % of the island is nature reserve (tourists who do not abide by the rules, harm the environment)
- Social carrying capacity: the tourism intensity is very high → 57,542.16 in 2015
- Economic carrying capacity: tourism is almost the only source of income of the island → depend on tourism

Source: Kurverwaltung Juist (2016a). Nachhaltigkeitsbericht 2015.

Type of capacity affected

During the summer time the capacity is exceeded

→ Growth in tourism is only possible in the off-season

Source: Kurverwaltung Juist (2016a). Nachhaltigkeitsbericht 2015.

Physical impacts

Due to the regulations of the Wadden Sea National Park, the possible space for new constructions is hardly reduced – especially in comparison to other destinations (at the mainland)

→ For that reason, the island does not have a various offer of (new/ modern) accommodations → the capacity of guests is limited

Old buildings are demolished but the new constructions do not reflect the character and charm of the island.

The infrastructure has developed positively

→ The residents profit from the infrastructure and institutions which were mainly constructed for the tourists

Source: Kurverwaltung Juist (2016a). Nachhaltigkeitsbericht 2015.

Economic impacts

- Tourism is the only industry on the island → the population depend on tourism
- 92 % of the employees are working (directly or indirectly) in the tourism sector

Source: Kurverwaltung Juist (2016a). Nachhaltigkeitsbericht 2015.

Social impacts on residents

- Too many seasonal workers (26 %)
- Many people just have their secondary residence on the island so that there is no social fabric existing → the residents are complaining about too many secondary residences
- Current problem: Investors buy old buildings for prices that are too high for the residents
 - They demolish and rebuild the buildings
 - They often use the new buildings only for secondary residences
 - The new constructions destroy the original character of the island
 - The good quality of life suffers
- Many young people leave the island

Source: Seiz, A. (2010). *Touristisches Leitbild "Zauberinsel Juist Töwerland"*. Retrieved from http://www.juist.de/fileadmin/Mediendatenbank/PDF/LB_Juist_Protokoll_Zukunftsklausur.pdf

- But in general, the tourism has influenced the quality of life of the residents positively (events, seawater adventure pool, Wellness treatments, cinema, gastronomy, shops, etc.) → They profit from the tourism infrastructure

Social impacts on tourists

4 different guest surveys of the past (scale: 1= very good 6= very bad):

- University Bielefeld: satisfaction score 2.3 (376 respondents)
- University Lüneburg in 2012: satisfaction score 1.3 (1,415 respondents)
- Online survey by Prof. Dr. Stefan Gössling and Sören Haxsen: satisfaction score 1.3 (1,006 respondents)
- REK Wattenmeer-Achter: satisfaction score 1.9 (1,325 respondents)

Source: Kurverwaltung Juist (2016a). Nachhaltigkeitsbericht 2015.

→To improve the data situation significantly, Juist takes part in the “comparative guest monitor” (the survey will be completed end of 2016)

Source: Kurverwaltung Juist (2016). Nachhaltigkeitsbericht 2015.

The “comparative guest monitor” (*vergleichender Gaestemonitor*) is a market research offer of the company Benchmark Services to analyze the guest satisfaction (Implementation of all process steps and methods according to DIN ISO 20252, the international standard for market and social research)

Source: Benchmark Services (2016). *Vergleichender Gästemonitor*. Retrieved from <https://www.gaeste-zufriedenheit.de/>

Environmental impacts

- Climate change →rising sea levels (huge problem for an island)
- The arrival and departure of the guests is Juist’s biggest source of CO² emission

Energy consumption in 2010:

Inhabitants 2015	1,710
Overall power consumption - electricity in 2010	13,157,000 kWh
Overall power consumption - heating energy in 2010	42,368,000 kWh
CO ₂ -emission 2010	12,954,000 t

Source: Kurverwaltung Juist (2016a). Nachhaltigkeitsbericht 2015.

Energy consumption of the tourists in 2015:

Average power consumption per guest in kWh in 2015	62,18
Average power consumption per overnight stay in kWh in 2015	8,37
Average heating energy per guest in kWh in 2015	207,95
Average heating energy in kWh per overnight night in 2015	27,98
Average CO ² emissions per guest in kWh in 2015	63,58
Average CO ² emissions per overnight stay in kWh in 2015	8,56

Source: Kurverwaltung Juist (2016a). Nachhaltigkeitsbericht 2015.

Problem: Because of its location in the Wadden Sea National Park, it is not allowed to build wind turbines

Water consumption of the tourists in 2014:

Average water consumption per guest in liters in 2014	1,409,67 l
Average water consumption per overnight stay in liters in 2014	189,69 l

Source: Kurverwaltung Juist (2016a). Nachhaltigkeitsbericht 2015.

Development of impacts/ Changes over time

Environmental impacts:

- During the last years, Juist won several sustainability awards and received different environmental certifications. Since 2010, the island pursues the goal to become a climate-neutral island. For that reason, Juist sensitized not only the residents but also the guests. The CO² emission, the water and energy consumptions have already decreased.

Physical impacts:

- In recent years, many new houses have been built. Consequently, the island’s character is changing. The investors just think about the touristic marketing but the residents are unsatisfied with this new development.

Source: Kurverwaltung Juist (2016a). Nachhaltigkeitsbericht 2015.

Summary: Beneficiaries and sufferers from tourism in the case study

Beneficiaries:

- The residents profit from the tourism infrastructure
- The residents depend on tourism because it is their only source of income

- The tourists are satisfied and they enjoy f.ex. the silence and nature → deceleration

Sufferers:

- The nature/ environment suffers because of too many tourists during the high season (changes are proceeding)
- The residents suffer because new constructions destroy the island's character
- The residents suffer because of too many secondary residences

Measures / Responses

What are the solutions that have been or are being discussed and/or implemented to reduce conflict between competing uses and to manage tourist masses? How can the challenges successfully be faced, managed and/or avoided?

General measures**Social measures**

Participation of the local population

- In 2010, the tourism director developed together with 70 residents a vision for the future tourism development of Juist
- Several workshops and online-tools for the residents

Source: Kurverwaltung Juist (2016a). Nachhaltigkeitsbericht 2015.

Participation of the tourists

- Since 2014, a guest-Parliament takes place annually (for 3 days)
- Juist wants to improve the destination and product development from an external point of view to guarantee a high guest satisfaction level
- With the guest-Parliament the island wants to create an USP
- Number of members: 10
- The guest-Parliament has a consultative role and can make suggestions (but no decisions)

Working conditions for employees

- The tourism management organization has developed a sustainable concept for business ethics. It includes: equality, integration, fair wages, responsibility

Source: Kurverwaltung Juist (2014). *Gäste-Parlament*. Retrieved from http://www.juist.de/fileadmin/Mediendatenbank/PDF/14Gaesteparlament_Juist.pdf

Economic measures

- The municipality and tourism management organization Juist has used regional and ecologically fair products and services worth 694.569,27 € in 2015. These are 59 % of all related services and products.
- 206 rental businesses are listed in the Juist catalogue 2016. 99 of these companies participate in the project "Climate island Juist" by submitting a current CO₂-footprint. These are 48% of the rental companies. Moreover, the catering trade list has 31 entries. 14 of them participate in the project "Climate island Juist", as well (these are 45%)
 - These partner companies use on average 67,7 % products which are regional and ecologically fair produced
 - To motivate more companies on the island, the partner companies are specially mentioned on the official website of Juist
 - In 2017, the sustainability manager wants to organize a weekly market with regional, organic and fair trade products in cooperation with the Federal Ministry of Agriculture to strengthen awareness
- The tourism management organization holds talks with the hospitality and retail sector in which they learn about sustainability issues such as regional products or a plastic free island

- The island wants to attract more tourists in the off-season to improve the economic situation
 - Motivation: nature, sustainability
 - Age: 50+
- With the concept, the municipality wants to change seasonal jobs to all-year jobs

Month	Number of unemployed persons
January 2015	195
February 2015	188
March 2015	97
April 2015	24
Mai 2015	16
June 2015	13
July 2015	10
August 2015	13
September 2015	19
October 2015	21
November 2015	117
December 2015	179
January 2016	212

Source: Kurverwaltung Juist (2016a). Nachhaltigkeitsbericht 2015.

Environmental measures

The main target of Juist is to become a climate-neutral island by 2030 therefore they have initiated the project "Climate island Juist"

How they want to achieve their goal:

Energy consumption:

- In 2010, Juist and the electricity provider EWE organized 15 consultation days in which companies and residents learned how to reduce their energy consumption
 - Juist wanted to raise the awareness of issues like energy saving and climate protection
 - EWE has shown first possibilities of saving energy
- The tourist information is currently carrying out their CO2 footprint in cooperation with Viabono. (Viabono is a certification for environmental- and climate-friendly tourism). The results are not available yet but they will use the information to develop suggestions for improvement
- Juist and the energy provider have also created the folder "Save your energy for the best moments. Practical energy saving tips for your holiday at Juist."
 - That folder is distributed to all guests for free
- Juist also informs children about the climate change and organized a project day to explain them how to reduce their energy consumption in an easy way
- The average percentage of renewable energy used by the accommodations is in the overall calculation of the island at 29.61% (only the partner companies: 24.9%)
 - Both values are still in need of improvement according to the sustainability manager of Juist

Water consumption:

- Outdated toilets are continuously replaced by water-saving toilets
- At the weekly guest greetings the tourism management organization informs their guests about the water supply on the island of Juist and ask them to save water during their stay

Waste disposal:

- The waste on the island is separated in paper, plastic, recycled glass, organic and residual waste
- With the project "Plastic Free Juist", the island aims to reduce the plastic waste at the beach. For this purpose Juist has put up eight grid boxes at the beach for waste disposal.

CO²-emission:

- Juist asks their guests to arrive climate-neutral by train
→ In case of package tour bookings Juist offers directly a climate-neutral train ticket

Recycling:

- The Juist catalogue and almost all brochures are made of recycled paper

Juist carries out the project “Energiewende Juist” (*energy revolution Juist*) in cooperation with EWE.

This project is based on the theory of the “Third Industrial Revolution” by Jeremy Rifkin. It is based on 5 pillars:

- The switch to renewable energy
- Conservation of the building stock in micro-power plants → This should be done in a first step, especially for buildings of the municipality, but also in commercial buildings and private homes
- Examination of energy storage systems for storing the irregular renewable energy
- Use of internet technology (to transform the power grid into an energy-sharing network)
- Use of electric and fuel cell vehicles → not important for Juist as a car-free island

Source: Kurverwaltung Juist (2016a). Nachhaltigkeitsbericht 2015.

Specific measures**Expand and improve the capacities and infrastructure**

Measures that are being discussed but not implemented yet:

- According to experts, Juist has to focus on sustainable, climate-neutral multifunctional buildings. These are buildings which can be used by both residents and tourists (as identification places and meeting-points). Moreover, these buildings should have a climate-neutral construction → Net Zero Emission Buildings
- In Addition, a sustainable decontamination of existing buildings is needed

→ But for these projects the financial resources are missing

→ The municipality has to develop a finance plan or has to apply for funding

Source: Kreilkamp E., Gössling, S. (2016). *Abschlussbericht – Klimaneutrale Insel Juist*. Retrieved from <http://www.futouris.org/projekte/klimainsel-juist/>

Accessibility

- In the area of accessibility Juist still has a high need for action. The rental companies on Juist are usually older buildings and reflect the insular conditions. Accessibility did not matter at the construction time of the buildings. Today it is very difficult to make these buildings accessible. The hotels are currently working on that problem. The new buildings, such as the Hotel Atlantic, consider that aspect from the beginning of the construction.
- The municipality Juist tries to improve the accessibility, as well. In 2015, more than 20 curb cuts were carried out in cooperation with the Juist Foundation. This is also a result of the guest-Parliament.

Source: Kurverwaltung Juist (2016a). Nachhaltigkeitsbericht 2015.

Disperse tourist attractions

Target until 2020: 6.400 guest beds (→ current number: 6.003)

Source: Kurverwaltung Juist (2016a). Nachhaltigkeitsbericht 2015.

Restrictions

Access restriction:

- The nature conservation on the island is regulated in the National Park Act. Furthermore, there are various laws, policies, programs and agreements at regional, national and international levels. There are precise rules for the following areas: hiking, cycling and horseback riding, dogs, kite flying, kite surfing and water sports. Source: Kurverwaltung Juist (2016a). Nachhaltigkeitsbericht 2015.

Information and communication

The tourism management organization informs their guests and residents extensively about sustainability and sustainable products/ services:

- The entries about sustainable accommodations, products and activities are especially highlighted in the Juist catalogue and on the homepage

- The catalogue has a special brochure which exclusively informs about all sustainable activities of the island
- During the weekly guest welcome the tourist information also informs their guests about all sustainable and climate-friendly activities and ask them to support the sustainable strategy (for example by arriving by train)
- Before events/shows in the “Haus des Kurgastes” start, the tourist information presents Juist’s sustainability activities via big screens
- The tourism management organization has initiated the new project “Juist Klimaretter” (Juist climate rescuer) to make all information about the sustainability concept available for guests and residents at any time → Therefore Juist has provided a large screen at a central place on the island which presents all sustainable news and activities

Source: Kurverwaltung Juist (2016a). Nachhaltigkeitsbericht 2015.

Optimize temporal distribution of tourists

The municipality and tourism organization wants to extend the visit season by attracting sustainable interested travellers

- They want to attract tourists who travel several times a year and who may spend their second or third vacation of the year on Juist
→ The second or third vacation is often during the off-season so that the island has the chance to extend the season

Optimize spatial distribution of tourists

Visitor management concepts are already precisely regulated. Nevertheless, the municipality and the National Park-House want to optimize the visitor management continuously.

Source: Kurverwaltung Juist (2016a). Nachhaltigkeitsbericht 2015.

Organisational Measures

- 2015: Juist received a Thalasso-certification from the the European Audit Institute Wellness & SPA e.V (Thalasso is the medical use of seawater as a form of therapy)
- 2012: Juist received the Highest Achievement Award from Green Globe (The Green Globe certification is a structured assessment of the sustainability performance of travel and tourism businesses and their supply chain partners)
- 9 partner companies on Juist (mainly accommodations) received the TourCert-certification (an award for sustainability and corporate social responsibility)

→ Juist participates on various sustainability competitions and has often become finalist or winner

Source: Kurverwaltung Juist (2016a). Nachhaltigkeitsbericht 2015.

Reflection on measures implemented and/or discussed

Success

- The project “Climate island Juist” has already received various awards and certifications
- The island could attract new cooperation partners: Island La Gomera, Futouris, EWE, National Park Administration “Niedersaechsisches Wattenmeer”, CIST, etc.
- The involvement of residents and guests has increased
- Through various information sessions for guests and residents, the awareness of sustainability is increasing
- Establishment of a Sustainability Board

Barriers

- For some measures the financial resources are missing (e.g. accessibility)
- Not all accommodations participate in the project “climate island Juist” → The island tries to motivate more companies to join the project
- 80 % of the island is protected area, so that the constructions of new buildings are limited

In this case, short-term success are difficult to measure → it is a long-term process

Source: Kurverwaltung Juist (2016a). Nachhaltigkeitsbericht 2015.

New innovative solutions

Innovation and research

- In the area of research, Juist is well positioned with the application “Climate-Cent” for alternative financing of climate protection projects in tourism. Cooperation partners for that project are the Fraunhofer Institute, the Center for Innovation and Sustainability in Tourism (CIST), and the myclimate gGmbH Germany. Practice partners are the Deutsch Bahn AG, the German Lufthansa AG, the German Tourism Association, the Tourism Region Uckermark and the AG Reederei Norden-Frisia. (Climate-Cent → you pay 1 cent per kilowatt hour for your CO2-footprint to support sustainable and innovative projects)

Source: Kurverwaltung Juist (2016a). Nachhaltigkeitsbericht 2015.

Outlook
How will tourism on the site develop in future? What are the expected changes?

Important future trends

Sustainability is an important trend in tourism. Consequently, more and more tourists are interested in sustainable tourism. Due to many certifications and awards, Juist become more known in the area of sustainable travelling. This is an important step to continue the sustainable project and to achieve their goal to get the first climate-neutral island by 2030 because the support of the tourist is an essential part of the concept.

Prospects for tourism development

To achieve their objective to become a climate-neutral island by 2030, the municipality has developed different future measures and recommendations in 11 fields of actions with different priorities. The concept includes all levels of sustainability (environmental, ecological, social aspects)

Field of action	Priority
Nature / Climate neutrality	A
Communication	B
Improvement of working conditions	B
Guest satisfaction	A
Plastic-free Juist	A
Product development	B
Travel for all	A
Economics	B
Regional, organic and fair trade products and services	B
Employees	A
Certifications	A

Source: Kurverwaltung Juist (2016a). Nachhaltigkeitsbericht 2015.

Expected changes?

The following table shows the expected changes in the next years.

Until when	Target	Measures	Responsible person
2018	Heat energy savings of the seawater pool complex	Improvement of the heat pump system	Building contractor of the municipality, employees of the seawater pool complex, university Kassel (as cooperation partner)
2017	Improved data of the guest satisfaction	Participation in “vergleichender Gaestemonitor” (“comparative guest monitor”)	Thomas Vodde (sustainability manager)
2017	Improved data of the destination marketing und brand strengths	Participation in “Destination Brand 2015” (tourism and destination development study)	Thomas Vodde (sustainability manager) Inspektour

2017	Substitution of plastic bags and cosmetics with microplastics	Realization of the project "plastic-free island"	Thomas Vodde (sustainability manager) Dietmar Patron (major)
2017	Improved information concerning "Travel for all"	Visits to service providers and tourist attractions to record the required data	Thomas Vodde (sustainability manager) Sabrina Rotter (manager tourist information)
2019	Improvement of the financial situation through new financing options, especially for the sustainability projects	Implementation of the project "Climate Cent"	Fraunhofer Institut UMSICHT, CIST, myclimate, municipality, Thomas Vodde
2017	Improvement of regional, organic and fair-trade product offers	Implementation of a weekly market with regional, organic and fair trade products in cooperation with the Federal Ministry of Agriculture	Thomas Vodde (sustainability manager)

Source: Kurverwaltung Juist (2016a). Nachhaltigkeitsbericht 2015.

Conclusion

What are the central conclusions that can be drawn?

General conclusions

In contrast to many other German islands, Juist is one of the first islands which take action against climate change, tourist overuse and other negative impacts of tourism. The overall vision of Juist is also focused on sustainable tourism, which is not only the long-term target of the municipality but also of many residents and guests. Consequently, Juist aims to become the first climate-neutral island of Germany.

What makes this case special?

Juist is a pioneer concerning sustainable tourism development of German islands. Particularly significant is the long-term direction of the project, the collaboration with various partners as well as the participation of the residents and guests.

How do the framework conditions affect impact and management?

Tourism is the only industry of the island, so that the management focuses on this area. However, Juist has noticed that particular islands are affected by climate change. Especially tourism has a negative impact on the environment, so that the framework conditions have a huge influence on management decisions.

Why are the measures implemented successful/ not successful?

According to the sustainability manager Thomas Vodde, the success of the project is currently difficult to measure because of its long-term orientation. The implemented measures are successful because of the willingness of the partner companies, residents and guests. For example: In 2016, Juist organized a kids university for sustainability which was so far the most successful sustainable event for kids on the island.

Source: Vodde, T.

What are the main barriers that hamper a sustainable development in the case?

The main problem is the financial situation of the municipality. The island does not have the financial resources to modernize buildings and to ensure accessibility for everyone. Moreover, there are still service providers that do not participate in the project "climate neutral island" so that there is still a need of action. According to the sustainability manager of Juist the general challenge is to achieve the **climate neutrality** by 2030.

Which measures seem to be the most promising? What are the most important findings for the industry/ for politics?

The energy and water saving measures as well as the waste prevention are not only helpful for the island Juist, but for the whole environment.

In 2016, Juist has finished the data collection for an environmental study (first results will be published in near future). This information is important to take new sustainable and ecological measures.

Source: Vodde, T.

What are the findings/conclusions other destinations could learn from?

The economic sufficiency should not be the sole interest of a destination. The aim is to ensure the satisfaction of the local population and visitors. In addition, the nature is one of the most important components for tourism, so that the natural resources must be protected. The project of the island shows that the tourism industry also has to demonstrate a high degree of responsibility concerning sustainable development. Even small measures such as education and awareness of guests, visitor management and the promotion of regional products, can contribute to sustainable tourism. It is also important to measure the long-term success and not to focus on short-term results.

References

- Benchmark Services (2016). *Vergleichender Gästemonitor*. Retrieved from <https://www.gaeste-zufriedenheit.de/>
- Bundesministerium für Wirtschaft und Technologie (2012). *Wirtschaftsfaktor Tourismus Deutschland*. Retrieved from <https://www.bmwi.de/BMWi/Redaktion/PDF/Publikationen/wirtschaftsfaktor-tourismus-deutschland,property=pdf,bereich=bmwi2012,sprache=de,rwb=true.pdf>
- Forschungsgemeinschaft Urlaub und Reisen e.V. (2015). *Die Reiseanalyse 2015*, Hamburg.
- HolidayCheck Group AG (2016). *Insel Juist*. Retrieved from <https://www.holidaycheck.de/pi/inselfjuist/3a273b72-5301-347a-a27a-c2a75b428128>
- Inselgemeinde Juist (2016a). *Gemeinderat*. Retrieved from <http://gemeinde-juist.de/gemeinderat/>
- Inselgemeinde Juist (2016b). *Öffentliche Einrichtungen*. Retrieved from <http://gemeinde-juist.de/oeffentliche-einrichtungen/>
- Kreilkamp E., Gössling, S. (2016). *Abschlussbericht – Klimaneutrale Insel Juist*. Retrieved from <http://www.futouris.org/projekte/klimainselfjuist/>
- Kurverwaltung Juist (2014). *Gäste-Parlament*. Retrieved from http://www.juist.de/fileadmin/Mediendatenbank/PDF/14Gaesteparlament_Juist.pdf
- Kurverwaltung Juist (2016a). *Nachhaltigkeitsbericht 2015*.
- Kurverwaltung Juist (2016b). *Anreise mit dem Auto, der Bahn, dem Flugzeug und der Fähre zur Nordseeinsel Juist*. Retrieved from <http://www.juist.de/zauberinsel/anreise.html>
- Kurverwaltung Juist (2016c). *Inselurlaub*. Retrieved from <http://www.juist.de/inselfurlaub.html>
- Kurverwaltung Juist (2016d). *Reiseführer und historisches auf Juist*. Retrieved from <http://www.juist.de/zauberinsel/reisefuehrer.html>
- Kurverwaltung Juist (2016e). *Sport und Aktivitäten auf der Nordseeinsel Juist*. Retrieved from <http://www.juist.de/inselfurlaub/sport-aktivitaeten.html>
- Kurverwaltung Juist (2016f). *Historisches – Aus der Gesichte der Insel Juist bis zum Jahr 1999*. Retrieved from <http://www.juist.de/zauberinsel/reisefuehrer/historisches.html>
- Kurverwaltung Juist (2016g). *Allgemeine Infos über die Insel*. Retrieved from <http://www.juist.de/vermieterseite/leitbild-neue-mitarbeiter/allgemein.html>
- Kurverwaltung Juist (2016h): *Auto-Freies Juist*. Retrieved from <http://www.juist.de/zauberinsel/reisefuehrer/hafen/auto-freies-juist.html>
- Kurverwaltung Juist (2016i): *Juist im UNESCO Weltnaturerbe Wattenmeer*. Retrieved from <http://www.juist.de/inselfurlaub/natur-umwelt/unesco-weltnaturerbe-wattenmeer/unesco-weltnaturerbe-wattenmeer.html>
- Kurverwaltung Juist (2016j). *Zauberinsel*. Retrieved from <http://www.juist.de/zauberinsel/reisefuehrer/hafen/auto-freies-juist.html>
- Kurverwaltung Juist (2016k). *Kultur und Veranstaltungen*. Retrieved from <http://www.juist.de/vermieterseite/leitbild-neue-mitarbeiter/kultur.html>
- Nationalpark Niedersächsisches Wattenmeer (2010). *Nationalpark-Haus Juist*. Retrieved from <http://www.nationalparkhaus-wattenmeer.de/juist>

Seiz, A. (2010). *Touristisches Leitbild "Zauberinsel Juist Töwerland"*. Retrieved from http://www.juist.de/fileadmin/Mediendatenbank/PDF/LB_Juist_Protokoll_Zukunftsklausur.pdf

Statistisches Bundesamt (2016a). *Tourismus in Zahlen*. Retrieved from <https://www.destatis.de/DE/ZahlenFakten/Wirtschaftsbereiche/BinnenhandelGastgewerbeTourismus/Tourismus/Tourismus.html>

Statistisches Bundesamt (2016b). *Bruttoinlandsprodukt 2015 für Deutschland*. Retrieved from https://www.destatis.de/DE/PresseService/Presse/Pressekonferenzen/2016/BIP2015/Pressebrochure_BIP2015.pdf?__blob=publicationFile

World Economic Forum (2015). *The Travel and Tourism Competitiveness Report 2015*. Retrieved from http://www3.weforum.org/docs/TT15/WEF_Global_Travel&Tourism_Report_2015.pdf

3.6. Kasane (Botswana)

Botho University – Gaborone
Simon Lloyd
Dr. Kgosietsile Velempini

Tourism in Kasane is currently facing diverse pressures that range amongst others from increasing population to lack of effective manpower, poor waste management, climate variability and financial leakages. These pressures lead to land degradation and to overuse of limited municipal infrastructure such as sanitation.

General information	
Title / Name of the site/destination	Kasane / Chobe district
Region, country	Northern Region, Botswana
Area size (km²)	
Geographic coordinates	17.7952° S, 25.1711° E
Population and scope (if inhabited)	
As of 2015, the population of Botswana was 2,262 million (The World Bank, 2017) ⁸	
Kasane and its associated localities (Chobe Chilwero Lodge, Sedudu Island, Chobe Game Lodge) had a population of 9,244 in 2011. There were 4609 male and 4635 female (Statistics Botswana, 2015).	
Short description of the case	
Kasane is currently facing diverse pressures that range from increasing population, pollution (Moswete and Mavondo, 2003), climate variability (The World Bank, 2016) and financial leakages (Botswana Tourism Development Program, 1999). These pressures lead to overuse of limited municipal infrastructure such as sanitation. Local migrants to Kasane are becoming unemployed and pockets of prostitution in this tourist destination continue to emerge in the media. Littering of waste in and around the Chobe National Park, Chobe River and Kasane Hot Springs continue to occur. Kasane is also experiencing development pressures due to the ongoing regional bridge construction that passes through the wild animal habitat in Kazungula to Zambia.	

Tourism development in the country of the case study
Short description of the importance of tourism in the country
Tourism plays an important role in increasing revenue in Botswana. Leechor and Fabricius (2002) suggested that given Botswana's dependency on mining, particularly diamonds, and the increasing pressure on employment creation, tourism products are well suited for economic diversification.
<u>Revenue</u>
The World Tourism and Travel Council (2015) reported that direct contribution of Travel and Tourism to Gross Domestic Product (GDP) in 2015 was BWP6,246.3 million (4.1% of GDP). This was forecast to rise by 1.9% to BWP 6,363.4 million in 2016. The rise primarily reflects the economic activity that occurs in hotels, travel agents, airlines, restaurants and leisure industries in Botswana. Moreover, the direct contribution of travel and tourism to GDP is expected to grow by 5.6% per annum to BWP 11,009.3million (4.8% of GDP) by 2026.
Visitor exports (money spent by foreign visitors to a country) are an essential component of the direct contribution of travel and tourism. In 2015, Botswana generated BWP 6,286.5mn in visitor exports. By 2026, international arrivals are forecast to total 4,238,000, generating expenditure of BWP 11,090.1mn, an increase of 5.9% per annum (WTTC, 2015).
<u>Enclave tourism</u>
According to Tisdell (2013), international travel and tourism companies dominate the tourism industry in Botswana. Research and the media have suggested that this domination limit opportunities for local people to benefit economically from the presence of international tourists due to its enclave nature.

⁸ <http://www.worldbank.org/en/country/botswana>

<p>Tourist areas</p> <p>Botswana Investment and Trade Centre (2016) reported that there has been a call for possible inclusion of Kasane (as a tourist destination) to be one of the sites for Special Economic Zones (SEZ) in Botswana. Kasane mainly offers wildlife expeditions and wilderness experiences due to its rich natural capital and scenic beauty (Saarinen, Moswete and Monare, 2014). Other major tourist areas in Botswana include the Okavango Delta region in Ngamiland district and the Kgalagadi Transfrontier Park in the Kgalagadi South district.</p>
<p>Arrivals, Overnight stays</p> <p>Statistics Botswana (2015) reported that there were 1, 660,202 visitors in 2015 in Botswana. This number comprises of 8% same-day visitors (132, 588) and 92% tourists (overnight visitors) (1,527,614).</p> <p>However, Statistics Botswana (2014) reported that Botswana received a relatively higher (2,082,521) number of arrivals in 2014 and 2013 (2,598,158) compared to the year 2015.</p> <p>Most visitors, 33.8 percent (561, 967) came for Business purposes, Visiting friends & relatives (VFR) accounted for 26.7 percent (442 590) while those who came for Holiday/ leisure made 15.6 percent (258, 558) of total tourists (Statistics Botswana, 2015).</p> <p>Europe dominates the top ten leading overseas countries that supplied tourists to Botswana in 2015 (Statistics Botswana, 2015).</p> <p>The top ten leading overseas countries together supplied 143, 032 tourists (both overnight and same-day visitors), accounting for 8.6 percent of total tourists. USA accounted for 28.1 percent (40, 124), and the UK and Germany supplied 17.8 percent (25, 485) and 17.1 percent (24, 423), respectively.</p> <p>In 2015, arrivals through Sir Seretse Khama Airport constituted 62.4 percent (98, 072) of total arrivals by air (157, 157), followed by Maun Airport with 22.5 percent (35, 422) and Kasane Airport with 10.5 percent (16, 447) (Statistics Botswana, 2015).</p>
<p>GDP</p> <p>SADC (2015) reported that in 2015 the GDP of Botswana was 14, 39 billion.</p> <p>The mining sector (mainly the diamond mining), is the major contributor to the GDP of Botswana.</p> <p>Tourism continues to play a significant role in the diversification of the economy.</p> <p>The livestock industry contributes about 80% of agriculture's share of Botswana's Gross Domestic Product (GDP).</p>
<p>Tourism value added (% of GDP)</p> <p>The contribution of tourism to GDP is minimal. According to Bank of Botswana (1999), cited by Mbaiwa (2005), there is poor forward and backward linkages and heavy reliance on foreign services.</p> <p>BTDP (1999), cited by Mbaiwa (2005), reported that tourism contributed 4.5% to GDP in 1996 / 1997.</p> <p>Similarly, Mbaiwa (2005) cited the Department of Tourism (2000) stating that by 2000 tourism had grown to be the second largest economic sector contributing to about 4.5% to Botswana's GDP.</p> <p>Nonetheless WTTC (2007), cited by Saarinen, Moswete and Monare (2013), reported that tourism contributed an improved 9.5% to Gross Domestic Product (GDP).</p>
<p>Employment in tourism (%)</p> <p><u>Job creation</u></p> <p>Travel and Tourism generated 28,500 jobs directly in 2015 (3.0% of total employment). This includes employment by hotels, travel agents, airlines, restaurants and leisure industries in Botswana.</p> <p>WTTC (2015) reported that by 2026, travel and tourism will account for 41,000 jobs directly, an increase of 3.7% per annum over the next ten years (WTTC, 2015).</p>

Tourism supply of the site
<p>Short description of tourism on the site</p> <p>WTTC (2015) reported that leisure travel spending (inbound and domestic) generated 73.7% of direct travel and tourism GDP in 2015 (BWP 9,055.7mn) compared with 26.3% for business travel spending (BWP 3,234.9mn).</p> <p>Leisure travel spending was expected to grow by 1.8% in 2016 to BWP 9,217.8mn, and rise by 4.8% pa to BWP 14,733.1mn in 2026.</p> <p>Business travel spending was expected to grow by 3.2% in 2016 to BWP 3,338.8mn, and rise by 5.4% pa to BWP 5,645.5mn in 2026 (WTTC, 2016).</p> <p>Domestic travel spending generated 48.9% of direct travel and tourism GDP in 2015 compared with 51.1% for visitor exports (i.e. foreign visitor spending or international tourism receipts).</p> <p>Domestic travel spending was expected to grow by 4.9% in 2016 to BWP 6,296.1mn, and rise by 4.0% pa to BWP 9,288.4mn in 2026.</p> <p>Visitor exports were expected to fall by 0.4% in 2016 to BWP 6,260.6mn, and rise by 5.9% pa to BWP 11,090.1mn in 2026.</p>
<p>Access (how to get there?)</p> <p>Kasane is easily reached by air and roads. Air Botswana offers direct airline route from Johannesburg, South Africa to Kasane. The same airline has routes from Gaborone, Botswana to Kasane. Visitors from Lusaka, Zambia and Francistown, Botswana can also board Air Botswana to Kasane.</p> <p>South African Airline (Air link) also offers direct routes from Johannesburg to Kasane.</p> <p>Other regional private airlines (relatively small in carrying passengers) offers transport in and around Kasane and the Southern Africa tourist sites.</p> <p>Kasane is situated in the centre of where four countries (Botswana, Zambia, Zimbabwe and Namibia) meet. Therefore, the location of Kasane “potentially allows visitors a unique opportunity to experience some of Africa’s most exceptional natural attractions within a short period of time” (Leechor and Fabricius, 2002).</p> <p>Visitors can also get to Kasane by road from Victoria falls in Zimbabwe and Zambia. There is also a highway that connects Kasane to Namibia.</p> <p>Mbaiwa (2005) also stated that the tarred road (505 km) that links Francistown and Kasane provide accessible connection between Botswana’s Chobe National Park and the Okavango Delta with Namibia’s Caprivi Strip and Zimbabwe’s Victoria Falls.</p> <p>At relatively small scale, visitors from Namibia and Zambia also use small and medium boats through the Chobe River to Kasane.</p> <p>According to Tisdell (2013), many tourists enter Kasane from Zambia (Livingstone) or Zimbabwe (namely Victoria Falls). This is by road. Many wildlife tours in Botswana are based on the use of fly-in lodges. “Tourists are flown in by light plane and are often moved between lodges by planes as part of their itinerary” (Tisdell, 2013).</p>
<p>Main attractions</p> <p>Botswana’s wildlife resources are the primary foundation on which the tourism industry in Kasane is built.</p> <p>Botswana’s most famous wildlife habitat is the Okavango Delta, which covers some 16,800 km², and is a unique area of lagoons, reed-fringed waterways and islands.</p> <p>The Chobe National Park (about 11,000 km² (Moswete and Mavondo, 2003) and Chobe River and nearby forest reserves in Kasane are also major tourist attractions due to their habitat for a variety of wildlife species.</p>
<p>Accommodation offer</p> <p>Visitors enjoy a variety of accommodation facilities in Kasane. These ranges from international lodges, campsites, and guesthouses. Some of these are Chobe Safari Lodge, Chilwero Lodge, Chobe Marina Lodge,</p>

<p>and Mowana Safari Lodge.</p> <p>In 2011, the Chobe district, which houses Kasane, had 26 accommodation facilities with 558 rooms and 1200 beds (Department of Tourism, 2011).</p> <p>In the above statistics, the Chobe district lack behind Ngamiland, Central, North East, and South East districts.</p> <p>Kasane had 50.0 bed occupancy rate and 45.1 bed occupancy room.</p> <p>Kasane has a variety of campsites licensed. Some of them are: Motswiri Lodge; Selinda Camp, Zarafa Lodge, Senyati Safari Camp.</p>
<p>Restaurants</p> <p>The Lodges and guesthouses offer international restaurants. There are also international restaurants in town such as the Indian restaurants, Kentucky Fried Chicken (KFC) restaurants.</p>
<p>Other tourism service providers</p> <p>Kasane faces a poor service delivery. This impacts on the quality of tourism products. Moreover, there is overcrowding and lack of displaying appropriate ethics (e.g. required discipline in the hospitality industry) by some employees. Kasane has one public museum.</p> <p>Lodges and guesthouses have their own tour guides to assist visitors enjoy their experiences. Other professional tour guides are also found in town operating their own private guide services.</p> <p>A variety of souvenir shops are found in lodges, guesthouses, and in and around the town of Kasane.</p> <p>Examples of some motorboats in Kasane include the Classified Safaris, Cherry Safaris, Mamasi Cruise, and Chobe Charlin Charters.</p>
<p>Stage of the tourism life cycle</p> <p>Kasane is an international tourist destination. It could be classified in the Mature stage of the tourism life cycle.</p>

<p>Tourism demand at the site</p>
<p>Short description of tourism demand</p> <p>Europe is a significant source of Holiday/Leisure tourists, having supplied 32.2 percent (83,283) of total Holiday/Leisure tourists (258,558).</p> <p>Leechor and Fabricius (2002) reported that Maun and Kasane attract more than 90% of all Holiday Visitors to Botswana and that these two areas are the key drivers of holiday travel performance.</p> <p>Overall tourists residing in Europe accounted for 6.2 percent (103,575) of all tourists (1,660,200) entering Botswana.</p> <p>According to Tisdell (2013), the main purpose of tourists visiting Kasane/Chobe is to join wildlife tours (Tisdell, 2013).</p> <p>Kasane is currently facing a much more diverse tourist market. This is to say that there is an increase of transfer companies (particularly small local businesses), many more accommodation establishments, informal vendors selling crafts, wood, clothing, food, car valet (e.g. for the larger overland market) African motif cloth materials and activity agents (day trips to Victoria Falls, Chobe, Fishing, cultural tours etc.).</p>
<p>Volume of tourists</p> <p>In 2012, Botswana in general registered the following numbers of tourist arrivals: 167,498 visiting friends and relatives; 185, 668 visiting for holidays; 335, 424 visiting for business and 823, 308 being on transit resulting in 1,511,898 (Department of Tourism, 2013).</p>
<p>Length of stay</p> <p>Department of Tourism (2013) reported a 2.7 average length of stay for residents; 2.1 average length of stay for non-residents and 2.2 average length of stay for all.</p>
<p>Origin countries of tourists</p> <p>Most visitors came from Zimbabwe and South Africa, the two countries respectively contributed 40.4 percent (670,427) and 33.1 percent (549,492) of total visitors during the year. Still in the region of Southern Africa, other significant countries of origin are Zambia, Namibia, Lesotho, Malawi, Swaziland, Tanzania, Mozambique</p>

and Angola (Statistics Botswana, 2015).
Other significant countries of origin for tourists are USA (40,124), Germany (25, 485), UK (24,423), France (8,562), Australia (12,810), Netherlands (8,619), Switzerland (6,834), Canada (6, 691), Japan (4,916) and Spain (4,568) in 2015 (Statistics Botswana, 2015).
Motives / target groups Generally, the motives for tourists to visit Botswana are <ol style="list-style-type: none"> 1. Visiting Friends and Relatives 2. Holiday 3. Business and 4. Transit (Statistics Botswana, 2015).
It could be said that tourists visit Kasane mainly for Holiday (safari tours) and Business (attending meetings in international lodges).
Visitors' activities, activity patterns Photography and game viewing constitute major activities for travellers in Botswana (Borge et al, 1990; Mbaiwa, 2005)
Seasonality (peaks) May – October are the seasonality peaks in Kasane and other tourist areas.
Additional data According to Leechor and Fabricius (2002), tourism in and around Kasane has shown major growth. These authors argued that the tourism demand in Kasane areas has resulted in significant increases in accommodation and other facilities, which are dependent upon the parks and wildlife areas for their existence and growth. For example, the number of available bed nights in Kasane grew by 61% between 1998 and 2003 (DWNP, 2004, quoted from Leechor and Fabricius (2002)).

Framework conditions <i>What are the framework conditions that might influence the impact and/or the management of the site?</i>
History and background The town of Kasane is situated along the Chobe river. It is located about 5km from the village of Kazungula, where the borders of Botswana, Zimbabwe and Zambia meet. It is also about 60km from the Ngoma border. Kasane is an important tourist hub in the district of Chobe. The adjacency of Chobe National Park means that Kasane is the only town where day trips into a major national park or game reserve are mainly possible.
Political situation Kasane is an administrative centre of the Chobe district (Botswana Tourism Organization, 2013)
Legal issues <ol style="list-style-type: none"> 1. Botswana Tourism Policy, 1990. 2. Botswana Tourism Master Plan 3. Botswana National Ecotourism Strategy, 2002
Organisation <ol style="list-style-type: none"> 1. Botswana Tourism Organization http://www.botswanaturism.co.bw/ 2. Department of Tourism 3. The Hospitality and Tourism Association of Botswana (HATAB) www.hatab.bw/ 4. Ministry of Environment, Wildlife and Tourism http://www.gov.bw/en/ministries--authorities/ministries/ministry-of-environment--wildlife-and-tourism/
Physical setting <ol style="list-style-type: none"> 1. Public transport is available in and around Kasane. Reliable buses connect Kasane and Gaborone (the capital town). 2. Air Botswana 3. Air link (South African Airline).
Economic situation <ol style="list-style-type: none"> 1. Hospitality jobs in lodges, travel agencies and other small scale industries. 2. Government supported jobs in government departments. 3. Mobile jobs such as street selling of clothes, lunch and dinner meals.
Social/cultural situation Diverse tribe exist in Kasane. Some of them are as follows: Basubiya tribe (Kasane for instance has the Basubiya tribe which is known to be the river people) ⁹ In Kasane, Seboba is one cultural village which is useful for information dissemination to tourists once

⁹ <http://www.kutlwano.gov.bw/kut-article-detail.php?aid=425&mid=40>

completed.

They showcase the traditions of indigenous cultural communities such as festivals, rituals, their values and lifestyle.

“Basubiya tribe and other tribes found in the Chobe District will now have a chance to tell their tale to the world. The local community is also thrilled at the establishment of the cultural center. As the indigenous people of Kasane, Rev Ozias Kalund says the people of river welcome the idea. Rev Kalund strongly believes that culture should be another aspect of tourism, despite living in an area where wildlife dominates the industry” (More, 2012).

- Environmental situation**
1. “Congested national park river front and Chobe river itself, this leads to a degraded natural resource, pollution thereof and is/will create negative publicity” (Interviewer’s response).
 2. Habitat destruction: Infrastructural development such as the construction of the regional bridge has led to destruction of vegetation, soils, and the general landscape in the wetland of Kazungula (*Lived experiences of the researcher / author who worked in the Kasane Bridge project*).
 3. Noise pollution has been reported in and around Kasane due to taking off and landings of Aircrafts.
 4. Climate variability is reported to have negative impacts in the Chobe River and associated wetlands and thus impacting negatively on wild animals (The World Bank, 2016).
 5. Poor sewage infrastructure and consequently poor odour that pollute the environment.

Bottlenecks and constraints

Preliminary findings suggest that uncontrolled growth of businesses in Kasane lead to poor service delivery. There are delays to helping visitors at the Kasane international Airport and also there is lack of sustainable technology possible in conveying visitors’ baggage, bill board announcements or messages. The above constraints are negatively impacting on the quality of tourism products.

Challenges / Impacts
What are the most important challenges resulting from high tourism intensity on the site?

Short description of main challenges

Kasane is undergoing growing incidences of land degradation due to occurrences of poor waste management, water resource reduction, habitat destruction and lack of effective manpower, skills, and motivation from stakeholders to enable structures that conserve the natural resources.

Tourism intensity

Tourism demand and development in Kasane has placed major pressures on the parks infrastructure. Leechor and Fabricius (2002) suggests that visitors in Kasane stay outside of the parks (e.g. Chobe National Park) and enter the park as day visitors in need of optimal wildlife experience within a limited time space. This increases pressure on the natural resources. For example, the number of day visitors brought into the Chobe National Park rose by 360% between 1998 and 2003, from 4,333 to 15,587 (DWNP, 2004 as cited from Leechor and Fabricius, 2002).

It seems that parks infrastructure has not been planned and adapted to accommodate the changing market trends.

Influencing factors

Poor service delivery in the airport and in retail stores in Kasane lead to overcrowding of tourists.

Classification of carrying capacity affected

There is social carrying capacity due to influx of domestic migrants to kasane hoping to get jobs. They end up unemployed and eventually engage in substance abuse, alcohol, and prostitution.

Type of capacity affected

Daily capacity

- Physical impacts**
- According to Tisdell (2013), long-term environmental changes which could eventually threaten the natural attractions of Botswana include
1. climate change that situation can affect water supplies in the Chobe River and Chobe National Park
 2. The increasing elephant population in Chobe National park is outstripping its carrying capacity. This could result in the destruction of much of its natural vegetation.

<p>Economic impacts Although tourism business in Kasane potentially offers jobs to a majority of youths in the region, there are cases of unemployment as well.</p>
<p>Social impacts on residents Modernity is reported to have also contributed to a change in the lifestyles of local people in major tourist destinations of Botswana such as Kasane. Changes have been reported on the dressing or attire, language, eating habits and entertainment practices. There are numerous families that have also constructed modern houses with the hope of offering short term self-catered accommodation to tourists.</p>
<p>Environmental impacts According to Leeshor and Fabricius (2002), recent growth and expansion in Kasane has unfortunately resulted in poor waste management, with litter not being removed regularly and “these towns taking on a dirty ambience” (p. 72).</p>
<p>Development of impacts/ Changes over time Mushrooming of tourism facilities along the Chobe River The ongoing construction of the regional bridge suggests a change on the landscape of the Chobe river, Kasane and Kazungula as well.</p>

<p>Measures / Responses <i>What are the solutions that have been or are being discussed and/or implemented to reduce conflict between competing uses and to manage tourist masses? How can the challenges successfully be faced, managed and/or avoided?</i></p>
<p>General measures</p>
<p>Social measures Local people participation through the government aided program of CBNRM (Community based natural resource management). Strong networks between safari operators and local people.</p>
<p>Economic measures Government aided programs that focus on enabling youths kick start variety of business in Botswana, including Kasane.</p>
<p>Environmental measures Measures put in place by the Department of Sanitation and Waste Management. They place in various areas boards which read “No littering” Water Utilities department places stickers in water tap which says, “Conserve water drop”</p>
<p>Specific measures</p>
<p>Expand and improve the capacities and infrastructure 1. Department of Tourism in Kasane 2. Civil Aviation Authority of Botswana in Kasane 3. Department of Wildlife and National parks 4. Water Utilities 5. Department of Sanitation and Waste Management 6. Representatives from different organizations and local communities in Kasane</p>
<p>Disperse tourist attractions 1. Cultural tourism products e.g. traditional or local community dancing 2. Curio items such as various animal and bird sculptures</p>
<p>Restrictions 1. Car speed limits in Kasane are quiet often monitored by traffic police officers. This mainly aims at avoiding car accident and protecting drivers, passengers, pedestrians, animals and also making sure that tourists in this destination are safe from harm.</p>
<p>Information and communication Residents normally receive information through Kgotla (communal) meetings addressed by the local chief or one of the headmen in the village. Information also reaches residents through the government daily newspaper, Radio Botswana stations, and television.</p>
<p>Optimize spatial distribution of tourists Already there is an increasing diversification of small scale tourism related businesses in Kasane. Customer segmentation is driven forward due to a distribution of customers spending habits and interests.</p>

Organisational Measures

1. Chobe District Development Plan
2. Chobe National Park Management Plan
3. Kavango-Zambezi Transfrontier Conservation Area plan (KAZA)
 - a. Grading and Eco-certification of tourism establishments is carried out by a committee that include or is led by the Botswana Tourism Board.
 - b. Certification mainly focuses on Star grading system and Eco-certification system.

Outlook

How will tourism on the site develop in future? What are the expected changes?

Important future trends

“There is a great opportunity to make tourism a sustainable principle economic activity in our Chobe region, this however needs a cohesive and well planned effort from our authorities and buy in of all the role players in the tourism industry, there are efforts underway. One thing is paramount however, sacrifices will have to be made by the industry to save our resource that we all tap into” (Preliminary findings from the interviewer)

Conclusion

What are the central conclusions that can be drawn?

General conclusions**What makes this case special?**

The Kasane community, nearby communities, and the regional economy is much more reliant on the industry of tourism and availability of natural resources.

How do the framework conditions affect impact and management?

Stakeholders have lack of communication. This means that government department and other organizations are not proactive in sharing information.

Why are the measures implemented successful/ not successful?

There is rare assessment, monitoring and evaluation of government policies, strategies, and programs in the area of tourism in Botswana.

What are the main barriers that hamper a sustainable development in the case?

1. Influx of citizens to Kasane leading to overcrowding and high demand of utilities
2. Slow implementation processes from relevant authorities
3. Lack of capacity building skills to citizens

Which measures seem to be the most promising? What are the most important findings for the industry/ for politics?

1. Stakeholder participation
2. The role played by the Botswana government in the development of effective conservation measures and availing a variety of financial assistant programs to citizens.
 - a. Kasane is experiencing the emergency of small scale local business in the area of tourism such as accommodation facilities, formal and informal vendor selling crafts, etc.
 - b. There is a diversification of tourist packages and this increases dynamism in tourism supply and demand in Kasane.
 - c. Politicians need to know as well that there is ongoing poor service delivery in many visitor attraction places in Botswana.

References

- Botswana Tourism Organization (2013). Kasane.
<http://www.botswanaturism.co.bw/destination/kasane>
- Mbaiwa, J. (2005). The problems and prospects of sustainable tourism development in the Okavango Delta of Botswana. *Journal of Sustainable Tourism*, 13, 203 – 227.
- More, K (2012). Showcasing culture as tourism. *Kutlwano*. Vol 54, 4. <http://www.kutlwano.gov.bw/mobile/kut-article-teaser-detail.php?aid=425&cid=33&mid=70>

Department of Wildlife and National Park (2014) cited from Leeshor, C. and Fabricius, M. (2002).
Republic of Botswana (2002). Botswana National Ecotourism Strategy. Final Report. Government of Botswana,
Gaborone, Botswana.

Saarinen, J., Moswete, N. and Monare, M.J., 2014: Cultural tourism: new opportunities for diversifying the tourism
industry in Botswana. In: Rogerson, C.M. and Szymańska, D. editors, Bulletin of Geography. Socio-economic
Series, No. 26, Toruń: Nicolaus Copernicus University, pp. 7–18. DOI: <http://dx.doi.org/10.2478/bog-2014-0041>

Statistics Botswana (2015). Tourism Annual Report 2015. Gaborone , Botswana
<http://www.statsbots.org.bw/sites/default/files/publications/Tourism%20Statistics%20Annual%20Report%202015.pdf>

The World Bank (2017). <http://www.worldbank.org/en/country/botswana>

Tisdell, C. (2013). Nature Based Tourism in Developing Countries. Issues and Case Studies. Working Papers on
Economic, Ecology and the Environment. Working Paper No. 190. The University of Queensland.

World Travel and Tourism Council (2015). Travel and Tourism. Economic Impact 2015 Botswana.
<https://www.wttc.org/-/media/files/reports/economic%20impact%20research/countries%202015/botswana2015.pdf>

3.7. Lombok (Indonesia)

**Sekolah Tinggi Pariwisata Bandung (Bandung Institute of Tourism)
Mrs. Beta Budisetyorini, Ms. Pita Ratna Sari, Mr. Dicky Arsyul Salam**

The case of the island of Lombok in Indonesia shows a fundamental conflict between a fast growing economy oriented towards tourism development and the goal of sustainable tourism that also integrates the needs of society and the environment.

General information	
Title / Name of the site/destination	Lombok Island
Region, country	West Nusa Tenggara, Indonesia
Area size (km²)	4.725
Geographic coordinates	8.6510° S, 116.3249° E
Population and scope	3.2 Million (1.5 Men and 1.7 women) in 2013
Short description of the case	
Lombok as a fast growing tourism destination known for its nature and culture has to deal with some environmental as well as social challenges. Many of these challenges are directly related to tourism activities. Although there are masterplans for a sustainable tourism development, the implementation of sustainable tourism is difficult and the local population will have to be better integrated in the benefits from tourism.	

Tourism development in the country of the case study	
Short description of the importance of tourism in the country	
Product portfolio: 35% Nature (marine, eco, adventure), 60% Culture (heritage and pilgrim, culinary and shopping, city and village), 5% Man-made (MICE, sport and integrated areas) (PUSDATIN, 2014)	
Arrivals, Overnight stays (year)	10.4 Million (2015),
GDP	82.4 Billion US dollar
Tourism value added (% of GDP)	9.6% in 2015 (WTTC, 2016)
Employment in tourism (%)	8.4% (WTTC, 2015)

Tourism supply of the site
Short description of tourism on the site
As a tourist destination, the island of Lombok has two flagships of tourist attractions, the beauty of nature and the unique culture of the people. Lombok is composed of two areas with natural vegetation contrast; the north and central Lombok are more green and lush than the south. The vegetation of northern and central Lombok is strongly influenced by Mount Rinjani. Mountain with a height of 3,726 m is the center of the lives of various species of flora and fauna in Lombok. The southern part of Lombok has drier vegetation but is decorated with a stretch of white sand beach that extends from east to west. Contour southern Lombok that hilly reliefs create a beautiful and unique shape of the bay. Various types of dances, games, traditional music, as well as the philosophy of Lombok community-owned is a reflection of the teachings of Hinduism and Islam are kept in harmony by the people of Lombok hereditary (Saufi, A; et al, 2015).
Access (how to get there?)
Access to Lombok can be reached by air and sea, with three main entrance of the BIL (Lombok International

Airport), Port Lembar and Port Kayangan. For domestic flights, Lombok is accessible via Jakarta, Surabaya, Makassar, Bali, Yogyakarta and Bima, with most flights originating from Bali. Meanwhile, there are two international flights to Lombok namely from Singapore and Malaysia. As for the sea lanes, Lombok is connected to the port of Padang Bai in Bali and Poto Tano on Sumbawa. There are ferries every hour comes from and to the two ports. There is also a fast boat that regularly comes from Benoa Bali to Teluk Nare and Gili Trawangan in North Lombok and from Serangan, Bali to Marina del Ray in Gili Gede (Saufi, A; et al, 2015).

Main attractions
The main attractions are: Gunung Rinjani & Segara Anak Lake, Senggigi Beach, 3 Gili Islands (Air, Meno, and Trawangan), Kuta Beach, Tanjung Aan Beach

Tourism offer
In 2014 Lombok had 46 hotels (quality: fair % good) and 514 homestays, B&Bs, guesthouses and others (quality: fair & poor). There are 939 restaurants of various quality and type and 362 travel bureaus (Saufi, A; et al, 2015).

Stage of the tourism life cycle
Growth/development stage

Tourism demand at the site

Short description of tourism demand
Lombok tourism industry development has been going on for more than three decades, including since established as a tourist destination in Indonesia in 1979. During this period, the development of tourism in this area can be classified into three periods, namely: (1) the construction period until the late 90s; (2) the early recovery period 2000 to 2005 (after 9/11, terrorist attacks in Bali in 2002, the Tsunami and others); and (3) the period of revival which is still running today. In the first ten years of development, the tourism industry in Lombok experienced rapid development characterized by an increased number of tourist arrivals from year to year (Saufi, A; et al, 2015).

Volume of tourists | 1.629.122 tourists (60% domestic & 40% foreign)

Development of tourist numbers

2006	2007	2008	2009	2010	2011	2012	2013	2014
427.577	457.379	544.481	619.370	725.388	886.880	1.163.142	1.357.602	1.629.122

Length of stay | 5.8 days for domestic tourist & 4.8 days for foreign tourist (2013)

Origin countries of tourists
The visits are dominated by domestic market, which accounts for nearly 60% of visits. The majority of domestic tourists are from Jakarta, Bandung, Yogyakarta, Surabaya, Makassar and Bali. The rest are tourists from ASEAN and other overseas markets.
The main foreign markets are Australia, Germany and the Netherlands.

Tourism image | The "Second" Bali Destination

Motives / target groups
There are four main motives of European tourists that travel abroad. First, 40% of European travelers aiming recreation with family and friends, and escape from the daily routine. Their main objective is the beach and the sun. The second motive was visiting relatives, family, and friends, which reached 36%. Meanwhile third motive is aimed at travelers who visit natural attractions such as mountains, lakes, enjoying the scenery and so on, reaching 26%. The fourth motif (22%) is a cultural motif: travelers who are looking for a spiritual experience. The groups of tourists who are in other regions such as America, ASEAN, Asia Pacific others, including Australia are also has the same motive (Saufi, A; et al, 2015).

Visitors' activities, activity patterns	For marine activities: sand, sun, fishing, diving, snorkeling dan surfing For mountain activities: adventure, sightseeing, research & education, also soft and hard trekking
Seasonality (peaks)	May – August (peak)
<p>Visitors' opinions, attitude and behaviour, expectations and preferences, satisfaction</p> <p>In connection with the motive, there are three main factors that affect the satisfaction of European travelers. Aspects of nature as the scenery and weather conditions of the destinations visited, affecting up to 95% satisfaction rate. The second factor is the quality of accommodation, about 92%, and the third is the service or treatment that they get during the holidays, reaching 85%. Related to the determinants of satisfaction, tourists from Germany, Netherlands, and Scandinavia are the most that paying attention to aspects of nature during their holiday and making it as a major factor that attracted them to come back. Furthermore, approximately 56% of European travelers decide to choose the destinations for vacation based on recommendations from family and close friends, 46% see the information from the website, and 34% refers to the personal experience as an important factor influencing the decision.</p> <p>The world economy in the last decade characterized by the emergence of the four countries with stable economic growth tends namely Brazil, Russia, India and China, known as BRIC. The high economic growth, increase the number of the middle and the elite class in the four countries, which then turned into a potential market for international tourism. Among the four BRIC countries, Chinese outbound tourism market and Russia is more interesting to look more closely because both of these countries have better prospects as Lombok tourism market compared to the other two countries. Moreover, inspired by a number of Muslim majority population, and designation as an island of a thousand mosques, Lombok has been proclaimed to be one of the Halal destinations in Indonesia by the Ministry of Tourism. This stimulates the idea to market the Lombok tourism products to Middle East markets, especially countries of Saudi Arabia, Bahrain, United Arab Emirates, Kuwait, Oman, and Qatar (Saufi, A; et al, 2015).</p> <p>2016 Travelers' Choice by Tripadvisor (Number 5 in Top 10 Islands – Asia)</p>	

<p>Framework conditions <i>What are the framework conditions that might influence the impact and/or the management of the site?</i></p>
<p>History and background</p> <p>Lombok is an island located in the Sunda Kecil archipelago or Nusa Tenggara which is separated from Bali by Selat Lombok in the west and separated Selat Alas in the east from Sumbawa. Mataram is the capital city of Lombok. The island is divided into 3 districts and 1 municipality (Mataram):</p> <ul style="list-style-type: none"> • Kabupaten Lombok Barat (West Lombok District) • Kabupaten Lombok Tengah (Central Lombok District) • Kabupaten Lombok Timur (East Lombok District) (Pariwisata Lombok, 2016) <p>Naniek L. Taufan in her book titled <i>“Langkah Pariwisata NTB Menerobos Pasar Dunia (2009)”</i> mentioned that tourism in Nusa Tenggara Barat (West Nusa Tenggara) started on the early 1970. The tourists who came to Lombok were tourists who visited Bali before. Lombok was their layover before they went to their origin countries. The famous 3 Gilis (Gili Air, Gili Meno and Gili Trawangan) were the place with the highest tourist visitation. 3 Gilis be can easily accessed by slow or speed boat from Lombok mainland (10 minutes rides). 3 Gilis itself are famous for their beautiful underwater scenery, white sands and clear water. The 3 Gilis can also easily be accessed from Bali with about one and a half hour trip by speed boat. As the time goes by, the 3 Gilis are becoming more and more famous by the words of mouths among tourists. Also West Nusa Tenggara was becoming more and more famous as tourist destination.</p> <p>Lombok also started to develop other tourist destination such as Desa Adat Suku Sasak in Sade (Sasak Tribe Village in Sade), Senggigi Beach, Rinjani Mountain, etc. the development of tourism in Lombok and Gilis quickly seen as the opportunity for local businessman who started to build hotels, restaurants, bars and other</p>

tourism facilities. In 1975, there were 4 hotels which was built in Lombok that time: Paradiso hotel (40 rooms), Mataram hotel (12 rooms), Pusaka Hotel (20 rooms) and Sasaka Beach Hotel (15 – 20 bungalows). In 3 Gilis, the accommodation & restaurant business started to grow in 1979, all of the hotels and restaurants in Gili Air were managed by Paradiso hotel management (Naniek, 2009 cited in Hakim, 2015).

With the fast growing of tourism in Lombok, Local Government was interested to development Lombok's tourism even more. Local Government start to organize its tourism more seriously. In 1980, United Nations Development Programme (UNDP) gave their support to Lombok Government to develop its tourism by sending their experts to help Lombok's government to develop the design and concept of tourism development in West Nusa Tenggara. Lombok's government and UNDP experts was making regional mapping for region which were potential for tourism development. The result of these mapping was officially announce as regional regulations or Peraturan Daerah (Perda) West Nusa Tenggara No. 9 year of 1989 which divide West Nusa Tenggara into 15 potential areas for tourism development (9 in Lombok island and 6 in Sumbawa island).

The number of problems then arose with the resistance of local communities who are still not aware of tourism in Lombok. Most of them are Muslims who still seeing tourism as a business that is close to disobedience and sins so that its presence must be rejected. H. Usman, the owner of Hotel Paradiso were also appointed by the government as an escort team of experts from UNDP tells how hard the rejection of the society in Lombok for tourism. *"There are several people who understand tourism. Certain groups still considers tourism is negative," said Usman.* (Naniek, 2009 cited in Hakim, 2015).

That's why the government, through the Regional Office of the Ministry of Posts and Telecommunications (*Deparpostel*) West Nusa Tenggara in charge of tourism trying to approach the society. It is necessary to communicate how tourism developed by the government in West Nusa Tenggara. In addition, the local government also conduct consultations with the Majelis Ulama Indonesia (MUI) in West Nusa Tenggara. The goal is that religious leaders took part in explaining to the public regarding the tourism in West Nusa Tenggara.

To bridge the issues in the early stage of tourism development in West Nusa Tenggara, the activities sought not to mingle directly with local communities' lives (not in residential areas). The first area which was developed are 3 Gilis, tourists are directed to enjoy the natural beauty in three islands, and return to the main island of Lombok to rest. The concept of environmentally sustainable tourism (eco-tourism) is selected so that the tourism industry can go hand in hand with nature conservation.

To communicate to the world about West Nusa Tenggara as tourist destination in Asia, there were ranging series of promotional activities carried out by both government and community groups. Variety of activities held both in Indonesia and abroad. In Mataram, the government organized a West Nusa Tenggara Night of Art and Clothing on 26 to 31 August 1982. This event is the first tourism promotion activities held by local government. The event involved about five thousand performers displaying various arts and culture of West Nusa Tenggara. The organizers also invited journalists, writers, travel agents and artists.

After that, around 1983 non-governmental organizations from Germany came to Lombok to make a documentary movie titled Lombok Today and 100 Years Ago. This movie reveal the kinds of uniqueness and distinctiveness of Lombok and was published in a number of media in Europe about a year. With this movie, Lombok is increasingly recognized. Moreover, in the same year for the first time West Nusa Tenggara join the Night Market at Tong – Tong Fair in The Hague, Netherlands, the event which annually visited by European. A year later, West Nusa Tenggara also promote themselves in ITB - Berlin. (Naniek, 2009 cited in Hakim, 2015).

On the other hand, West Nusa Tenggara regional government continue to invited the investors to invest in tourism and PT. Garuda Indonesia became one of the first investors who are interested to build a five-star hotel. Garuda choose Senggigi area in West Lombok which then still a thicket of woods and fields to develop their hotel. In this location, the state-owned airline founded Senggigi Beach Hotel in 1984. A year later the hotel operates with 60-80

rooms. And then, a hotel built alongside the Senggigi Beach Hotel. Namely, Elen Berugaq hotel with 15 bungalows. Promotional activities and improvement of tourist destinations began to give a positive impact on visitors numbers in subsequent years. In the *Handover Position Memorandum of the Regional Head Office (or Memorandum Serah Terima Jabatan Kepala Kantor Wilayah) Deparpostel* in Mataram delivered on 29 February 1996 stated that, in 1982 the number of tourists who visit to West Nusa Tenggara carrying as many as 2,125 people. This figure continues to show improvement along with the more familiar Lombok and Sumbawa as new tourist destinations. In 1985 the number of tourists which came to West Nusa Tenggara as many as 8,822 people, this number continues to rise in 1986 to 13,673 and 25,714 visitations in 1987. In this period, tourists from Germany and the Netherlands were visiting West Nusa Tenggara the most (Hakim, 2015).

Political situation

Based on a tourism and market survey conducted in recent years, the professionals and consumers has similar thought about the importance of responsible tourism which can be explained as "a journey that minimize negative impacts, bringing economic benefits to local communities, as well as conserve natural resources and culture of a destination".

This resulted in a global paradigm shift towards tourism with sustainable principles :

- Tourism with conservative spirit and not exploitative (to prevent the commercialization of natural resources and local culture);
- Tourism is a process of economizing experience, related to the satisfaction of human needs which exceed expectations to gain experience and knowledge that is inspired by something seen, observed and felt, conducted in tourism destinations.
- Growing naturally based on society, natural environment and the culture

The preparation of the Sustainable Tourism Master Plan (STMP) in Lombok based on sustainability principles that applied globally includes (Saufi, A; et al, 2015): Global Sustainable Tourism Council (GSTC), Agenda 21 and UNWTO Global Code of Ethics for Tourism.

The activity of tourism in Lombok is gaining momentum to become a leading revenue sectors with the establishment of the West Nusa Tenggara as a corridor of the Acceleration and Expansion Master Plan For Indonesian Economic Development; ie. as tourism gateway and national food support. In the Regional Tourism Development Master Plan (RIPPARDA), West Nusa Tenggara provincial government shows commitment to direct the tourism sector into the concept of sustainable, responsible and quality combined with local knowledge, protection and management of the environment and environmentally friendly policy (Saufi, A; et al, 2015).

Legal issues

The principles of sustainability at the national level for the formulation STMP (Sustainable Tourism Master Plan) are outlined in many legislations and different government's programs (Law on Tourism, Law on the Environmental Protection and Management, Law on the Coastal Areas and Small Islands Management, Government Regulation on Tourism Development Master Plan, Government Regulation on Forest Utilization and Management and many others) (Saufi, A; et al, 2015)

In accordance with the masterplan 2015-2019 (RPJMN), tourism is one of the four main sectors which will be developed by the government. Among the 39 developing tourist areas that have been established in Indonesia, two of them are located in West Nusa Tenggara and one of them is Mount Rinjani in Lombok.

The principles of sustainability in the regional level (government regulation) include:

- Medium Term Development Plan of West Nusa Tenggara Province or *Rencana Pembangunan Jangka Menengah Daerah (RPJMD)* Year 2013-2018;
- Regional Action Plan for Greenhouse Gas Emission Reduction or *Rencana Aksi Daerah Penurunan Emisi Gas Rumah Kaca (RAD-GRK)*
- Regional Tourism Development Master Plan or *Rencana Induk Pembangunan Kepariwisata Daerah*

(RIPPARDA) West Nusa Tenggara Year 2013 - 2028.

Based on *Undang-undang No. 10 Tahun 2009 tentang Kepariwisata pasal 2* (Indonesian Law No. 10, Year 2009 about Tourism - Article 2) mentioned that tourism development must be based on : (a) benefits, (b) family oriented, (c) fair and equitable, (d) balance, (e) independence, (f) sustainability, (g) participation, (h) democracy, (i) equality and (j) unity.

Sustainable Tourism Master Plan (STMP) in Lombok is targeting overall objectives as follows :

- Driving sustainability and overall economic growth,
- Create jobs and improve the welfare,
- Preserving the environment and manage one of the major tourism assets in Indonesia,
- On a national scale, the development of tourism contributes to a number of commitments from the Government

These objectives should be reached by

1. involving the community in tourism training, especially for tourism activities that directly impact the social change (cultural change) and environment.
2. applying environmental quality improvement strategies through community awareness programs in keeping cleanliness and environmental sustainability.
3. engaging the community participation in maintaining security and comfort in tourist destination.

To achieve those objectives, STMP in Lombok is supporting tourism development which is :

- positioned as a concept / approach / tool / instrument to achieve the ultimate goal of development,
- able to conserve (protect, develop and exploit) the environment (natural and cultural),
- able to empower the community,
- afford the public welfare,
- sustainable.

Sustainable tourism approach in national level must be viewed holistically. In addition, analysis of the advantages and disadvantages of tourism (cost and benefit analysis of tourism) in tourism destination development, must be communicated to local communities in detail and transparent (Saufi, A; et al, 2015).

Organisation

There are organizations in Lombok which focus in creating awareness in the community also involving tourists in order to reduce the amount of waste produced by tourism activities:

- South Lombok Community Association (SLCA) which focus on safety, hygiene, and education in the area of Kuta beach;
- Gili Eco Trust, focusing in waste management, conservation of coral reefs and turtle in 3 Gilis;
- Educate villagers about environmental impact, introduce waste management based on the principles of 3R in Kampung Tete Batu;
- Development of eco region in Tanjung Ringgit by Eco Solution Lombok; and tree planting program by tour operators and local hotels, as well as mangrove rehabilitation program by the local government.

(Saufi, A; et al, 2015)

Physical setting

Good facilities or general infrastructure such as roads, adequate lighting to tourist destination, security and comfort feeling of the tourists affecting the quality of the tourism experience has to be offered. Moreover, if the product itself is a special interest activities such as trekking or hiking in Gunung Rinjani (Rinjani Mountain), the facilities and security offered need a well-made standard operational procedures (Saufi, A; et al, 2015).

To provide good infrastructure is still a challenge that must be addressed by Lombok tourism stakeholders in order to reach bigger segments of tourist.

Economic situation

Lombok has several main products in tourism that supports local economy. The production houses of the handicraft are located in five districts. All of these products, except pearls, are goods that have been produced, long before tourism industry became one of the main source of income in Lombok (Saufi, A; et al, 2015).

Social/cultural situation

Sasak is a native tribe in Lombok who inhabits more than 2/3 of the island. Also there are Samawa tribe and Mbojo tribe who came to Lombok mainland from Sumbawa Island, Bali tribe who had been in Lombok since the beginning of the 15th century, and a small group of Chinese and Arabs are said to have inhabited the island of Lombok since hundreds of years ago. The majority of the population in Lombok are from Sasak, Samawa, and Mbojo tribes, and most of them are Muslim. As for arts and cultures, traditional music and dances in Lombok were influenced by Hindu culture rather than Islam (major religion in Lombok).

In general, nowadays, local people around the island of Lombok have high enthusiasm and positive response towards tourism; they see tourism as economic opportunity. This enthusiasm is becoming a very valuable support in improving and developing tourism in Lombok. Yet they still need to be educated to be able to become a driving force for business activity and tourism in Lombok (Saufi, A; et al, 2015).

Cultural Attractions

Lombok cultures consist of places, objects and cultural events. Although the majority of the people in Lombok are Muslim, there are many traditions influenced by Hindu's culture. It can be seen in relics on the building which used as places for worship. Lombok has a lot of temples and mosques that were built on (from) the 16th and 17th century and that are still used as places for worship until now. The influence of Hinduism and Islam can also be seen at various rituals during cultural events. Various types of dance, games, traditional music, as well as the philosophy of community-owned law (local law) in Lombok are a reflection of both Hinduism and Islam. It also shows that both of the religions are living in harmony by hereditary. In southern and northern parts of the island, people are still practising unpretentious lifestyle as handed down by their ancestors, including in presenting a variety of traditional dances, music, games and traditional carnival like Nyongkolan and Bau Nyale (Saufi, A; et al, 2015).

Environmental situation

Lombok has lots of resources with huge potential to meet the demand of tourists both for local (Indonesia) and international market. Lombok can be divided into two areas with different type of vegetation; Northern and Central part of Lombok are greener and more fertile than the South areas. The vegetation of Northern and Central Lombok is affected by the existence of Mount Rinjani. Mountain with a height of 3,726 m above the sea level is the living space for various species of flora and fauna in Lombok.

Historical records and geological studies mentioned Mount Rinjani was erupted powerfully in 1257, the positive effects of the eruption of Mount Rinjani is soil fertility and incredible natural scenery which now became one of the main natural tourist attractions in Lombok, the Segara Anak Lake.

Meanwhile, the southern part of Lombok has drier vegetation but decorated with white sand beach extends from east to west. The land contour of southern Lombok is filled with hills and creating beautiful reliefs and unique shape of the bay. The beaches also possible to do various kinds of water sports. South Lombok also has traditional villages which is still inhabited by the Sasak tribe who still keep their tradition and local wisdom that is still maintained very well (Saufi, A; et al, 2015).

Lombok's natural resources :

- Beach

Southern Lombok has white sand beaches stretch as far as more than 90 km, stretching from East to Southwest. The coast located between the curves of the foothills that present stunning scenery. Beaches in Lombok not only blessed by the white sands, lots of it are still preserved. In some places, coastal topography creating a currents / waves which good for water sports with relatively stable weather and the sun shines all year round.

- **Underwater world**
Lombok has hundreds of small islands with white sandy beaches and crystal-clear water. Each small island has its own diving points with various unique species of corals. Beside the 3 well known Gilis, other small islands have great potential to be developed into water sports destination.
- **Trekking and Hiking at mount Rinjani**
Mount Rinjani has long history as one of the most well-known tourist destination in Lombok. Not only for hiking, Mount Rinjani also one of the place in Lombok for sightseeing, research and education, health, as well as soft and hard trekking can be done here. Another attraction in Mount Rinjani is Segara Anak Lake, a lake which actually a crater located at an altitude of 2,008 meters above the sea level. Mount Rinjani is a natural landscape with various kinds of natural attractions such as waterfalls and rivers. As a protected area, Mount Rinjani is the home for various endemic flora and fauna.

Bottlenecks and constraints

Distribution of the population according to gender as happened on the island of Lombok is one of the factors that will support the development of tourism industry. Tourism industry which is a service based on hospitality is in desperate need of women as employees on the business. Currently, the tourism industry in Lombok absorb more women workers than male workers, as seen from the absorption of labour per-sector in Lombok where the proportion of women workers who work in the trade business, hotels and restaurants is 28.86%, while the male labour force amounted only to 12.30%.

Women are believed to provide more emotional bond with tourists. It is expected that this will increase the level of (tourist) repeater to Lombok. Lombok government also intends to increase the participation of women in the tourism industry where in the previous years are still dominated by men, such women empowerment like this are expected to increase the welfare level of the family, especially those who live near the tourist destination (income from both husband and wife). It is also meant to increase the independence of women as breadwinners considering the high divorce rate in Lombok.

Challenges / Impacts

What are the most important challenges resulting from high tourism intensity on the site?

Short description of main challenges

Safety & Security

One of the biggest challenges in the development of tourism industry in Lombok is security and safety issues which are still inadequate. The security system is needed as an effective approach in addressing crime which related to tourism activities such as theft, extortion, and robbery. There are special tourism police placed at various tourist destinations like Senggigi and Kuta. But the number of personnel is not sufficient and crimes against tourists are still common in certain places. Lombok tourism should also pay more attention to the safety of tourists and business owners in tourism industry. It is necessary to have an official certification board that is tasked with evaluating standards operational procedure of tour operators to ensure the safety, especially for adventure activities related to nature such as sea and mountain. The lack of standards leads to frequent accidents - especially in the area of Mount Rinjani (Saufi, A; et al, 2015).

Local value added

Most of the value added in the tourism sector tends to be captured by foreign investors, international tour operators and foreign airline companies, and only limited benefits flow to the poor.

Environmental challenges

Beside climate change waste management and water use are central challenges for tourism in Lombok.

Lack of participation

An important challenge of tourism in Lombok is the lack of participation from local communities. Local

communities still lack knowledge and skills in tourism and there's also a lack of empowerment from local governments. As the result, the tourism sector in Lombok, especially tourism investment, is still dominated by immigrants from outside Lombok.

There are several further challenges for tourism in Lombok:

- The lack of tourism infrastructure;
- Lack of professionals in tourism industry;
- Lack of management systems that include local communities in tourism activities
- Overcoming cultural boundaries

Tourism development and intensity

In 2014 the number of tourist arrivals in Lombok reached 1,629,122 million, an increase of 20% compared to 2013. The annual growth of tourists is very impressive. In 2015 there were already 2,210,527 tourist arrivals registered.

Most of the tourist who visited Lombok are concentrated/stay in the Gilis (Trawangan, Meno, Air). The Gili which have most numbers of tourists is Gili Trawangan (the biggest among other Gilis).

In 1997, European countries dominated the visit to Lombok by 60%. In the following years, tourism in Lombok had encountered various challenges in political, economic and social issues at the local, national, and international level. The following issues consecutively influenced the development of the tourism industry in Lombok during the period 1997 - 2006 include: (1) Political instability in the country that began with the collapse of the New Order regime in 1997; (2) Riots with ethnicity, race and religion issue that occurred in Mataram in 2000; (3) Terrorist Attack on the twin towers in New York in 2001; (4) The terrorist attacks in Bali in 2002 and 2005; (5) Natural disasters such as the Tsunami in Aceh in 2004, earthquake in Yogyakarta in 2006; and (6) Spread of SARS Virus and bird flu in Southeast Asia in 2005.

Lombok tourism activities begin to show positive increase after 2006, the average number of visits is higher than in the previous period. In 2007, domestic tourists dominated the number of visits. This phenomenon was triggered by the raise of domestic economy situation. One of the main factor which caused the increase in tourists number to Lombok is due to the opening of Lombok International Airport in 2011 (Saufi, A; et al, 2015).

Unlike the tourist arrivals in Indonesia which is dominated by European outbound markets from France, Germany and Dutch which dominated in the year 2013/14, tourist from Asia countries is still low in numbers, it is slightly change when the new flight connections from Singapore, Bali (and for a while from Perth) launched. The arrival of visitors from Australia soared in the first quarter of 2013/2014. In 2015, market growth is mainly expected to come from the Asian market.

Lombok started showing positive numbers of tourist visit on May, where the peak season is in August. This was triggered by summer holidays in Europe and America, mid-term holiday in Indonesia, and the Eid holiday season in Indonesia which falls in mid-year since 2009. The decline mostly happens in September, October, and November, and numbers increase again in December in conjunction with the holiday season of Christmas and New Year that ends mid-January. The lowest number of tourists recorded is in February, March and April in conjunction with the rainy season in Lombok (Saufi, A; et al, 2015).

An unusual phenomenon had been seen in the last ten years where Lombok experienced the increasing number of domestic tourists who far exceeded the number of foreign tourist arrivals. The improvement in the domestic economy is believed to influence the increase of motivation in traveling and strengthening the purchasing power of domestic tourists. Moreover, the local government is trying to promote Lombok as domestic MICE destination and built international standard MICE facilities and make Lombok as one of the major MICE destinations in Indonesia. The promotion itself also supported by the operation of Lombok International Airport (BIL) and the increasing number of flights to and from Lombok in the last three years.

Unfortunately, Lombok marketing strategy as MICE destination for the domestic market may getting a new challenge, President Joko Widodo policy prohibits civil servants (PNS) to hold a meeting in the hotel as well as

the restrictions on official travel in order to cut the country's operating budget, make Lombok MICE product need to find a new target market outside government officials (Saufi, A; et al, 2015).

Further challenges

In previous years, tourism in Lombok was developed without full commitment from government and stakeholders which often caused constraint. The development of tourism is a cross-sector task which requires the involvement of various parties, not just the tourism industry.

In Lombok, integrating government, stakeholders and local communities is not an easy task (sometimes because of the cultural boundaries). It takes more effort to ensure all parties know each other's role so they can actively participate in tourism development. International donors (from Germany, Australia and Switzerland) have tried to apply the dialog between stakeholders before and it is highly recommended to be continued in the future.

During three decades tourism development in Lombok, tourism marketing are done separately among tourism businesses one and another. Lombok has no concept of integrated marketing that can be adopted by all tourism entrepreneurs. Marketing activities and its expenses came from industry's own finance. Therefore, the purpose of marketing is still an individual profit-oriented for the company only and not for the image of the destination itself (Saufi, A; et al, 2015).

Classification of carrying capacity affected

The fast growth of tourism in Lombok also had an effect on the population density in some tourist areas like in and around the Gili Islands and Senggigi Beach. Many residents from Bali began to switch professions to become merchants in Lombok, meanwhile the people from Lombok mainland were also starting to seek for more promising economic conditions in the Gili islands. Therefore, the people of Lombok mainland also gradually began to migrate to Gilis and the density is quite difficult to control in some tourist destinations. One of main attraction in Lombok is Mount Rinjani, the mountain usually closed for three months starting from February to April, it is done because several reasons, the first reason is for safety of tourists because it is considered unsafe to do mountain climbing during the rainy season (extremely slippery), the second reason is to maintain the biodiversity sustainability of flora and fauna in Mount Rinjani (Saufi, A; et al, 2015).

Economic impacts

Increasing numbers of tourist visits have a major impact to the GDP. The Gross Domestic Product (GDP) value added at current prices in 2013 were amounting to IDR 56,277,970,000 in the previous year amounted to IDR 49,679,694,000.

The development of tourism sector will affect the development of other sectors and is one of the leading factors for the increase of economic growth in other sectors such as trade, accommodation, restaurant, transportation and communication. Gili Trawangan, Gili Meno and Gili Air contribute 70% of taxes to Lombok (Saufi, A; et al, 2015).

The development of the tourism sector caused land prices in Gili to increase significantly by 350 million Indonesian Rupiah per hectare to 500 million per hectare (especially the land along the coastline). It is a positive impact on the local GDP yet very negative impact for local people, a lot of local people sell their land to foreign and domestic investors. Currently, the three Gilis are mostly owned by foreign investors.

Until now, main income for West Nusa Tenggara is still dominated by primary sector such as mining and agricultural sectors, but nevertheless, tourism began to occupy positions and considered by its significance contribution to the GDP. In addition, the agriculture sector also need to be considered since this sector contributes a lot for tourism industry as main source of food and beverage, even though it cannot be seen directly from the economic impact because it has not systematically measured (Saufi, A; et al, 2015).

Social impacts on residents

Some negative social impacts where tourism sometimes plays a role are:

- Drugs & alcohol abuse (there is no police in Gilis)
- Party
- Early marriage because of pregnancy
- Cultural acculturation (local culture and tourist's culture)
- The loss of local culture among young generation

The image of Lombok tourism is strongly influenced by the support of all stakeholders in the area of tourism, especially the local communities. Society is a crucial party which forms the image of tourism destinations because of their position which not only act as subjects or actors in tourist attraction but also as an object or a tourist attraction itself.

Not all members of local communities have the same perspective and understanding of tourism. There are still lots of tourism knowledge gaps among local communities who are also not supported by institutional system or tourism professional. Low levels of education and skills made the number of welfare to be still below the average. There are still a lot of Lombok people who could not get a job with a good position (managerial level) in tourism business; mostly they just work as parking attendants, laundry workers, masseurs and others. Although the unemployment rate is very low, but they are still living below the poverty line. Local communities need to have an understanding about the benefits and impacts of sustainable tourism so that they are able to support the development in this sector. Community leaders and religious leaders play a very important role in building awareness and educating people.

In addition, the tourism education also needs support from educators in schools ranging from elementary, middle and upper. They, need to include tourism in local curriculum (*muatan lokal or mulok*) in each school, in order to provide early information and instruction for the students in order to encourage them to build a career in tourism industry (Saufi, A; et al, 2015).

Commercial sexual practices and other forms of exploitation of children, youth, women and minorities are a global phenomenon that happened and began to enter into the tourism sector also in Lombok. The tourism sector is expected to adopting principles and guidelines in taking action on this issue, such as the code of professional conduct.

Another important issue in Lombok is the land ownership. Business ownership of travel and tourist activity predominantly performed by migrants is particularly vulnerable to social cohesion in the community. That is why Lombok need to educate its local communities about tourism with more specific strategies, for example by engaging "non-formal" leaders such as tribes / traditional leaders, religious leaders and community leaders as partners in educating people about tourism, it is because the people of Lombok has paternalistic characteristics or has the tendency to follow the direction and recommendations of non-formal leader or elder person in their respective territories.

Social impacts on tourists

Noise pollution caused by loudspeakers from places of worship (mosque), motor vehicles, karaoke, bar and club in the area of tourism at certain times also often complained both by the tourists and local residents. It is undeniable that the use of loudspeakers is indispensable in every event, especially for religious celebration. However, loudspeakers are often overused and disproportionate to the detriment of the people residing in the vicinity. Special approach are requires to solve the problems that came from this kind of noise pollution because religion always become a sensitive issue especially in tourism. The solution requires the support of the local community.

Lombok people have different perceptions on tourism and its impact on society. Many local people have never experienced being a tourist (never travel) and do not understand how to manage the sustainability of tourist destination. This can lead to intercultural tensions.

Environmental impacts

Climate change: Climate change is also one of the main issues that threaten society, business and nature. Climate change has been affecting tourism and agriculture sectors in Lombok. The lives of coral reefs are threatened by rising temperatures in the water surface beside sea water oxidation; mangrove forests are threatened by rising sea levels and extreme weather. The water source is also affected from changes in rainfall patterns and extreme weather that caused damage to terrestrial forests.

Fresh water: Other impacts include the reduced resources of fresh water and the availability of water resources in general due to reduced rainfall and sea water intrusion. Especially the 3 Gilis are already threatened by fresh water issues and floods that occurred in residential and agricultural land near the beach. With the excessive use of groundwater in the three Gili, mainly Gili Trawangan, the concern is the increased seepage of the sea water into the groundwater with the increasing salinity in the groundwater. It is threatening the survival of life not only for the coral and fish in the sea but also plants around Gilis.

Changes in climate and weather patterns in tourism destinations such as Lombok can significantly affect the comfort of tourists during their stay. The changing pattern of demand from tourists will have an impact to the local community, as well as the influence of other related sectors such as agriculture, craft industry or construction. Indonesian government needs to cooperate seriously with local governments to understand the urgent need for tourism sector to develop and implement strategies to address climate change and the importance of preventive measures to reduce the environmental impact caused by it.

The new opening of recreation / tourist areas and activities such as boating, snorkeling, diving, and surfing can cause damage to the coastal environment, marine, flora and fauna that can be bad for the survival of local ecosystems. The impact is most keenly felt by local communities living in a tourist area with environmental pollution. Garbage left by tourists, an increasing need for clean water, traffic density is causing pollution / air pollution and noise pollution are some problems that might arise. Water pollution is increasing as a result of the use of pesticides, fertilizers and other chemicals in an effort to enhance the beauty of the tourist facilities (hotels, golf courses and swimming pools).

There are some considerable problems from (illegal) spread of buildings that are not properly planned and destroy landscape quality - especially in The Gilis. Often existing plans are not respected. Stronger legal enforcement procedures are needed.

Waste management: Lombok faces many problems because of the lack of waste management. It can be overcome by raising awareness of local people and tourists who come to visit. Illegal waste disposal and trash burning has caused health and social problems to the surrounding population.

However, there are also a series of challenges that come mainly from the local community:

- Lack of public awareness on environmental cleanliness and a habit of throwing garbage not in garbage bin. This is compounded by the lack of sanitation infrastructure and a weak waste management system by the government. The existence of waste management, such as waste banks, considered very urgent, especially in two main destinations, Mount Rinjani and 3 Gilis.
- Cutting of trees in the protected forest area of Mount Rinjani and other conservation area with the purpose of illegal logging or land clearing for gardening has become serious threat to the conservation of flora and fauna in the region. In addition, deforestation is often triggering flash floods and landslides in the east foothills of Mount Rinjani (in Sembalun and Sambelia).
- Catching, hunting, and commercialization of endemic and endangered animals in Lombok are uncontrolled. Animals such as monkeys, turtles and rare species of fish are hunted for consumption and as pets. So is the fate of almost all kinds of birds in Lombok which were hunted for consumption and commercialization. Illegal trade of birds in this area has reached worrying levels and if it's not immediately stopped would cause an imbalance of ecosystems and environmental catastrophe in the coming years.

- The destruction of coral reefs and sea fishing with explosives and poisons still rife around Lombok and the small islands surrounding it. The use of explosives and poisons threaten the preservation of coral reefs and fish, including the survival of traditional fishing (catch fish by using a fishing rod). Destruction of coral reefs also occurs by anchoring activity of the vessel. Therefore, it is urgently need a coordination among government, stakeholders and local communities especially government which is in charge of marine preservation, marine transportation, etc.
- Land and beach erosion caused by the construction of buildings and illegal sand mining. Buildings (either already established or are being established) encroaching the shoreline and local communities are taking illegal sand for construction purposes.

Summary: Beneficiaries and sufferers from tourism in the case study

Beneficiaries: land owners, foreign investors, tourism businesses, etc.

Sufferers: Environment, local population, etc.

Measures / Responses

What are the solutions that have been or are being discussed and/or implemented to reduce conflict between competing uses and to manage tourist masses? How can the challenges successfully be faced, managed and/or avoided?

General measures

All of the negative impacts by tourism need special attention and must be addressed by stakeholders such as governments, communities, businesses, NGOs and relevant International Institutions. Local Government is obliged to do the coordination, planning, implementation and monitoring of tourist attraction. The private sector should also play an active role in the development of eco-tourism in Lombok. Lombok as a tourist destination must have a strong commitment to preserve nature. With a beautiful landscape, biodiversity and culture, Lombok could be a trendsetter in the management of ecotourism in Indonesia (Karim, 2010).

The principles of a sustainable tourism were adopted in the preparation of the Sustainable Tourism Master Plan (STMP or *Rencana Induk Pariwisata Berkelanjutan*) which implemented a development action plan for five years.

To manage a destination successfully and sustainably security and safety of the environment for tourists have to be guaranteed. To reduce risks is one of the keys to increase the competitiveness of the destination. Local authorities play an important role in risk management.

Another important factor is tourism awareness. Increasing the public awareness about tourism in Lombok is also needed through education, campaigns and other informative forms to explain tourism to the public. By engaging with local communities through tourism education, government and other stakeholders can also develop solutions together to protect the rights of children and adolescents.

Social measures

Some important social measures are:

- Participation of Stakeholder.
- Availability of facilities to residents (improved infrastructure, information technologies, accessibility etc.)
- Encourage local resident participation in tourism (Reduce gaps between local ethnic group and newcomers)
- Integration and promotion of local culture
- Consideration of Specific guest needs (language, certified local tour guides, hospitality skills etc.)
- Working conditions for employees (training, more local employees, more women etc.)
- Ensure that the community profits from tourism (local entrepreneurship)

Economic measures

The most important economic measures are:

- Strengthening of the regional economy: Cooperation and partnership among public government, private sector and community in project Sustainable Regional Economic Growth and Investment Program (SREGIP)

regarding funding of tourism development.

- Improve economic efficiency

Promote integrated tourism marketing (e-marketing) specially to the tourism destination priority product such as Lombok Gili's islands, Mandalika Resort, Rinjani National Park with others strategic tourism destinations (Bali, Makasar, Flores, New Zealand).

- New customer benefits

Designing sustainable tourist activities experiences according to the Lombok regional regulation, Lombok's believe and tradition integrity, appreciation and understanding social culture of tourist and local community.

- Locally produced goods

GIZ provide community empowerment in education tourism knowledge and practice, interactive program to strengthen the tourism professional association, and innovative local sustainable tourism product planning, development and implementation to the SME's local entrepreneurship.

- Consideration of the whole value chain

Since tourism product related to the arrangement from the tourist generated area, transit area, and tourist destination area therefore Lombok islands tourist destination designed and packaged must include initiation of business cooperation, partnership and letter of understanding among both the supplier in the region and within the region in integrated sustainable approach.(tour operators, accommodations, food and beverages, transportations, tourist attractions business, legal aspects, and quality assurance).

Environmental measures

Climate Change: Initial steps had been taken to reduce the impact of climate changes on the environment in Lombok by developing institutional and society capacities to adapt the climate change and integrate them into government policies and strategies as well as by a resources saving project with the goal to reduce water use and electricity consumption by industries. In addition, some hotels began to take the initiative to apply the concept of sustainable building design.

Natural resources: Along with the damage of natural resources in Lombok especially in the marine life, several organization in tourism both from government or private sector are now trying to engage tourism activities (tourist) with preservation of natural resources such as planting coral reefs using biorock which is done by tourist working together with diving operators.

Green Procurement: Procurement of environmentally friendly materials as an attempt to connect the local product with businesses like hotels and restaurants, suppliers are encouraged to adopt procurement practices of sustainable goods and services; Projects that move community to preserve nature, planting trees, reforestation of mangrove forest; reef and coral planting by biorock (ongoing) (Saufi, A; et al, 2015).

Waste management: To solve the waste problem, educating local communities about the importance of waste management is the key to sustainable environment such as implementing 3Rs (reduce, reuse, recycle) especially for hotels, restaurants and community itself. Community need to be trained to establish and manage the waste banks which not only reduces the volume of waste but also how to turn plastic waste into recyclable commodities which will be attractive for sale including distribution bins for public areas and at the community / household.

There's a need for several further environmental measures such as:

- Conscious use of energy (emissions, carbon footprint etc.)
- Environmental resources (Reducing use of scarce and non-renewable resources – energy, water etc.)
- Protection of nature (conservation, biodiversity, better education etc.)
- Protection of landscape and environmental resources
- Consumable water management in certain Gillis
- Need for a new spatial plan

Expand and improve the capacities and infrastructure

Lombok Island tourism value chain can incorporate many sectors in an economy. Its promotion will require the construction and operation of hotels, restaurants and other tourism-related facilities through backwards linkages and the development of basic infrastructure services, such as energy, telecommunications and environmental services; agriculture, manufacturing and other support services. It can also create a wide range of forward linkages with sectors supplying services consumed by tourists. These include financial, telecommunications, retail, recreational, cultural, personal, hospitality, security and health services.

Therefore Lombok Island wishing to strengthen their tourism sector will need to develop other tourism-supporting infrastructure such as water and ground transportation, proper roads, ports, hospitals and banks, which are essential for providing access to high-quality services and creating a competitive sustainable tourism destination. Lombok Island needs to design a clear public- and private-sector strategy for investment and the development of essential tourism-supporting infrastructure.

Disperse tourist attractions

Lombok Island tourism linkages remain weak and underexploited. New attractions, tourist facilities and resorts will have to be developed. Most of the value added in the tourism sector tends to be captured by foreign investors, international tour operators and foreign airline companies, and only limited benefits flow to the poor. Therefore, in designing strategies for sustainable tourism, governments need to assess and identify the potential linkages or tourism business-related value chains in tourist destination as well as in economy perspective.

Restrictions

The level of acceptable change should be considered in Lombok island tourism development since the image of Lombok island is known as "The second Bali Destination". This would avoid overcrowding and high density building development. The case of Gili Trawangan and Sengigi tourist attractions should have been an indicator of denying the carrying capacities of landscape.

Regulations and prohibitions to manage the nature environmental conservation of the island have been published in terms of the requirement procedural for facilities establishment such as "The rule of Environmental feasibility analysis" before building up. However in most cases it is ignored or adjusted because of the investment needs.

Information and communication

The availability of information and communications technologies in Lombok Island has helped to make the tourism industry more productive and competitive and has made tourist services, such as flight and hotel room reservations, more accessible to potential travellers. Internet has radically changed the Lombok tourism industry by shortening the distance between providers of tourist services and their clients. (Telkomsel and Tourism Business Companies)

Optimize temporal distribution of tourists

To attract increasing number and length of stay of tourists and remain competitive, the Lombok Island tourism sector should have access to reliable and efficient utilities such as electricity, clean water and modern sanitary services. These are, of course, utilities that countries should develop for the well-being of their population, regardless of concerns for tourism. However, policy efforts to promote the tourism sector will give additional impetus to the development of these essential services. Today's tourism industry creates additional demand for information and communications technologies (ICTs), providing another opportunity to deepen linkages especially to increase tourist satisfied experiences.

Optimize spatial distribution of tourists

To optimize the spatial distribution of tourist, Lombok Island must cluster the stakeholders to advocate more effectively for sound environmental management (e.g. design and enforce regulation), benefit from economies of scale (e.g. cost sharing of upgrading a road), and extend the benefits to communities (e.g. putting in place a waste management system). This strengthens the competitive position for the entire Lombok Island as tourist

Other important measures:

- Strengthening productivity of the non-tourism sector and its linkages to tourism;
- Providing small-scale businesses with start-up grants, education and training, and low-interest loans to stimulate SME development;
- Introducing incentive measures to encourage hotels and restaurants to source inputs locally;
- Relaxing zoning and licensing requirements so that small-scale businesses can participate in the downstream tourism value chain.

Organisational Measures
The tourism organization in Lombok Island depends on the multi sector local government participation. Coordination is hard to achieve since each regency/district has its own priority of tourist destination development even though guideline in national and regional tourism master plan has been stated.

New innovative solutions
Promoting sustainable tourism is far-reaching and involves broad actions, ranging from the adaptation of new technologies and practices to obtain efficiency improvements in energy, water and waste systems, to the implementation of policies to restore biodiversity. This can lead, among others, to energy-efficiency gains in transport and accommodation, fewer health risks and the upgrading of the attractiveness of a destination. To enable stakeholders to move towards more sustainable tourism, there are many elements that are required or must be considered. They may include:

- Clustering / zoning plans;
- Linkages with local suppliers of goods and services;
- Skills and human resources development;
- Access to finance and investment;
- Institutional framework and mainstreaming of tourism in national and regional integrated policies;
- Promotion and marketing (e-marketing);
- Protection and conservation of cultural heritage*

*Most of cultural heritage in Lombok is related to traditional communities which are still implementing Awig - Awig (local / traditional law) as the base to punish any violation. Traditional community leader or traditional security officers must be strict in punishing or handling any violation related to the cultural heritage in their area. If Awig Awig is not enough to tackle any issues in cultural heritage sites, the role of tourism police (polisi pariwisata) will be effective to tackle any violation towards cultural heritage

Outlook
How will tourism on the site develop in future? What are the expected changes?

Prospects for tourism development
Lombok Island has the goal to become a sustainable and competitive tourist destination (Priority Mandalika Resort) and to develop Halal Tourism Infrastructures (Service and Information Communication Technology). In order to remain competitive and able to meet the needs of tourist in the future, the tourism development should be focused on the quality of products offered, sustainable and fit the image of Lombok as destination with biodiversity and cultural heritage. Other priorities are the development of community-based products in the marine sector in West and East Lombok, promoting rural green tourism and create a centre of cultural heritage study. This will contribute for the sustainable development by making villages and communities as an interesting place to be visited, so as to increase incomes for the local people and at the same time it will be helping Lombok to offer different tourism product which will make Lombok more attractive for both domestic and foreign tourists.

Expected changes?
Climate change will continue to be a threat for Indonesia’s tourism industry. The tourism sector in Lombok is considered at risk because of the large tourist infrastructure exposed to several threats such as tidal wave in

coastal areas, erosion, and the process of bleaching on reefs caused by an increase in temperature. Reducing the impact of climate change has become a key strategy for Indonesia government. It is intended to adapt to changes that occur in the environment. The Ministry of Tourism aims to develop West Nusa Tenggara as low carbon destinations. The tourism sector needs to anticipate and adapt, assess and take preventive steps such as implementing an austerity program.

Conclusion

What are the central conclusions that can be drawn?

General conclusions

Lombok Island has magnificent tourism resources, such as marine life (3 Gilis, Mandalika Resort Area), socio-cultural tradition (Sasak, Mbojo, and others), and natural attractions (Lake Segara anak, flora and fauna). However, Lombok Island facing some crucial challenges in developing its tourism. On the one hand the lack of tourism and hospitality knowledge from local communities is a problem; on the other hand there are several negative impacts of tourism. Moreover, climate changes and lack of natural resources preservation are severely affecting tourism industry in Lombok especially the marine life; coral reefs extinction and illegal mining of beach sand are decreasing the beautifulness of natural landscape in Lombok. Therefore, all tourism stakeholders in Lombok need to implement their Sustainable Tourism Master Plan in order to solve the problems, both actual and upcoming problems.

What makes this case special?

This case shows how difficult the implementation of ambitious tourism masterplans is and how important the education and involvement of the local communities is in order to reach a sustainable tourism development.

Why are the measures implemented successful/ not successful?

Tourism stakeholders in Lombok are working together to prevent the negative impact of tourism, especially the ones affecting natural and cultural resources, however, there are still tourism stakeholders in Lombok who work partially for their own profit.

What are the main barriers that hamper a sustainable development in the case?

Coordination of stakeholders and cultural boundaries among local communities.

Which measures seem to be the most promising? What are the most important findings for the industry/ for politics?

One approach to solve these problems - especially the lack of hospitality and tourism knowledge - is the Politeknik Pariwisata Mataram (Mataram Tourism Polytechnic) The goal of this institution is to empower local people and to offer programs concerning local community development.

What are the findings/conclusions other destinations could learn from?

The Sustainable Tourism Master Plan (STMP) has been promoted and introduced to the tourism board of Nusa Tenggara Barat Province as well as the Tourism Ministry of Republic of Indonesia. It is a good responsible tourism master plan however the lack of human resources and stakeholder coordination usually will make the implementation go slower than the effort of making the STMP. This means the STMP is considering a good effort for the first steps that can be learned for other destination in Indonesia that do not have a STMP.

References

- Hakim, Z. (2015, May 7). *Sejarah Pariwisata NTB*. Retrieved 11 17, 2016, from Ilmu Komunikasi: <http://tengahsemester.blogspot.co.id/2015/05/sejarah-pariwisata-ntb.html>
- Karim, S. A. (2010, October 8). *Ekowisata Pulau Lombok: Peluang, Tantangan dan Harapan*. Retrieved 11 15, 2016, from Facebook: <https://www.facebook.com/notes/pulaulombok/ekowisata-pulau-lombok-peluang-tantangan-dan-harapan/10150294933830503/>
- Mori, E; et al. (2014). *Small Island Developing States*. Nairobi: United Nations Development Program.
- Pariwisata Lombok*. (2016, October). Retrieved 11 17, 2016, from Wikipedia: https://id.wikipedia.org/wiki/Pariwisata_Lombok
- PUSDATIN. (2014). *Passenger Exit Survey*. Jakarta: Kementerian Pariwisata & Ekonomi Kreatif.
- Saufi, A; et al. (2015). *Rencana Induk Pariwisata Berkelanjutan Pulau Lombok 2015-2019*. Mataram: Badan Perencanaan dan Pembangunan Daerah Provinsi Nusa Tenggara Barat.
- Turner, R. (2015). *Travel & Tourism Economic Impact 2015*. London: World Travel & Tourism Council.
- Turner, R & Freiermuth, E. (2015). *Travel & Tourism Economic Impact 2016*. London: World Travel & Tourism Council.

3.8. Muskoka (Canada)

University of Waterloo, Canada
Ashley Gallant, Karla Boluk

The case of Muskoka in Canada shows the challenges at a tourist destination that struggles with issues pertaining to seasonality such as congestion, overcrowding, overworking, and on the flip side, lack of employment opportunities and service offerings in the off season.

General information	
Title / Name of the site/destination	District Municipality of Muskoka (Muskoka)
Region, country	Central Ontario, Canada
Area size (km²)	3,937.76 km ² (Statistics Canada, 2011)
Geographic coordinates	44° 54' 5.9112" N, 79° 34' 32.9556" W (LatLong.net, 2016)
Population and scope (if inhabited)	Permanent Population: 59,220, Seasonal Population: 83,203 (The District Municipality of Muskoka, 2013)
Short description of the case	
Muskoka, Ontario, is deemed cottage country in Ontario and is known to many as a wealthy tourist destination for the rich and famous. However, this has fostered a large disparity economically and socially between local people and seasonal second homeowners. Furthermore, a large influx of seasonal second homeowners and visitors has caused congestion and crowding in the destination and mass unemployment for local people in the off-season, from September-May.	
Tourism development in the country of the case study	
Short description of the importance of tourism in the country	
Lonely Planet has deemed Canada as the number one destination in the world for 2017 (Lonely Planet, 2016). Lonely Planet (2016) explains that Canada is known for captivating multiculturalism, artistic flair, the great outdoors, and diverse food offerings.	
-Niagara Falls, Ontario: "a natural spectacle" waterfalls, botanical gardens, casinos, arcades (Lonely Planet, 2016)	
-Toronto, Ontario: "a reflection of Canada", the most multi-culturally diverse city on the planet with over 140 languages spoken, featuring fine restaurants, bars, clubs, festivals, professional sports teams (Lonely Planet, 2016)	
-Vancouver, British Columbia: "an outdoor wonderland, the culinary capital of Canada, creative culture with many galleries and events" (Lonely Planet, 2016)	
-Quebec City: "one of North America's oldest and most magnificent settlements, and is a Unesco World Heritage site" (Lonely Planet, 2016)	
-Bay of Fundy, Nova Scotia: "nature-based escape with grand scenery, and steaming dishes of seafood" (Lonely Planet, 2016)	
Top three activities for international visitors in 2012: 9.5 million for shopping, 8.3 million for sightseeing, 7 million for VFR (Destination Canada, 2012)	
Arrivals, Overnight stays (year)	16.6 million international arrivals (TIAC, 2016)

GDP	\$1.551 trillion USD in 2016 (World Bank, 2016)
Tourism value added (% of GDP)	\$26.4 billion in constant dollars, and \$31.2 billion in unadjusted dollars (TIAC, 2012)
Employment in tourism (%)	9.4% of all jobs in Canada (Statistics Canada, 2011)

Tourism supply of the site

Short description of tourism on the site

“Muskoka is Ontario’s favourite year-round vacation destination. Covering more than 4000 sq kms of towering pines, sparkling lakes and rivers, endless recreational activities, diversified culture and genuine friendly service, Muskoka will have you under its spell on your first visit.

Just a 90-minute drive north of Canada’s business capital and Pearson International Airport, the gateways to Muskoka – Highway 11 North at Severn Bridge and in Port Severn – are an easy drive from Toronto. The moment you arrive, you’ll immediately feel the magic of the region: the pink granite rock of the Canadian Shield welcomes you as the roar of our many picturesque waterfalls and the charming beauty of our towns and villages enliven your spirit and imagination.” (Discover Muskoka, 2016)

Access (how to get there?)

Access by 4 different bus services, car, and by air to the Muskoka Airport (Discover Muskoka, 2016)

Main attractions

Santa’s Village Family Entertainment Park, Muskoka Heritage Place, Muskoka Steamships & Discovery Centre, Muskoka Lakes Museum, Bethune Memorial House, Sawdust City Brewery Co Tour, Muskoka Brewery Tour, Lake of Bays Brewing Co. Tour, Muskoka Lakes Winery Tours, Beaches, Boating, Fishing, Waterfalls, Flyboarding, Art Galleries & Festivals, Golfing, Hiking, Zip Lining, Horseback Riding, Spas, Shopping, Farmers Markets, Yoga Classes, Ice Skating Trails, Snowmobiling, Skiing, Dog Sledding, Ice Fishing (Discover Muskoka, 2016)

Accommodation offer

Hotels: 267	Housekeeping Cottages and Cabins: 61
Motor Hotels: 11	All other Traveller Accommodations: 6
Resorts: 52	Recreational Vehicle Parks and Campgrounds: 30
Casino Hotels: 0	Hunting and Fishing Camps: 16
Bed and Breakfasts: 11	Recreational and Vacation Camps: 28

(Statistics Canada, 2013)

Restaurants

Full-Service Restaurants: 142	Caterers: 16
Limited-Service Eating Places: 88	Mobile Food Services: 5

(Statistics Canada, 2013)

Other tourism service providers

Art Dealers: 6	Nature Parks and Other Similar Institutions: 4
Motion Picture and Video Exhibition: 7	Amusement and Theme Parks: 3
Theatre Companies: 6	Golf Courses and Country Clubs: 25
Other Performing Arts Companies: 3	Marinas: 72
Sports Teams and Clubs: 2	Fitness and Sport Centres: 24
Horse Race Tracks: 1	Tour Operators: 5
Sports Stadiums: 1	Other Travel Arrangement and Reservation Services: 4
History and Science Museums: 2	Total Retail: 707
Other Museums: 2	

(Statistics Canada, 2013)

Stage of the tourism life cycle
Mature/ Consolidation Stage

Tourism in Muskoka has been the industry of focus for over 100 years. Resorts, which were the main focus of the destination, are declining, and seasonal cottaging has taken its place. There has been an 84% decline in resort establishments over the past 50+ years. (PKF Consulting Inc, 2013)

Tourism demand at the site

Short description of tourism demand	There are six distinctive tourism core sectors: water-based features, outdoor rec, resort experience, small town/village experience, heritage and culture, the "cottage" experience (Muskoka Assessment Project)
Volume of tourists	Visits: 2.9 million arrivals and \$416 CAN million in annual visitor expenditures (Discover Muskoka, 2016)
Development of tourist numbers	Total Visits in 2003: 2,190,700 (District Municipality of Muskoka, 2011) compared with 4.3 million in 2013 (Ministry of Tourism, Culture, and Sport, 2013)
Length of stay	69% of trips are overnight; overnight visitors stay an average of 3.1 nights (Ministry of Tourism, Culture, and Sport, 2013)
Origin countries of tourists	Total Person Visits in 2013: -Ontario: 4,013,500 -Other Canada: 38,600 -US: 175,700 -Overseas: 41,000

Tourism image

"On several occasions, Muskoka has been recognized by National Geographic Traveler magazine as a special place to visit. Muskoka is one of their top 20 best places to visit and was chosen as the #1 pick for the Ten Best Trips of Summer. Just recently, Muskoka was recognized by National Geographic as one of the '100 Places That Can Change Your Child's Life.'" These endorsements from an iconic magazine are testimony to Muskoka's tourism experiences and our quality of life." (Discover Muskoka, 2016)

Motives / target groups

The Regional Tourism Marketing Organizations have identified the following target groups:

- Pampered Relaxers
- Sport Lovers
- Knowledge Seekers
- Up and Coming Explorers
- Connected Explorers
- Aces
- Outgoing Mature Couples
- Family Memory Builders
- Mellow Vacationers
- Nature Lovers
- Solitaires
- Youthful Socializers

(Ministry of Tourism, Culture, and Sport, 2016)

Visitors' activities, activity patterns	
Number of Visitor Participants:	Restaurant or bar: 134,200
Boating: 1,486,800	Cultural Performances: 120,000
Visit a beach: 948,900	Sports Events: 108,200
Hiking: 695,000	Sightseeing: 104,900
Fishing: 659,500	Casinos: 78,500
VFR: 725,400	Snowmobiling: 62,600
Wildlife/ Bird Watching: 576,700	Hunting: 57,400
Camping: 398,000	Theme Parks: 54,100
National/ Provincial Parks: 394,600	Skiing/ Snowboarding: 37,900
Golfing: 242,100	Business Meeting/ Conference/ Seminar: 37,500
Playing a sport: 189,600	Movies: 27,900
Festivals/ Fairs: 174,000	Medical/ Dental Appt.: 16,400
Cycling: 158,300	Zoos/ Aquariums/ Botanical Gardens: 13,700
Museums/ Art Galleries: 154,300	Aboriginal: 10,000
Shopping: 137,300	ATV (all-terrain vehicle): 10,000
Historic Sites: 136,700	
(Statistics Canada, 2013)	
Seasonality (peaks)	
54% of visits occur in July-September, 28% in April- June (Ministry of Tourism, Culture, and Sport, 2013)	
Visitors' opinions, attitude and behaviour, expectations and preferences, satisfaction	
Total US & Canadian Source Markets:	
<ul style="list-style-type: none"> - Satisfaction with Trip- Avg. Score/10: 8.8 - % Rating 9/10: 62% - Likelihood to Recommend Destination- Avg. Score/10: 8.5 - % Rating 9/10: 60% 	
GTA (Greater Toronto Area) Markets:	
<ul style="list-style-type: none"> - Satisfaction with Trip- Avg. Score/10: 8.8 - % Rating 9/10: 62% - Likelihood to Recommend Destination- Avg. Score/10: 8.6 - % Rating 9/10: 62% 	
Other Ontario Markets:	
<ul style="list-style-type: none"> - Satisfaction with Trip- Avg. Score/10: 8.8 - % Rating 9/10: 62% - Likelihood to Recommend Destination- Avg. Score/10: 8.4 - % Rating 9/10: 60% 	
Perceptions of Muskoka's Regional Tourism Organization:	
<ul style="list-style-type: none"> - <i>Highest Rated on a 10-point scale among recent visitors:</i> - has impressive scenery and landscapes (8.4) - A great place for enjoying outdoor activities (8.3) - A great place to enjoy boating (8.3) - A great place for having fun (8.1) - A place that can create lasting memories (8.1) - A great place to rest and rejuvenate (8.0) - A place where I would go to feel safe and comfortable (8.0) - <i>Lowest Rated on a 10-point scale among recent visitors:</i> - Interesting cities and towns that are worth seeing (7.4) - Easy destination to get to (7.4) 	

- Interesting festivals and fairs (7.4)
- Great food and restaurants (7.4)
- Offers appealing travel experiences year-round (7.4)
- Suits personal lifestyle and travel needs (7.4)
- Easy to get around from place to place once you are there (7.3)
- Excellent value for the money (7.1)
- Great for arts & culture (6.9)
- A great place to experience diverse cultures and ways of life (6.7)

(Ministry of Tourism, Culture, and Sport, 2013)

Framework conditions

What are the framework conditions that might influence the impact and/or the management of the site?

History and background

Logging was the original industry in Muskoka in the 1860s, with an impact so large that the timber dues on pine timber taken from the area was said to be profitable enough to pay the administration costs for the Province. However, lumbermen cut down all of the trees in the area, forcing themselves out of business. This prompted a new industry, which is deemed the Steamship Era. Alexander Cockburn founded the Muskoka Navigation Company, creating steamship tours on Muskoka's lakes. This attraction brought in visitors from Canada, the Southern US, and Europe. This then, prompted the growth of the luxury resort industry in Muskoka. To this day, Muskoka Steamships sail on the Muskoka lakes and resorts fill the 1500 lakes. Now, the lakes are also covered with second homes, utilized by a substantive seasonal population of 83,203. (Visit Muskoka, 2016)

Organisation

Regional Tourism Organization 12 (RTO12) named Explorer's Edge

- Destination Marketing Organization
- Board of directors, featuring representatives working in the industry in areas such as culinary, accommodations, and attractions, as well as individuals from the Ministry of Tourism, Culture, and Sport.
- Appears the board meets monthly
- Responsible for marketing the destination, hosting events and general meetings for local businesses to interact
- Create a strategic vision to promote tourism in Muskoka

Physical setting

4.1 Provide and maintain a safe and reliable regional road network that meets the desired service requirements of Muskoka.

4.2 Collaborate with the Area Municipalities to complete a regional active transportation network as envisioned in our Active Transportation Strategy.

4.3 Continue to exceed safe drinking water and effluent regulatory standards by maximizing the efficiency and effectiveness of water and wastewater (including hauled sewage) treatment programs through the most appropriate infrastructure, technology and practices in order to support the needs of all of Muskoka's communities.

4.4 Encourage the wise use and management of surface and groundwater resources through the most appropriate conservation and protection methods and practices.

4.5 Renew our emphasis on leadership in innovative and progressive waste management and diversion programs and other programs and practices to prolong the life of landfill sites.

4.6 Collaborate with the Area Municipalities to plan and complete joint infrastructure projects in a coordinated manner.

4.7 Promote rail, air and other forms of transportation to ensure improved and convenient access to Muskoka. (District Municipality of Muskoka, 2016)

Economic situation

Muskoka Community Services (2016) expresses a tough economic reality for residents, stating:

- average employment income of \$50,675 is 17% lower than the provincial average of \$61,496
- unemployment was roughly 7% in 2014
- youth unemployment was 14% in 2014
- 38% of Muskoka residents are over the age of 55...this is expected to increase to 48% by 2041

2.9 million person visits and \$416 million in expenditures in 2012 (Discover Muskoka, 2016)

Tourism accounts for 20% of all jobs and 57% of the economic base, which is projected to increase over the next decade (Discover Muskoka, 2016)

Muskoka's strategic priorities regarding the economy are as follows:

3.1 Build on Muskoka's reputation as an internationally recognized tourist destination by encouraging and supporting initiatives aimed at marketing and strengthening the tourism industry in Muskoka.

3.2 Collaborate with others to support and promote tourist commercial, recreational and other economic development which enhances the natural environment and recognizes the character of all of Muskoka's communities.

3.3 Collaborate with others to support new initiatives or methods that broaden the tourism base in Muskoka including development of the arts and culture, culinary tourism, local food promotion, outdoor adventure, sports, and special event sectors.

3.4 Collaborate with others to support the development or enhancement of businesses, facilities and programs which result in increasing year round living wage employment opportunities.

3.5 Collaborate with others to develop post secondary educational facilities and programming in Muskoka in support of these strategies.

3.6 Recognize, promote and expand the role and impact of the Muskoka Airport as a key economic driver in Muskoka that supports tourism, as well as the social and business needs of the area.

3.7 Collaborate with all partners to support the retention, expansion and attraction of businesses and the diversification of Muskoka's economy.

(District Municipality of Muskoka, 2016)

Social/cultural situation

Muskoka's strategic priorities regarding the community are as follows:

5.1 Collaborate with others to design and build communities to promote healthy and active living, and social inclusion for all cultures and life stages and ages.

5.2 Assist in addressing the basic health, employment, housing, transportation and social needs of residents in our community, particularly the more vulnerable population, including children, youth, seniors, low income earners and people with disabilities.

5.3 Support seniors initiatives through The Pines Long-Term Care Home and, in collaboration with other

agencies and groups, support and deliver programs and services focused on the health and well-being of all seniors in our community.

5.4 Collaborate with others to provide accessible community services and health care services through an integrated network of hubs throughout Muskoka, ensuring opportunity is available for residents to achieve optimal physical, mental and emotional health.

5.5 Provide leadership and support to develop community capacity to work together as individuals, groups, organizations, and networks to address its own challenges.

5.6 Promote housing affordability options, programs, and supports that are integrated throughout Muskoka for low and moderate income families and individuals.

5.7 Promote housing stability and options for preventing homelessness through programs that address the conditions that put residents at risk for homelessness.

5.8 Promote transportation initiatives that support comprehensive access to employment, health care, education and other community and social services.

(District Municipality of Muskoka, 2016)

Creative Muskoka (2014) refers to the following as critical to Muskoka's cultural identity:

- Designation of Muskoka as an arts community
- The ruggedness and beauty of the natural environment - our lakes, rock, trees
- A long history and tradition of our outdoor culture acting as an inspiration for the arts and cultural events
- A growing and eclectic pool of artists showcasing arts and crafts
- Over a century of cottaging traditions
- A long established reputation as a premier tourist destination
- An emerging focus on regional culinary arts
- Healthy and robust lifestyles based on outdoor sports and leisure activities
- A meeting place for diverse urban and rural populations celebrating nature and the arts
- A centre for formal and informal education opportunities related to the arts, environment, natural history, and outdoor recreation.

Social/cultural situation

Muskoka's strategic priorities regarding the community are as follows:

5.1 Collaborate with others to design and build communities to promote healthy and active living, and social inclusion for all cultures and life stages and ages.

5.2 Assist in addressing the basic health, employment, housing, transportation and social needs of residents in our community, particularly the more vulnerable population, including children, youth, seniors, low income earners and people with disabilities.

5.3 Support seniors initiatives through The Pines Long-Term Care Home and, in collaboration with other agencies and groups, support and deliver programs and services focused on the health and well-being of all seniors in our community.

5.4 Collaborate with others to provide accessible community services and health care services through an integrated network of hubs throughout Muskoka, ensuring opportunity is available for residents to achieve optimal physical, mental and emotional health.

5.5 Provide leadership and support to develop community capacity to work together as individuals, groups, organizations, and networks to address its own challenges.

5.6 Promote housing affordability options, programs, and supports that are integrated throughout Muskoka for low and moderate income families and individuals.

5.7 Promote housing stability and options for preventing homelessness through programs that address the conditions that put residents at risk for homelessness.

5.8 Promote transportation initiatives that support comprehensive access to employment, health care, education and other community and social services.

(District Municipality of Muskoka, 2016)

Creative Muskoka (2014) refers to the following as critical to Muskoka's cultural identity:

- Designation of Muskoka as an arts community
- The ruggedness and beauty of the natural environment - our lakes, rock, trees
- A long history and tradition of our outdoor culture acting as an inspiration for the arts and cultural events
- A growing and eclectic pool of artists showcasing arts and crafts
- Over a century of cottaging traditions
- A long established reputation as a premier tourist destination
- An emerging focus on regional culinary arts
- Healthy and robust lifestyles based on outdoor sports and leisure activities
- A meeting place for diverse urban and rural populations celebrating nature and the arts
- A centre for formal and informal education opportunities related to the arts, environment, natural history, and outdoor recreation.

Environmental situation

The Muskoka Watershed Council (2016) explains that the Muskoka River Watershed (MRW) is over 500,000 hectares and contains more than 2,000 lakes and rivers. 15% of the MRW is water, 11% of this are wetlands.

There are approximately 42 species at risk in Muskoka (Muskoka Watershed Council, 2016)

Muskoka WaterWeb (2016) explains that the Muskoka River Watershed is located on the Canadian Shield, which is characterized by thin soil with rocky outcroppings. The nutrient poor soil surrounding the environment limits the amount of nutrients that flow to waterbodies from the watershed. Primarily, in Northern Muskoka the following trees are present: white pine, black spruce, jack pine, white spruce, and balsam fir

The South of Muskoka primarily contains: white pine, sugar maple, yellow birch, red oak, and beech. Muskoka contains both acidic, as in conifer dominated forests, and non-acidic soil, as in hardwood forests.

The Muskoka wetlands, according to the Muskoka WaterWeb (2016) are crucial to the watershed, as they control and store surface water, maintain and improve water quality, aid in flood control, protect shorelines from erosion, provide wildlife habitat, as well as recreation opportunities.

Muskoka has a habitat of over 250 species of birds, almost 50 types of mammals, 25 types of reptiles and amphibians, dozens of species of fish. Some common wildlife are the moose, black bear, white-tailed deer, loon, great blue heron, and lake trout (Muskoka WaterWeb, 2016)

Many organizations and councils exist to promote environmental stewardship in Muskoka, as the environment is the main attraction for tourism in the destination.

Muskoka's strategic priorities regarding the natural environment are as follows:

- 1.1 Continue to be recognized as a leader in the creation and implementation of innovative environmental protection policies, programs, partnerships and practices.
- 1.2 Continue to enhance our knowledge and understanding of our natural environment in order to mitigate the effects of climate change on the resiliency and biodiversity of our watersheds.
- 1.3 Update and use the Muskoka Official Plan as a key document to protect the natural environment, to align growth and development with municipal infrastructure investment, to drive a vibrant economy, and to promote complete, safe, accessible, and inclusive communities.
- 1.4 Work together with the Area Municipalities to protect the natural environment by implementing the Muskoka Official Plan through local planning documentation and by continually improving the development review and approvals process.
- 1.5 Work together with the Area Municipalities to manage development and growth in a sustainable manner balancing environmental, economic, social, and cultural elements.

1.6 Reduce our environmental footprint by making continuous improvements to our transportation, water and wastewater treatment, waste management and other corporate infrastructure and programs.
(District Municipality of Muskoka, 2016)

Bottlenecks and constraints

The District collaborates with the Area Municipalities and other stakeholders to establish limits to growth assessments for waterbodies, with priority given to lakes considered to have surpassed an acceptable threshold for phosphorus. Limits to growth assessments are meant to identify development limits of a waterbody by using existing base data and applying the various official plan policies to determine potential development capacity. These limits to growth assessments provide background information for local municipal planning decisions, initiatives, and lake plans.(District Municipality of Muskoka, 2016)

Challenges / Impacts

What are the most important challenges resulting from high tourism intensity on the site?

Short description of main challenges

Mainly, there is an economic disparity between local people and cottagers, or tourists. This disparity then manifests into social tensions between the differing groups.

Tourism intensity

There is a permanent population of 59,220 people, and an additional 83,203 people who live in the destination between June-October (The District Municipality of Muskoka, 2013). On top of this, there are 2.9 million person visitors to the destination per year (Discover Muskoka, 2016).

Influencing factors

Most tourists visit from July to September for summer vacation (Ontario Ministry of Tourism, Culture and Sport, 2014) which leads to crowding during this time.

Classification of carrying capacity affected

The 2012 Muskoka Stewardship Conference explained their concern for carrying capacity when they wrote, “continued demand for both cottages and tourism opportunities may result in increased growth pressure along shorelines – both physical growth (environmental carrying capacity – limits due to environmental constraints) and social carrying capacity (social and safety limits to a lake while still maintaining character and desirability)”

The District identifies the following as ways carrying capacity is managed, sustained, and challenged:

- the local economy (jobs, income)
 - ecosystems, infrastructure, and administrative services (monitoring of the natural environment and infrastructure by planners)
 - property taxes (property values and taxes are continuing to climb)
 - health care (the influx of seasonal residents is a burden on the health care system in Muskoka)
 - police services (influx of tourists is a strain)
 - price of goods (rise exponentially during peak season)
 - crowding and overuse (traffic congestion and parking)
 - labour challenges (shortage of skilled trades people)
 - affordable housing
 - satisfaction levels (many attractions do not have ways to track guest satisfaction levels such as comment cards or surveys)
 - compensation and training (lack of high paying jobs in the tourism industry, lack of formal training)
 - technology (operators need assistance in creating and maintaining websites)
- (Muskoka Assessment Project)

<p>Type of capacity affected</p> <p>Seasonal Capacity, since tourists visit mainly in summer months. However, in the past ten years there has been an increased conversion from seasonal residents to permanent residents, where formerly seasonal residents plan to or have become retirees to Muskoka. Furthermore, the number of winterized cottages has increased from 31% in the 1970s, to 44% now, with 25% of non-winterized owners planning to winterize. This suggests that people are spending more time in the destination, either as retired full-time residents, or intend to use their cottage during the off-season. This creates challenges for affordable housing, water resources, and health and social services, as there is an increasing population with a limited number of services and resources. (Muskoka Stewardship Conference, 2012)</p>
<p>Physical impacts</p> <p>Due to the introduction of a seasonal population, Muskoka has many amenities which are normally associated with larger cities such as shops, restaurants, and historical attractions. In August 2016, the Government of Canada allotted almost \$250,000 to Muskoka to improve existing tourism infrastructure throughout the municipality (Muskoka Region, 2016)</p>
<p>Economic impacts</p> <p>The District Municipality of Muskoka (2013) explains that the resort sector generates \$400 million annually (\$50,000 per rental unit), while the cottage sector in Muskoka generates in excess of \$600 million in economic impacts to the District on an annual basis (\$30,000 per cottage), as there are 20,500 Cottages that can host over 75,000 persons.</p> <p>Not only Muskoka, but Ontario in general has the highest average University Tuition fees in Canada, we also spend the least in public programs and services per person and third least in public health per person (The Ontario Common Front, 2014).</p>
<p>Social impacts on residents</p> <p>Muskoka's median family income is \$61,159 leaving Muskoka families 12% behind the provincial average (Community Information Muskoka, 2010).</p> <p>Muskoka has an affordable housing crisis. There are currently 495 applications on the wait list for 384 subsidized housing units in Muskoka up from 439 in 2009, 376 in 2008, 305 in 2007 and 217 in 2006 (Community Information Muskoka, 2010).</p> <p>Muskoka has a homelessness problem. The Salvation Army oversees the 3 Emergency Family Units funded through the District of Muskoka in Huntsville, Bracebridge and Gravenhurst; 30 families are placed in Emergency Housing for durations of 4-6 weeks annually (Community Information Muskoka, 2010).</p>
<p>Environmental impacts</p> <p>Muskoka's septic system is reaching capacity which is interfering with its education system. Schools and education facilities are being shut down and students are being displaced due to the capacity of sewers and water rising (Good, 2012)</p>
<p>Summary: Beneficiaries and sufferers from tourism in the case study</p> <p>In ways, local people both benefit and suffer from tourism. Firstly, they benefit as their economy is reliant on tourists and cottagers, as tourism is the primary industry in the destination. However, the seasonality of the destination causes many local people to be unemployed in the off-season, causing many economic and social issues.</p>

<p>Measures / Responses</p> <p><i>What are the solutions that have been or are being discussed and/or implemented to reduce conflict between competing uses and to manage tourist masses? How can the challenges successfully be faced, managed and/or avoided?</i></p>
<p>General measures</p>
<p>Social measures</p> <p>Muskoka Homelessness Task Force was created and lead to enhance planning and communications among</p>

interested parties and more effectively distribute resources and meet goals (District Municipality of Muskoka, 2014).
<p>Economic measures</p> <p>Support the promotion of Muskoka local food, culinary tourism and value added agriculture through updated Official Plan policies for the agricultural sector. In co-operation with Savour Muskoka and other food production and sales businesses, strengthen the agricultural sector in Muskoka to enhance business development, employment opportunities and wellness / health benefits. (District Municipality of Muskoka, 2014)</p>
<p>Environmental measures</p> <p>Different organizations have been set up such as the Muskoka Watershed Council with different programs such as watershed report cards, a best practices program, an environmental lecture series, and environmental handbooks that are designed to improve Muskoka's environmental problems (Muskoka Watershed Council, 2016).</p> <p>The conservation of nature is also encouraged through organizations like Muskoka Conservancy (Muskoka Conservancy, 2016).</p> <p>Annual Muskoka Summit on the Environment (Muskoka Summit on the Environment, 2016).</p>
Specific measures
<p>Expand and improve the capacities and infrastructure</p> <p>The District Municipality of Muskoka has the goal to eliminate the two remaining chlorine disinfection systems in the sewage treatment plants, Identify and incorporate suitable technologies into sewage treatment plants for controlling nutrients and contaminants of emerging concern, as opportunities arise (District Municipality of Muskoka, 2014). Furthermore, they are working to support the needed development and modernization of the recreation and tourism industry as a principal component of the Muskoka economy. Develop the Muskoka Airport as an economic development tool that supports the social and business needs of Muskoka. Together with the Area Municipalities, encourage a positive business environment for all sectors of the economy (District Municipality of Muskoka, 2014).</p>
<p>Disperse tourist attractions</p> <p>Advocate for improved passenger rail service serving and connecting Muskoka to the rest of Ontario (District Municipality of Muskoka, 2014). Muskoka is currently in the consultation phase of expanding their pre-existing airport to be able to offer international flights to the destination. Currently, the airport is used for private flights as well as an education center.</p>
<p>Restrictions</p> <p>Not allowed to cut more than 20 trees in a year on an individual property (District Municipality of Muskoka, 2014).</p> <p>Various lakes have implemented restrictions regarding size of boathouses and the construction on the shorelines. For example, on some lakes, boathouses may not be two-stories. Similarly, there are environmental restrictions around shoreline use (dock sizes, introducing a beach-like setting, etc.)</p> <p>Some lakes and rivers have restrictions on motor-boats and large boat access.</p>
<p>Information and communication</p> <p>Strengthen the planning capacity and communication among social agencies providing service in Muskoka through vibrant Planning Tables and web-based communications, Develop communication strategies to engage the public regarding Muskoka's policies and programs and the achievement of these goals (District Municipality of Muskoka, 2014).</p>
<p>Optimize temporal distribution of tourists</p> <p>RTO12, Explorers Edge, the regional tourism marketing organization is attempting to make the destination a year-round hot-spot, through marketing outdoor winter experiences, to diversify the tourism market and allow for more jobs in the winter season for local people.</p>

<p>Optimize spatial distribution of tourists</p> <p>The spatial distribution of tourists has not been a focus, although overcrowding and congestion has been a common complaint. In summer 2016, Muskoka did not charge for parking in downtown areas, in an attempt to bring in more visitors to their downtown core.</p>
<p>Organisational Measures</p> <p>Encourage the use of methods by the Area Municipalities to preserve and protect the shoreline areas. Identify and protect sensitive natural areas through the planning process (District Municipality of Muskoka, 2014).</p>
<p>New innovative solutions</p> <p>Social media marketing has become common in the destination to bring in visitor, and destination marketing and branding is quite cohesive across the destination. A focus has been made on marketing the destination as a winter hot-spot, and has received success in marketing the Arrowhead Provincial Park skating trail, which has been featured on television programs and widely shared on social media platforms.</p>

<p>Outlook</p> <p><i>How will tourism on the site develop in future? What are the expected changes?</i></p>
<p>Important future trends</p> <p>There is expected to be a demand for condos and higher density housing which are closer to amenities. There will also be a larger demand for adult lifestyle, of the majority of individuals in the destination are young retirees whom will continue to demand waterfront housing.</p> <p>The district explains that sustainable tourism is critical to the destination and it aims to be sustainable by using destination marketing, product renewal, and managing carrying capacities.</p>
<p>Prospects for tourism development</p> <p>Priorities, as set in 2014 for Muskoka were:</p> <p>“Marketing and Promotion Strategy: continuing to target the GTA and beyond, including niche markets available through strategic collaboration, continuing an active web-based, social media presence, continued tracking, research and establishing a transacting website.</p> <p>Product Development and Innovation Strategy: encouraging packaging of weekend or longer events as well as product development workshops. Educating operators regarding Eco-designations within their respective sectors is also identified. Encouraging sports tourism and events in all four seasons and continuing the Partnership Fund are also priorities.</p> <p>Investment Attraction Strategy: collaborating to make use of the Northern Ontario incentive grant/loan program and working closely with existing economic development agencies and OMTCS.</p> <p>Workforce Development and Training Strategy: working with other agencies to help identify industry needs to encourage and deliver relevant training, continuing to deliver we-based marketing seminars/presentations (e.g. social media).</p> <p>Industry Communication, Liaison and Accountability Strategy: moving forward with the Tourism Indicator Framework designed specifically for RTO 12 and industry liaison activities begun in the last two years as well as strengthening communications with industry and developing educational materials informing industry of market research. Engaging operators both through the newly developed Tourism Operator Forum (600 members), newsletters and direct mail was also cited. Collaborating with other RTOs and advocacy are also identified. Determining future membership and funding models are also priorities.” (RTO12, 2014)</p>

<p>Conclusion</p> <p><i>What are the central conclusions that can be drawn?</i></p>
<p>What makes this case special?</p> <p>Muskoka is quintessential for tourism for Canadians, as evidenced in the table; the region has gained traction for international visitors, as well, based on its landscape and access to nature.</p>
<p>How do the framework conditions affect impact and management?</p> <p>The framework conditions pose challenges for tourism planners and managers, as they struggle with issues pertaining to seasonality such as congestion, overcrowding, overworking, and on the flip side, lack of employment opportunities and service offerings in the off season.</p>
<p>Why are the measures implemented successful/ not successful?</p> <p>There are not many specific implemented measures, other than the various watershed councils and conservancies, which try to inform local people and cottagers on how to preserve the natural environment. Strategic goals, which are previously mentioned, are set up, but there are no specific plans mentioned to reach these goals.</p>
<p>What are the main barriers that hamper a sustainable development in the case?</p> <p>The main barrier to sustainable development in this case is seasonality. The destination, and Canada itself, is greatly shaped by seasonality. Muskoka struggles to make itself a year round, self-sustaining destination.</p>
<p>Which measures seem to be the most promising? What are the most important findings for the industry/ for politics?</p> <p>Community engagement of cottagers through donations and volunteer work have shown to be promising for the industry in Muskoka to support the both the natural environment, but also the social aspects of Muskoka. The most important findings for politics and the industry is the expected growth of the destination, from a seasonal tourism destination, to one where seasonal people are retiring to and becoming permanent residents. It is important for politics to understand this and prepare for more long term stays in the destination.</p>

<p>References</p>
<p>Bowman, J. (2014, July 11). Overcoming poverty - a Muskoka success story. Retrieved February 16, 2017, from http://www.muskokaregion.com/news-story/4624435-overcoming-poverty-a-muskoka-success-story/</p> <p>Cilliers, R. (2016, September 09). Muskoka named #1 for Canadian fall colours. Retrieved February 16, 2017, from http://www.muskokaregion.com/community-story/6848738-muskoka-named-1-for-canadian-fall-colours/</p> <p>Community Information Muskoka. (2010) A Statistical Economic & Social Profile of Muskoka - May 2010. <i>Community Statistics</i>. Accessed on Nov 11, 2016. Retrieved from http://www.muskokacommunity.ca/general-information/community-statistics/a-statistical-economic-and-social-profile-of-muskoka-may-2010201</p> <p>District Municipality of Muskoka. (2016) Limits to Growth and Assessment. Lake System Health. Accessed on Nov 10, 2016. Retrieved from http://www.muskoka.on.ca/en/live-and-play/Limits-to-Growth--and-Assessment.aspx</p> <p>District Municipality of Muskoka. (2014) STRATEGIC PRIORITIES, District Government. 1-15. Accessed on Nov 11, 2016. Retrieved from https://muskoka.civicweb.net/document/5321</p> <p>Dmitrevia, K. (2015, June 24). Canada Has a Hamptons and It's Booming. Retrieved from http://www.bloomberg.com/news/articles/2015-06-24/hamptons-north-booms-as-muskokacottages-lure-buyers</p> <p>Good, Kim. (2012) Overcrowding Riverside. Muskoka Region. Accessed on Nov 10, 2016. Retrieved from http://www.muskokaregion.com/news-story/3567194-overcrowding-at-riverside/</p> <p>LIVING IN COTTAGE COUNTRY: WHAT YOU NEED TO KNOW (Rep.). (2016, July 7). Retrieved from http://www.seguin.ca/en/live/resources/Living-in-Cottage-Country---Rebecca-Willison.pdf</p> <p>Lonely Planet (2016). Canada - Lonely Planet. Retrieved from https://www.lonelyplanet.com/canada</p>

- MacGREGOR, R. (2015, August 07). The story of the Muskoka River: A struggle between preservation and development. Retrieved February 16, 2017, from <http://www.theglobeandmail.com/news/national/along-ontarios-idyllic-muskoka-river-locals-fight-dam-development/article25814523/>
- McAllister, C., & Ryan, J. (2013). Colin and Justin: Add elbow grease to cottage tool box. Retrieved February 16, 2017, from <http://www.vancouversun.com/news/colin-justin-elbow-grease-cottage-tool/8559540/story.html>
- Muskoka Conservancy. (2016) <http://muskokaconservancy.org/about-us/>. Accessed on Nov 11, 2016
- Muskoka Region. (2016). Muskoka receives almost 250,000 in infrastructure funding. Retrieved from <http://www.muskokaregion.com/news-story/6800180-muskoka-receives-almost-250-000-in-infrastructure-funding/>
- Muskoka resort and tourism official plan policy review (Rep.). (2013, July). Retrieved from [https://muskoka.civicweb.net/document/21661/PKF - Muskoka Resort and Tourism Official Plan Policy Review - Recommendations Report.pdf](https://muskoka.civicweb.net/document/21661/PKF-Muskoka-Resort-and-Tourism-Official-Plan-Policy-Review-Recommendations-Report.pdf)
- Muskoka Summit on the Environment. (2016) <http://muskokasummit.org/>. Accessed on Nov 11, 2016
- Muskoka Watershed Council. (2016) <http://www.muskokawatershed.org/about-us/mission/>. Accessed on Nov 10, 2016
- Ontario Ministry of Tourism, Culture and Sport. (2014) Region 12: Muskoka, Parry Sound and Algonquin Park. Regional Tourism Profiles. Accessed on Nov 11, 2016. Retrieved from <http://www.mtc.gov.on.ca/en/research/rtp/rtp.shtml>
- Our Demographic Destiny. (2012, April). Retrieved from http://www.muskokawatershed.org/wpcontent/uploads/2012/05/DemographicDestiny_Notes-SValentine1.pdf
- Strategic Priorities. (2016). Retrieved from http://www.muskoka.on.ca/en/district-government/StrategicPriorities.aspx?_mid_=637
- The 10 Best Muskoka District Hotels 2016 (with Prices) - TripAdvisor. (2016). Retrieved November 30, 2016, from https://www.tripadvisor.ca/Hotels-g499279-Muskoka_District_Ontario-Hotels.html
- The District of Muskoka Economic Profile (Rep.). (2011, September). Retrieved from https://muskoka.civicweb.net/document/17450/Economic_Profile_September2011.pdf?handle=1590F26790D141D2B0AD3C27EE3CF456
- Tourism Snapshot – Year-in-Review 2012. (2012). Retrieved November 30, 2016, from <http://en.destinationcanada.com/infographic/tourism-snapshot-year-review-2012>
- The Ontario Common Front. (2012) Ontario's Backslide into Widening Inequality, Growing Poverty and Cuts to Social Programs. *Falling Behind*. PP. 31 and 34. Accessed on Nov 10, 2016. Retrieved from <http://ofl.ca/wp-content/uploads/2012.08.29-Report-FallingBehind.pdf>
- Vega, T. D. (2016, September 16). Circles Muskoka needs your help to inspire and equip communities to resolve poverty. Retrieved February 16, 2017, from <https://doppleronline.ca/huntsville/circles-muskoka-needs-your-help-to-inspire-and-equip-communities-to-resolve-poverty/>
- VISIT MUSKOKA. (n.d.). Retrieved November 30, 2016, from <http://www.visitmuskoka.com/history2.htm>
- VISIT MUSKOKA. (n.d.). Retrieved November 28, 2016, from http://www.visitmuskoka.com/muskoka_hotels_motels_inns.htm

3.9. Ohrid (Macedonia)

University St. Kliment Ohridski
Faculty of Tourism and Hospitality, Ohrid
Prof. Dr. Ivanka Nestoroska
Prof. Dr. Naume Marinovski
Prof. Dr. Sasho Korunovski
Prof. Dr. Simona Martinoska
Prof. Dr. Katerina Angelevska-Najdeska
Prof. Dr. Risto Reckoski
Prof. Dr. Danijela Miloshoska

In the case of Ohrid, rapid growth of tourism together with inadequate infrastructure leads to overcrowding in the high season. The main reasons for the problems relate to a lack of strategic approach and the low awareness of the local population about the importance of sustainable tourism development.

General information	
Title / Name of the site/destination	Ohrid
Region, country	South western Region of the Republic of Macedonia
Area size (km²)	384km ²
Geographic coordinates	41°07'01"N 20°48'06"E
Population and scope (if inhabited)	55,749
Short description of the case	
<p>Ohrid is the most country's developed destination and it counts the highest scope of tourist arrivals in 2015 with total 219.944. It participates with approximately 62% in total registered visits in lake tourist resorts of the country (Statistical Yearbook of R. Macedonia, 2016).The highest intensity of tourist arrivals is within summer period (July-August) when this destination faces problems mainly related to the lack of parking lots, public transport and overcrowding at cultural sites, beaches, and restaurants. Different problems are addressed to current situation and most of the stakeholders views are joined when it comes to this issue. However, despite the views that it is necessary to undertake activities aimed at sustainable development of tourism in Ohrid, the current situation shows that it is necessary to do much more to overcome this situation.</p> <p>There are some initiatives to enrich the tourist offer through selective tourism products that would contribute to sustainability in tourism development and reduce pressure by the concentration of tourist arrivals in those months, but what is lacking is a strategic approach to improve the situation by leading actors of tourism in Ohrid.</p>	

Tourism development in the country of the case study
Short description of the importance of tourism in the country
<p>Recent development of tourism in the Republic of Macedonia had all characteristics of tourism development within international frames, and with main orientation to achieve higher economic benefits, very often neglecting the environmental and socio-cultural aspects of tourism at same time. The result of such development was existence of tourist offer that was not very competitive on tourist market, often overlapped with similar tourist offer from neighbouring countries with exclusion of Ohrid as specific cultural destination on Balkans. The number of tourists and overnights registers trend of increasing the volume of tourist traffic which is present in the regional framework, and it is the most present in the South western Region (with dominant participation of Ohrid Lake region) and Skopje Region within the eight regions of the country. Distribution of tourist flows registers <i>uneven regional distribution of tourism flows with high concentration in above mentioned regions</i>. Such concentration is due to the high concentration of touristic valorized natural and cultural values as a result of which marks the largest volume of tourist traffic realized in the South</p>

western and Skopje Region (61%). Then follow Southeast, Pelagonia and Polog with 29%. The remaining 10% are realized in other 3 regions (State Statistical Office, 2016).

Arrivals, Overnight stays

A trend of continuing growth in arrivals and overnights is present during the last decade, especially in the number of foreign tourists from Western European and neighboring countries (Netherlands, Germany, Poland, Turkey, Serbia, Bulgaria, Albania and Greece) which indicates growing interest for the tourist offer of the Republic of Macedonia.

Scope and structure of tourist flows in the Republic of Macedonia

Year	Tourists		Total	Foreign in %	Nights		Total	Foreign in %
	domestic	foreign			domestic	foreign		
2006	297 116	202 357	499 473	40,5	1 474 550	442 845	1 917 395	23,0
2007	306 132	230 080	536 212	42,9	1 501 624	518 088	2 019 712	25,6
2008	350 363	254 957	605 320	42,1	1 648 073	587 447	2 235 520	26,2
2009	328 566	259 204	587 770	44,0	1 517 810	583 796	2 101 606	27,7
2010	324 545	261 696	586 241	44,6	1 461 868	559 032	2 020 217	27,6
2011	320 097	327 471	647 568	50,5	1 417 868	755 166	2 173 034	34,7
2012	312 274	351 359	663 633	52,9	1 339 946	811 746	2 151 692	37,7
2013	302 114	399 680	701 794	56,9	1 275 800	881 375	2 157 175	40,8
2014	310 336	425 314	735 650	57,8	1 273 370	922 513	2 195 883	42,0
2015	330 537	485 530	816 067	59,5	1 357 822	1 036 383	2 394 205	43,3

Source: Statistical Yearbook of the Republic of Macedonia, 2016; Authors' own calculations

Based on data on the number of arrivals and nights spent, average stay of days in the analyzed period was 3.5 days, which is relatively short. Mostly, the lack of enriched content for tourist stay is an important indicator of the relatively short length of stay of tourists.

GDP

According to the preliminary data of the State Statistical Office (2016), obtained from the annual reports of business entities and other sources, the gross domestic product (GDP) in 2015 was 558,240 million denars (9,679million US\$), and in comparison with 2014 it increased by 5.8% in nominal terms. The real GDP growth rate in 2015, compared to 2014, was 3.8%. Tourism sector in Macedonia participate with 5,2% to national GDP (2,3% direct and 2,9% indirect).

Tourism value added (% of GDP)

The direct contribution of Travel & Tourism to GDP in 2015 was estimated for MKD8.4bn with 1.5% of total GDP (WTTC, Country Report, 2016).

Employment in tourism (%)

In 2015 Travel & Tourism directly supported 10,000 jobs (1.4% of total employment). This is expected to remain unchanged in 2016 and rise by 1.7% to 12,000 jobs (1.7% of total employment) in 2026 (WTTC Country Report, 2016).

Further remarks:

An emerging need to create new enriched offer was definitely identified within the last decade particularly among the creators of tourist policy and facilitators of tourist activity, that future orientation of Macedonian tourism development necessarily has to consider competitiveness and sustainability along with the care for natural and cultural values as tourist offer' inevitable components and, at same time to achieve competitive position on international tourist market, as well.

Tourism supply of the site
<p>Short description of tourism on the site</p> <p>As a heritage city, Ohrid faces many challenges through its tourism development. Geographical location, natural and cultural heritage are the main components for tourism development of Ohrid as tourist destination. Due to the presence of Ohrid Lake and National park Galicica, along with the richness of cultural heritage that are worldwide recognized, Ohrid is the most important tourist center in the Republic of Macedonia. The special values of Lake Ohrid and National Park Galicica together with rich cultural values as unique heritage have placed this destination on the World Heritage List of UNESCO since 1979 (Vasilevska & Petrovska, 1998). Ohrid tourism supply is consisted of touristic valorized natural and cultural heritage attractions, with high level of tourism exploitation as important components of summer- lake tourism, cultural tourism, rural tourism and active tourism. This destination is urban with respective rural environment and potentials for rural tourism development with initiated rural activities in some rural areas.</p>
<p>Access (how to get there?)</p> <p>Accessibility is by road and air transport. The International Airport "St. Paul "is on 10 km from the city, on the highway Skopje-Kicevo-Struga. It operates through all year, but the highest flight frequency is during May-October.</p> <p>The distance between Ohrid and the capital Skopje is 235 kilometres. There are ongoing activities for modernisation of the highway M4 planned to be finished by 2018.</p> <p>Regional road R-1208 (Ohrid - Sv. Naum) leads to Macedonian-Albanian border (35 km).</p> <p>Accessibility to Ohrid by lake is not in function although there are initiatives to establish an international ferry line Pogradec (from Albania) –Ohrid.</p>
<p>Main attractions</p> <p>The main attractions for visiting Ohrid are:</p> <ul style="list-style-type: none"> - <u>Ohrid Lake</u> with its summer vacation offer, world-wide, the Baikal, the Caspi and the Tanganyika lakes are with a similarly remote origin such as Lake Ohrid as an ecological and natural heritage that is shared by Macedonia and Albania. It is one of the most important natural values of the country, which is at altitude of 695 m and is surrounded with high mountains (the massifs of Mokra Planina 1589 m, Jablanica 1945 m, Galicica 2255m). Lake Ohrid covers an area of 348.8 km² of which about two thirds belong to Macedonia and one third to Albania. On the Lake shores there are 21 equipped beaches offering all the necessary equipment for rest and recreation on the water (Marinoski, 1998). - <u>National Park Galicica</u> (with highest peak of 2.265 m) that lies in the closest surrounding of Ohrid, and stretches in the area of two municipalities: Ohrid and Resen, with huge potential for recreational activities and alternative forms of tourism. The area with height over 2.000 m is relatively small but it has excellent conditions for panoramic view points that give possibilities to watch the two Lakes Ohrid and Prespa at the same time. As most recommended and developed activities of National Park Galicica (NPG) are mountain biking, hiking, walking, and natural and cultural trail on Prespa Lake Island - Golem Grad, with established routes and guiding. - <u>Old part of the town</u>. Each period of the history of Ohrid has remains that can be measured not by centuries but even with the millennia. Therefore the ancient town of Ohrid is actually <i>a museum town</i> or <i>a treasure of the centuries</i>. Within the area of old part of the town lying on the hillside below the dual ridge of Samuel's Fortress there has been preserved a unique museum and an archaeological treasury of classical and medieval art (Vasilevska & Petrovska, 1998). - There are more than 30 monuments and sites in the city and its surrounding nearby which with their heritage value are on the list of places usually visited. Among them the most visited are the Ohrid fortress of Tsar Samuel, the Anique Theatre, the Early Christian Episcopal Church, St. Kliment's Monastery of Sts. Kliment and Panteleimon at Plaosnik, Neolithic Settlement Bay of Bones in Gradishte, St. Naum's Monastery of the Holly Archangels, Cathedral church of St. Sophia, St. Bogorodica Perivlepta, St. Jovan Bogoslov at Kaneothe Gallery of Ohrid Icons, cave church St. Erasmus, The Museum-Hous of Robevi, as well as catholic church Sts. Cyril and Methodius, Ajdar –pasha mosque, the Hadzi Turgut mosque (the Cross mosque), Ali-pasha mosque and Teketo of Ohrid¹⁰.

¹⁰ www.ohrid.com.mk

<p>Accommodation offer (number, type, quality)</p> <p>According to data of the Municipality Department for local economic development (2016) Ohrid has 72 accommodation capacities, out of which 43 hotels with 4,538 rooms and 12,422 beds, with the following structure: 5 stars (1), 4 stars (12), 3 stars (21), 2 stars (8), 1 star (1)</p> <p>Private accommodation capacities in Ohrid count 5,098 rooms with total number of beds 12,105. The capacity of Motels is 114 beds, camps have 1,676 beds, workers, children and youth resorts have 3,450, inns 64, and others 224¹¹.</p>
<p>Restaurants (number, type, quality)</p> <p>Ohrid abounds with catering facilities, restaurants, coffee bars, night clubs, and lounge bars. The total number of these facilities in Hospitality Ohrid is 188, with a total of 7,592 seats. The total number of employees who serve these facilities is 906.</p>
<p>Other tourism service providers</p> <p>There are 2 museums, Tour guide association "Kej" with 41 tour guides members out of total 145 tour guides on the territory of municipality, over 15 souvenir shops, 3 shops that produce "Ohrid pearl" with family tradition over 60 years (Families. Filevi and Talevi), National workshop on handmade paper "St. Kliment Ohridski", lapidarium, Memorial house of the Macedonian poet and educator Grigor Prlicev.</p>
<p>Stage of the tourism life cycle</p> <p>In regards to the UNWTO stages of destination development, Ohrid is in the growth/development stage with recording high concentration of tourist arrivals during the high season resulting in having more visitors than residents in the destination in these times.</p>

Tourism demand at the site																																																																																									
<p>Short description of tourism demand</p> <p>In the last years Ohrid was mostly visited by tourists from Turkey, Holland, Serbia and Bulgaria. But it can also be noted that the number of tourists from Turkey, the Netherlands and Bulgaria is growing since 2010 (Statistical Yearbook of Republic of Macedonia, 2010), while the number of tourists from Serbia has certain oscillations, but it is still less than the number of tourists who visited Ohrid in 2010. Main purposes for visiting Ohrid by the foreign tourists are: summer vacation and cultural heritage.</p>																																																																																									
<p>Volume of tourists</p> <p>The number of overnight stays by country of origin of tourists for the period 2009-2015 shows increase. The data in the table shows that during this period in Ohrid the highest volume of nights were realized by tourists from Turkey, the Netherlands, Bulgaria, and Serbia. It indicates that, although the number of tourist arrivals from Turkey is highest within the last 4 years, yet they don't stay as long as tourists from the Netherlands and Serbia.</p>																																																																																									
<p>Number of tourist arrivals in Ohrid by country of origin in the period 2009-2015</p> <table border="1"> <thead> <tr> <th>Year</th> <th>Total</th> <th>Croatia</th> <th>Slovenia</th> <th>Bulgaria</th> <th>Greece</th> <th>Holland</th> <th>Turkey</th> <th>Albania</th> <th>Serbia</th> </tr> </thead> <tbody> <tr> <td>2009</td> <td>189699</td> <td>2669</td> <td>3580</td> <td>11505</td> <td>2007</td> <td>1228</td> <td>3432</td> <td>4408</td> <td>12296</td> </tr> <tr> <td>2010</td> <td>165109</td> <td>2511</td> <td>3211</td> <td>4596</td> <td>3137</td> <td>1613</td> <td>3553</td> <td>3766</td> <td>10325</td> </tr> <tr> <td>2011</td> <td>178288</td> <td>2994</td> <td>3609</td> <td>5241</td> <td>6546</td> <td>10128</td> <td>8024</td> <td>2707</td> <td>7914</td> </tr> <tr> <td>2012</td> <td>183335</td> <td>2708</td> <td>3831</td> <td>5275</td> <td>3525</td> <td>14206</td> <td>14198</td> <td>2158</td> <td>7293</td> </tr> <tr> <td>2013</td> <td>191504</td> <td>3164</td> <td>3559</td> <td>5492</td> <td>5997</td> <td>13269</td> <td>18822</td> <td>3581</td> <td>8071</td> </tr> <tr> <td>2014</td> <td>197196</td> <td>4735</td> <td>3769</td> <td>8900</td> <td>5973</td> <td>13634</td> <td>16839</td> <td>3419</td> <td>7874</td> </tr> <tr> <td>2015</td> <td>219944</td> <td>4243</td> <td>2775</td> <td>8445</td> <td>4551</td> <td>15382</td> <td>31270</td> <td>3281</td> <td>6442</td> </tr> </tbody> </table> <p>Source: Statistical Review (2010); Statistical Yearbook of Republic of Macedonia (2016): Transport, tourism and other services, Author's own calculations.</p>										Year	Total	Croatia	Slovenia	Bulgaria	Greece	Holland	Turkey	Albania	Serbia	2009	189699	2669	3580	11505	2007	1228	3432	4408	12296	2010	165109	2511	3211	4596	3137	1613	3553	3766	10325	2011	178288	2994	3609	5241	6546	10128	8024	2707	7914	2012	183335	2708	3831	5275	3525	14206	14198	2158	7293	2013	191504	3164	3559	5492	5997	13269	18822	3581	8071	2014	197196	4735	3769	8900	5973	13634	16839	3419	7874	2015	219944	4243	2775	8445	4551	15382	31270	3281	6442
Year	Total	Croatia	Slovenia	Bulgaria	Greece	Holland	Turkey	Albania	Serbia																																																																																
2009	189699	2669	3580	11505	2007	1228	3432	4408	12296																																																																																
2010	165109	2511	3211	4596	3137	1613	3553	3766	10325																																																																																
2011	178288	2994	3609	5241	6546	10128	8024	2707	7914																																																																																
2012	183335	2708	3831	5275	3525	14206	14198	2158	7293																																																																																
2013	191504	3164	3559	5492	5997	13269	18822	3581	8071																																																																																
2014	197196	4735	3769	8900	5973	13634	16839	3419	7874																																																																																
2015	219944	4243	2775	8445	4551	15382	31270	3281	6442																																																																																

¹¹ www.ohrid.gov.mk

Number of overnight stays by country of origin of tourists for period 2009-2015

Year	Total	Croatia	Slovenia	Bulgaria	Greece	Holland	Turkey	Albania	Serbia
2009	951254	6593	9237	24079	3085	3868	6873	7284	40295
2010	791991	6009	9653	9066	5681	5741	6492	7085	30914
2011	810795	7123	11987	10253	11453	60900	12898	5517	25561
2012	823666	6850	12045	10288	5683	88197	23434	3951	20749
2013	796048	7368	10760	11560	10748	78986	30120	5997	23973
2014	754048	10188	8185	17848	11001	79340	25068	6791	20752
2015	868644	8580	7457	17087	7733	92060	48120	5615	20077

Source: Statistical Review (2010); Statistical Yearbook of Republic of Macedonia (2016): Transport, tourism and other services, Author's own calculations

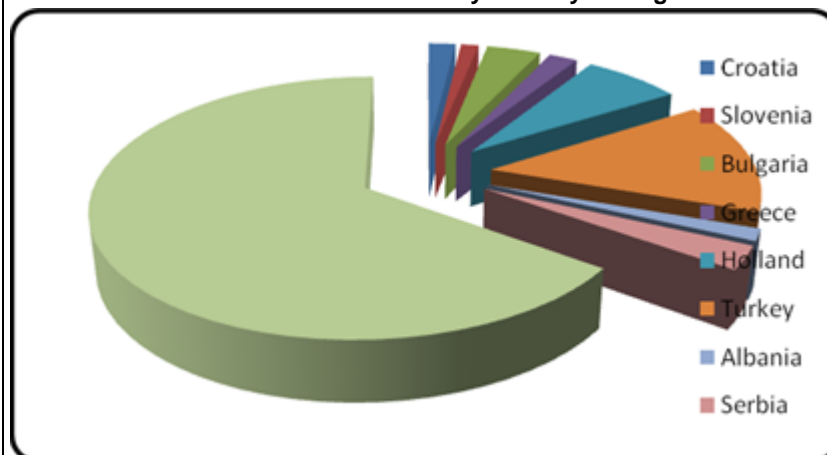
Length of stay

Between 2009-2015 average length of stay was 4,5 days

Origin countries of tourists

Ohrid is mostly visited by tourists from Albania, Bulgaria, Croatia, Greece, Netherland, Serbia, Slovenia and Turkey

International tourist arrivals in Ohrid by country of origin in 2015



Source: State Statistical Office of Republic of Macedonia, Makstat data, 2016

Tourism image

Ohrid' image is developed on the following main attractions:

- Ohrid Lake known as BALKAN PEARL
- Ohrid cultural heritage for which is called BALKAN JERUSALEM
- Rich cultural events during summer period

Motives / target groups

Families, Young people, Older population, Business travellers

Visitors' activities, activity patterns

Families -summer vacations, weekend escapes, active holidays, cultural heritage
 Young people- summer night life, concerts, active holidays
 Older population –cultural heritage , off-season escapes
 Business – MICE

Seasonality (peaks)

July-August

Visitors' opinions, attitude and behaviour, expectations and preferences, satisfaction

In several analyses research indicates that visitors are satisfied by the natural and cultural beauties and attractions, but they complain about the cleanness and infrastructure (Nestoroska & Marinoski, 2009).

The top 15 rating on Tripadvisor for best sights and landmarks of Ohrid are listed as follows: St. Jovan Kaneo, Monastery of St. Naum, Tsar Samuel's Fortress, St. Sophia, St. Kliment Ohridski, Church of Our Lady Perivlepta, Plaoshnik, National workshop for handmade paper, Ancient Theatre of Ohrid, Monument St. Naum of Ohrid, Early Cristian Basilica, Icon Gallery-Ohrid, National Ohrid Museum-House of Robevi, Gorna Porta, and Monument of St. Kliment Ohridski.

Further indicators/ remarks

Despite numerous attempts to overcome the seasonality there is still much to be done in the case of Ohrid. Primarily, the recommendations are towards extending the main tourist season, the diversification of the tourism market, using pricing policies, subsidies, attracting domestic tourists and organizing events apart from the main season and so on, as differential pricing, diversity of attractions, diversification and market support from central and local government (loans, subsidies, concessions, partnerships, improvement of legislation, etc.).

Framework conditions

What are the framework conditions that might influence the impact and/or the management of the site?

History and background

The shores of Lake Ohrid have been inhabited since prehistoric times. Archaeological findings revealed settlements from the Neolithic period 6,000 years B.C. and from the different important periods since then (Kuzmanovski, 1996). The ancient name of Ohrid was Lychnidon - City of light, and the name *Ohrid* is first mentioned in a protocol issued by the Assembly of Constantinople in 879. It is believed to have been derived from the Slavonic words - *vo hrid* - 'on a hill' - since the old town of Ohrid stands on the crest of a hill. City filled with history, Ohrid was a well-known trade and religious centre whose reputation went far beyond the frontiers of the region.

It is said that Ohrid's history is as old as the worked stone of the town. The centuries and even the millennia can be felt here in many things (Vasilevska & Petrovska, 1998). It is for this reason that the ancient town of Ohrid has rightly been styled *a museum town* and *a treasure of the centuries*.

The city of Ohrid and the Lake region can be styled as a magical land of archaeology. More than 250 archaeological sites with remains dating from between the Neolithic period and the late middle ages have been excavated.

With its cultural heritage Ohrid has entered the history of Europe. During its history it was a cultural centre of Slavonic literacy, Tsar Samuel's capital, an artistic centre of fresco paintings which are ranked among the finest achievements of European fine art of that time. No anthology of medieval art is conceivable today without the 11th century frescoes from the cathedral church St. Sophia or those from the 13th century in St. Clement church or without the icons from the Ohrid Gallery of Icons collection. Through a century Ohrid has been developed into a prosperous town which attracted some of the best-known painters and architects of the period. Ohrid is notable for once having had 365 churches, one for each day of the year, and has been referred to as a "Jerusalem of the Balkans" (Petrovski, 2004).

Nowadays Ohrid is the largest city on Lake Ohrid and the eighth-largest city in the country, with over 42,000 inhabitants (Republic of Macedonia, 2002). Ohrid is also home to Villa Biljana, which serves as an official residence of the Presidents of Macedonia. It is the most important tourist destination of Macedonia.

Political situation

Republic of Macedonia is country candidate for EU membership, it is located in the heart of Balkan Peninsula, and it is the crossroad of Southeastern Europe. Macedonia takes different economic, legal and political measures, programs and strategies for achieving EU Membership. In Parliament and in Government of Macedonia set of measures, amendments of different laws were passed in order Macedonia to be more attractive for investment in tourism sector, and also for achieving sustainable tourism development.

From an organizational point of view – different stakeholders for tourism development are involved.

Macedonian Parliament – where laws are passed, Government and its ministries for passing bylaws and Strategies and monitoring the state of tourism development.

At state level, especially within the Ministry of Economy of Macedonia there is a Tourism department, with local offices, and there is an Agency for support and promotion of tourism in Macedonia.

On local level, in Ohrid municipality there is Sector for Local Tourism and Economic Development (LTED) with Sector for tourism.

All these factors have different legal competencies in reasonable manner. The Municipal Council of Ohrid is the

highest decision-making body for all issues within the authority and duties of the municipality. The activity of the Municipal Council is in accordance with the Local Government Law and the Statute of the Municipality of Ohrid. The Council has 10 established committees as working bodies; one of those is the Committee for Tourism. Annually these Committees propose Programs with planned activities, measures and budget. Since tourism sector plays an important role in local economy, in Municipality administration there is Tourism Sector within the Department for Local Economic and tourism development. Development of the municipality is funded by different budgets from Municipality own sources, Ministry of Local self-government, International Funds and Grants (IPA, UNDP, World Bank, EBRD and others), other Ministries and business sector.

Legal issues

Legal framework for Ohrid as specific Macedonian tourist destination is comprehensive and it is consisted of different laws, regulations and strategies, and all these are of special importance for the specific case. There is a broad law framework that regulates important issues for tourism development of Ohrid as: Law for hospitality activity (Official Gazette of Republic of Macedonia No. 192/15), Law for tourism activity (Official Gazette of Republic of Macedonia No. 192/15), Law for Agency for support and promotion of tourism in Macedonia (Official Gazette of Republic of Macedonia No. 187/13), Law for tourism development zones (Official Gazette of Republic of Macedonia No. 141/12), National Strategy for rural tourism 2012-2017 (National Strategy for tourism in Macedonia 2016-2021)¹², Law for proclamation of old town core of Ohrid for cultural heritage with great importance (Official Gazette of Republic of Macedonia No. 47/11), Law for management with world natural and cultural heritage in the Ohrid region (Official Gazette of Republic of Macedonia No. 75/10), Law for performing of crafts activity (Official Gazette of Republic of Macedonia No. 62/04), Management plan for national park Galicica 2010-2020¹³, Plan for solid waste management in the National Park Galicica, Strategy and plan for developing a system of trails in the National Park Galicica, Local Action Plan for Environment in the Municipality of Ohrid (Official Gazette of Ohrid Municipality, No.1/12), Sub-strategy for rural tourism development in Municipality of Ohrid 2014-2018 (Official Gazette of Ohrid Municipality, No.3/14).

According to *The Law for management with world natural and cultural heritage in the Ohrid region*, the measures, standards and environmental objectives for the protection of natural and cultural heritage are applied as minimum requirements that must be met in the management of world natural and cultural heritage in the Ohrid region. In this region the strictest measures and standards must be applied in order to protect the environment and protection of natural and cultural heritage. Particular attention is towards the creation of conditions for sustainable development of the Republic of Macedonia and municipalities of Ohrid, Struga and Debarca, through appropriate usage of the World Heritage of the Ohrid region; prevention of activities that negatively affect the exceptional values of World Heritage in the Ohrid region, and inclusion of Republic of Macedonia and municipalities of Ohrid, Struga and Debarca in the international system of cooperation and assistance for the international protection of the world natural and cultural heritage.

With *Law for performing craft activity*, conditions and manner of craft and association of craftsmen are regulated, and this Law is particularly important for the specific crafts that are still alive in Ohrid: production of Ohrid Pearl, Woodcarving, and Goldsmith.

The *Law on proclamation of old urban core of Ohrid as a cultural heritage of particular importance*, provides permanent preservation of historical, artistic, architectural, urban, ambient, ethnological, spiritual, sociological and other scientific and cultural values, and authenticity, uniqueness, rarity, diversity, integrality, age and other characteristics, contents and features.

The biggest problem despite all adopted legislation in the field of urban planning is their implementation and monitoring, evaluation activities and reprocessing.

Organisation

There are several important stakeholders for tourism in Ohrid Municipality: Department for local and tourism

¹² www.economy.gov.mk/Upload/Documents/Kohl%20&%20Partner_Tourism%20Strategy%20Macedonia_FINAL%20REPORT_16%2004_MK.pdf

¹³ www.galicica.org.mk

<p>development, Center for development of South-western planning region (where Ohrid municipality belongs to), Council for regional development¹⁴, EDEN-tourism cluster of Southwest Macedonia¹⁵, Business sector, and Civil sector.</p> <p>The tourism sector has responsibility for creation, adoption and realization of development strategies and planning documents, and activities for the destination. In the municipality in the area of tourism as an organizational structure functions inspectorate that has a mandate to control activities and deviations in the field of tourism with a remarkable impact on the development of this activity.</p> <p>The business sector is organized into several chambers forms. However, it's necessary to form strong, innovative and active craft association that will enable improvement of economic activities.</p> <p>Networking and connection on a horizontal basis is relatively weak. Namely, in the Municipality of Ohrid, there is EDEN- Tourism Cluster that targets symbiotic relationship between stakeholders, but it is still needs stronger influence in destination' tourism.</p> <p>There are NGOs who are oriented towards different environmentally issues, youth, gender, religious and social equality to promote relations in the communities as representatives of civil sector They give a remarkable contribution to the critical approach they have and some of them undertake activities related to tourism.</p> <p>Activities for the preparation of the Tourism development strategy of Municipality of Ohrid are expected to be finished in 2017. Currently there is no strategy.</p>
<p>Physical setting</p> <p>Communal, transport and communications infrastructure in the Municipality of Ohrid are in relatively good condition, but according to the analysis it was found that in some infrastructure areas it is necessary to further intervene. Particular focus should be put on cycling infrastructure and the improvement and upgrading of the existing road infrastructure, water supply and sewerage infrastructure. During the peak season there's a lack of parking places. In regards to utility services, there is a well installed and maintained water-supply system, sewerage network, station for wastewater treatment, electrical network, cable network, and telecommunication.</p>
<p>Economic situation</p> <p>The economy of Ohrid is in the post privatization cycle and follows the trends of the national economy. These developments resulted with closing of many former large scale social enterprises, and orientation towards development of newly established private SMEs that become the main driver of local economy. According to the State Statistical Office of the Republic of Macedonia (2014) in Ohrid Municipality 2,696 business entities were registered, 5 of which large, 24 medium, 688 small and 1.979 micro enterprises.</p> <p>Data shows that the investments in the Municipality of Ohrid account for 1.09% of total investments in the country. Investment in accommodation and food service activities amounted to 13,000,000 denars (228.070 US\$) while the remaining investments are for support of development of the municipality. (State Statistical Office 2014)</p>
<p>Social/cultural situation</p> <p>Remarkable cultural heritage connected with ethnographic and ethnological characteristics within events in Ohrid create good basis for enriched tourist offer. Tradition and events are vital element of the culture in Macedonia as well, and the connection of tourism can lead to improved tourism development and destinations promotion not only on tourist market, but also within worldwide cultural identity.</p> <p>Cultural events related with tradition and different celebrations and religious occasions take important part of local residents' live and destination' cultural offer. Among them are the following: Ohrid Summer Festival, Balkan song and dance festival, Balkan music square festival, Ohrid Choir Festival, Celebration of Orthodox Easter, Celebration of Epiphany. Celebration of the day of St. John of Caneo the protector of Ohrid fishermen, Wine and cheese festival, Gjomlezijada, Ohridska Sofra.</p> <p>All these events are initiated and supported by Municipality, Ministry of culture, NGO's, cultural institutions, cultural associations, the church, and local businesses.</p>
<p>Environmental situation</p> <p>The main natural attractions in Ohrid: Lake Ohrid and National Park Galicica, although protected areas confront with challenges related to potentially environmental damage.</p> <p>In this sense there is need for higher attention to biodiversity in these areas for the purpose of their protection, and touristic valorisation and affirmation. Such approach will enable to attract visitors for other motives rather than those who are dominant for tourist visits: educational activities, photography.</p> <p>The development of tourism in Ohrid as city rich in natural and cultural resources includes actions to reduce the</p>

¹⁴ <http://www.mchamber.mk>

¹⁵ <http://eden.mk/>

amount of waste produced, reduce consumption and the threat to natural resources and cultural heritage, thereby giving contribution to sustainable development. These actions are supported not only by Municipality but also by communal utility services, NGO's and the Cluster.
<p>Bottlenecks and constraints</p> <p>Problems with transport and parking in peak season, efficiency in different sectors of services (banking, post office, telecommunication, efficient waste management, lack of green areas-parks, overcrowded building construction, inconsistency and lack of respect of detailed urban plan and general urban plan to the Law for management with world natural and cultural heritage in the Ohrid region and the Law on proclamation of old urban core of Ohrid as a cultural heritage of particular importance.</p>
<p>Other factors/ Further remarks</p> <p>Considering the status as a city of UNESCO, Ohrid has privilege and at same time obligations to protect and maintain the natural and cultural values. More, since they are included in tourist promotion of this destination. Economic development must not endanger the cultural identity especially in the cities under the protection of UNESCO. Protected cities should increase revenue by promoting the cultural and natural heritage, but not at the cost of its destruction.</p>

<p>Challenges / Impacts</p> <p><i>What are the most important challenges resulting from high tourism intensity on the site?</i></p>
<p>Short description of main challenges</p> <p>Main challenges for Ohrid are:</p> <ul style="list-style-type: none"> - to improve sustainable tourism development - to overcome bottlenecks - to increase the awareness of local population for the importance of sustainable tourism development - to improve tourism infrastructure <p>The perception for sustainable tourism development still focuses on natural environmental protection, neglecting the importance of the cultural and economic issues in sustainability. Activities for raising awareness for different stakeholders (e.g. municipal administration, business sector, students) can contribute to overcome this situation. There's a lack of efficient public transport that is environmentally friendly at same time (SMART transport concept in National Park Galicica, along lakeshores), sightseeing shuttles, increased bicycle network infrastructure, development of the concept of public bike transport.</p>
<p>Tourism intensity</p> <p>The area of Ohrid covers 389.93 km² with a population of 55,479. Therefore, population density is 142.28pers/km². According to the number of tourist arrivals the relation "tourists to permanent population" in July and August was 1:1 (in 2015). (State Statistical Office, 2016)</p>
<p>Influencing factors</p> <p>In general, some of the problems in Ohrid are: insufficient staff in the institutions of spatial planning and protection of cultural heritage, public participation and other stakeholders in the planning process, transparency and timely information, application of modern technologies and accessibility information from the institutions to the public, public - private partnership, political influence and so on.</p> <p>All problems can be divided into three basic groups: institutional, social and economic.</p> <ul style="list-style-type: none"> • Institutional problems: legislation, personnel and technical problems. • Social problems: awareness, and unemployment. • Economic problems: lack of funds, outdated and ruined buildings, etc. <p>Legal framework is fully in accordance with high European standards for sustainable tourism development, but it can be said that implementation of some provisions is a real problem.</p> <p>Many preconditions are leading to overcrowding in some tourist attractions in Ohrid region, and there are some visual and non-visual impacts. Mainly it is connected with rapid building development in Ohrid region, and endangering of some building standards and terms regarding UNESCO principles for world heritage property. Also pollution of environment is a problem.</p>

<p>Classification of carrying capacity affected</p> <p>Physical-ecological carrying capacities in Ohrid are determined by transportation, public services, sewerage and waste management.</p> <p>Socio-demographic carrying capacities are determined by the structure and scope of workforce in tourism and hospitality sector (restaurants, hotels, tour guiding, travel agencies, souvenir shops, public services)</p> <p>Economic carrying capacities are related to the revenue from tourism and its distribution issues on municipality level (within last 6-8 years there is indication on increased incomes of hotels, restaurants, souvenir shops, tourist sites, local population that offer private accommodation).</p>
<p>Type of capacity affected</p> <p>Peak times:</p> <p>Peak capacity: July-August</p> <p>Daily capacity: 10:00- 17:00; 19:00h -23:00h</p> <p>Weekly capacity: Friday-Sunday</p> <p>Seasonal: April-October</p>
<p>Physical impacts</p> <p>Overcrowded streets, pedestrian area in the old part of the city "Carsija", high frequency of visits in cultural sites in old part of the city, full beaches during July-August, problems with seats in restaurants, cafes, bars, bakery shops.</p>
<p>Economic impacts</p> <p>According to Article 4 and 5 of the fee for temporary stay (Official Gazette of Republic of Macedonia, No.19/96; 17/11) 80% of the fee is for the municipalities and 20% for the Ministry of economy. Since the number of nights spent in 2015 was 816,723 (State Statistical Office of Macedonia, 2016), the average of 26,180 mil.denars (459.290 US\$) were directed to the municipality's sector for tourism which should be spent for promotional and developmental tourism activities.</p>
<p>Social impacts on residents</p> <p>Evident increase of number of private accommodation capacities, that in 2015 counts over 5,098 rooms with total number of beds 12,105 (State Statistical Office of Macedonia, 2016). Orientation to this activity impacts on residents' quality of life by increasing their family incomes and satisfaction.</p> <p>Crowding is mostly manifested within peak season when the most complaints are about transport, public services and noise in the night particularly in the old part of the city.</p>
<p>Social impacts on tourists</p> <p>Complaints about tourist services by tourists are mostly on the efficiency of workers in restaurants, bars, public services, lack of knowledge of foreign languages. There is improvement in the case of littering due to management plans of public communal enterprises for improved services during the season, peaks and holidays.</p>
<p>Environmental impacts</p> <p>Changes in landscape in the area around the old city area due to intensive construction activities that lead to disturbing the natural look of these areas, very high density of buildings, very few green areas.</p>
<p>Development of impacts/ Changes over time</p> <ul style="list-style-type: none"> - Increased tourist arrivals and nights - Diversified structure of tourists - increased financial income for municipality - improved living standard of the citizens that offer private accommodation - increased problems with transport, parking, noise, overcrowding
<p>Summary: Beneficiaries and sufferers from tourism in the case study</p> <p>Beneficiaries:</p> <ul style="list-style-type: none"> - cultural institutions - national park -business sector -residents who are more or less directly or indirectly involved in tourism - public services <p>Sufferers:</p> <ul style="list-style-type: none"> - citizens from the old part of the city

Measures / Responses <i>What are the solutions that have been or are being discussed and/or implemented to reduce conflict between competing uses and to manage tourist masses? How can the challenges successfully be faced, managed and/or avoided?</i>
<p>General measures</p> <p>With an exception of the measures implemented by the government for subsidising tour operators and hotels who attract foreign tourists, and tourist promotion of different regions in Republic of Macedonia, so far there haven't been undertaken any other measures in terms of managing the tourists masses. The general measures are done by the state on both national and regional levels, by implementation of different projects on a national level and strategies of the local self-governments on a local level. So far the Government of Republic of Macedonia has fulfilled or is in a process of realisation of numerous projects of tourism development and inclusion of the local stake holders in processes of tourism sustainable development.</p>
<p>Social measures</p> <p>Different stakeholders implement measures and activities that have social impact on municipality through tourism , among which are:</p> <ul style="list-style-type: none"> - Sector for tourism of the Ohrid municipality with realization of guidelines set for tourism development on local level, creation of programs to support the development of tourism in the Municipality (Annual program for support tourism development), subventions for small scale private accommodation' owners, promo tours, Organization of events and support a variety of activities and events related to the promotion of traditional local products. - Tourism Cluster–EDEN, The Tourism Cluster of Southwestern Macedonia on regional level is an independent, non-political and non-profit association, which brings together representatives from the private, public and civil sectors from Southwest Macedonia with an idea of a successful development and management of sustainable tourism. They undertake activities to increase awareness of local population for the benefits of tourism development, inclusion of local traditional culture in tourism, promote active tourism, and participate in projects. - Other non-governmental, non-political, non-profit associations, clubs, organizations on local level, for culture, arts, environmental protection, protection of animals, ecology, sport mountaineering, scout club, sport fishing, club of underwater activities, ecological farmers etc. They, with activities indirectly influence and contribute for tourism offer improvement.
<p>Economic measures</p> <p>The newest program implemented by the Local Government - Ohrid through its Sector for Tourism and Local economic development for the period from 01.07.2016 – 30.09.2016 is the Program – G2, for tourism development support, conducted by the Local tourism department. According to the information gained from the interview with responsible persons in the Sector, 90% of the planned activities are completely realized. In the scope of this program conducted activities are in the field of: promotion, development, subsidy, financing small scale tourism projects, tourism signalization and organization of events (Official Gazette of the municipality of Ohrid No. 21/16).</p>
<p>Environmental measures</p> <p>There haven't been fully realized any measures of conscious use of energy, environmentally friendly mobility, protection of nature, landscape and environmental resources, managing water demand and waste disposal even tough once in a while the national and local stakeholders create different programs and start the implementation of various projects. Almost all of them are realised and implemented but unsatisfactory level of public awareness of local population in this sense should be considered. On the other side there is a lack of inspection measures and the penal system barely. Therefore there is a problem with waste disposal in the natural protected areas and a lot of residues end in rivers and the lake.</p> <p>The landscape has been significantly changed especially in Ohrid and the coastal area of Lake Ohrid with inappropriate construction of buildings with different purposes.</p> <p>The projects of the Government of Republic of Macedonia for building highway that will run through the National Park Galicica, building Ski Center in the Park in strictly protected area and plans for 3 tourist zones with low level of consideration for the environment have brought problems to Ohrid and the region</p>

<p>to a point of almost being expelled from the list of UNESCO. It can be concluded that the problems exist and so far no significant measures have been undertaken to solve them.</p>
<p>Specific measures</p>
<p>Expand and improve the capacities and infrastructure</p> <p>Sector for tourism and Local economic development undertakes on regularly basis management with small volume tourist activities:</p> <ul style="list-style-type: none"> - Continuous categorization and registration of Houses Apartments and Rooms for rent. Activities include field work to perform the process of categorization of the objects. - Subsidized private room renters of small volume - Subventions for Houses Apartments and Rooms for rent – subsidizing Tourist fee for providers of services in this type of facilities. - Subsidizing airline carriers - By the initiative of the cycling club WHY BIKE, Tourism cluster EDEN, the Municipality of Ohrid marked and secured bicycle trails on the main streets in central city area. This new infrastructure is predicted to be upgraded on the road Ohrid-Struga and Ohrid-St. Naum.
<p>Disperse tourist attractions</p> <ul style="list-style-type: none"> - Within the Annual Program of Agency for promotion and support of tourism in Macedonia the Project activity "Active Tourism" in cooperation with USAID (Agency for International Development USA) and Atta (Association for Active Tourism) - provided the first organization of Regional Conference and Summit of Balkans active tourism in Ohrid (may 2016), with international participation of 300 tour operators in the country. - National Park Galicia has established biking, hiking and mountaineering trail with organized tour guiding. - Defined activities within the sub-strategy for rural development of Ohrid 2014-2018 where development of rural tourism and alternative forms of tourism; capacity building of local population of rural areas, and development of entrepreneurship, traditionally crafts, SME development are identified as priorities for tourism development in Ohrid rural areas already resulted with several <i>purpose-built tourist complexes</i> that enriched and dispersed tourist offer of Ohrid in rural areas Konjsko, Kuratica, Xzavoj, Elshani and Trpejca. Establishing of "donkey sfari-trails" in rural areas contribute to diverse tourist offer too.
<p>Restrictions</p> <ul style="list-style-type: none"> - access restriction in summer period for cars in old part of the city, except for residents in this area - limited access within a specific time period for vehicle deliveries of goods in the city center - three parking zones with different prices - introducing a regime of one-way streets through downtown area - entree fees for some sites
<p>Optimize temporal distribution of tourists</p> <ul style="list-style-type: none"> - The most crowded tourist period in Ohrid is between the middle of July and mid-August. - Within the last period of 7 years there is evidence of extend visit season due to Government measure for subsidizing hoteliers and tour operators for attracting foreign tourists from the Netherlands with resulted with evident increased number of Dutch tourist in Ohrid Lake region. - Promotion of Macedonia on Turkish market resulted with increased number of tourists from Turkey in Ohrid in off season especially in the months from September to November and February to June. Visitors Bulgaria and Albania are also present mostly in same period. Visitors from Serbia are present in summer season mostly. - There is evident absence of domestic tourists in the low season period, the highest concentration is during summer season, public and religious holidays. <p>There are ongoing activities that contribute to increased tourist demand for Ohrid for which more measures have to be implemented by the local government for International promotion of Ohrid tourism potentials:</p> <ul style="list-style-type: none"> - International tourist fairs. Together with the Agency for Promotion and Support the tourism of RM and Municipality of Ohrid is present on international tourism fairs. This activity involves the promotion of tourist potential of Ohrid in targeted foreign countries which are identified as a potential markets. It has to be

<p>emphasized that Japanese tourists are always travelling during the off season.</p> <ul style="list-style-type: none"> - Wine and cheese festival: 26 and 27 August on the square "Krushevo Republic" with promotion of rural products - different types of quality cheeses and wines of Macedonia. The event has over 15 exhibitors, producers of honey and wineries. The festival is enriched with a performance of folk and dance groups for Ohrid. - Ohrid sofra manifestation (Ohrid table manifestation). Held in September in the village Skrebatno, traditionally event SOFRA is organized with an aim to promote traditional food and drinks and other forms of traditional and cultural values of Ohrid. Traditional dishes are prepared by students from secondary catering school Vanco Pitosheski and the Faculty of tourism and hospitality of Ohrid. - Souvenir competition for city of Ohrid. A public call was announced on 13.06.2016 for selection of authentic souvenir, but none of the reported participants met the calls' criteria.
<p>Optimize spatial distribution of tourists</p> <ul style="list-style-type: none"> -Improved tourist signalization for the monuments and sites of the city and surrounding with interactive apps maps. (implemented) -Visitor management in the museums, improved promotion increase the interactive content in the museums (proposal) - "Education points" for children and students along the lakeshore, in the National Park, in the old part of the city (proposal)
<p>Organisational Measures</p> <p>The Assessment of the proposed activities in National Tourism Strategy 2009-2013, indicates that around 75% of total 80 proposed activities are fully or partially implemented and 25% are not realized. Some of the realized activities which have impact on tourism development in Ohrid are (Kohl & Partner, 2016):</p> <ul style="list-style-type: none"> - Develop a list and promote tourism actions - Regulation of accommodation on black market - Preparation of business plans for national parks - Inclusion of crafts and culture in promotion actions - Providing favorable conditions for low budget carriers - Pledging to improve roads through the National development plan - Improving tourist signs and develop criteria for use of such signs - Permission for entry of EU citizens with ID card - Removal of visa regime for Albanian citizens - Develop and implement management plans for all national parks - Creation of a database of cultural heritage - Development and implementation of plans to protect cultural heritage - Create a tourism logo and slogan for the Macedonian Tourism - Identification of priority markets and segments for promotion - Development and implementation of annual marketing plan - Expanding tourism portal - Developing new and attractive promotional materials - Participation in international fairs, starting with promotional media campaigns - Ensuring that tourism will become sixth economic sector and granting priority status by government and the program "Invest in Macedonia" - Supporting the process of cadastre development - Hiring experienced staff in the Tourism Sector within the Ministry of Economy - Provide short-term technical assistance support of the Agency for Promotion and Support of tourism - Harmonization of criteria for categorizing accommodation with European standards
<p>Reflection on measures implemented and/or discussed</p> <ul style="list-style-type: none"> - increased international tourism visibility of Ohrid as destination. - Evident increase in tourist arrivals and nights, and diversified structure of foreign visitors by country of origin. - Trend of extending of tourist season. - increased interest of foreign tour operators for Ohrid as destination - lack of funding - lack of destination management plan

<ul style="list-style-type: none"> - a need for continuity of the municipality's strategic orientation and vision for the future tourism development of the destination. - a need for deeper exploration of potential tourist markets through previous research on the profile of tourists that are potential tourist market for Ohrid, not only by country of origin, but also to search for niche markets.
<p>New innovative solutions</p> <p>Apps for different sites, restaurant offer, event offer, interactive maps, more free advertising materials, city maps. (proposals)</p>
<p>Other measures/ Further remarks</p> <p>Need for innovation of upgraded, enriched offer, development of different trails upon a previous identification if existing and potential tourist flows in the destination. Need for "real" and "active" tourist information centre (TIC) because the existing doesn't play the role of TIC.</p>

<p>Outlook</p> <p><i>How will tourism on the site develop in future? What are the expected changes?</i></p>
<p>Important future trends</p> <ul style="list-style-type: none"> - Orientation towards increased diversified tourist offer with tourist products for different tourism segments. - Higher attention to measures and activities for promotion and development of alternative forms of tourism: sport-recreational, rural, active, adventure, eco, and event tourism.
<p>Prospects for tourism development</p> <ul style="list-style-type: none"> - integrative approach in destination management - strengthen initiatives for tourism development from all stakeholders - innovative solutions for the use of natural and cultural heritage for tourism development - inclusion of events and tradition for time distribution of tourist offer - implementation of innovative renewable energy solutions in business sector, eco-hotels - increase attention to professional development of employees in tourism and hospitality sector and in tourism related services. - enrich tourist offer with unique and diverse products
<p>Expected changes?</p> <ul style="list-style-type: none"> - Organization of tourism with more coordinated activities and produced results - Improved tourism development - Increased use of smart solutions for destination that will reduce negative environmental impacts - Increased awareness of the importance for Ohrid to be preserved and more promoted as UNESCO site.
<p>Further remarks</p> <p>There is need to strengthen cooperation, support and trust between all stakeholders which will significantly maximize the multiple effects of tourism development in destination.</p>

<p>Conclusion</p> <p><i>What are the central conclusions that can be drawn?</i></p>
<p>General conclusions</p> <p>Although the most developed destinations with specific status of UNESCO site, Ohrid faces the need to include new content in tourist offer, to overcome problems with overcrowding of tourists during the summer period when it is peak season, and be oriented to better cope with problems relating to destination management.</p>
<p>What makes this case special?</p> <p>Ohrid is in the growth/development stage when there is a need to pay more attention to the quality of tourism supply and destination management. In this stage there is a need for enriching and restructuring the tourist offer in order to attract attention of potential tourist markets.</p>
<p>How do the framework conditions affect impact and management?</p> <p>There is a well-established framework with a defined set of regulations, documents, and programs but insufficiently coordination activities of stakeholders.</p> <p>Particularly there is need of a pro-active role of tourism sector and local development in municipality for initiating different management programs.</p>

<p>Why are the measures implemented successful/ not successful?</p> <p>Act declaring the old city core of Ohrid as cultural heritage significance Management Plan for World Heritage in Ohrid Region</p> <ul style="list-style-type: none"> - Management Plan for the National Park Galicica - Plan for solid waste management in the National Park Galicica - Plan for the sustainable use of the forests of National Park Galicica - Local Action Plan for Environment in the Municipality of Ohrid <p>The above mentioned documents and plans have positive results that lead to successful changes, for example within the old part of the city in terms of controlling the building or restoration of houses, villas, shops, etc.; improved management of the National Park Galicica with particular orientation for its perception as attractive natural site for tourists (improved promotion of the Park, ranger service, mountain guides), improved sustainable use of the forests in the Park.</p>
<p>What are the main barriers that hamper a sustainable development in the case?</p> <p>High tourism intensity within two months, and low tourist performance in the remaining period. It is more evident that different problems occur in different sectors related more or less to tourism activity (natural and cultural protection, public infrastructure, service quality, visitor management etc.)</p>
<p>Which measures seem to be the most promising? What are the most important findings for the industry/ for politics?</p> <p>Tourism has an inseparable tie to socioeconomic development of the Municipality, and its development should consider tourism activities that will not endanger natural and cultural values, but to maintain them through measures for protecting the natural and cultural heritage. The development of tourism in Ohrid, as destination rich in natural and cultural resources, should include actions that will contribute to reduce the amount of waste produced, reduce consumption and the threat to natural resources and cultural heritage, thereby giving contribution to sustainable development. Activities related to affirmative actions:</p> <ul style="list-style-type: none"> - Reducing energy consumption; - Improving energy efficiency; - Increasing use of renewable energy sources - Identifying priorities for tourism development in tourism zones - Subventions for houses, apartments and rooms for rent - Subsidizing tourist fee for providers of services in this type of facilities - To initiate local residents in tourism economy - Further international promotion - Organization of manifestations and support of different activities and events - Support innovative solutions in tourism - Development of modern information system for tourism businesses, local people and tourists
<p>What are the findings/conclusions other destinations could learn from?</p> <p>Due to the presence of Ohrid Lake and National park Galicica, along with the richness of cultural heritage that are worldwide recognized, Ohrid is the most important tourist destination in the Republic of Macedonia. In addition, the inscription of Ohrid on UNESCO List of natural and cultural heritage is an obligation that has high influence on its future tourism development by providing appropriate utility of its sites. The destination, in its current stage of development is challenged with a need for improved management plan, strategic approach to tourism development, improved infrastructures and tools towards sustainable tourism development. Although there are adopted plans that consider the cultural and environmental issues related to tourism development, the competencies of the municipality, along with national authorities in some aspects, still lack with strong results of the interventions in physical, socio-economic and environmental spheres.</p>
<p>Further remarks</p> <p>Development of Ohrid as tourist destination must be considered through its development as community, and regulations on urban planning, heritage protection, infrastructure development and other related issues have to be consulted and respected. The obligation is stronger because tourism development of Ohrid relies mainly on the preservation, evaluation and promotion of cultural and natural resources.</p>

References

- Kuzmanovski, R. (1996), *Ohrid and its treasures*, Fund of Tourism of the Assembly Ohrid
- Marinoski, N. (1998), *Tourist geography of the Republic of Macedonia*, Institute for scientific research, Faculty of Tourism and Hospitality, Ohrid Ministry of Economy of Republic of Macedonia (2016), National Strategy for tourism in Macedonia 2016-2021, Skopje
- Nestoroska, I., Marinoski, N. (2009), "Initiating ecotourism in National Park Galicica" (with co-author), International conference: "Ecological tourism: trends and perspectives of development in the global world", Saint-Petersburg State Forest Technical Academy, Saint-Petersburg, Russia, April
- Kohl & Partner (2016). National Tourism Strategy of Republic of Macedonia.
- Official Gazette of Republic of Macedonia No. 75/10. Law on Managing the World Cultural and Natural Heritage of the Ohrid Region
- Official Gazette of Republic of Macedonia No. 75/10. Law for management with world natural and cultural heritage in the Ohrid region
- Official Gazette of Republic of Macedonia No. 192/15. Law for hospitality activity
- Official Gazette of Republic of Macedonia No. 192/15. Law for tourism activity
- Official Gazette of Republic of Macedonia No. 187/13. Law for Agency for support and promotion of tourism in Macedonia
- Official Gazette of Republic of Macedonia No. 141/12. Law for tourism development zones
- Official Gazette of Republic of Macedonia No. 47/11. Law for proclamation of old town core of Ohrid for cultural heritage with great importance
- Official Gazette of Republic of Macedonia No. 62/04. Law for performing of crafts activity
- Official Gazette of Ohrid Municipality, No.1/12. Local Action Plan for Environment in the Municipality of Ohrid
- Official Gazette of Ohrid Municipality, No.3/14. Sub-strategy for rural tourism development in Municipality of Ohrid 2014-2018
- Petrovski, Z. The Mirror of the Macedonian Spirit. Napredok, 2004
- Republic of Macedonia (2002). State Statistical Office. Census on Population, Households and Dwellings in the Republic of Macedonia. Retrieved from: <http://www.stat.gov.mk/Publikacii/knigaX.pdf>
- State Statistical Office: http://www.stat.gov.mk/Default_en.aspx
- Statistical Review (2010): Transport, tourism and other services, Tourism in the Republic of Macedonia, 2005-2009, State Statistical Office of R. Macedonia
- Statistical Yearbook of R. Macedonia (2010), State Statistical Office of the Republic of Macedonia
- Statistical Yearbook of R. Macedonia (2016), State Statistical Office of the Republic of Macedonia
- Vasilevska, I., & Petrovska, I. (1998) *The importance of natural and cultural heritage for tourism development in Lake Ohrid Region – case study*, (with co-author) an international scientific congress: "Tourism and culture for sustainable development", Greece
- WTTC (WORLD TRAVEL & TOURISM COUNCIL) (2016). Travel & tourism. Economic impact 2016. Macedonia

3.10. Rigi (Switzerland)

Lucerne University of Applied Sciences & Arts
Barbara Rosenberg-Taufer, Julia Huilla

The case of Mount Rigi shows how fast tourism growth and changing guest segments can lead to overcrowding issues, traffic problems and intercultural challenges that include complaints from local residents and domestic visitors about the noise and undesired visitor behaviours.

General information	
Title / Name of the site/destination	Mount Rigi
Region, country	Cantons of Schwyz and Lucerne, Central Switzerland
Area size (km²)	around 90 km ² ¹⁶
Geographic coordinates	coordinates 47.055981, 8.485158 ¹⁷
Population and scope (if inhabited)	
<p>There are nine communes and districts¹⁸ around the Rigi and a population of 56,632 in 2014¹⁹:</p> <ul style="list-style-type: none"> • Küsnacht/Immensee/Merlischachen (12,426) • Arth/Oberarth/Goldau (11,062) • Lauerz (1,060) • Greppen (1,043) • Weggis (4,242) • Vitznau (1,249) • Gersau (2,169) • Ingenbohl/Brunnen (8,640) • Schwyz/Seewen/lbach/Rickenbach (14,785) <p>Areas Klösterli, First, Staffel and Kulm are part of the commune Arth and form a settlement area Rigi²⁰. These areas are sparsely populated. At the end of 2015 the population of the settlement area Rigi was 34 permanent residents and 8 “other foreigners” (asylum seekers)²¹. Area Rigi Kaltbad is part of commune Weggis and area Rigi Scheidegg part of commune Gersau, but number of residents in these specific areas is not published.</p>	
Short description of the case	
<p>Mount Rigi is a tourism hotspot in Lake Lucerne area. Firstly, there was a rise in the number of domestic visitors after Rigi Bahnen AG started accepting the GA travelcard of Swiss federal railways in December 2009 (the GA travelcard allows unlimited travel on most trains, boats, buses and trams within Switzerland. It also offers discounts or even free travel on mountain railways). Secondly, the amount of tourists increased rapidly in 2015, thanks to active marketing measures in Asia, especially in China. 2015 was the record year with nearly 800,000 visitors on Mount Rigi. This has been good for business, but it also poses a challenge. Main challenges include overcrowding especially on Rigi Kulm and on mountain railways, traffic challenges in Vitznau, complaints from the local residents and domestic visitors about the noise and undesired visitor behaviour as well as intercultural challenges.</p>	

¹⁶ Switzerland Tourism (2016). Rigi. Retrieved July 26, 2016 from <http://www.myswitzerland.com/en-ch/rigi-alps.html>

¹⁷ Google Maps (2016). Rigi Kulm. Retrieved July 26, 2016 from <https://www.google.ch/maps/@47.0559819,8.4846108,19z>

¹⁸ RigiPlus (n.d.). Leitfaden.

¹⁹ Bundesamt für Statistik (2016). Bilanz der ständigen Wohnbevölkerung nach Bezirken und Gemeinden, 2014. Neuchâtel: BFS.

²⁰ Gemeinde Arth (n.d.). Portrait. Retrieved September 8, 2016 from <http://www.arth.ch/de/portrait/>

²¹ Einwohneramt Arth (2016). Bevölkerungsstatistik nach Ortskreis. Retrieved September 8, 2016 from http://www.arth.ch/de/verwaltung/aemter/welcome.php?amt_id=4499

Tourism development in the country of the case study

Short description of the importance of tourism in the country

Tourism is an important sector of the Swiss economy. Total revenue generated by Swiss tourism in 2014 was CHF 47.8 billion. In the same year approximately 4.7 % of Switzerland's export revenue came from tourism.²²

In 2015, the Swiss hotel industry recorded a total of 35.6 million overnight stays, which was 0.8 % less than in 2014. This decrease in overnight stays as well as in turnover is due to the abolition of the franc /euro exchange rate floor amongst other reasons like the demand shift to other destinations.

Swiss demand amounted to 16.1 million overnight stays. After domestic market the biggest source markets were Germany, United States, United Kingdom, China and France.

Tourism Monitor Switzerland 2013 shows that about two third of the tourists in Switzerland stay in alpine destinations, whereas about one third stay in cities²³

- alpine 62 %
- small city 22 %
- big city 14 %
- rural 1 %

Main tourist regions based on number of overnight stays in 2015 were: Zurich region, Grisons, Valais, Bernese Oberland, and Lucerne/Lake Lucerne. The main tourist communes, in turn, were: Zurich, Geneva, Lucerne, Zermatt and Basel.

Arrivals, Overnight stays (year)

Arrivals (2015):

- international arrivals: 9.3 million²⁴ (provisional figure)
- total arrivals: 17.4 million²⁵

Overnight stays (2015):

- hotels and health resorts ("Kurbetriebe"): 35.6 million
- youth hostels: 813,635²⁶
- camping sites: 2,657,280²⁷
- bed and breakfast: 396,423²⁸
- holiday homes and group lodgings: no data in 2015. Statistics on commercial holiday homes and group lodgings (project PASTA) are currently under development: in the first quarter of 2016 the number of overnight stays in holiday homes was 3,287,050²⁹ and in group lodgings 1,364,802³⁰

GDP

- GDP of Switzerland (2014): CHF 642,256 billion³¹
- Domestic total gross value added (2014): CHF 622,024 billion³²

²² Swiss Tourism Federation (STF) (2016). Swiss tourism in figures 2015. Bern: STF.

²³ Switzerland Tourism (2014). Tourism Monitor Switzerland 2013. Retrieved September 8, 2016 from <http://www.stnet.ch/de/dienstleistungen/tourismus-monitor-schweiz.html>

²⁴ World Tourism Organization (UNWTO) (2016). Tourism Highlights Edition 2016. Madrid: UNWTO

²⁵ Bundesamt für Statistik (2016). Hotellerie: Angebot und Nachfrage der erfassten Betriebe im Überblick. Neuchâtel: BFS.

²⁶ Bundesamt für Statistik (2016). Jugendherbergen: Ankünfte und Logiernächte für das Jahr 2015 nach Tourismusregion. Neuchâtel: BFS.

²⁷ Bundesamt für Statistik (2016). Campingplätze: Ankünfte und Logiernächte für das Jahr 2015 nach Tourismusregion. Neuchâtel: BFS.

²⁸ Bundesamt für Statistik (2016). Bed and Breakfast Switzerland: Ankünfte und Logiernächte nach Gästeherkunftsland 2015. Neuchâtel: BFS.

²⁹ Bundesamt für Statistik (2016). Ferienwohnungen: Ankünfte und Logiernächte in der Schweiz. Neuchâtel: BFS.

³⁰ Bundesamt für Statistik (2016). Kollektivunterkünfte: Ankünfte und Logiernächte in der Schweiz. Neuchâtel: BFS.

³¹ Bundesamt für Statistik (2016). Gross domestic product: production approach. Neuchâtel: BFS.

³² Bundesamt für Statistik (2016). Tourism share of gross value added and employment. Neuchâtel: BFS.

<p>Tourism value added (% of GDP)</p> <ul style="list-style-type: none"> • Tourism gross value added (2014): CHF 17.4 billion • Tourism share of gross value added (2014): 2.8 % (provisional value)³³
<p>Employment in tourism (%)</p> <p>Swiss Federal Statistical Office /Tourism Satellite Account:</p> <ul style="list-style-type: none"> • Direct employment in tourism (2014): 170,118 full-time equivalents (tourism share of employment 3.4 %, provisional value) <p>World Travel & Tourism Council (WTTC)³⁴:</p> <ul style="list-style-type: none"> • direct employment in tourism (2014): 147,500 jobs (3.0 % of total employment) • total (direct and indirect) employment in tourism (2014): 471,000 jobs (9.6 % of total employment)

Tourism supply of the site	
<p>Short description of tourism on the site</p> <p>Mount Rigi is known as "Queen of the Mountains" and is surrounded by Lake Lucerne, Lake Zug and Lake Lauerz. The main summit Rigi Kulm is 1,797 meters above sea level³⁵. Rigi is a popular mountain destination for leisure tourism (mostly day trippers).</p> <p>There are also permanent residents on Rigi in Klösterli, First, Staffel, Kulm, Rigi Kaltbad and Rigi Scheidegg. Because Rigi is car-free area and because there are no schools, health care centers or many other facilities on the mountain the residents depend on the public transport system in order to go up and down the mountain. There are no numbers regarding the amount of work places, value added etc. There are many family run businesses with owners and employees over 50 years old. A lot of workers - also younger ones - at Rigi Bahnen AG live in the area.³⁶</p>	
<p>Access (how to get there?)</p> <p>The mountain station Rigi Kulm can be reached by two cogwheel railways from Goldau and Vitznau and the station Rigi Kaltbad by the aerial cable car from Weggis. These are operated by Rigi Bahnen AG. In addition, the following aerial cable cars are operating: Kraebel-Rigi Scheidegg, Oberschwend-Rigi Burggeist, Küsnacht-Seebodenalp, Vitznau-Hinterbergen, Vitznau-Wissiflüh and Brunnen-Urmiberg. The valley stations can be reached by boat, train, car or bus. There are regular public transport connections from Lucerne which allow to reach the top of Mount Rigi within 90 minutes.³⁷</p>	
<p>Main attractions</p> <ul style="list-style-type: none"> • Rigi Kulm, the highest peak of Mount Rigi with panoramic view, and the 200 years old Rigi Kulm-Hotel • Rigi Kaltbad and the Mineralbad & Spa Rigi Kaltbad • 120 kilometers of hiking trails • Rigi Staffel, Rigi Klösterli • Rigi Scheidegg-Burggeist for families • Seebodenalp, Hinterbergen-Wissiflüh, Urmiberg • 3 ski areas and 40 km winter hiking trails³⁸ 	
Accommodation offer (number, type, quality)	7 hotels, 1 B&B, 1 group accommodation ³⁹
Restaurants (number, type, quality)	16 restaurants (including 1 gourmet restaurant and 1 self-service restaurant), 6 alpine huts / inns ⁴⁰

³³ Bundesamt für Statistik (2016). Tourism share of gross value added and employment. Neuchâtel: BFS.

³⁴ World Travel and Tourism Council (WTTC) (2016). Travel & tourism economic impact 2015 Switzerland. London: WTTC.

³⁵ RigiPlus AG & Rigi Bahnen AG (2016). Welcome to the top: Rigi Kulm. Retrieved July 26, 2016 from <https://www.rigi.ch/en/Places/Rigi-Kulm>

³⁶ Hauter, Ch., RigiPlus AG, Interview, November 28, 2016

³⁷ RigiPlus AG & Rigi Bahnen AG (2016). Rigi mountain railways. Retrieved July 26, 2016 from <https://www.rigi.ch/en/Information/Mountain-railways>

³⁸ RigiPlus AG & Rigi Bahnen AG (2016). The Rigi experience at a glance. Retrieved July 26, 2016 from <https://www.rigi.ch/en/Places>

³⁹ RigiPlus AG & Rigi Bahnen AG (2016). Accommodations. Retrieved July 26, 2016 from <https://www.rigi.ch/en/Experience-Enjoy/Accommodations>

<p>Other tourism service providers</p> <p>2 cogwheel railways and 7 aerial cable cars, 1 mineral baths & spa, 1 hotel and 1 restaurant with wellness infrastructure, 1 village shop, 3 souvenir shops, station and service center in Rigi Kaltbad, 120 km of summer hiking trails⁴¹, 40 km winter hiking trails, 6 km snowshoe trekking trails, 12.5 km cross-country skiing trails, 5 toboggan runs, 3 ski areas with 9 lifts, 1 snow sport school⁴², cheese dairy⁴³, chapels⁴⁴, playgrounds, barbecue areas⁴⁵</p>
<p>Stage of the tourism life cycle</p> <p>Mature/consolidation stage:</p> <p>The first mountain inn in Switzerland was opened 200 years ago, in 1816, on Rigi Kulm, which meant the beginning of the development of tourism in the area. Three years later, already more than 1,000 guests visited Mount Rigi. Moreover, the Vitznau – Rigi Kulm cogwheel railway opened in 1871, making it Europe's first mountain railway. Today, the railway transports more than 850,000 passengers each year.⁴⁶</p>

<p>Tourism demand at the site</p>	
<p>Short description of tourism demand</p> <p>Rigi receives a large number of day trippers and most of the guests travel for leisure purposes. About 70 to 75 % of the guests are Swiss. One reason for the large number of domestic visitors is that since December 2009 the GA travelcard that allows unlimited travel on SBB trains and many other railways in Switzerland is valid also on the mountain railways and the cable car of Rigi Bahnen AG. This explains the significant rise (13.4 %) in the number of frequencies in 2010 compared to 2009.⁴⁷ Moreover, the number of Chinese tourists has increased significantly during the last years. The biggest increase took place in 2015. The increase from 2010 to 2015 in terms of Asian tourists was from 20,000 visitors to nearly 150,000.</p>	
<p>Volume of tourists</p> <ul style="list-style-type: none"> • 45,474 overnight stays⁴⁸ in 2015, slightly less than in 2014 (45,832)⁴⁹ • The Rigi mountain railways and cable cars (Rigi Bahnen AG and the aerial cable cars of Burggeist, Schneidegg and Seebodenalp) achieved over 1.7 million frequencies in 2015 which is 18 % more than the year before. This means over 800,000 passengers. Frequencies of Rigi Bahnen AG were 1,569,632 in 2015. • At peak days (mostly in July and August and during foggy days), up to 10,000 tourists visit Mount Rigi.⁵⁰ • More than 65,000 guests visited the Mineralbad & Spa, approximately 6 % more than in 2014 • According to Luzern Tourismus AG, the subregion Weggis Vitznau Rigi generated 278,001 overnight stays in 2015 (10.9 % more than in 2014). The number of Asian guests increased 111.2 % and American guests 16.3 %. The amount of Swiss tourists remained stable (-0.5 %). In contrast, there was a fall of 15.3 % in the number of European tourists.⁵¹ 	

⁴⁰ RigiPlus AG & Rigi Bahnen AG (2016). Restaurants. Retrieved July 26, 2016 from <https://www.rigi.ch/en/Experience-Enjoy/Restaurants>

⁴¹ RigiPlus AG & Rigi Bahnen AG (2016). Explore Mount Rigi now. Retrieved July 26, 2016 from <https://www.rigi.ch/en/Experience-Enjoy>

⁴² RigiPlus AG & Rigi Bahnen AG (2016). Winter auf der Rigi. Retrieved September 8, 2016 from <https://www.rigi.ch/Erleben-Genuss/Winter>

⁴³ RigiPlus AG & Rigi Bahnen AG (2016). Chaeserenholz cheese dairy. Retrieved September 8, 2016 from <https://www.rigi.ch/en/Media/attraction/Chaeserenholz-cheese-dairy>

⁴⁴ RigiPlus AG & Rigi Bahnen AG (2016). Rigi Kulm mountain chapel. Retrieved September 8, 2016 from <https://www.rigi.ch/en/Media/attraction/Rigi-Kulm-mountain-chapel>

⁴⁵ RigiPlus AG & Rigi Bahnen AG (2016). Family trip Rigi: grand for the little ones too. Retrieved November 10, 2016 from <https://www.rigi.ch/en/Experience-Enjoy/Summer/Families>

⁴⁶ RigiPlus AG (2016). 200 Jahre Rigi Kulm. Retrieved July 26, 2016 from www.200jahre-rigikulm.ch

⁴⁷ Rigi Bahnen AG (2011). Geschäftsbericht 2010.

⁴⁸ note: number of overnight stays is based on the visitor's tax (Kurtaxenabrechnung) and not on the statistics of the Federal Statistical Office

⁴⁹ RigiPlus AG (2016). Geschäftsbericht 2015.

⁵⁰ Hauter, Ch., RigiPlus AG, Interview, November 28, 2016

⁵¹ Luzern Tourismus AG (2016). Geschäftsbericht 2015.

<p>Development of tourist numbers</p> <p>Development of overnight stays on Rigi⁵²:</p> <ul style="list-style-type: none"> • 2010: 34,712 • 2011: 31,229 • 2012: 37,497 • 2013: 42,031 • 2014: 45,832 • 2015: 45,474 <p>Development of frequencies of Rigi Bahnen AG (excluding the aerial cable cars of Burggeist, Schneidegg and Seebodenalp):</p> <ul style="list-style-type: none"> • 2005: 1,124,639; +5.6 % • 2006: 1,118,050; -0.6 % • 2007: 1,106,106; -1.1 % • 2008: 1,098,618; -0.7 % • 2009: 1,106,117; +0.7 % • 2010: 1,254,327; +13.4 % • 2011: 1,291,774; +3.0 % • 2012: 1,187,115; -8.1 % • 2013: 1,213,968; +2.3 % • 2014: 1,309,284; +7.9 % • 2015: 1,569,632; +19.9 %⁵³
<p>Length of stay</p> <p>Not reported, but most of the visitors are day trippers, foreign group tourists stay a couple of hours. Most day trippers stay between 10am and 4pm. Overnight guests spend 1-1.5 nights on average.⁵⁴</p>
<p>Origin countries of tourists</p> <p>Customers of Rigi Bahnen AG in 2015: 70-75 % from Switzerland, 25-30 % from abroad, the biggest growth markets are China and Korea⁵⁵. About half of the foreign guests are from China⁵⁶.</p> <p>Foreign target groups of Rigi Bahnen AG are⁵⁷:</p> <ul style="list-style-type: none"> • In Asia: China, Korea, Japan, Taiwan, Thailand, Singapore, Hong Kong, Indonesia, Malaysia • In Europa: UK, Italy, Germany • In the Americas: USA, Brazil, Mexico
<p>Tourism image</p> <p>Good: nature, mountain view, near lakes, typical Swiss.</p> <p>An example of the good image is that in 2015 Rigi was the most searched Swiss mountain summit on Google: 1. Rigi, 2. Matterhorn, 3. Titlis, 4. Weissenstein, 5. Pilatus, 6. Jungfrauoch, 7. Saentis, 8. Stanserhorn</p> <p>Guests characterize Rigi as recreational, unhurried and unique.⁵⁸</p>
<p>Motives / target groups</p> <p>Common motives of Swiss visitors are: nature and mountain landscape, 360° panorama view, relaxation and recreation. Furthermore: exercise (mainly walking, hiking), time with family and friends, escape from the (high) fog.^{59,58}</p> <p>Rigi is an attractive day trip destination for foreign group tourists (especially from China and Korea) who want to experience the authentic Swiss mountains with a spectacular lake and mountain view. In addition, Rigi can</p>

⁵² RigiPlus AG (2016). Geschäftsbericht 2015.

⁵³ Rigi Bahnen AG. Geschäftsberichte.

⁵⁴ Hauter, Ch., RigiPlus AG, Interview, November 28, 2016

⁵⁵ Rigi Bahnen AG (2016). Geschäftsbericht 2015.

⁵⁶ Hauser, W. & Murmann, K. (2015, August 23). Chinesen-Alarm auf der Rigi! *Blick*. Retrieved from <http://www.blick.ch/>

⁵⁷ Daniel Fischer & Partner (2015). Eckwerte der "Marketingstrategie RIGI" –Version 2. Umsetzung der Strategie RIGI BAHNEN AG 2015-2019, Teilprojekt Marketing.

⁵⁸ Rigi Bahnen AG (n.d.). Kundenzufriedenheit Rigi, Sommer 2013.

⁵⁹ Hauter, Ch., RigiPlus AG, Interview, November 28, 2016

be easily and fast reached from Lucerne and Zurich by boat, bus and train. Moreover, the location of Rigi is ideal for the group tourists travelling on Italy-Switzerland-France axis.⁶⁰

Target groups of Rigi Bahnen AG include⁶¹:

FIT (Free Independent Traveler), Families, Best Ager, DINKS (Double Income No Kids), LOHAS (Lifestyle of Health and Sustainability), groups, 70+ and Swiss companies (MICE)

Visitors' activities, activity patterns

Common activities: walking, hiking, travelling by mountain railways/cable cars, taking photos, admiring landscape, eating, wellness

Very common are also the "majestic round trip" and the "classic Rigi round trip" (both a combination of boat, cogwheel railway and aerial cable car rides)⁶²

Seasonality (peaks)

Main season from June to October (August being the busiest month), winter peak in January, the least number of visitors during March and April (based on average frequencies of Rigi Bahnen AG 2009-2013)⁶³

When fog covers central Switzerland and the midlands, it can be very crowded as up to 10,000 people go up on Mount Rigi.⁶⁴

Visitors' opinions, attitude and behaviour, expectations and preferences, satisfaction

Results of the customer satisfaction survey (n=822)⁶⁵

- Means of transport to the valley stations 2015: public transport 54.1 %, car 45.1 %, coach 0.6 %, motorbike 0.3 %
- Choice of ticket 2015: GA travelcard (28.6 %), roundtrip ticket with Half-Fare travelcard (20.6 %), Rigi annual ticket (15.9 %), roundtrip ticket normal price (12.4 %), one-way ticket with Half-Fare travelcard (12.4 %), Swisspass (3.2 %), one-way ticket normal price (2.5 %), no service used (2.2 %), Railway (1.7 %), Eurail (0.5 %)
- Sources of information 2015 (how to visitors came to know about Rigi): friends and relatives (74.3 %), internet (18.6 %), advertisement or report in a newspaper (12.7 %), Rigi event (3.4 %), tourist office (3.0 %), travel agency (2.2 %), radio (1.4 %), social media (1.0 %)
- Travel companion 2015: partner (52.6 %), friends (32.4 %), another family member (19.6 %), children/teenagers (16.3 %), alone (13.9 %), travel group/club (3.3 %)

Additional data

Customer satisfaction in 2015 (n=822, scale 1 not at all satisfied, 4 completely satisfied, presented as mean values, 2013 mean values in parentheses)

Tickets:

- Clarity/comprehensibility: 3.2 (3.31)
- Price-performance ratio: 2.9 (2.91)

Railways and cable cars:

- Punctuality: 3.61 (3.64)
- Seating comfort: 3.08 (3.14)
- Cleanliness: 3.46 (3.51)
- Announcements: 3.18 (3.32)

⁶⁰ Chinesen und Rigianer tauschen Steine (2015, August 6). *Rigi Anzeiger*. Retrieved from <http://www.rigianzeiger.ch/>

⁶¹ Daniel Fischer & Partner (2015). Eckwerte der "Marketingstrategie RIGI" –Version 2. Umsetzung der Strategie RIGI BAHNEN AG 2015-2019, Teilprojekt Marketing.

⁶² RigiPlus AG & Rigi Bahnen AG (2016). Explore more on Mount Rigi. Retrieved September 8, 2016 from <https://www.rigi.ch/en/Experience-Enjoy/Summer/Summer-experiences>

⁶³ Rigi Bahnen AG (2014). Geschäftsbericht 2013.

⁶⁴ Hauter, Ch., RigiPlus AG, Interview, November 28, 2016

⁶⁵ Rigi Bahnen AG (n.d.). Vergleich Erhebungen der Kundenzufriedenheit 2013 und 2015

Railway personnel:

- Friendliness: 3.57 (3.58)
- Competence: 3.54 (3.53)
- Clothing: 3.51 (3.36)
- Language skills: 3.32 (3.39)

Shops:

- Selection of the products: 3.17 (3.22)
- Presentation of the products: 3.2 (3.23)
- Friendliness of personnel: 3.4 (3.35)
- Price-performance ratio: 2.99 (n/a)

Restaurants

- Facilities/atmosphere/infrastructure: 3.12 (3.12)
- Friendliness of personnel: 3.3 (3.24)
- Cleanliness: 3.38 (3.39)
- Price-performance ratio: 2.98 (2.99)

Rating on tripadvisor for "Mt. Rigi"⁶⁶

rating score 4.5/5

- excellent: 666
- very good: 204
- average: 5
- poor: 1

(total 1,365 reviews on 8th of September 2016)

Framework conditions

What are the framework conditions that might influence the impact and/or the management of the site?

History and background

Rigi has a long history. When the first map of Switzerland was drawn in 1479 Rigi was the midpoint of the map. 1540 Kaltbad spring was mentioned for the first time, which was the starting point for spa and wellness tourism on Rigi. Inauguration of the chapel "Maria zum Schnee" in 1689 was, in turn, the starting point of pilgrim tourism. However, the real birth hour of the touristic development was 200 years ago, in 1816, when the first Swiss mountain inn was opened on Rigi Kulm. After this also more hotels were built and the number of visitors increased: around the middle of the 19th century there were between 40,000 and 50,000 tourists every year. Another important event was the inaugural celebrations for Europe's first mountain railway from Vitznau to Rigi held in 1871. The winter tourism started later, in 1906, when the mountain railway starts operating also in winter. Since then the number of visitors have increased, 2015 was the record year with over 800,000 visitors on Rigi.⁶⁷

Political situation

Swiss politics is played out at three levels, the Confederation, the cantons and the communes. The cantons and communes are largely autonomous and have their own responsibilities.⁶⁸ This means that the cantons of Lucerne and Schwyz as well as the nine communes on and around the Rigi are largely in charge of development of the area.

There seem to be political will for development of the area. An example is the cross-cantonal NRP-project

⁶⁶ Tripadvisor (2016). Mt. Rigi. Retrieved September 8, 2016 from https://www.tripadvisor.com/Attraction_Review-g188064-d542499-Reviews-Mt_Rigi-Lucerne.html

⁶⁷ RigiPlus AG (2016). 200 Jahre Rigi Kulm. Retrieved July 26, 2016 from www.200jahre-rigikulm.ch

⁶⁸ The Federal Council (n.d.). Federalism. Retrieved July 26, 2016 from <https://www.admin.ch/gov/en/start/federal-council/political-system-of-switzerland/swiss-federalism.html>

(New Regional Policy) “RigiPlus” (2009-2011) which aimed to increase value added and secure the jobs in the area⁶⁹. The partners of the project founded later in 2012 RigiPlus AG which continues the work⁷⁰. Recently, in July 2016, RigiPlus AG and Rigi Bahnen AG commissioned Quant AG to develop a “Masterplan Rigi” which highlights the future strategy and position of the destination and its subareas. Each subarea has its own positioning profile like “outlook, panoramic view and history” on Rigi Kulm or “Swissness, enjoyment, tradition, alpine farming” on Rigi Staffel. The natural experience space is to be preserved and played with respect and farsightedness - to redefine relaxation, recreation and deceleration.⁷¹

Legal issues

Swiss laws and regulations at all three levels (central state, federal states and communal) apply. However, there are no laws and regulations that are of a special importance for this specific case.

National tourism laws (examples)⁷²

- Federal Act on the Promotion of Innovation, Cooperation and Knowledge Creation in Tourism of 30 September 2011, Status as of 1 February 2012 (SR 935.22)
- Federal Act on Regional Policy of 6 October 2006, Status as of 1 January 2013 (SR 901.0)
- Federal Act on Cableways for Passenger Transport of 23 June 2006, Status as of 1 January 2016 (SR 743.01)

Cantonal tourism laws (examples)

- Lucerne: Tourism Act of 30 January 1996
- Schwyz: Law on Economic Development of 27 November 1986

Cantonal environmental laws (examples)

- Lucerne: Regulation on plant protection in the Rigi area of 6 April 1970⁷³
- Schwyz: Regulation on the protection of wild plants of 29 June 1965⁷⁴

Organisation

RigiPlus AG⁷⁵ is a marketing and development organisation for tourism which was founded in 2012. The organisation is responsible for promoting brand Rigi. Their website www.rigi.ch showcases touristic offers in the area from accommodation to wellness offers. RigiPlus AG has currently 24 stakeholders/members including transport companies and hotels as well as other service providers:

Luzern Tourismus AG is a destination management organisation (DMO) in Lucerne and Lake Lucerne region. Weggis Vitznau Rigi Tourismus (www.wvrt.ch) is one of the sub-regions of Luzern Tourismus AG. RigiPlus AG has overtaken some of the responsibilities of Weggis Vitznau Rigi Tourismus such as operating the tourist information center Rigi Kaltbad⁷⁶. In addition, the visitor's tax generated in Weggis, Vitznau and Rigi are transferred to RigiPlus AG since the beginning of 2015.

RigiPlus AG and its stakeholder hold a general meeting once a year. Additionally, bilateral meetings take place when needed. RigiPlus AG attends regularly board meetings of IG Rigi Kaltbad First.⁷⁷

⁶⁹ Regiosuisse (n.d.). Rigi-Plus-Eintrag Datenbank «Beispielhafte NPR-Projekte». Retrieved July 26, 2016 from http://rapport.planval.ch/seco_project/project_detail.php?projectID=26&languageID=1

⁷⁰ Regiosuisse (n.d.). Aus dem NRP-Projekt «RigiPlus» wird «RigiPlus AG». Retrieved July 26, 2016 from <http://www.regiosuisse.ch/news-agenda-de/news/aus-dem-nrp-projekt-abrigiplusbb-wird-abrigiplus-agbb>

⁷¹ Quant AG (2016). Masterplan Rigi. Masterplanung zur nachhaltigen Positionierung des Erlebnisraumes Rigi. Im Auftrag von RigiPlus AG und RIGI BAHNEN AG. Retrieved July 26, 2016 from <https://www.rigi.ch/Information/Bergbahnen/Rigi-Bahnen/Ueber-die-RIGI-BAHNEN-AG/Organisation/Masterplan-Rigi>

⁷² Swiss Tourism Federation (STF) (2015). Swiss tourism in figures 2015. Bern: STF.

⁷³ Kanton Luzern (n.d.). Verordnung über den Pflanzenschutz im Rigigebiet. Retrieved November 28, 2016 from <http://srl.lu.ch/frontend/versions/421>

⁷⁴ Kanton Schwyz (n.d.). Verordnung über den Schutz wildwachsender Pflanzen. Retrieved November 28, 16 from http://www.lexfind.ch/dtah/13339/2/722_411.pdf

⁷⁵ RigiPlus AG (2016). Geschäftsbericht 2015.

⁷⁶ Luzern Tourismus AG (2016). Geschäftsbericht 2015.

⁷⁷ Haueter, Ch., RigiPlus AG, Interview, November 28, 2016

The involvement of the stakeholders seems to be generally good. However, some of the organisations wish to be informed better about projects and measures (e.g. for what reason a slope gets moved).⁷⁸

Physical setting

Infrastructure and facilities: 9 cogwheel railways and aerial cable cars, 120 km hiking trails, hotels and restaurants, shops, station and service center in Rigi Kaltbad. It is to note that many areas on Rigi are car-free.

Economic situation

No exact numbers about the value added or jobs in tourism are provided. However, it can be stated that Rigi Bahnen AG, an important transport company in the area, employed 173 employees at the end of the year 2015, 60 % of them worked part-time. This equals 100.7 full-time equivalents.⁷⁹

Social/cultural situation

Top events on Rigi according to Switzerland Tourism⁸⁰:

- Wrestling and Mountain Festival – the wrestlers, alpine farmers and dairymen celebrate a traditional festival
- Rigi Dixie and Swing Weekend
- Rigi Lounge Cinema (March - April)
- Rigi Music Days (July)
- International Rigi Mountain Run (August)
- Rigi Kaltbad Chilbi – Rigi's traditional country fair offers entertaining games, culinary specialities and music (September)

Tourists are generally accepted among the local residents and only few of the locals have a negative attitude towards tourists. However, the level of tourism awareness has sunk⁸¹.

Locals have access to tourism facilities. Moreover, the mountain railways and cable cars enable permanent residents who live on the mountain in car-free areas to leave the mountain. Also, residents of the communes Arth, Vitznau and Weggis receive 50 % discount on individual tickets and 25 % discount on Rigi annual tickets, Rigi combination tickets and Rigi winter tickets of Rigi Bahnen AG⁸².

Environmental situation

There is an area of conflict between agriculture and tourism, the Rigi area being characterised by mountain farming.

Rigi has about 900 different flowers and plants, as well as 300 lichens and 100 mosses. In the area of the Rigi, there are also 37 native orchid species. The Rigi area is a territory of national importance. Moreover, large areas belonging to the cantons of Lucerne and Schwyz are protected areas for plants and flowers, with objects of national importance. Nearly 40 % of the Rigi is forest.⁸³

Mean winter temperatures in the Swiss Plateau have changed during the last decades and a reduction of the snow cover is reported⁸⁴. Climate change also affects Rigi. For instance, Rigi Bahnen AG reported that the lack of snow and bad weather conditions during the first months of 2016 led to a drop in the number of visitors.

Bottlenecks and constraints

Access and transport capacity:

Capacity of the transport system (Rigi Bahnen etc.) is currently limited. Rigi is a car-free destination and can be reached only by mountain railways or cable cars or by foot. Most of the visitors arrive by mountain railways and cable cars owned by Rigi Bahnen AG which leads to crowding in Vitznau and partly in Weggis. This means both; too many coaches at the valley stations and too many visitors wanting to go to the summit at the same

⁷⁸ Galliker, U., Pro Rigi, Interview, November 30, 2016

⁷⁹ Rigi Bahnen AG (2016). Geschäftsbericht 2015.

⁸⁰ Switzerland Tourism (2016). Rigi. Retrieved July 26, 2016 from <http://www.myswitzerland.com/en-ch/rigi-alps.html>

⁸¹ Wittwer, J. (2016). Touristische Hotspots – Wie gehen Schweizer Destinationen mit zu vielen Touristen um? (Bachelor's thesis). Lucerne University of Applied Sciences and Arts, Lucerne, Switzerland.

⁸² RigiPlus AG & Rigi Bahnen AG (2016). Concessions for individuals. Retrieved September 19, 2016 from <https://www.rigi.ch/en/Information/Mountain-railways/Rigi-Bahnen/Prices-tickets/concession-tickets/>

⁸³ Pro Rigi (n.d). Summary in English. Retrieved July 26, 2016 from http://prorigi.ch/?Summary_in_English

⁸⁴ CH2014-Impacts (2014), Toward Quantitative Scenarios of Climate Change Impacts in Switzerland. Bern: OCCR, FOEN, MeteoSwiss, C2SM, Agroscope, and ProClim.

time. In Goldau there is no problem of crowding. Also, other six cable cars do not face problems because they mostly serve domestic customers. Another bottleneck is at Rigi Kulm when between 300 and 400 visitors arrive at the summit at the same time.⁸⁵

Service capacity:

Rigi Kulm Hotel on the summit has an Art Nouveau dining room as well as a self-service restaurant. The capacity is 260 seats inside and 240 seats outside⁸⁶. If large numbers of visitors, especially big groups, arrive at the summit at the same time and head directly to have food at Rigi Kulm Hotel, can this lead to crowding. However, the main visitor streams are mainly located on Rigi Kulm, Rigi Kaltbad and Rigi Känzeli. Other areas do not face crowding problems.⁸⁷

Challenges / Impacts

What are the most important challenges resulting from high tourism intensity on the site?

Short description of main challenges

Rigi experienced a rise in the number of domestic visitors already in 2010 after Rigi Bahnen AG started accepting the GA travelcard of Swiss federal railways. Later, after record year 2014 the number of Rigi visitors increased rapidly in 2015. Pilatus Bahnen AG reported that their frequencies increased 20% compared to 2014. Especially the number of Asian visitors increased significantly. This is due to the dual marketing strategy that focuses on Swiss and Asian markets and active marketing in Asia. Increased number of visitors, especially Chinese group tourists, has created some challenges such as overcrowding, traffic problems in Vitznau, complaints from the local residents and domestic visitors about the noise and undesired visitor behaviour as well as intercultural challenges such as misunderstandings.

Tourism intensity

Relation day tourist vs. overnight stays:

The amount of overnight stays (45,474 in 2015) is small compared to the amount of day tourists. Over 800,000 passengers travelled with the mountain railways and cable cars in 2015⁸⁸.

Relation to permanent population:

Population of the settlement area Rigi (part of the commune Arth) was only 34 permanent residents at the end of 2015.⁸⁹

Influencing factors

Active marketing abroad, especially in China, is certainly affecting the tourism flows. Rigi Bahnen AG entered the Chinese market already in 2004 and opened a Mt. Rigi office in Beijing in 2007⁹⁰. Another milestone was March 2009 when Mt. Rigi formed a partnership with Mt. Emei and region Leshan in China. As a symbol of friendship between the two similar looking mountains a Rigi stone was placed on the top of Mt. Emei in 2015 and vice versa.⁹¹

In addition, Rigi is located close to Lucerne and benefits from the popularity of city of Lucerne and the region Lake Lucerne among the foreign tourists. For instance, more than 136,000 Chinese tourists visited the city of Lucerne and more than 433,000 Chinese tourists the region Lake Lucerne in 2015. This is 60 % and 105 % more than in 2010, respectively. Also many other Asian markets show double digit growth rates in region Lake Lucerne compared to 2010: Hong Kong +18 %, Taiwan +25 %, Thailand +50 %, India +27 %, Korea +96 %.

⁸⁵ Wittwer, J. (2016). Touristische Hotspots – Wie gehen Schweizer Destinationen mit zu vielen Touristen um? (Bachelor's thesis). Lucerne University of Applied Sciences and Arts, Lucerne, Switzerland.

⁸⁶ RigiPlus AG & Rigi Bahnen AG (2016). Rigi Kulm Hotel. Retrieved September 9, 2016 from <https://www.rigi.ch/en/Media/Restaurants/mountain-restaurant-Rigi-Kulm-Rigi-Kulm-Hotel>

⁸⁷ Galliker, U., Pro Rigi, Interview, November 30, 2016

⁸⁸ RigiPlus AG (2016). Geschäftsbericht 2015.

⁸⁹ Einwohneramt Arth (2016). Bevölkerungsstatistik nach Ortskreis. Retrieved September 8, 2016 from http://www.arth.ch/de/verwaltung/aemter/welcome.php?amt_id=4499

⁹⁰ Felder, G. (2012, June 10). Chinesen wollen Teil der Rigi abbuchen. *Neue Zuger Zeitung*. Retrieved from <http://www.zugerzeitung.ch>

⁹¹ Chinesen und Rigiener tauschen Steine (2015, August 6). *Rigi Anzeiger*. Retrieved from <http://www.rigianzeiger.ch/>

Moreover, the number of visitors from Gulf States (+107 %) and Brazil (+39 %) has also increased rapidly over the five years. ⁹²	
Classification of carrying capacity affected	
Physical carrying capacity (mountain railways and the main summit are overcrowded during peak times) and psychological/perceptual carrying capacity (local residents and Swiss tourists have perceptions of crowding)	
Type of capacity affected	Peak capacity, seasonal (summer)
Physical impacts	
Overcrowding has an impact on infrastructure and facilities. For instance, toilet facilities need to be cleaned more often. Some of the guests mount on the toilet seats to do their business or throw the toilet paper in the trash instead of flushing it. ^{93 94}	
Numerous coaches that transport visitors to Vitznau are blocking the parking places and roads. There is a turning point for coaches near the mountain railway station where coaches can leave and pick up their customers. However, the parking place for coaches is at the other end of the village. ⁹⁵ Maximum four coaches can drop off visitors in front of the station simultaneously, but even in this case the public bus stop is affected ⁹⁶ .	
Another important aspect to note is the restriction of construction of second homes in Switzerland. Federal Act on Second Homes entered into force on January 2016 and it applies to communes in which second homes make up more than 20 % of the housing stock ⁹⁷ . An annex of the Federal Ordinance on Second Homes ⁹⁸ lists 413 communes that are currently subject to restrictions on the construction of second homes. Many of these communes are touristic destinations. Also Weggis, Vitznau and Gersau are on the list which means that more than 20 % of housing stock in these communes are second homes.	
Economic impacts	
The increased number of tourists, especially during the traditionally weak low season, has created jobs for local residents. In addition, there are more possibilities for local volunteers called oRIGInals. These volunteers guide visitors and recount alpine tales ⁹⁹ . Moreover, Chinese tourists travel whether the weather is good or not, whereas Swiss tourists travel when it is sunny.	
Nevertheless, not all restaurants benefit from the boom of Chinese tourists since the tourists often carry food with them and do not buy food in the destination as one of the employees mentions. ¹⁰⁰	
Social impacts on residents	
Perception of crowding: there have been complaints by the local residents about the disturbance on “their own” mountain after the number of Asian visitors rapidly increased ¹⁰¹ . An example of this is the already mentioned dropping and picking up visitors who arrive with coaches to Vitznau. Additionally, some local residents complain, that there is often no seating space as the seats are blocked by tourists who made a booking for their group but do not need all seats. ¹⁰²	

⁹² Luzern Tourismus AG (2016). Geschäftsbericht 2015.

⁹³ Kitsching, C. (2015, August 30). Swiss rail firm launches separate trains for Chinese tourists after locals accuse them of crowding corridors and spitting on the floor inside carriages. *Daily Mail Online*. Retrieved from <http://www.dailymail.co.uk/>

⁹⁴ Neue Touristen brauchen Nachhilfe für WC-Nutzung (2015, July 1). *20 Minuten*. Retrieved from <http://www.20min.ch>

⁹⁵ Wächter, N. (2015, April 23). Rigi-Bahnen rollen zu neuen Rekorden. *Rigi Anzeiger*. Retrieved from <http://www.rigianzeiger.ch/>

⁹⁶ Wittwer, J. (2016). Touristische Hotspots – Wie gehen Schweizer Destinationen mit zu vielen Touristen um? (Bachelor’s thesis). Interview with Christian Haueter May 13, 2016, lines 155-156. Lucerne University of Applied Sciences and Arts, Lucerne, Switzerland.

⁹⁷ Bundesamt für Raumentwicklung (ARE) (n.d.). Zweitwohnungen. Retrieved September 8, 2016 from <http://www.are.admin.ch/themen/raumplanung/00236/04094/index.html?lang=de>

⁹⁸ Zweitwohnungsverordnung (ZWV) vom 4. Dezember 2015 (Stand am 1. Januar 2016), AS 2015 5669, SR 702.1

⁹⁹ RigiPlus AG & Rigi Bahnen AG (2016). oRIGInale - the friendly Mt. Rigi guides. Retrieved August 4, 2016 from <https://www.rigi.ch/en/Media/attraction/oRIGInal-die-freundlichen-Rigi-Gastgeber>

¹⁰⁰ Hauser, W. & Murmann, K. (2015, August 23). Chinesen-Alarm auf der Rigi! *Blick*. Retrieved from <http://www.blick.ch/>

¹⁰¹ Aschwanden, E. (2016, July 19). Rigi – vom Berg zur Destination. *Neue Zürcher Zeitung*. Retrieved from <http://www.nzz.ch/>

¹⁰² Schärer, E., IG Rigi Kaltbad First, Interview, December 07, 2016.

<p>There have also been cases in Weggis where Asian visitors entered the gardens of local residents^{103,102}. Cultural differences are also creating some challenges. For example, a Chinese tourist can appear for a local rather loud and demanding and groups are almost always louder than individuals^{103,102}.</p>
<p>Social impacts on tourists</p> <p>Perception of crowding, noise, littering, undesirable visitor behaviour:</p> <p>Swiss visitors travel to Rigi to experience quiet and peaceful nature, whereas Chinese tourists visit the destination only shortly as part of their Switzerland or Europe travel programmes¹⁰⁴. There has also been some complains that for example Chinese tourists have filled all the seats on the mountain train and full-fare paying visitors have not gotten a seat.</p> <p>Michael Bähler from Rigi Bahnen AG mentions for <i>Blick</i> that Chinese tourists do not always follow the rules. For instance, locals and other visitors have accused Asian tourists of crowding train corridors to snap photos and even spitting inside the carriages¹⁰⁵.</p>
<p>Environmental impacts</p> <p>More visitors means also more litter and waste. However, environmental impacts have not been recorded, the newspaper articles on the topic focus mainly on social impacts as listed previously.</p> <p>The interviewees have not noticed an increased level of litter. They have picked up litter for many years and are keeping the mountain clean.¹⁰²</p> <p>Additional usage of water and energy as well as other resources consumption or environmental damages has not been reported as a real problem. A general problem is the need to replace oil heating as the mountain railway will not be able to transport the oil anymore in a few years (running out concession). To secure the water supply, measures like water regeneration and integration of the supply net with all communes involved have been implemented.¹⁰⁶</p>
<p>Development of impacts/ Changes over time</p> <p>The number of tourists increased rapidly in 2015 which means that the situation has changes recently. Initially, residents felt overrun as suddenly Asian tourist seemed to be everywhere. The residents (as well as the mountain railways, hotels etc.) were not prepared to this new group of tourists. But meanwhile most of them have adapted to the new situation with guests from a different cultural part of the world. Tour operators and tour guides have been informed, more sanitary and other infrastructures have been built and signs in foreign languages have been placed.¹⁰⁷</p>
<p>Summary: Beneficiaries and sufferers from tourism in the case study</p> <p>The mountain railway companies benefit the most, but also other tourism service providers (hotels, restaurants etc.) make more profit when more people visit Rigi. Those who have different target groups than Asian tourists may have to put up with some negative effects like the overuse of sanitary installation etc. without generating a financial benefit. The local residents may be considered as the main sufferers as they experience crowding effects on the mountain railways the most and get disturbed by the tourists' behaviour. However, local residents benefit at least indirectly as they depend on the mountain railway to reach their houses up on Mount Rigi.</p>

¹⁰³ Wittwer, J. (2016). Touristische Hotspots – Wie gehen Schweizer Destinationen mit zu vielen Touristen um? (Bachelor's thesis). Interview with Christian Haueter May 13, 2016, lines 203-205. Lucerne University of Applied Sciences and Arts, Lucerne, Switzerland.

¹⁰⁴ Hauser, W. & Murmann, K. (2015, August 23). Chinesen-Alarm auf der Rigi! *Blick*. Retrieved from <http://www.blick.ch/>

¹⁰⁵ Kitsching, C. (2015, August 30). Swiss rail firm launches separate trains for Chinese tourists after locals accuse them of crowding corridors and spitting on the floor inside carriages. *Daily Mail Online*. Retrieved from <http://www.dailymail.co.uk/>

¹⁰⁶ Galliker, U., Pro Rigi, Interview, November 30, 2016

¹⁰⁷ Schärer, E., IG Rigi Kaltbad First, Interview, December 07, 2016.

Measures / Responses

What are the solutions that have been or are being discussed and/or implemented to reduce conflict between competing uses and to manage tourist masses? How can the challenges successfully be faced, managed and/or avoided?

General measures**Social measures**

RigiPlus AG and Rigi Bahnen AG have taken the main responsibility in implementing measures and discussing the challenges that have emerged with the increased number of tourists. These measures are explained in detail in the next section “specific measures”. They include for instance communication and information given to tourists, local residents and service providers as well as visitor management.

Locals are encouraged to participate in tourism by becoming volunteers, or as they are called in Rigi, oRIGInals.¹⁰⁸

Furthermore, RigiPlus AG is thinking about starting a co-creation process with tourism service providers, local residents and guests to develop new products. They also plan to implement a platform where people can place their feedbacks, ideas and so on.¹⁰⁹

Economic measures

Masterplan Rigi¹¹⁰ can be seen as a general tool for strengthening tourism in Rigi area and sets a vision for the tourism development. It covers wide range of measures and focuses on visitor management. The masterplan includes detailed plans and planned measures for various places on Rigi. These can be summarised as follows:

Rigi Kulm:

- Short-term measures: spatial distribution of tourists, temporary picnic zone, additional temporary toilets, signalisation in Asian languages
- Middle-term measures: enhancing summit experience 360°, providing more culinary offers for short-term visitors, opening of a Swiss Shopping World, shuttle service to Rigi Staffel and focus on the track Kulm-Staffel (for example augmented reality path)
- Long-term measures: implementation of the summit station Rigi Kulm, considering the possibility of combining shopping and picnic zones, creation of programmes and event offers on the summit

Rigi Staffel:

- Short-term measures: signalisation in Asian languages, making the area near the event tent more “alpine” and attractive, floral interventions, weatherproof catering facilities
- Middle-term measures: enhancing short-term visitor experience (offer/experience “Enjoyment” (“*Genuss*”), enhancing offer/experience “Swissness”, pop-up stores, changes in station Staffel such as weather-proof stop
- Long-term measures: replacing the event tent with a new construction, new culinary concept “new alpine cuisine”, opening of a Swiss Shopping World

Rigi Kaltbad and First

- Short-term measures: signalisation in Asian languages, spatial distribution of tourists
- Middle-term measures: culinary concept, concept for using existing second homes, establishment of temporary accommodation outdoor, optimization “Swissness” (shopping), creation of offers for families
- Long-term measures: station Rigi Kaltbad as information and booking hub, opening of a Swiss Shopping World

¹⁰⁸ RigiPlus AG & Rigi Bahnen AG (2016). oRIGInale - the friendly Mt. Rigi guides. Retrieved August 4, 2016 from <https://www.rigi.ch/en/Media/attraction/oRIGInal-die-freundlichen-Rigi-Gastgeber>

¹⁰⁹ Haueter, Ch., RigiPlus AG, Interview, November 28, 2016

¹¹⁰ Quant AG (2016). Masterplan Rigi. Masterplanung zur nachhaltigen Positionierung des Erlebnisraumes Rigi. Im Auftrag von RigiPlus AG und RIGI BAHNEN AG. Retrieved July 26, 2016 from <https://www.rigi.ch/Information/Bergbahnen/Rigi-Bahnen/Ueber-die-RIGI-BAHNEN-AG/Organisation/Masterplan-Rigi>

<p>Rigi Scheidegg and Burggeist</p> <ul style="list-style-type: none"> • Short-term measures: signalisation in Asian languages, start of the co-creation process “Adventure Park Rigi” • Middle-term measures: creation of offers for families, renovation of Kräbel-Bahn (2017), nature programme, outdoor creativity concept, augmented reality path • Long-term measures: evaluation of the station Scheidegg, further development of outdoor creativity concept <p>Seebodenalp</p> <ul style="list-style-type: none"> • Short-term measures: signalisation • Middle-term measures: integration of theme hiking part “Gletscherspur” into overall offer and development of hiking trail Kulm-Staffel-Seebodenalp-Chänzeli, new touristic concept for the brewery Rigi Gold, beer merchandising • Long-term measures: theme world “beer” <p>Urmiberg, Hinterbergen and Wissifluh</p> <ul style="list-style-type: none"> • Short-term measures: signalisation • Middle-term measures: communication existing outdoor creativity offers 	
<p>Environmental measures</p> <p>RigiPlus AG works in close cooperation with Pro Rigi Association. Their advice is asked, for instance, when planning visitor management measures such as optimizing spatial distribution of tourists¹¹¹. There are more than 40 Rigi guards who work for the cantons of Lucerne and Schwyz and are responsible for the supervision and management of the nature and plant protection areas of the Rigi. They also give information to guests when needed, and observe and report any environmental change in the areas of nature and water conservation, trails, cultivation, landfill, building, traffic regulations.¹¹² In addition, the number of waste bins as well as the number of permanent and temporal sanitary facilities were increased which protects the landscape. Furthermore, an interborough “Rigi Service GmbH” has been planned that would be responsible for cleaning, putting signposts and other services as currently every commune on Mount Rigi has its own way and system to fulfil these kind of tasks.¹¹³</p> <p>Most of the measures in the case of Mount Rigi focus on social and economic aspects rather than on environment.</p>	
<p>Specific measures</p>	
<p>Expand and improve the capacities and infrastructure</p> <p>In 2015 separate mountain trains were launched for international group guests in order to avoid conflict between different guest segments¹¹⁴. Extra trains operate a half an hour before or after scheduled trains. The amount of waste bins as well as the number of permanent and temporal sanitary facilities has been increased.</p>	
<p>Disperse tourist attractions</p> <p>Masterplan Rigi aims to create attractive attractions in different areas of Mount Rigi.</p>	
<p>Restrictions</p>	<p>Not reported</p>
<p>Information and communication</p> <p>According to desk research providing information and communicating to guests and residents has been one of the main tools of Rigi Bahnen AG in order to find solutions to the challenges. Examples include:</p> <ul style="list-style-type: none"> • In Vitznau coach drivers have been given information sheets how and where to drop the guests and to park the coach¹¹⁵. In addition, site trained signallers are guiding the parking process¹¹⁶. 	

¹¹¹ Wittwer, J. (2016). Touristische Hotspots – Wie gehen Schweizer Destinationen mit zu vielen Touristen um? (Bachelor’s thesis). Lucerne University of Applied Sciences and Arts, Lucerne, Switzerland.

¹¹² Pro Rigi (n.d). Summary in English. Retrieved July 26, 2016 from http://prorigi.ch/?Summary_in_English

¹¹³ Haueter, Ch., RigiPlus AG, Interview, November 28, 2016

¹¹⁴ Hauser, W. & Murmann, K. (2015, August 23). Chinesen-Alarm auf der Rigi! *Blick*. Retrieved from <http://www.blick.ch/>

¹¹⁵ Wächter, N. (2015, April 23). Rigi-Bahnen rollen zu neuen Rekorden. *Rigi Anzeiger*. Retrieved from <http://www.rigianzeiger.ch/>

- Asian tour guides are informed that visitors may only sit in restaurants if they also consume food there¹¹⁷
- Signs are posted that aim at educating foreigners about Western toilet etiquette. Also, there are new signs that guide guests to public toilets and the toilets are cleaned more often¹¹⁸
- Rigi Bahnen AG organises workshops for their employees every year, for example about intercultural issues. There have also been workshops in the villages for local residents organised partly together with Luzern Tourismus AG. These workshops aim to explain why all these tourists are visiting the area.
- At very busy days, people get informed by loudspeaker about departure time and platform of the trains.¹¹⁹

Optimize temporal distribution of tourists

In a way Asian tourists have helped to optimize temporal distribution of tourists (see part “economic impacts”). There are special trains for groups to separate individual and group tourists and to avoid that they travel exactly at the same time with the same trains.

Optimize spatial distribution of tourists

Along with information and communication another measure employed by Rigi Bahnen AG is optimizing spatial distribution of tourists. Examples include:

- Spatial distribution of coaches to Goldau and Weggis. However, Vitznau will probably remain the main station for Rigi visitors with around 20-25 coaches arriving there every day even though a construction of a large parking place near the mountain railway station is not possible due to geographical reasons.
- Temporary sanitary infrastructure has been built to prevent people from using toilets of restaurants without consumption.¹¹⁹
- Visitor management (*Besucherlenkung*) is an important tool in solving the problem. For example photo points were marked in order to guide tourists to certain spots on the summit. There is, for instance, a hotel restaurant on Rigi Kulm that is not equipped for group tourists. Signalisation should help so that the group tourists do not enter the restaurant immediately after reaching the summit. Signs written in Chinese should also help guests who are looking for quiet mountain experience since they can avoid the spots that are visited by Chinese tourists. Also Masterplan Rigi covers wide range of planned visitor management measures as seen in the summary above.
- To create attractive attractions in different areas of Mount Rigi (see also Masterplan Rigi).

Organisational Measures

Rigi Bahnen AG carries out a customer survey yearly. There are 25 questions about the offers, service, friendliness, quality and other topics.¹²⁰ Masterplan Rigi is a good example of an organisational measure.

Outlook
How will tourism on the site develop in future? What are the expected changes?

Prospects for tourism development

Increase in day trippers as well as guests who stay overnight
More guests from abroad – especially Asian countries (see also target groups)

Expected changes?

Capacity of the transport system (Rigi Bahnen etc.) is currently limited. However, investment projects are planned – also as some of the mountain railways need to be modernised and replaced.

Further remarks

RigiPlus AG expects a well-balanced development on Mount Rigi which considers tourism, local residents as well as the environment

¹¹⁶ Wittwer, J. (2016). Touristische Hotspots – Wie gehen Schweizer Destinationen mit zu vielen Touristen um? (Bachelor’s thesis). Lucerne University of Applied Sciences and Arts, Lucerne, Switzerland.

¹¹⁷ Hauser, W. & Murmann, K. (2015, August 23). Chinesen-Alarm auf der Rigi! *Blick*. Retrieved from <http://www.blick.ch/>

¹¹⁸ Neue Touristen brauchen Nachhilfe für WC-Nutzung (2015, July 1). *20 Minuten*. Retrieved from <http://www.20min.ch>

¹¹⁹ Hauter, Ch., RigiPlus AG, Interview, November 28, 2016

¹²⁰ Rigi Bahnen AG (2016). Geschäftsbericht 2015.

Conclusion
<i>What are the central conclusions that can be drawn?</i>
<p>What makes this case special?</p> <p>Rigi is a mountain destination which shows growing numbers of tourists – especially Asian tourists who travel in groups. Simultaneously many day trippers visit the top of the mountain. Mount Rigi is not only visited by tourists, there are also several inhabited areas on the mountain as well as villages at its foot. Crowding effects arise around the stations of the mountain railways – mainly in the villages as there is no space left next to the stations for new parking zones for coaches.</p>
<p>How do the framework conditions affect impact and management?</p> <p>Two cantons as well as nine communes on and around Mount Rigi are largely in charge of development of the area. Additionally, there are several tourism service providers involved. Therefore, decision making processes get delayed as there are many different players to be considered.</p> <p>Lack of (parking) space near the mountain railway stations in the villages Vitznau and Weggis is another condition which can't be changed easily and leads to crowding effects.</p>
<p>Why are the measures implemented successful/ not successful?</p> <p>From the tourism industry perspective, most current measures are successful. Furthermore, some have been planned but need to be realised first. Those who have been implemented seem to be successful insofar as they support the prevention of crowding effects and give people more information.</p> <p>Local residents seem to have mainly adapted to the new guests.</p>
<p>What are the main barriers that hamper a sustainable development in the case?</p> <p>Decision making processes are sometimes slow as there are many different players to be considered.</p>
<p>Which measures seem to be the most promising? What are the most important findings for the industry/ for politics?</p> <p>Involving and informing all parties (service providers, local residents etc.) right from the beginning is very important. People (especially local residents but also employers and employees) need time to adapt to new guests with a different cultural background. But also guests need information and guidelines (e.g. signposts in their language, briefing of tour operators etc.). Solving capacity problems and avoiding crowding effects seem to be very important as well.</p>
Methodology
<p>In addition to an extensive desk research telephone interviews with the following experts have been conducted:</p> <ul style="list-style-type: none"> - Galliker, Urs, Pro Rigi, Chairman (November 30, 2016) - Haueter, Christian, RigiPlus AG, Managing Director (November 28, 2016) - Schärer, Esther, IG Rigi Kaltbad First, Chairwoman (December 07, 2016)

3.11. Soweto (South Africa)

University of Johannesburg
Milena Ivanovic, Maisa Adinolfi, Vyasha Harilal

The case shows how rapid tourism growth around Vilakazi Street in Soweto, a historically underdeveloped township with limited infrastructure, leads to special challenges for the community with regards to participating in and benefitting from tourism.

General information	
Title / Name of the site/destination	Vilakazi Street (focus on Nelson Mandela House/Museum)
Region, country	Soweto, Johannesburg, South Africa
Area size (km²)	200km ² (Soweto)
Geographic coordinates	26.2485° S, 27.8540° E (Soweto) / 26° 14' 11.23" S 27° 54' 18.93" E (Nelson Mandela House)
Population and scope (if inhabited)	
Soweto population: +/- 1.3 million (Census, 2011)	
<p>South African townships are a legacy of the Apartheid era. During this time, townships were designed primarily as areas to house large populations of Black people as a source of cheap labour (World Bank, 2014). The houses that were built were all according to prescribed standards and sizes (example – Mandela House). Many of the characteristics of townships, such as a lack of infrastructure and service provision are perpetuated by the legacy left behind by the legacy of the apartheid policy framework.</p> <p>Soweto is the country's most populous township, housing 43% of the City of Johannesburg's total population (Pernegger & Godehart, 2007: 4). It is predominantly black, with the main linguistic groups being Zulu, Sotho, Tswana, Venda and Tsonga (South Africa Explorer, UD).</p> <p>Soweto was created on the outskirts of Johannesburg as a reservoir of a cheap black working force for the city, thus limited in economic activity except for some basic activity such as retail, construction, etc. Many jobs in the township are centred on tourism, hospitality, public works and JDA (Johannesburg Development Agency) projects.</p> <p>Although not a report specifically focused on Soweto, the 2008 Johannesburg Poverty and Livelihoods study (De Wet, Patel, Korth & Forrester, 2008) reveals realities of those living in Soweto and the Greater Johannesburg area which still ring true today to varying extents. The report describes a relatively young population mostly concentrated between the ages of 20 and 39 (pg. 11), with levels of education mostly ending at matric (high school) level with an extremely low higher education level (pg. 13). The main job types are domestic work, office and factory work, and hawking (pg. 16). There is a significant dependence on social grants (pg. 17), limited access to credit and loans with a high rate of indebtedness (especially due to credit cards and store cards), as well as a poor savings culture where money is aimed at essentials for survival, such as food, transport and school fees (pg. 18).</p> <p>These realities have made it particularly difficult for such populations to break the poverty cycle and also serve to hinder the growth of entrepreneurship, particularly with regards to access to finance and a resulting reliance on the cash economy. The latter is a phenomenon common in developing countries, frequently referred to as "grey money". Grey money refers to money that flows through the informal economy that is not banked but rather kept in the form of cash. "Grey money fuels a largely tax-free township economy and often serves as a catalyst for entrepreneurial enterprises" (Lefifi, 2014). The cash that exchanges hands in the informal economy is particularly difficult to control or account for principally in terms of tax generation and the total value of the</p>	

township economy.

There exists a gap between Small, Micro and Medium Enterprises (SMMEs) especially in the informal economy. Lack of understanding by both parties, financial institutions and the informal businesses, with limited or no access to finance and no dedicated bank accounts, leaves the former unable to account for their financial status and the latter missing out on substantial monies flowing throughout the economy unaccounted for (Agwa-Ejon & Mbohwa, 2015: 531). Rogerson (2008) emphasises these and other issues with regards to SMME development particularly issues on broader access to finance challenges for black owned SMMEs (due largely to the country's political legacy), lack of training and skills acquisition for SMME owners in managing and growing their business, and the need for a more supportive regulatory environment.

SMMEs, particularly in the informal realm, common in townships, are significant contributors to such cash economies and the tourism sector is not excluded. It is especially the case in indirect and induced contributions of the informal sector in the context of Soweto and the Nelson Mandela House Museum, which is surrounded by the informal traders including hawkers, transport operators (i.e. taxis) and unregistered and/or ungraded accommodation establishments.

Short description of the case

Soweto is situated south of the city of Johannesburg in South Africa. The township is of significant historical importance to the country and particularly the region. During the apartheid era, Soweto was designed to suit the needs of the then government's segregation policies. In its early days, being a "dumping ground for black citizens", the township received little development attention resulting in unpaved and untarred streets, limited service provisions and being scattered with poor quality, low cost housing or "matchbox houses" (Naidoo, 2014). The majority of township dwellers still reside in these houses made of corrugated iron or plastic sheets with no infrastructure for portable water, electricity or sanitation. The illogical spatial planning during the apartheid era makes the situation particularly difficult. Approximately 70% of Soweto's population commutes outside of the township to Johannesburg and beyond for employment due to the historically underdeveloped local economic base (City of Johannesburg, 2010: 3). Soweto's contribution is only 4% to the total metropolitan economic activity which explains the high unemployment rate of 52% (Dludla, 2015).

Within Soweto, Vilakazi Street is the only street in the world to have housed two Nobel Prize Winners, Nelson Mandela and Archbishop Desmond Tutu. The Nelson Mandela house is currently a significant tourist attraction, with the Archbishop's home remaining a private residence. The street has developed over the years to become an important stopping point for international tourists. As tourism demand grew within Soweto (see tourism demand at the site) and the area, so did the restaurant and accommodation offerings, together with an increase in the number of tour operators and agents offering tours to the destination (see section on supply). The township itself is faced with many challenges including continued poor access to proper housing, education and medical care for some, as well as unemployment despite numerous development projects being implemented since the dawn of democracy in 1994.

With regard to tourism, besides some infrastructural challenges evident in Vilakazi street where Mandela house is situated (lack of parking facilities, sanitary or shade facilities etc.), there are also challenges with regards to social aspects (high prices, businesses owned by people from outside of Soweto) emerging from an unequal distribution of the benefits from tourism (tour operators bringing tourists to Soweto are predominantly outside companies, not registered in Soweto and with no headquarters in Soweto) and an insufficient involvement of the residents in tourism development.

Tourism development in the country of the case study

Short description of the importance of tourism in the country

South Africa's tourism sector has grown substantially since 1994. The sector is a significant contributor to the economy, both to the GDP and in terms of employment. Tourists are drawn from all over the world with particular emphasis on regional tourists from Southern African (SADC) and African countries and other source markets, from Europe, Asia and the Americas. International tourism to the country tends to be heavily geographically concentrated in a handful of provinces, with the top four provinces being namely Gauteng (3 682 510 arrivals in 2015), the Western Cape (1 323 283 arrivals in 2015), Limpopo (1 311 830 arrivals in

<p>2015), and Mpumalanga (1 300 271 arrivals in 2015) (SA Tourism, 2016: 30). The first two provinces, each housing an international airport and the latter provinces being the gateway to the Kruger National Park, one of the biggest attractors of international tourists to the country.</p> <p>Gauteng, where Soweto is situated, is an important gateway into the country, being home to the biggest international airport in Africa and South Africa, Oliver Tambo International having received 19 135 093 passengers in 2015 which is an increase of 1.7% from 2014. The province offers an array of tourist activities, and is a significant attractor of tourists Visiting Friends and Relatives (VFR), business tourists, meetings and events tourists and cross boarder shoppers. Soweto is an interesting attractor of international tourists coming through or arriving in the province because of its rich political history. The province of Gauteng received 41.4% (3 682 510 arrivals) of all international arrivals to the country (SA Tourism, 2016: 68). Of the categories of arrivals, the province received 39.8% of total Africa land arrivals in 2015, 71.8% of Africa air arrivals, 46.2% of the Americas arrivals, 57.5% of the Asia and Australia arrivals, and 36.1% of the European arrivals (SA Tourism, 2016: 68).</p> <p>Compared to the Western Cape (Cape Town), it is clear that Gauteng (Johannesburg) attracts more African or regional tourists as opposed to other international markets that tend to go for the Western Cape more. This leaves a gap for destinations such as Soweto that tend to attract more of the latter markets rather than the African markets that are more inclined to come for VFR, business or shopping activities instead. Thus there is potential for further development in attracting leisure tourists and those interested in consuming cultural and historical experiences of the province.</p>	
Arrivals, Overnight stays (year)	<ul style="list-style-type: none"> 8.9 million arrivals (international) in 2015 (SA Tourism, 2016: 17) 25.4 million domestic trips in 2015 (SA Tourism, 2016: 7)
GDP	<ul style="list-style-type: none"> 2015 nominal GDP estimated at ZAR4.0 trillion, with an increase of 1.3% from 2014 (StatsSA, 2016: 5)
Tourism value added (% of GDP)	<ul style="list-style-type: none"> Direct GDP contribution in 2015 – ZAR118,6 billion, 3.0% of total GDP (WTTC, 2016: 1) Total GDP contribution in 2015 – ZAR375.5 billion, 9.4% of GDP (WTTC, 2016: 1)
Employment in tourism (%)	<ul style="list-style-type: none"> Direct employment contribution in 2015 – 703 000 jobs, 4.5% of total employment (WTTC, 2016: 1) Total employment contribution in 2015 – 1 554 000 jobs, 9.9% of total employment (WTTC, 2016: 1)
Further remarks:	<ul style="list-style-type: none"> Visitor exports generated in 2015 – ZAR115.0 billion, 9.1% of total exports (WTTC, 2016: 1) Travel and Tourism investment in 2015 – ZAR63.7 billion, 7.8% of total investment (WTTC, 2016: 1)

Tourism supply of the site

Short description of tourism on the site

Soweto is an urban township on the interior (not seaside), situated approximately 27km from the Johannesburg CBD, in the province of Gauteng. Tourism activity in the township is particularly focused on township tours of key attractions (see below) which typically appear on most tour routes to the township. The township tends to attract mostly international tourists, particularly Europeans, with source markets also coming from Asia and the Pacific, the Americas and Africa.

The township as a whole has a variety of tourist offerings that have grown substantially over the years. Some of the typical township businesses related to tourism are:

- Spaza shops and/or general dealers;

- Bakeries and Shebeens (informal township pubs);
- Restaurants and Shisanyamas (typical South African butcher and grill shops);
- Dress makers and tailors;
- Hospitality-Guest house and B&Bs;
- Arts and Crafts;
- Tour guide and
- Safety and security guards (car guards);
- Recycling, (GDED: 2014:12)

Vilakazi Street which is a central tourist point where the Nelson Mandela House is situated currently offers restaurant facilities, the Mandela House Museum, souvenir sales via informal street sellers/hawkers, helicopter tours (across from the museum), and walking tours.

Soweto's tourism industry contributes R143 million to Gauteng's gross domestic product and more than 1 million tourists visited the township in 2013 (Dludla, 2015).

Access (how to get there?)

The township is easily accessible through a variety of roads and highways all linking to the main city of Johannesburg. Roads within the township vary in condition but are typically in a relatively good condition where tourists would naturally go.

Main attractions

Key attractions and activities in the Soweto township as a whole include: the Nelson Mandela House, Vilakazi Street as a whole, Hector Pieterse Museum and Memorial, Orlando Towers (includes a bungee jumping facility), Regina Mundi Church, Chris Hani Baragwanath Hospital, cycle tours, shebeen visits, visits to famous restaurants (examples: Sakhumzi, Chaf Pozi, Wandie's Place, Vuyo's, Restaurant Vilakazi, Jazz Maniacs, etc.), etc.

The township also has an 85 000 seater stadium (FNB stadium) which can also be toured. The stadium was built for the FIFA World Cup in 2010 and is the third largest stadium in Africa (South Africa Explorer, UD), attracting visitors from an array of locations and has fast become a tourist attraction.

Accommodation offer

Accommodation in Soweto tends to be centred around black-owned, typically female owned (Rogerson, 2004: 277) and managed Bed & Breakfast (B&B) / Guesthouse accommodation types with some backpackers and only one hotel on offer. Two famous accommodation establishments include the Soweto Hotel which offers conferencing facilities and Lebo's Backpackers, both having an official star grading of 4 and 3, respectively.

Vilakazi Street is surrounded by numerous Bed & Breakfast and Guesthouse establishments. With the exception of Nthateng B&B (3 star), none of these establishments appear on the Tourism Grading Council of South Africa's (TGCSA) site search as officially graded establishments. However, when doing an internet search on these establishments some appear to claim to have a star grading of some sort. Some establishments display a star graded sign or plaque of some nature on their physical premises despite not being officially graded by the TGCSA. This could cause confusion for the consumer and result in inconsistencies in standards of service. The reluctance to be graded with the official body could stem from lengthy, complicated and expensive processes, and a lack of accounting records stemming from low levels of training typical of SMMEs. In South Africa, the tax bracket for those who are excluded from paying tax is R70000 or 4703 Euros annually. Many township business owners do not want to make anything traceable over this amount and are reluctant to divulge any information about their business in order to avoid paying tax. The Government is well aware of this problem and applies various methods in order to certify township businesses but with little success.

Furthermore, these black-owned bed and breakfast establishments play an integral role in the necessary transformation agenda in the country's tourism economy. The emergence of black-owned B&Bs and their inherent challenges is outlined by Rogerson (2004). These black-owned B&Bs feature almost exclusively in the former 'black spaces' deemed by the former apartheid regime (Rogerson, 2004: 276). Rogerson (2004) further highlights key challenges for these establishments, which include: marketing challenges, access to finance,

<p>lack of knowledge of the tourism industry, and lack of support from the local community. Many of these challenges are possibly the result of the major underlying reason or motivation for establishing a B&B by a black owner being an opportunistic sense of perceived market opportunities rooted in the observation of increasing flow of visitors to townships (Rogerson, 2004: 278).</p>
<p>Restaurants (number, type, quality)</p> <p>There are several restaurants available in Soweto, varying in size and quality. However, on Vilakazi Street itself, the restaurants available include: Sakhumzi, Restaurant Vilakazi, Vuyo's, Nambitha, Mandela's Family Restaurant, Nexdor, Kwa Lichaba, The Wine Bar, and Kofi food and coffee bar.</p>
<p>Other tourism service providers</p> <p>The only museums available to visit within Soweto include the Nelson Mandela House Museum and the Hector Pieterse Museum, as well as the Kliptown Museum, which is an open-air museum. Souvenirs are typically available within the Hector Pieterse museum or via informal street vendors who sell a variety of arts, crafts, and memorabilia.</p>
<p>Stage of the tourism life cycle</p> <p>Soweto is still in the development stage of the tourism life cycle. Despite lapsing 22 years since democracy, the township still holds a lot of tourism potential. The province itself also holds potential for attracting more visitors beyond the typical VFR, business, events, and shopping tourists.</p>

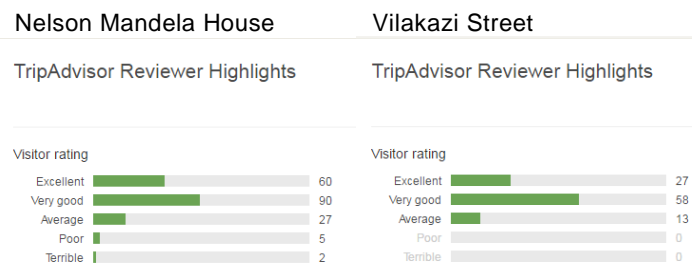
<p>Tourism demand at the site</p>
<p>Short description of tourism demand</p> <p>Johannesburg is set to be the most popular destination city in Africa for the fourth year, according to the 2016 MasterCard Global Destinations Cities Index ranking 132 world cities (IOL, 2016). Thus the city is an important tourist hub and gateway for sites and destinations within it, such as Soweto.</p> <p>The main purpose of travel to the area seems to be for authentic tours of a historical South African township, as well as to gain knowledge and experience of the struggles faced by former president Nelson Mandela (Mandela House and Museum) and the 1976 Student Uprising (Hector Peterson Memorial and Museum). Tourists also visit the area (Vilakazi Street) to see heritage sites, such as the Tutu house, which is not open to the public. Vilakazi Street offers tourists an authentic township experience through the restaurants offering traditional South African cuisine, adding a cultural element to the tourists' experience.</p> <p>At the Nelson Mandela House Museum however, international tourists are keen to engage in the rich political history available to them and to grasp at the opportunity to be able to step into the former home of a political icon, make up a significant proportion of visitors. According to the museum's manager, 45% of visitors are in fact school children who come to the museum on their school trips.</p>
<p>Volume of tourists</p> <p>Even though staying tourists are more desirable as they are regarded bigger contributors to Soweto economy than daily visiting tourists, there is no available statistical data on any of the tourist parameters.</p>
<p>Development of tourist numbers</p> <p>Soweto is the 11th most visited destination in South Africa receiving 173 000 tourists annually in 2015 as part of organised Soweto tours.</p> <p>The tourist participation rate in organised visits to Soweto showed steady annual increase of at least 10% over the past 3 years:</p> <ul style="list-style-type: none"> • 2015-173 000 • 2014-157 000 • 2013-142 000 (SAT, 2015: 64) <p>Note: Data for 2013-2015 is the only available stats in South Africa</p> <p>It is estimated that including individual tourists more than 1'000'000 tourists visit Soweto annually.</p>

<p>Length of stay</p> <p>The length of stay of tourists in Gauteng is on average 8.2 days (SAT, 2016:28) but there is no data available for Soweto in particular. Soweto is known for predominantly attracting day visitors, not the overnight stays. Nevertheless there is no information on how many visitors actually stay in Bed and Breakfasts in Vilakazi Street or in Soweto in general as these establishments are not graded and owners are not willing to disclose any information regarding their businesses.</p>
<p>Origin countries of tourists</p> <p>The main generating regions for Gauteng tourism in 2015 (SAT, 2016) are Africa Land (71.9%), dominated by neighbouring countries of Mozambique (22.3%), Zimbabwe (18.4%) and Lesotho (10.8%), and Africa Air dominated by Nigeria (1.3%) and other African countries and the Middle East (1.9%). European tourists account for 11.8% of the visitors to the province leading by UK (3.4%) and Germany (2.3%) while USA share stands at 3.5%, China 1.5% and Australia 1.3%.</p> <p>The main generating cities for international overnight visitors to Johannesburg in 2016 are London 373 000, Harare (294 000), Frankfurt (233 000), Maputo (185 000) and Paris (163 000) (IOL, 2016).</p>
<p>Tourism image</p> <p>Historical, cultural and township.</p>
<p>Motives / target groups</p> <p>Vilakazi street as a tourist attraction is mainly targeted at those tourists seeking to experience an authentic township experience, as well as those wanting to gain a historical insight into the past of Apartheid. The vision of the Mandela House “strives to be a world-class visitor attraction and a leading centre for the preservation, presentation, and research of the history, heritage and legacy of the Mandela Family“. The purpose of having the house open to the public, as a museum, is to ensure that tourists are able to gain an understanding of former President Nelson Mandela’s lived experiences, both as a citizen of the country, as well as a family figure.</p>
<p>Seasonality (peaks)</p> <p>No seasonality recorded</p>
<p>Visitors' opinions, attitude and behaviour, expectations and preferences, satisfaction</p> <p>Visitor’s opinions, expectations and satisfaction may be noted from the comments that tourists/visitors have posted on various websites such as TripAdvisor (2016 a, b, c). The comments that have been posted with regard to Mandela House indicated that tourists are satisfied and emotionally moved by visiting historically significant places along Vilakazi Street. However, there are some visitors who did not feel that their time and money were well spent.</p> <p>The comments that have been posted with regard to Vilakazi Street as a whole indicate that tourists and visitors to the area are pleased with their experience of the street, many citing their experience as ‘incredible’, ‘moving’ and ‘powerful’.</p> <p>In order to further investigate the impact of overcrowding on authentic tourist experience, a survey based on 122 questionnaires was conducted at the Mandela House Museum during December 2016-January 2017. It was a quantitative study based on non-probability, convenience sampling method. The results indicate that 30% of visitors thought that the inside of the house was crowded at the time of their visit. Moreover, only 21% were distracted by noise, 36.7% could not look closely at the exhibits, while a staggering 50.4% did not even listen to the audios. Despite all these distractions more than half of the visitors (56.6%) felt as if they were present in Mandela’s time and a further 57% had a very deep emotional experience of the house. In summary, 67% of the visitors had an authentic experience of the Mandela house seen as highly representative of the South African struggle for the universal human rights such as the right for freedom and against racial discrimination championed by Nelson Mandela.</p> <p>The results lead to a conclusion that an iconic status of political heritage sites in South Africa, especially sites</p>

linked to 'Mandela Magic' (Ivanovic, 2014; Ivanovic & Saayman, 2015) contributed to an increased tourist tolerance of the number of experience distractors (crowding, queueing, noise) resulting in an emotional and authentic tourists experience.

Additional data

The Nelson Mandela House Museum currently (15 November 2016) holds an average rating of 4 out of 5 on TripAdvisor, has 268 reviews available, 232 visitor photos posted and is rated 19 out of 254 things to do in the Greater Johannesburg area. Of the 268 reviews, 90 rated it as very good, 60 as excellent, 27 as average, 5 as poor and 2 as terrible (TripAdvisor, 2016a).



Vilakazi Street currently holds an average rating of 4 out of 5 on TripAdvisor, has 121 reviews available, 119 visitor photos posted and is rated 4 out of 20 things to do in Soweto (TripAdvisor, 2016b). Of the 121 reviews, 58 rated it as very good, 27 as excellent, and 13 as average (TripAdvisor, 2016c).

Framework conditions
What are the framework conditions that might influence the impact and/or the management of the site?

History and background

Soweto was established in the 1930s under the Urban Areas Act, with the intent to separate the black population from the white population by removing the black population from the inner city. The township became the biggest black city in the country and to date is home to approximately 1.3 million people. The township gained international recognition due to its ongoing civil unrests and riots during the 1970s. It is also famous for being the location of the only street in the world to have housed two Nobel Prize recipients.

After the first democratic election in 1994, the new government was faced with having to grow an economy that needed to be more inclusive. Tourism was identified as a priority sector in addressing the damages of apartheid, with the view of using the untapped potential of tourism to address issues of inequality, economic growth, wealth distribution, poverty alleviation, as well as education and skills development (DEAT, 1996). It was only natural that the country's political heritage would become part of its tourism offerings. Thus Vilakazi Street and the Nelson Mandela Home became key assets for the development of tourism in Soweto. Nelson Mandela moved in in 1946 with his first wife, Evelyn Mase and later in 1958 he shared the home with his second wife, Winnie Madikizela Mandela. After his release from Robben Island in 1990, Mandela spent a mere 11 days in the Soweto home. Despite his move to a suburb called Houghton, the family continued to occupy the house until 1996 where shortly after it was turned into a heritage site and opened to the public.

Political situation

Soweto currently falls under the City of Johannesburg Metropolitan Municipality. At a macro level, support is given to the development of tourism via the National Department of Tourism via a variety of policies and strategies. The need for support for SMMEs (Small, Medium and Micro Enterprises) is emphasised in the National Tourism Sector Strategy (2012).

Legal issues**The most important tourism acts are:**

1. Gauteng Tourism Act, No. 10 of 2001
2. Gauteng Tourism Amendment Act. No. 3 of 2006
3. Tourism Act, No. 3 of 2014

Furthermore, there are many other Acts that influence the development of tourism in Soweto.

Organisation

The organisation of tourism in South Africa begins with the National Department of Tourism. All 9 provinces have a dedicated tourism authority responsible for the growth and development of tourism within that province. In Gauteng, Johannesburg Tourism would be the immediate point of call for the development of tourism in Soweto. There appears to be an existing Soweto Tourism Association which is member driven, and represents a number of tourism businesses including restaurants, B&Bs, tour operators, tour guides, etc. but does not have an official online presence. They also do not have any official statistics relevant to business they represent.

The Nelson Mandela House Museum is owned and managed by the Soweto Heritage Trust (Mandela House, UD) in conjunction with Standard Bank. The Trust initially was responsible for the establishment of the Hector Pieterse Memorial along with other stakeholders (municipal and provincial authorities). However, this is now managed by the Johannesburg Metropolitan Council. The Mandela House underwent intensive restoration work in July 2008 in order to create a more presentable and educational tourist attraction in line with feedback received from visitors prior to the restorations. The restoration cost the estimated R9 million (1.1 million euros).

Physical setting

Soweto is easily accessible despite being a significant distance from areas of economic activity. The township is connected through a variety of roads and highways to other parts of the Greater Johannesburg area. From observation, there are no public restroom facilities besides those offered by the museum and the restaurants. There are poor shade facilities for the tourists to make use of during the hot summer season or to shelter from the rain. There are also no public water facilities (i.e. drinking water fountains) available should tourists require water.

Vilakazi Street itself is very clean with very little visible litter and numerous concrete dustbins available. The pavements are however not consistent in width and accessibility, resulting in tourists having to walk on the narrow road together with passing cars, public buses and tour buses. Parking for private cars will be a problem in busy seasons and the busiest days of the week (weekends and Friday's) as there is no designated parking areas for visitors, meaning that vehicles parked on the main street and other adjacent streets will result in more crowded street, traffic congestion and possible inconveniences for residents (see impacts of tourism and Carrying Capacity).

Another important observation that there is only one cash withdrawal facility (ATM) on Vilakazi Street that could be advantageous to hawkers who transact in cash. However, should that be out of order tourists may not have cash or access to cash in order to spend on items sold by street vendors. In addition, the only foreign exchange services within the area are located in formal retail shopping centres; at a relative inconvenient distance should tourists require to exchange their foreign currency.

Economic situation

Since statistics on Soweto are limited, it is still possible to look at the economic situation of the province as a whole. In total the government and private investors have poured over \$45 billion (USA dollars) into Soweto's makeover since 1994, according to the City of Johannesburg (cited in Kuwait Times, 2014: 15) focusing mostly on public projects, such as building roads and basic infrastructure, electricity & water. The combined annual buying power of township residents in 2013 is estimated at \$750 million (USA dollars) (540 million euros) (Kuwait Times, 2014: 15).

As noted in a study on the economics of townships, access to finance for SMME's is problematic, which further perpetuates the economic exclusion of people within these areas. A further point to take note of is the 'informal economy' in townships. As many residents of townships are less likely to use a bank account for financial

transactions (World Bank, 2014), much of the business conducted is on a cash basis (referred to as grey economy).

However, there is support offered for certain types of small businesses, especially guesthouses and bed and breakfasts. Tsogo Sun, a leader in the accommodation sector, has a programme that adopts a start-up guesthouse or bed and breakfast for a period of time, ensuring that the owner of the establishment is given access to the training and development needed to sustain their businesses after the mentorship program is over. On the contrary, other informal traders, artists and crafters, do not, for the most part, have access to this sort of support.

One such example is of Lindiwe Mngomezulu, an ambitious woman who has opened an arts and craft establishment in her house, 7261 Vilakazi Street. The house is a block away from the Mandela House Museum. Lindiwe Mngomezulu has opened an arts and craft establishment in her house but Mngomezulu, who started her business, Mamfiso Arts and Craft, in 2004, interesting case-could only register a cooperative but did not have money, Currently they seems to be working in Gifts, cards and party supplies activities (City of Johannesburg, 2009).

Social/cultural situation

Festivals and Special Events:

- Soweto Fashion Week - 26 – 28 May 2016 at the Soweto
- Soweto Wine Festival 3-5 March annually
- Vilakazi street night market -every last Thursday of the month starting from November 2016
- Soweto Art & Craft Fair -03 January 2017
- Makhelwane Festival – 05-07 December 2015 30 residents in Poka Street, Orlando West open their houses for young artists to exhibit their arts and crafts
- Soweto Beer Festival, Mofolo Central, 25-26 November 2016
- Old Mutual Soweto Marathon, 6 November 2016

Sporting and conference facilities:

- FNB stadium
- Orlando Stadium
- Nasrec (conference and exhibition centre just outside Soweto)
- Nike Football Training Centre
- A variety of recreation centres, swimming pools, sports complexes and community halls.
- Soweto Hotel and Conference Centre
- Kliptown Conference Centre (Tourism information Centre)

Markets:

- The Locrate Market every last Sunday of the month in Orlando West close to Vilakazi

Cultural and Religious Attractions:

- Credo Mutwa Cultural Village
- Theatre in Bolani Road
- Regina Mundi Church

Environmental situation

Vilakazi street is still residential with the exception of some businesses. The tourism activity on the street is mostly aimed at visiting the Nelson Mandela House Museum. There is no immediate threat to the environment per se. However, with continued growth of visitor numbers to the street, noise, visual, and air pollution may be on the rise, particularly for residents still living on the street and surrounds.

Bottlenecks and constraints

Constraints with regard to transport/facilities: the development capacity of the area is being/has been maximised, as is evidenced by the new developments of restaurants, shops and accommodation over the past few years. The access capacity may be limited / constrained, especially during busy or crowded times of the day.

Challenges / Impacts
<i>What are the most important challenges resulting from high tourism intensity on the site?</i>
<p>Short description of main challenges</p> <p>From observation the following impacts-pressures indicative of development stage of Butler's Tourist Area Life Cycle (TALC) are evident in Vilakazi Street and Nelson Mandela House Museum:</p> <ol style="list-style-type: none"> 1. <i>Volume pressure:</i> Based on information provided by the Nelson Mandela House Museum Manager, on average the museum receives 400 visitors per day. Also the results of a survey on 122 visitors to the museum have shown that 61% of the respondents were traveling as part of a group while 39% of them were travelling individually. 2. <i>Traffic pressure</i> refers to a conflict between pedestrians and cars, lack of parking spaces and traffic congestion. There is clear evidence of traffic pressure on Vilakazi Street. The pavements are not consistent in width and accessibility, resulting in tourists having to walk on the narrow road together with passing cars, public busses and tour busses. Parking for private cars will be a problem in busy seasons as there are no designated parking areas for visitors, meaning that vehicles parked on the main street and other adjacent streets will result in an even narrower street, traffic congestion and possible inconveniences for residents. 3. <i>User-conflict pressure:</i> <ul style="list-style-type: none"> • Conflict between residents and tourists: Vilakazi Street is an interesting case as there are still many residential homes in between restaurants and other businesses, including a high school. Residents on that particular street often experience high volumes of tourists, whilst going about their daily lives. • <i>Conflict between traders and tourists:</i> The presence of informal traders/hawkers selling souvenirs to tourists is an indication that there are job opportunities as a result of tourism. However, there is no formal infrastructure in place for these traders. They tend to hassle tourists in attempts to sell their goods. 4. <i>Infrastructural pressure:</i> By observation, Vilakazi Street itself is very clean with very little visible litter and numerous concrete dustbins available. However this type of pressure also refers to infrastructural overload or alternatively, lack of infrastructure. <ul style="list-style-type: none"> • There are no public restroom facilities besides those offered by the museum and restaurants. • There are poor shade facilities for tourists to make use of during the hot summer season or to shelter from the rain. • There are also no public water facilities (i.e. drinking water fountains) available should tourists require water.
<p>Tourism intensity</p> <p>See below under "Classification of Carrying Capacity".</p> <p>Data for numbers, ratios and length of tourist stay is not officially available by Gauteng or National government</p>
<p>Influencing factors</p> <p>Visual impact is not even applicable at this stage of destination's development. Based on participant observations lack of uniformity is what gives Vilakazi street experience a charm and authenticity.</p>
<p>Classification of carrying capacity affected</p> <p>Based on information provided by the Mandela House Museum's Manager, on average the museum receives 400 visitors per day. The problem is their Carrying Capacity which is determined to be 20 visitors per tour which in turn lasts for 40 minutes. Since the museum is open for 8 hours daily it means that in order to accommodate 400 visitors either a tour should last for only 24 minutes to maintain the determined physical CC of 20 or more tourists are allowed in at any given time. Based on participant observations, the latter seems to be the case.</p> <p>The results from 122 respondents have shown that 29% of group visitors and 30.2% of individual visitors spent less than 10 minutes inside the house while a further 26.1% and 14% of group and individual visitors spent 10-15 minutes. It seems that physical CC is self-regulating by a much shorter visitation time than what one would expect. The results of the study have shown that there is no correlation between queuing time and perceived authenticity of the tourist experience.</p>

Type of capacity affected	Daily and weekly capacity (especially public holidays and weekends)
<p>Economic impacts</p> <p>Soweto's tourism industry contributes more than R143 million to Gauteng's gross domestic product and more than 1 million tourists visited the township in 2013 (Dludla, 2015).</p> <p>Operators in the informal sector are not used to paying for the services such as rent, utilities and tax, thus why they continue to repel local government effort to house them in proper structures as it has an impact on their profit.</p> <p>In terms of economic impacts, the following were the main concerns that surfaced in the interviews conducted:</p> <ul style="list-style-type: none"> • A common theme among interviewees was the perceived lack of funding opportunities or support from government or financial institutions. • Interviewees also revealed that it is common for the established businesses such as the restaurants to be owned by people that are not from Soweto, resulting in potential leakages outside of the immediate community. The resident interviewed also mentioned that such restaurants hire locals as wait staff as they are more familiar with local foods than the very chefs producing the foods. Such an issue is echoed by Rogerson (2011) in his work on tourism and agricultural linkages. • Work opportunities do arise particularly in the restaurants as waiters, cooks and cleaning staff but restaurants tend to be owned by people from outside Soweto in most cases, leaving residents with lower paying jobs. • The B&B owner interviewed expressed a sense of pressure to hire at least one employee to keep her business running and acknowledged the potential to hire more people should her business grow. • A concern expressed by both the resident and hawker interviewed is the perceived power of tour guides to direct business to or deprive business from street vendors as they have the power to inform and influence tourists on what to do and where to buy souvenirs or other items. The concern expanded to include issues around tour guides guiding the spending of their customers to businesses outside of Vilakazi Street owned by their friends or families. • The hawker emphasised other challenges such as lack of shelter and the need to run his business as a one man band of sorts being responsible for all aspects of his business, including the need to learn foreign languages on his own accord to be able to engage with international tourists better and to improve his sales. 	
<p>Social impacts on residents</p> <p>Vilakazi Street is an interesting case as there are still many residential homes in between restaurants and other businesses, including a high school. Residents on those particular streets often experience high volumes of tourists, whilst going about their daily lives.</p> <p>In terms of social impacts, the following were the main concerns that surfaced in the interviews:</p> <ul style="list-style-type: none"> • Everything has become more expensive on Vilakazi Street and the immediate surrounds compared to other areas of Soweto. Such increases in prices include especially rent prices and general food and beverages. • Residents seem to have very little say on what is developed around the area and particularly the conduct of restaurants that operate until late hours with loud music. The hawker that was interviewed expressed concern that residents who came before the museum was established now have to follow the rules set out by the museum and associated by-laws. • During public holidays and weekends, tourists and locals flock to the street to enjoy the entertainment available where crowding becomes more prominent. • The resident interviewed expressed the frustration regarding opportunists who take advantage of the busy periods and come to sell their goods while local residents sit at home unemployed. • In the case of the helicopter tour company, two interns have been given the opportunity to develop on their job skills through an established training programme. • The hawker interviewed mentioned that he is in fact a trained tour guide. He also went on to describe how tour guide training programmes paid for by organisations such as GTA (Gauteng Tourism Authority) are often taken up by friends and family who complete the training in order to improve their CV and not with the intention of actually becoming a tour guide. 	

- Crime was a concern that also surfaced. The B&B owner gave an account of when her house was broken into, explaining that such crimes are committed by local children and others who are aware of the movement of people and when is the most opportune time to strike. She also emphasised that crime has worsened over the years but she cannot confirm whether it is connected to the increase in tourism activity. The resident interviewed also recalled that crime is on the rise and particularly tends to be more prominent at night.

Social impacts on tourists
The presence of informal traders/hawkers selling souvenirs to tourists is an indication that there are job opportunities as a result of tourism. However, there is no formal infrastructure in place for these traders. They tend to hassle tourists in attempts to sell their goods.

Environmental impacts
In terms of environmental impacts, the following were the main concerns that surfaced in the interviews mentioned above:

- Litter did not seem to be a problem. The hawker recalled that tourists tend to be more careful or conscious of littering.
- Concerns were raised by interviewees around noise and air pollution due to the regular number of cars and busses passing by and the noise also produced by restaurants particularly when hosting parties or corporate functions.
- The resident interviewed recalled how there is irregular removal of rubble and sometimes residents have to remove it themselves in other areas of Soweto but on Vilakazi Street, however, rubbish and waste removal is always regular.
- Energy consumption does not seem to be a concern for the hawkers as they do not require any. However, a rise in the consumption of energy by the restaurants and other businesses was noted by the resident particularly in busier times.

Development of impacts/ Changes over time
The development of such impacts mentioned above appears to have increased organically over time as tourism activity has increased over the years.

Summary: Beneficiaries and sufferers from tourism in the case study
In terms of beneficiaries and sufferers, the following were the main concerns that surfaced in the interviews mentioned above:

- Those that tend to gain the most from tourism are the minority – i.e. the tour guides, the museum and the restaurants.
- Street vendors seem to benefit less as they are faced with more challenges than the established, larger scaled businesses.
- There is a little evidence to support a proposition that tourism in Vilakazi Street creates an abundance of employment opportunities.
- Residents of Vilakazi street are clear beneficiaries in terms of service provision and infrastructural development especially the roadworks (roads and pavements) in.

Measures / Responses Survey- *What are the solutions that have been or are being discussed and/or implemented to reduce conflict between competing uses and to manage tourist masses? How can the challenges successfully be faced, managed and/or avoided?*

General measures

Social measures
Tourism development evident in Vilakazi street is organic, fluid and spontaneous in nature.

Economic measures
The development of support for SMMEs and a need for a focus on the development of the informal economy

has been noted at both provincial and national level as mentioned in initiatives and strategies throughout this report. However, this is an ongoing development that will take extensive time to see considerable and sustainable results.	
Environmental measures	None that can be observed.
Specific measures	
Expand and improve the capacities and infrastructure	
The roadworks that have been implemented over the years on Vilakazi Street and the rest of Soweto are evident of efforts to improve infrastructure provision in the township. In terms of the Nelson Mandela House Museum, it seems that the museum is content with its capacity management system and does not feel that it is a concern.	
Disperse tourist attractions	
There is opportunity for expansion of tourism in Soweto as it has not yet reached the saturation point.	
Restrictions	
<i>See discussion on carrying capacity and visitor opinions in tourism demand section.</i>	
Information and communication	
The lack of communication between residents, local businesses and government is apparent. The need for the dissemination of information around opportunities for funding and training need to be made clearer.	
Optimize temporal distribution of tourists	
As there is no clear seasonality for the destination what makes it difficult to do so.	
Optimize spatial distribution of tourists	
Currently the Nelson Mandela House Museum manages their carrying capacity by limiting 20 tourists at any given time in the house. However, even though this may be expected to result in extensive queues it was not the case as tourists were allowed into the house regardless if the physical CC set at 20 visitors at the time has been exceeded or not. It is established visitors management practice to let tourists in whenever there was a longer queue in front of the house regardless of the number of tourists already inside the house. The queues were managed in this same manner during the week and in busier periods such as over the weekends and during Christmas holidays.	
Reflection on measures implemented and/or discussed	
There are no measures implemented to analyse.	
New innovative solutions (<i>Technology, pricing, new offers etc.</i>)	
More interactive experience in the museum and on the official website could be ideas to make the museum more attractive.	

Outlook
<i>How will tourism on the site develop in future? What are the expected changes?</i>
Important future trends
The most important future trend which will shape the tourist experiences of Nelson Mandela museum is an increasing demand for authentic experiences so their presentation and time scheduling has to facilitate these trends.
Prospects for tourism development
It is spontaneous type of development which is demand driven. The businesses in Vilakazi street are often changing ownership and use of premises and shops (except for a few restaurants)
Expected changes?
Changes are foreseen in the future of both look and feel of the Vilakazi street being the main attraction in Soweto. Still there are no high rise buildings and the street is not yet exclusive touristic zone because of mixed residential –business activities. As it goes to stages of TALC the destination is expected to change in the future but the nature and dynamics of these changes cannot be predicted in advance.

Conclusion	
<i>What are the central conclusions that can be drawn?</i>	
General conclusions	
What makes this case special?	
This case is special in the context of tourism development in the developing world. These communities face special challenges in participating in and benefitting from tourism and require extensive support from a variety of different stakeholders. Vilakazi Street and its surrounds have developed sporadically resulting in limited beneficiaries and potential for future growth.	
How do the framework conditions affect impact and management?	
They do not directly affect the impact and management except for physical Carrying Capacity.	
Why are the measures implemented successful/ not successful?	
There are no measures other than setting the limit of Carrying Capacity to 20 visitors at the time which has not been correctly calculated and there is further evidence that the feeling inside the house is that of overcrowded and noisy space.	
What are the main barriers that hamper a sustainable development in the case?	
No specific barriers were detected in this particular case. A suggestion is that two neighbouring properties should be acquired in order to relieve overcrowding and alleviate potential pressure on physical Carrying Capacity which may arise with an expected increase in tourist numbers.	
Which measures seem to be the most promising? What are the most important findings for the industry/ for politics?	
There is a severe lack of availability of basic statistics for Soweto in terms of visitor numbers, types and origins of tourists, motivations, spending, length of stay, etc. the Gauteng Tourism Authority (GTA) in particular needs to place an emphasis on gathering such statistics in order to further understand the development potential of Soweto as a destination.	
What are the findings/conclusions other destinations could learn from?	
In order to ensure sustainability of a destination evaluation and monitoring becomes crucial in facilitating decisions on further investment and strategic decisions regarding tourism development. Collecting statistical data on an ongoing basis is critical to understanding the current and future state of development and assessing current and potential future impacts of tourism on a destination.	

Methodology
Beside an extensive desk research four interviews were conducted with: one intern at a helicopter tour service company, one B&B owner, one resident and one hawker to get a sense of the perceptions of the growth of tourism on Vilakazi Street by such stakeholders.

References
Agwa-Ejon, J. & Mbohwa, C. (2015). <i>Financial challenges faced by SMMEs in Gauteng South Africa</i> . 24 th International Association for Management of Technology Conference Proceedings (520-532). 8-11 June 2015, The Westin, Cape Town, South Africa.
Census (2011). <i>Soweto</i> . Available at: https://census2011.adrianfrith.com/place/798026 Accessed: 28 November 2016.
City of Johannesburg (2009). <i>Locals cash in on Vilakazi Street</i> . Available at: http://www.joburg.org.za/index.php?option=com_content&id=4363&Itemid=222 . Accessed: 16 November 2016.
City of Johannesburg (2010). <i>The Remaking of Soweto. End of Term Report 2006-2011</i> . Available at: http://www.joburg-archive.co.za/2008/pdfs/legacy_of_achievements/soweto_report.pdf . Accessed: 28 November 2016.
CoGTA (Department of Co-operative Governance and Traditional Affairs) (2009). <i>Township Transformation Timeline</i> . Pretoria, South Africa: COGTA and the European Union.

- Diudla, S. (2015). *Soweto's young and talented entrepreneurs*. Available at: <http://www.smesouthafrica.co.za/15417/Sowetos-young-and-talented-entrepreneurs/>. Accessed: 16 November 2016.
- Gauteng Department of Economic Development (GDED) (2014). *Revitalisation of the Township Economy. Draft Strategy Report*. Available at: <http://www.ecodev.gpg.gov.za/Documents/Draft%20GTER%20Strat.pdf>. Accessed: 21 November 2016.
- Gauteng Tourism Authority (GTA) (2015). 2014-2015 Annual Report. Available at: www.gauteng.net/uploads/legacy/uploads/GTA_Annual_Report_2014_15.pdf. Accessed: 21 November 2016.
- Henama, U.S. (2016). *The 85 000 spending power #FillUpFNB*. Available at: <http://africabusiness.com/2016/06/06/the-85-000-spending-power-fillupfnb/>. Accessed: 28 November 2016.
- IOL (2016). *Sorry Cape Town, You're not Africa's most visited city*. Available at: <http://www.iol.co.za/travel/south-africa/gauteng/sorry-cape-town-youre-not-africas-most-visited-city-2090202>. Accessed: 15 November 2016.
- Ivanovic, M. (2014). The perceived authenticity of iconic heritage site in urban tourism: the case of Constitution Hill, Johannesburg, South Africa. *Urban Forum*, 25:501-515.
- Ivanovic, M. & Saayman, M. (2013). South Africa calling cultural tourists. *African Journal for Physical, Health Education, recreation and Dance (AJPHERD)*, Supplement 2 (September):138-154.
- Kuwait Times (2014). Soweto: From Bullets to BMWs. Friday Times. 18 April 2014. Available at: <http://news.kuwaittimes.net/pdf/2014/apr/18/kt.pdf>. Accessed: 15 November 2016.
- Lefifi, T.A. (2014). *Opportunity knocks in the grey economy*. Sunday Times, 27 July 2014. Available at: www.pressreader.com/south-africa/sunday-times/20140727/282647505651218. Accessed: 28 November 2016.
- Magubane, K. (2009). *A walk on vibey Vilakazi Street*. Available at: <http://www.medioclubsouthafrica.com/visitsa/296-vilakazistreet-soweto>. Accessed: 15 November 2016.
- Mandela House (UD). Soweto Heritage Trust. Available at: <http://www.mandelahouse.com/trust.asp>. Accessed: 14 November 2016.
- Naidoo, R. (2014). *Soweto: From Struggle to Suburbia*. Available at: <http://www.medioclubsouthafrica.com/visitsa/3767-soweto-from-struggle-to-suburbia>. Accessed 28 November 2016.
- Pernegger, L. & Godehart, S. (2007). Townships in the South African Geographical Landscape – Physical and Social Legacies and Challenges. Available at: <http://www.treasury.gov.za/divisions/bo/ndp/TTRI/TTRI%20Oct%202007/Day%201%20-%2029%20Oct%202007/1a%20Keynote%20Address%20Li%20Pernegger%20Paper.pdf>. Accessed: 28 November 2016.
- DEAT (Department of Environmental Affairs and Tourism) (1996). White Paper on the Development and Promotion of Tourism in South Africa. Available at: <https://www.tourism.gov.za/AboutNDT/Publications/Tourism%20White%20Paper.pdf>. Accessed: 17 February 2017.
- Rogerson, C.M. (2008). Tracking SMME development in South Africa: Issues of finance, training and regulatory environment. *Urban Forum*. 19(1), 61-81.
- Rogerson (2011). Strengthening agriculture-tourism linkages in the developing World: Opportunities, barriers and current initiatives. *African Journal of Agricultural Research*. 7(4), 616-623.
- SA History (2016). *Soweto*. Available at: <http://www.sahistory.org.za/places/soweto> Accessed: 28 October 2016.
- SA Tourism (2016). *Tourism Performance Highlights 2015*. Available at: www.southafrica.net/uploads/files/2015_Annual_Report_v8_07062016.pdf. Accessed: 21 November 2016.
- South Africa Explorer (UD). *Soweto Township Tours*. Available

- at: <http://www.southafricaexplorer.co.za/attractions/soweto-township-tour/soweto-township-tours.html>
Accessed: 18 November 2016.
- StatsSA (2016). *Gross Domestic Product. Fourth Quarter 2015*. Available
at: www.statssa.gov.za/publications/P0441/Press_statement_1_4q_2015.pdf. Accessed: 16 November
2016.
- TripAdvisor (2016a). *Mandela House*. Available at: https://www.tripadvisor.co.za/Attraction_Review-g1210028-d2436621-Reviews-Mandela_House-Greater_Johannesburg_Gauteng.html. Accessed: 15 November
2016.
- TripAdvisor (2016b). *Things to do in Soweto*. Available at: https://www.tripadvisor.co.za/Attraction_Review-g312587-d469337-Reviews-Hector_Pieterse_Museum-Soweto_Greater_Johannesburg_Gauteng.html.
Accessed: 15 November 2016.
- TripAdvisor (2016c). *Vilakazi Street*. Available at: https://www.tripadvisor.co.za/Attraction_Review-g312587-d501688-Reviews-Vilakazi_Street-Soweto_Greater_Johannesburg_Gauteng.html. Accessed: 15
November 2016.
- World Bank (2014). *Economics of South African Townships. Special focus on Diepsloot*. Available
at: <http://elibrary.worldbank.org/doi/abs/10.1596/978-1-4648-0301-7>. Accessed: 21 November 2016.
- WTTC (2016). *Travel & Tourism Economic Impact 2016 South Africa*. Available at:
<http://www.wttc.org/research/economic-research/economic-impact-analysis/country-reports/>. Accessed:
16 November 2016.

3.12. Vienna (Austria)

**MODUL University Vienna, Department of Tourism and Service Management
Igor Gula, Prof. Dr. Dagmar Lund-Durlacher**

Other than many European cities Vienna is not (yet) confronted with general negative impacts of overcrowding. Nevertheless, challenges of overcrowding occur in some of the city's major attractions, in particular during high season and peak times.

General information	
Title / Name of the site/destination	The city of Vienna (capital of Austria)
Region, country	Austria
Area size (km²)	414,87 km ² ¹²¹
Geographic coordinates	North latitude: from 48° 07' 06" to 48° 19' 23" Eastern length: from 16° 10' 58" to 16° 34' 43" ¹²²
Population and scope (if inhabited)	1.840.226 inhabitants ¹²³
Short description of the case	
<p>As in many other European cities tourism in Vienna is booming. The greater area of Vienna counted 15,138,670 bed nights in 2015, which means a growth by 5.3% in comparison to 2014.¹²⁴ Moreover, the Vienna Tourist Board (VTB) has announced that the city of Vienna generated 6.6 million bed nights in in the first half year of 2016 which represents an increase of 4.9% in comparison to January until June 2015. In addition, the Viennese hotels generated 3.4% more room revenue in the first half year of 2016, as in the comparable period of 2015.¹²⁵</p> <p>Overall, the European city destinations and their surroundings as well as the local infrastructure and population benefit from this current development (Zanad 2015). However, some drawbacks in the form of overcrowded places and negative perception of tourists can be detected on the other hand (Füller and Michel 2014).¹²⁶ In Vienna the "Schönbrunn Palace and Park", "Schönbrunn Zoo" as well as the Aqua Terra Zoo are some of the most visited sights. This case study analyses these three sights in more detail.</p>	
Tourism development in the country of the case study	
Short description of the importance of tourism in the country	
<p>In Austria, the tourism industry is a very important economic factor¹²⁷. In 2015, the Austrian tourism industry generated 39,4 million arrivals and 135,4 million overnight stays. Furthermore, the industry generated a direct value added of 18.485 million euros, which represented 5,5% of the GDP of Austria in 2015. Moreover, the total expenditure by tourists was estimated to be 38.388 million euros in 2015.¹²⁸</p> <p>According to the Federal department of tourism and leisure of the Austrian Chamber of Commerce, the direct</p>	

¹²¹ <https://www.wien.gv.at/statistik/lebensraum/tabellen/stadtgebiet-eckdaten.html>

¹²² <https://www.wien.gv.at/statistik/lebensraum/tabellen/stadtgebiet-eckdaten.html>

¹²³ <https://www.wien.gv.at/statistik/bevoelkerung/tabellen/bevoelkerung-bez-zr.html>

¹²⁴ Ibid.

¹²⁵ <https://b2b.wien.info/de/presse/unternehmens-presse-info/2016/hj-statistik-2016>

¹²⁶ Gula, I. (2016): Tourism Compatibility in European Cities, Using the example of the city of Vienna, MBA Master Thesis at the MODUL University Vienna, Forthcoming

¹²⁷ http://www.bmwf.gv.at/Tourismus/TourismusInOesterreich/Documents/HP_Lagebericht%202015_barrierefrei.pdf

¹²⁸ https://www.statistik.gv.at/web_de/statistiken/wirtschaft/tourismus/index.html

and indirect value added was estimated to be 45,7 billion euros in 2015. Furthermore, the Federal department of tourism and leisure also pointed out that in 2015, 478.962 people were employed by the tourism industry at least for one day.¹²⁹

The Austrian Federal Ministry of Science, Research and Economy calculated the revenue market share of the Austrian tourism industry to be 5,8% within the EU15 and the overnight stays market share to be 7,1% within the EU26 (without Ireland and Great Britain because of missing data).¹³⁰

According to the Austrian National Tourist Office, Austrian tourism has recorded a higher increase of international arrivals as Europe and Western Europe and has moved to the 11th place considering the international arrivals in destinations worldwide in 2015.¹³¹

Arrivals, Overnight stays (year)	39,4 million arrivals in 2015 (+49% since 2000) 135,4 million overnight stays in 2015 (+19% since 2000) ¹³²
GDP	339,9 billion euros (2015, +2,9%), 39.390 euros per habitant ¹³³
Tourism value added (% of GDP)	5,5% direct value added in 2015 (forecast)* 7,1% direct and indirect value added in 2015 (forecast)*) both excluding business travel ¹³⁴
Employment in tourism (%)	5,9% There were 202.943 non-self-employed employees in the Austrian tourism in 2015 (+2,6%). These 202.943 employees represented 5,9% of all active non-self-employed employees in Austria in 2015. ¹³⁵

Tourism supply of the site

Short description of tourism on the site

In 2015, the city of Vienna generated 6.589.031 arrivals and 14.328.261 overnight stays (+5,9% in comparison with 2014) as well as a revenue of 736,7 million euro excluding breakfast and VAT.¹³⁶

The revenue per available room (RevPar) was calculated to be 57,7 euros per room and night excluding breakfast and VAT.¹³⁷

Following the European Cities Marketing (ECM) Benchmarking Report 2016, the city of Vienna has reached the 9th place in the top 15 European cities considering overnight stays in 2015.¹³⁸

The Vienna meeting industry is also an important part of the Viennese tourism industry and generated 1,7 million overnight stays in 2015. Moreover, the city of Vienna has reached the fourth place in the ranking of the International Congress Convention Association (ICCA) as well as in the ranking of the Union of International Associations (UIA) in 2015.¹³⁹ According to the Viennese Chamber of Commerce, the Viennese tourism and

¹²⁹ <https://www.wko.at/Content.Node/branchen/oe/Tourismus-Freizeitwirtschaft-in-Zahlen-Mai-2016.pdf>, p. 7

¹³⁰ http://www.bmfwf.gv.at/Tourismus/TourismusInOesterreich/Documents/HP_Lagebericht%202015_barrierefrei.pdf

¹³¹ <https://www.austriatourism.com/wp-content/uploads/2016/04/2016g-welttourismus-2015-zusfassg-oew-unwto.pdf>

¹³² Figures 2013-2015: https://www.statistik.gv.at/web_de/statistiken/wirtschaft/tourismus/index.html, comparison 2000-2015: <https://www.austriatourism.com/tourismusforschung/tourismus-in-zahlen/>

¹³³ https://www.statistik.gv.at/web_de/statistiken/wirtschaft/volkswirtschaftliche_gesamtrechnungen/bruttoinlandsprodukt_und_ha_uptaggregate/jahresdaten/index.html

¹³⁴ https://www.statistik.at/web_de/statistiken/wirtschaft/tourismus/tourismus-satellitenkonto/wertschoepfung/019848.html

¹³⁵ http://www.bmfwf.gv.at/Tourismus/TourismusInOesterreich/Documents/HP_Lagebericht%202015_barrierefrei.pdf, p. 34

¹³⁶ <https://b2b.wien.info/media/files-b2b/bilanz-2015.pdf>, p. 31

¹³⁷ <https://b2b.wien.info/media/files-b2b/revpar-2015.pdf>

¹³⁸ <http://www.europeancitiesmarketing.com/european-cities-keep-showing-resilience-despite-slow-economic-growth-confirmed-ecm-benchmarking-report-2016/>

¹³⁹ <http://www.vienna.convention.at/Home/News/Top-Platzierung-fur-Wien-als-4--weltweit-bei-UIA-K.aspx?lang=en-US>

leisure industry counted 7.519 employing companies (16,0% of all employing companies) in July 2015. These companies employed 89.172 employees in total (15,2% of all employees).¹⁴⁰

All other relevant figures can be found in the current "Tourism Review" (annual report) of the Vienna Tourist Board: <https://b2b.wien.info/media/files-b2b/bilanz-2015.pdf>

Access (how to get there?)

Vienna is the capital of Austria and can be accessed by plane, train, car, bus, boat and bike.¹⁴¹

Main attractions

Schönbrunn Palace, Schönbrunn Zoo, St. Stephan's Cathedral, Imperial Palace – Hofburg, Belvedere Palace, the Giant Ferris Wheel and its square, Albertina Museum, Art History Museum, Natural History Museum, MuseumsQuartier, Viennese City Hall and many others.¹⁴²

Tourism offer

In 2016, there were 439 hotels with 33.563 rooms and 65.928 beds in total. There were 21 5-star (3.939 rooms and 7.759 beds) 164 4-star (15.793 rooms and 30.433 beds) and 172 3-star (9.026 rooms and 18.129 beds) hotels.¹⁴³

In 2016, there were 7.732 gastronomic facilities in total: 1.694 restaurants, 730 bars, 514 taverns, 821 coffee houses and 648 coffee restaurants.¹⁴⁴

In Vienna, the history and culture of the city play a very important role in tourism. There are over 100 different museums in Vienna.¹⁴⁵

Stage of the tourism life cycle

Considering the development of arrivals and overnight stays between 2001 and 2015 (see below) the city of Vienna can be considered to be in the mature and consolidation stage of the tourism life cycle.

Tourism demand at the site

Short description of tourism demand

Type of tourists: 49% of tourists coming to Vienna are travelling as a couple, 16% travel to Vienna with friends, 4% are couples travelling with friends, 16% travel with family, 6% in groups and 9% alone.¹⁴⁶

Volume of tourists

Arrivals in 2015: 6.589.031 (+6,1% in rel. to 2014)

Overnight stays in 2015: 14.328.261 (+5,9% in rel. to 2014)¹⁴⁷

Development of tourist numbers (last 10 years)

The development of arrivals and overnight stays between 2001 and 2015¹⁴⁸:

¹⁴⁰ <https://www.wko.at/Content.Node/Interessenvertretung/Daten--Fakten--Zahlen/w/Statistikbuch2016.pdf>, p. 27

¹⁴¹ <https://www.wien.info/en/travel-info/to-and-around>

¹⁴² <https://www.wien.info/en/sightseeing/sights/must-sees>

¹⁴³ <https://b2b.wien.info/media/files-b2b/auslastung-2016.pdf>

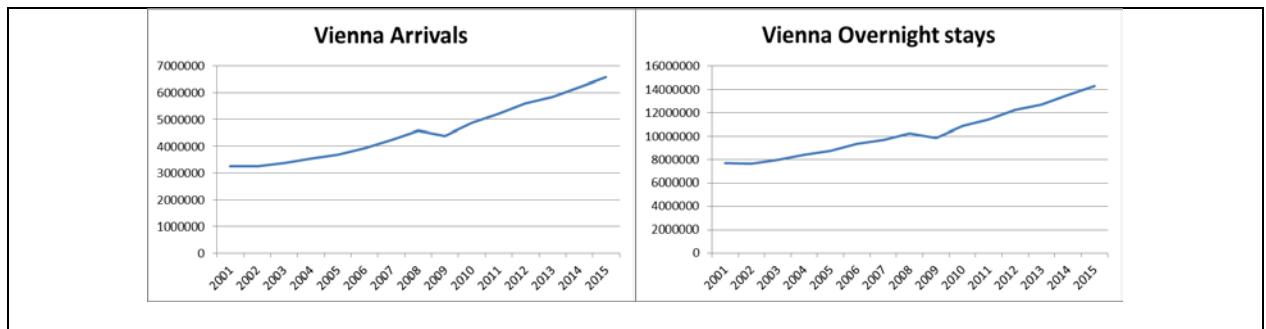
¹⁴⁴ http://wko.at/statistik/BranchenFV/B_601.pdf, p. 11

¹⁴⁵ <https://www.wien.info/en/sightseeing/museums-exhibitions>

¹⁴⁶ <https://b2b.wien.info/media/files-b2b/t-mona-ergebnisse.pdf>, p. 5

¹⁴⁷ <https://b2b.wien.info/media/files-b2b/naechtigungen-kumuliert-2015.xlsx>

¹⁴⁸ <https://b2b.wien.info/media/files-b2b/zeitreihe15jahre.xls>



Length of stay

The length of stay was on average 2,17 days in 2015.¹⁴⁹

Origin countries of tourists

Countries of origin in 2015¹⁵⁰:

Main markets	Arrivals	+/- %	Overnight stays	+/- %
1. Germany	1.181.787	5,1	2.783.212	5,0
2. Austria	1.443.841	5,2	2.617.304	5,5
3. USA	363.159	10,7	843.113	12,8
4. Italy	298.839	6,5	750.132	7,8
5. Great Britain	257.357	15,2	587.987	17,5
6. Spain	188.416	13,0	436.927	12,7
7. Switzerland	177.149	7,0	434.919	9,0
8. Russia	159.492	-31,6	408.436	-32,3
9. France	151.893	3,0	371.334	1,6
10. Japan	133.587	-4,2	286.115	-4,5

Tourism image

90% of Viennese visitors would recommend Vienna as a holiday destination. 46% of the guests think Vienna is an active city, which is also very harmonic (34%), open-minded (28%), cultivated (27%) and hospitable (26%).¹⁵¹

Motives / target groups

Main travel purpose:

50% of tourists came to Vienna because of its art and culture offerings, 45% because of its sights and trip possibilities, 42% because of its architecture, 37% because of its history and 32% because of the quality of the offerings.¹⁵²

Target groups:

In its new brand strategy, the Vienna Tourist Board (VTB) defines the target group of Open-Minded guests as its global core target group, using the so-called limbic types¹⁵³. In further, the VTB defines its extended global core target audience to be the following: performers, hedonists and harmonizers.¹⁵⁴

VTB's strategy is to minimize its dependence on individual markets and to target growth and promising markets.¹⁵⁵

¹⁴⁹ <https://b2b.wien.info/media/files-b2b/naechtigungen-kumuliert-2015.xlsx>

¹⁵⁰ <https://b2b.wien.info/media/files-b2b/naechtigungen-kumuliert-2015.xlsx>

¹⁵¹ <https://b2b.wien.info/media/files-b2b/t-mona-ergebnisse.pdf>, p. 14

¹⁵² <https://b2b.wien.info/media/files-b2b/t-mona-ergebnisse.pdf>, p. 8

¹⁵³ <http://www.nymphenburg.de/identitaetsorientierte-markenf%C3%BChrung-limbic.html> (in German)

¹⁵⁴ <https://b2b.wien.info/media/files-b2b/moduletto-brand-manual-marke-neu-2016-english.pdf>, p. 8-9

More information about new target groups of the Vienna Tourist Board can be found in the VTB's brand manual¹⁵⁶. More information about the limbic types can be found on the Gruppe Nymphenburg's homepage¹⁵⁷. Gruppe Nymphenburg consulted the VTB during its brand relaunch in 2016. Within this process, VTB decided to use a new definition of its target audience¹⁵⁸.

Visitors' activities, activity patterns¹⁵⁹

The most frequent tourist activities in Vienna are: sightseeing (81%), visiting a museum (54%), go to a restaurant (51%), window shopping (42%), shopping (38%), go to a coffee house (33%), tasting local food and beverage (29%), guided city tour (24%).

Seasonality (peaks)

Considering the arrivals and the overnight stays of Vienna in 2015, the months January, February and March as well as November performed below the monthly average. Therefore, they can be considered as low season time. The highest numbers in 2015 were reached in August (1st place), July (2nd place) and September (3rd place).¹⁶⁰

Visitors' opinions, attitude and behaviour, expectations and preferences, satisfaction:¹⁶¹

Guest satisfaction is very high. 90% of Viennese visitors would recommend Vienna as a holiday destination.

Overall satisfaction	Other strengths of Vienna
Overall satisfaction: 1,68	Architecture: 1,44
Diversity and quality of offerings: 1,66	Sights: 1,47
Accommodation: 1,74	Art and culture: 1,47
Gastronomy: 1,74	City space: 1,52
Value for money: 2,16	Promenades: 1,62

(1 = excellent / 6 = disappointed)

TripAdvisor city survey 2014:¹⁶²

"In its annual survey, the online portal also asked 54,000 travellers who had recently rated a hotel, restaurant or attraction on the world's biggest travel website "TripAdvisor" to provide an evaluation of the cities they visited. Vienna scored highest in the areas of Safety, Transport and Cultural Offering, and came sixth in the overall ranking of 37 world cities, behind Tokyo, New York City, Barcelona, Istanbul and Prague."

Framework conditions

What are the framework conditions that might influence the impact and/or the management of the site?

History and background

The city of Vienna has already been mentioned in the 5th and 6th century. In 881, Vienna was first mentioned by its current name, but it officially became a city only in 1137/1138. Later on, Vienna received its first university in 1365 and the city became a bishop's see in 1469.¹⁶³ In the medieval times Vienna became more and more involved in the European trade system, which was followed by a rapid growth of the city¹⁶⁴.

In the modern age, Vienna became a popular residence of the Habsburg's dynasty and the city grew again¹⁶⁵.

¹⁵⁵ <https://b2b.wien.info/media/files-b2b/bilanz-2015.pdf>, p. 9

¹⁵⁶ <https://b2b.wien.info/media/files-b2b/moduletto-brand-manual-marke-neu-2016-english.pdf>

¹⁵⁷ <http://www.nymphenburg.de/identitaetsorientierte-markenf%C3%BChrung-limbic.html> (in German)

¹⁵⁸ <https://b2b.wien.info/en/press-media-services/new-brand>

¹⁵⁹ <https://b2b.wien.info/media/files-b2b/t-mona-ergebnisse.pdf>, p. 11

¹⁶⁰ <https://b2b.wien.info/media/files-b2b/bilanz-2015.pdf>, p. 31

¹⁶¹ <https://b2b.wien.info/media/files-b2b/t-mona-ergebnisse.pdf>, p. 12-14

¹⁶² <https://www.wien.info/en/travel-info/tripadvisor-ranking-2014-05>

¹⁶³ <https://www.wien.gv.at/kultur/archiv/geschichte/ueberblick/stadtwerdung.html>

¹⁶⁴ <https://www.wien.gv.at/kultur/archiv/geschichte/ueberblick/aufstieg.html>

¹⁶⁵ <https://www.wien.gv.at/kultur/archiv/geschichte/ueberblick/residenz.html>

After the WW1 Vienna became the capital city of a new/ first Austrian republic¹⁶⁶ as well as the capital city of the second Austrian republic after the WW2¹⁶⁷.

Nowadays, Vienna has developed into a modern city and it has become the residence of many international organisations such as: IAEO, OPEC and UNO.¹⁶⁸ In 1995, Austria became part of the EU and in 2007 the country also became part of the so-called Schengen area.¹⁶⁹

Political situation

The city of Vienna is a federal state, the capital city of Austria and also the biggest city of Austria. Because of that, ministries and organisations of the federal state as well as the Austrian state ministries and organisations can be found in Vienna.¹⁷⁰

One of the latest development initiatives and strategies, is the Smart City Wien initiative, which focuses on the improvement of design, development and perception of Vienna.¹⁷¹

Transportation and Urban planning are two of the main topics of the Smart City Wien initiative, which are also very important for the development of the tourism industry.¹⁷²

SMART Vienna 2020 is also one of the three goals of the Vienna 2020 tourism strategy of the Vienna Tourist Board.¹⁷³

Legal issues

The most important law which regulates the Viennese tourism industry is the so-called “Vienna’s Promotion of Tourism Act” (Wiener Tourismusförderungsgesetz, WTFG)¹⁷⁴, which was lately updated¹⁷⁵ because of the development of the sharing economy in Vienna¹⁷⁶.

Organisation

The Vienna Tourist Board (VTB) is the PR and marketing agency for Vienna’s tourism industry. VTB was founded in 1955 and it operated with a budget of 26,5 million euros in 2016. The majority of the budget (78%) comes from the local accommodation tax called “Ortstaxe”, 10% come from the city’s budget and the rest is provided by the Viennese Chamber of Commerce, sponsors and supporters of the VTB as well as from VTB’s own revenue. 88% of the budget are invested in various marketing activities such as advertising, PR, sales promotions and visitor services.

Physical setting

Land use in Vienna¹⁷⁷

Of the total area of Vienna (41,487 hectares) 45,1% is green area, 35,8% built-up area, 14,4% road space and 4,7% are bodies of water. Vienna has an extensive traffic and transport system that includes motorways, railways and public transport such as buses, trams and a metro system¹⁷⁸.

¹⁶⁶ <https://www.wien.gv.at/kultur/archiv/geschichte/ueberblick/metropole.html>

¹⁶⁷ <https://www.wien.gv.at/kultur/archiv/geschichte/ueberblick/roteswien.html>

¹⁶⁸ <https://www.wien.gv.at/kultur/archiv/geschichte/ueberblick/international.html>

¹⁶⁹ https://europa.eu/european-union/about-eu/countries/member-countries/austria_en

¹⁷⁰ <https://www.wien.gv.at/verwaltung/organisation/index.html>

¹⁷¹ <https://smartcity.wien.gv.at/site/en/>

¹⁷² <https://smartcity.wien.gv.at/site/en/projekte/verkehr-stadtentwicklung/>

¹⁷³ http://www.tourismusstrategie2020.wien.info/downloads/WT-Tourismusstrategie-2020_EN.pdf, p. 43

¹⁷⁴ <https://www.wien.gv.at/recht/landesrecht-wien/rechtsvorschriften/html/w1200000.htm>

¹⁷⁵ <https://b2b.wien.info/de/presse/unternehmens-presse-info/2016/tourismus-gesetz-novelle>

¹⁷⁶ <https://www.wien.gv.at/wirtschaft/standort/pdf/share-economy-in-vienna.pdf>

¹⁷⁷ <https://www.wien.gv.at/statistik/pdf/viennainfigures-2016.pdf>, p. 8-9

¹⁷⁸ <https://www.wien.gv.at/statistik/pdf/viennainfigures-2016.pdf>, p. 22-23

Economic situation		
Viennese economy ¹⁷⁹		
Gross domestic product (2014)	Gross value added (2014)	Foreign trade (2015)
Austria: EUR 329,3 bn.	85,3% services	Imports: EUR 33,7 bn.
Vienna: EUR 84,2 bn.	14,7% industry and energy sectors	Exports: EUR 18,4 bn.
	0,1% agriculture and forestry	
<p>In 2015, Vienna recorded 8,821 business start-ups (+5,6%). Moreover, 175 international companies set up business in Vienna as well (49% were from Germany, 18% from Hungary and 14% from Italy). International companies invested EUR 630 m. and created 1.450 new jobs in total.</p> <p>According to the Viennese Chamber of Commerce, the Viennese tourism and leisure industry counted 7.519 employing companies (16,0% of all employing companies) in July 2015. These companies employed 89.172 employees in total (15,2% of all employees).¹⁸⁰</p> <p>In general, it can be concluded that the Viennese tourism has a positive impact on the Viennese economy.¹⁸¹</p>		
Social/cultural situation		
<p>Vienna holds many international awards, especially for its quality of living. The Mercer Consulting Group, that analyses 230 international cities all over the world, honoured Vienna seven times in a row.¹⁸²</p> <p>Apart from the quality of living, Vienna also ranks high in many other international comparisons, such as the City Brand Index, the Global Cities Index, the Innovation Cities Index and the Smart Cities Index.¹⁸³</p> <p>Tourism awareness of Viennese population is quite high.¹⁸⁴</p>		
Environmental situation		
<p>The share of green space of the total area in Vienna (41.500 hectares) is 45,1%¹⁸⁵. The share of publicly accessible green space is 31%¹⁸⁶. 2.000 hectares are farm land (of which are 50% organic farmland) and 60 hectares are wine land. The city produces its own vegetables as well as wine.¹⁸⁷</p> <p>The city of Vienna as well as the Vienna Tourist Board are placing emphasis on active environmental protection. Due to the success of the first "Climate Protection Programme" from 1999 until 2009, the city launched a second initiative for environmental protection which covers the period from 2010 until 2020.¹⁸⁸</p>		
Bottlenecks and constraints		
<p>The city of Vienna is not yet limited in terms of access, commercial or construction capacity. Considering the current bed occupancy in Viennese hotels it can be concluded that there are still enough accommodation capacities in the city. The average bed occupancy in 01-10/ 2016 was 57,9% (lowest in January with 36,8% and highest in August with 70,5%).¹⁸⁹</p> <p>The construction capacity in the city is also not yet limited, because new hotel projects are being developed every year. Until the end of 2018, the hotel capacity in Vienna should grow to 446 hotels with 34.544 rooms and 67.900 beds.¹⁹⁰</p> <p>The Viennese public transportation system also receives positive feedback on a regular basis considering its infrastructure and organisation, especially during big events and fairs in the city.</p>		

¹⁷⁹ <https://www.wien.gv.at/statistik/pdf/viennainfigures-2016.pdf>, p. 18-21

¹⁸⁰ <https://www.wko.at/Content.Node/Interessenvertretung/Daten--Fakten--Zahlen/w/Statistikbuch2016.pdf>, p. 27

¹⁸¹ <https://www.wien.gv.at/wirtschaft/standort/pdf/konjunkturbericht-herbst-2015.pdf>, p. 1, 5, 10, 15-19

¹⁸² <https://www.wien.gv.at/politik/international/wettbewerb/rankings.html>

¹⁸³ <https://b2b.wien.info/media/files-b2b/wien-im-internationalen-vergleich-ranking.pdf>

¹⁸⁴ <https://b.wien.info/media/files-b2b/tourismusbewusstsein.pdf>

¹⁸⁵ <https://www.wien.gv.at/statistik/pdf/viennainfigures-2016.pdf>, p. 8

¹⁸⁶ <https://www.wien.gv.at/umweltschutz/umweltgut/oeffentlich.html>

¹⁸⁷ <https://www.wien.gv.at/umwelt/wald/landwirtschaftsbetrieb/>

¹⁸⁸ <https://www.wien.gv.at/english/environment/klip/programme.html>

¹⁸⁹ <https://b2b.wien.info/media/files-b2b/auslastung-2016.xlsx>

¹⁹⁰ <https://b2b.wien.info/media/files-b2b/hotelprojekte-vorschau-okt2016.pdf>

Only mentionable bottlenecks can be found during the Christmas markets in the city, when the bus entry into the city has to be regulated because of the increased share of day visitors coming during the Christmas time by coach (using a specialised bus travel agency, not the public or intercity transport system)¹⁹¹ or at some major attractions in peak times.

Challenges / Impacts

What are the most important challenges resulting from high tourism intensity on the site?

Short description of main challenges

As in many European cities, tourism in the greater area of Vienna is booming and counted 15,138,670 bed nights in 2015, which means a growth by 5.3% in comparison to 2014.¹⁹²

Overall, Vienna as many other European city destinations benefits from this current development (Zanad 2015). However, some drawbacks in the form of overcrowded places and negative perception of tourists can be detected on the other hand (Füller and Michel 2014).¹⁹³ In Vienna the “Schönbrunn Palace and Park”, “Schönbrunn Zoo” as well as the Aqua Terra Zoo are some of the most visited sights. This case study analyses these three sights in more detail.

Tourism intensity

In their comparative analysis of the tourist intensity in Prague, Vienna and Budapest, Dumbrovská and Fialová use the following indicators of tourist intensity in a city destination (Dumbrovská and Fialová 2014):

- Tourist intensity rate (TIR) – the number of arrivals per 100 inhabitants
- Tourist penetration rate (TPR) – the number of tourists in the city per day and per 100 inhabitants on average
- Tourist density rate (TDR) – the number of tourists in the city per day and per 1 km²
- Defert function (DF) – the number of beds per 100 inhabitants
- Impact of tourism activities on the locality (TL) – the number of beds per 1 km²¹⁹⁴

The following table presents the selected indicators of the tourist intensity for Budapest, Prague and Vienna by Dumbrovská and Fialová updated by the authors with figures of 2015 (tab. 1).

	Area (km ²)	Population	Population density per km ²	Tourist arrivals	Overnight stays	Number of beds	Tourist intensity rate	Impact of tourism on the locality
Budapest	525,2	1,774,000	3,378	3,776,000	8,713,000	51,537	212.9	98.1
Prague	496,1	1,262,000	2,544	6,573,349	15,907,932	87,961	520.9	177.3
Vienna	414,9	1,797,337	4,332	6,589,031	14,328,261	65,059	366.6	156.8

Table 1 Selected Indicators for Budapest, Prague and Vienna in 2015

Source: Own illustration based upon Dumbrovská and Fialová 2014: 11, sources of 2015 figures: Budapest 2016, HT 2016, Praha 2016, PCT 2016, MA23 2016, VTB 2016a, 2016b

The next table shows the selected indicators of the tourist intensity for Vienna and their increase between 2010 and 2015 (tab. 2).

¹⁹¹ <https://b2b.wien.info/en/travelindustry/busguide/tourist-buses-advent-season-2016>

¹⁹² Ibid.

¹⁹³ Gula, I. (2016): Tourism Compatibility in European Cities, Using the example of the city of Vienna, MBA Master Thesis at the MODUL University Vienna, Forthcoming

¹⁹⁴ Ibid.

	Area (km ²)	Population	Population density per km ²	Tourist arrivals	Overnight stays	Number of beds	Tourist intensity rate	Impact of tourism on the locality
2010	414,9	1,689,995	4,073	4,878,564	10,860,126	51,342	288,7	123,7
2015	414,9	1,797,337	4,332	6,589,031	14,328,261	65,059	366.6	156.8
Increase	0,00%	6.35%	6.35%	35.06%	31.93%	26.72%	26.99%	26.72%

Table 2 Selected Indicators for Vienna in 2010 and 2015

Source: Own illustration based upon Dumbrovská and Fialová 2014: 11, sources of 2010 figures: MA23 2016, VTB 2011a, 2011b

As can be seen in the table 2, Vienna's population as well as the population density has increased by 6,35% between 2010 and 2015. Furthermore, the tourist arrivals (+35,06%) and the overnight stays (+31,93%) have increased as well. Moreover, there have been 13,171 (+26,99%) more available beds in 2015 as in 2010. Due to the fact that the tourist arrivals, the overnight stays and the number of beds have increased, the tourist intensity rate (TI - the number of arrivals per 100 inhabitants) as well as the impact of tourism in the locality (TL - the number of beds per 1 km²) have grown by 26,99% and 26,73%. However, considering the tourism density, the relation of overnight stays and inhabitants, the value of the city of Vienna lies only slightly above the average of the analysed cities.¹⁹⁵

The cases: During their research, the authors could not detect any negative impacts of the current tourism development as well as any issues related to crowding in Vienna, compared to other European cities such as Venice, Prague, Florence, Barcelona or Amsterdam.¹⁹⁶ The majority of the Viennese population sees the tourism industry and its development in the city of Vienna positively and supports the efforts of the Vienna Tourist Board.¹⁹⁷ Nevertheless, during season peaks and in the most popular attractions, some negative impacts related to the increased number of guests can be observed. Because of that, the authors will focus on the most visited sights of the city of Vienna (as well as of Austria)¹⁹⁸, the Schönbrunn Palace and Park¹⁹⁹, Schönbrunn Zoo (the oldest zoo in der world and one of the Vienna's top 5 attractions)²⁰⁰ as well as the Aqua Terra Zoo (one of the top rated attractions in Vienna situated in a lead tower)²⁰¹.

¹⁹⁵ Cf.: http://www.tourismstrategy2020.vienna.info/downloads/WT-Tourismusstrategie-2020_EN.pdf, p. 48; ECM Benchmarking Report 2014-2015, p. 40; ECM Benchmarking Report 2015-2016, p. 40

¹⁹⁶ Cf.: http://ec.europa.eu/environment/iczm/pdf/tcca_material.pdf;

¹⁹⁷ Cf.: <https://b.wien.info/media/files-b2b/tourismusbewusstsein.pdf> (in German), http://www.tourismstrategy2020.vienna.info/downloads/WT-Tourismusstrategie-2020_EN.pdf, p. 48-49, <http://diepresse.com/home/panorama/wien/5068611/Wie-Wien-den-Tourismus-zaehmt>

¹⁹⁸ <https://blog.austriatourism.com/2013/12/infografik-besucherschahlen-in-sehenswuerdigkeiten/>

¹⁹⁹ <https://www.schoenbrunn.at/en/>

²⁰⁰ <https://www.zoovienna.at/ueber-uns/tiergarten-schonbrunn/> (in German)

²⁰¹ <http://www.haus-des-meeres.at/en/Home.htm>

Sight	Schönbrunn Palace and Park	Schönbrunn Zoo	Aqua Terra Zoo
Reason for the analysis	No. 1 attraction in Vienna	The oldest zoo in the world and one of the top 5 attractions in Vienna	One of the top rated attractions in Vienna situated in a lead tower
Founding year	1642	1752	1957
Homepage	About Schönbrunn Palace: https://www.schoenbrunn.at/en/about-schoenbrunn/the-palace/ ,	About Schönbrunn Zoo (in German): https://www.zoovienna.at/ueber-uns/tiergarten-schonbrunn/ ,	General information (in English): http://www.haus-des-meeres.at/en/Visitor-Info/General-Information.htm , About the managing company (in German): http://www.haus-des-meeres.at/de/Ueber-Uns/Vorstand_Mitarbeiter/Betriebs-GmbH-Mitarbeiter.htm
Visitors	2016: 2,6 mio. visitors in the palace, 3,2 mio. visitors in the palace and the other subsidiaries/ attractions belonging to the Schönbrunn managing company.	Since 2006, over 2 mio. visitors visit the zoo every year. In 2016, there were 2,2 mio. visitors in the zoo.	Approx. 584.000 visitors in 2016
Reasons for the increasing visitor numbers	<ul style="list-style-type: none"> - General increase in city breaks and city tourism in Europe and especially in the city of Vienna - The stories behind the Schönbrunn Palace are connected to empresses Maria Theresia and Elisabeth "Sissi" or to the emperor Franz Josef - Focus on service and support as well as on digital services (e.g. ticket ordering) 	<ul style="list-style-type: none"> - General increase in city breaks and city tourism in Europe and especially in the city of Vienna - Positive image of the zoo as well as good marketing and PR - Quality of the animal husbandry and new facilities – many new facilities were constructed in the last 20 years - Broad animal spectrum on the one 	<ul style="list-style-type: none"> - General increase of tourists in Vienna was mentioned as well - Recent activities and investments - The introduction of a new attraction, the so-called "Atlantic tunnel" in December 2016

Sight	Schönbrunn Palace and Park	Schönbrunn Zoo	Aqua Terra Zoo
	and purchasing) and facilitating the ordering process for travel agencies	hand and lot of “flagship” species such as the big panda, elephants, tigers and polar bears on the other hand - 4 times in a row winner of the best European Zoo Award (2008, 2010, 2012 und 2014)	
Most frequented month by visitors	August	August	August
Less frequented month by visitors	February	January	March
Top 5 foreign nationalities visiting the attraction	1. Germany 2. USA 3. Italy 4. China 5. Korea	1. Germany 2. Italy 3. Hungary 4. Russia 5. Czech Republic	Germany (No. 1, others without ranking) Czech Republic Slovakia Hungary Italy and Switzerland
Mean of transportation to get to the attraction	40% of the visitors are booking their trips and tickets via a travel agency, thus the most frequented mean of transportation is the bus. However, many visitors also arrive on the airports in Vienna, Prague or Budapest and then travel to Vienna by bus as well. Schönbrunn is located 7 km away from the city centre as a stand-alone attraction, but well connected to public transportation (subway U4).	60% of the visitors are using the public transportation, 33% of the visitors arrive by car and 7% of the visitors arrive by foot, mostly because there are only few parking spaces available next to the zoo.	The majority of the visitor is using the public transportation, because of the nearby metro station and the busses stopping in front of the Aqua Terra Zoo.

Sight	Schönbrunn Palace and Park	Schönbrunn Zoo	Aqua Terra Zoo
Number of events in the attraction	<p>Palace: There are daily concerts in the Orangery in Schönbrunn. Moreover, also many weddings take place in the palace (in the Weissgoldzimmer or in the Apothecary Wing).</p> <p>Park: The Vienna Philharmonic Summer Night Concert Schönbrunn is the only annual event, which takes place in the park on a regular basis. Besides the Summer Night Concert, other one-time only events and concerts take place in the park too.</p> <p>In 2016, 100.000 visitors came to the Summer Night Concert, which set a visitor record. Because of the fact that the maximum capacity of 100.000 visitors was reached it became necessary to close the park entrances.</p>	<p>In 2015, the visitor service centre organised 3.286 events for 49.541 visitors in total.</p> <p>Furthermore, the Viennese Zoo run and Kids-weekends are organised on a regular basis.</p> <p>Moreover, the Schönbrunn Zoo catering company is organising various events in their locations: Tiroler Hof, Pavillon and Orangerie. The catering company always offers the possibility to combine the events with a guided tour or a theme walk in the zoo as well.</p>	<p>On average, there are 80-90 events organised in the Aqua Terra Zoo per year. These events are separate company or private events.</p> <p>The zoo could be organising more events, because they have more requests as they decide to take on.</p> <p>However, the management does not want to limit the visitors by closing the Ocean's Sky restaurant on the 11th/ top floor or the meeting room on the 10th floor earlier (in order to be able to set the location for the event) as well as to allow the catering companies to use the only one lift more often.</p>
Carrying capacity	The Schönbrunn Palace can be characterised as a "closed" attraction and because it is a building, its carrying capacity is limited.	The Schönbrunn Zoo is an "open" attraction and in relation to the palace, its carrying capacity is not that limited.	The Aqua Terra Zoo can be described as a "closed" attraction and because it is a building, its carrying capacity is limited.
Positive impacts of the high volume of visitors	<p>The management company does not receive any financial aid, but instead it generates profits.</p> <p>Visitors coming to the palace show interest in the history of Vienna as well as in the history</p>	The attractions can cover its costs, invest in marketing, PR and new facilities.	<p>The attraction is privately owned. Therefore, it has to generate enough revenue to be able to finance itself.</p> <p>Another positive aspect of the high volume of visitors is the increased word of mouth</p>

Sight	Schönbrunn Palace and Park	Schönbrunn Zoo	Aqua Terra Zoo
	of Europe.		of visitors whose expectations have been fulfilled.
Negative impacts of the high volume of visitors	<p>The high number of visitors sometimes leads to overcrowding, but the impacts are manageable, because the visitors respect the palace and its historical importance.</p> <p>Some visitors would like to have a private tour through the palace. Others consider the fact that the place is crowded as a sign for its popularity.</p> <p>The management analyses every visitor review in detail and also calculates a so-called "enthusiasm coefficient". The coefficient expresses the extent to which the visitors' expectations have been met. It is calculated using the data from visitor questionnaires (valuation 1-4).</p> <p>The most frequented hours are between 9.30 am and noon, because most of the guests visit the palace after their breakfast. In August, which is the most frequented month in the palace, there are 3.000 visitors coming to Schönbrunn every morning that</p>	<p>One of the few negative aspects considering the high volume of visitors in the zoo is the waste production.</p> <p>Occasionally, some issues with the high volume of visitors can arise, especially in the peak times. Some individuals complain that there are too many visitors in the zoo.</p> <p>But many tourists act according to the motto "there are many people, thus it has to be great" and they consider the high volume of visitors as a part of the experience.</p>	<p>Because of the construction and the fire protection regulations, the capacity of the tower is limited to 600 people that can be situated inside of the building at once.</p> <p>Therefore, the cashier will slow down the ticketing process on purpose and the visitors trying to enter the zoo will have to wait.</p> <p>This happens especially on weekends, during school holidays and on days with bad weather. In these cases, the visitors will have to wait 30-45 minutes on average.</p> <p>Because of the construction and its infrastructure, the capacity of the lift (there is only one) and the staircase, the lift can get crowded. This will happen especially on weekends, during school holidays and on days with bad weather.</p> <p>Moreover, families with small children and</p>

Sight	Schönbrunn Palace and Park	Schönbrunn Zoo	Aqua Terra Zoo
	<p>want to enter the palace at the same time. Since only 1.000 visitors can enter the palace per hour, many visitors have to wait for 3-4 hours in order to get in. Nevertheless, only 7% of the entry tickets are sold online, even though it is possible to pre-order the ticket and to book a certain time slot in order to enter the palace. Between March 2017 and January 2018, the Schönbrunn management expects days, when individual visitors without a pre-ordered ticket will not be allowed to enter the palace on the same day and will be asked to come back on another day.</p>		<p>buggies have to use the lift and therefore they have to wait during peak times.</p>
Measures in order to prevent crowding	<p>Because of the characteristics of the attraction, its physical capacity is limited. In order to prevent crowding, the palace is open 365 days a year and 7 days a week.</p> <p>Furthermore, the management has the possibility to prolong the opening hours when there are many visitors waiting to enter the palace.</p> <p>The management is also making use of a computer controlled ticketing program (called 'autopilot'), which regulates the volume of</p>	<p>The Schönbrunn Zoo has already tried many different measures in order to prevent crowding. For example, the management organised a campaign called "Zoo in winter", where they advertised all the facilities which can be visited in winter time as well. Over 100.000 visitors have annual passes and many of them plan their visits (based on their own experience from the past) and try to avoid peak times such as weekends and school holidays.</p>	<p>In the Aqua Terra Zoo, there are guides who will tell the visitors if a floor is overcrowded and they will also point them to less crowded floors as well as to recommend activities to pass the time such as visiting the Ocean's Sky restaurant on the 11th/ top floor or the self-service café on the 4th floor of the tower.</p> <p>Furthermore, the cashier will slow down the ticketing process on purpose and the visitors trying to enter the zoo will have to</p>

Sight	Schönbrunn Palace and Park	Schönbrunn Zoo	Aqua Terra Zoo
	<p>visitors entering the palace (max. 1.000 visitors per hour).</p> <p>Moreover, tour guides have to wear headsets, thus they do not have to shout and the visitors can hear them talking. This also helps to keep the groups together, because the visitors follow their tour guides. Because of the high volume of visitors, certain waiting times might occur.</p>	<p>The management tried to sell reduced annual passes valid only from Monday to Friday in order to animate the visitors to come to the zoo during the week and to relieve the weekends. Unfortunately, this measure did not work out, because the prices of the regular annual passes are very favourable and many buyers decided to buy the regular annual passes in order to be able to visit the zoo on the weekends as well.</p>	<p>wait if the maximum capacity of 600 people in the building is about to be reached.</p> <p>The visitors who bought an online ticket don't have to wait in line and can use the side entrance.</p> <p>However, the online ticket buyers will also have to wait if the maximum capacity has already been reached. Nevertheless, only 4-5 % of the entry tickets are sold online.</p>
Future construction plans	<p>The next major development is the construction of a new arrival zone and Imperial Parking Ground for busses and cars close to the U4 subway station.</p>	<p>In 2017, the Schönbrunn Zoo is going to open a new giraffe park in spring as well as to start with the construction of a new aquarium.</p>	<p>The managing company of the Aqua Tera Zoo would like to build an outside lift in order to make the switching between the floors more comfortable.</p>

Sight	Schönbrunn Palace and Park	Schönbrunn Zoo	Aqua Terra Zoo
Future strategic plans	<p>The management wants to focus on providing more support and services to travel agencies as well as to visitors.</p> <p>Furthermore, the emphasis lies on promoting the online booking and to increase the number of tickets sold online.</p> <p>In line with its digital strategy, the management company considers new technologies for a digital visitor experience (e.g. 360-degree view of Google Arts Institute).</p>	<p>The managing company of the Schönbrunn Zoo would like to take over the botanic garden, which is situated next to the zoo, but the negotiations are still on-going.</p>	<p>The main emphasis of the managing company lies on the construction of an additional lift on the one hand and on the extension of the construction into the park in front of the building on the other hand.</p>
Further comments	<p>Many visitors just come to the Schönbrunn Park and do not visit the palace at all. Therefore, the management discusses the possibilities to open the second half of the park, which is situated behind the Gloriette and is currently not accessible to the public. However, this part of the park is a nature conversation area as well as a biotope conversation area, thus the opening of the second half of the park might be connected to some restrictions for the visitors.</p>	<p>The construction of a new parking area with a visitor centre installed next to the Schönbrunn Palace in 2017, will have a positive impact on the Schönbrunn Zoo, because the visitors will be able to use the available parking spaces as well.</p> <p>Moreover, the management company is also looking forward to the opening of the second half of the Schönbrunn Park. Because of the opening, more visitors might use the zoo entrance next to the "Neptun fountain".</p>	<p>The Aqua Terra Zoo is a privately owned company, therefore the zoo is not getting and subventions and have to finance its expenses for maintenance, renovation and marketing itself.</p> <p>The parking situation in the city of Vienna is an on-going issue and more visitors might come to the Aqua Terra Zoo, if they would find available parking possibilities in the area.</p> <p>Also, it is very complicated for coaches to drive to the zoo and then back to the old town, where they are allowed to park.</p>

General measures / responses in Vienna

The city of Vienna as well as the Vienna Tourist Board place emphasis on balancing the needs of tourists and inhabitants (as a part of their “Smart City Wien” and Vienna Tourism 2020 strategies).²⁰² The Vienna Tourist Board made use of Open Innovation and co-created its current tourism strategy (Vienna Tourism 2020 strategy²⁰³) by involving the public as well as independent experts into the development of the tourism strategy.²⁰⁴

Moreover, the Vienna Tourist Board is actively consulting the city of Vienna in regards to city development and planning in order to develop new tourism-related projects and attractions outside of the tourism hot spots such as the old town area.

The Vienna Tourist Board has also supported a MBA Master Thesis at the MODUL University Vienna focusing on crowding in the city of Vienna and granted a PhD scholarship at the MODUL University Vienna, in order to research the aspects of tourism compatibility in cities in detail.²⁰⁵

After three different surveys of tourism awareness of Viennese citizens (in 2006, 2011 and 2016)²⁰⁶, the Vienna Tourist Board is going to monitor the attitude towards tourism (including the residents' perception of crowding in the city) permanently and will continually receive insights about the current situation, beginning with January 2017²⁰⁷.

Conclusion

What are the central conclusions that can be drawn?

General conclusions

City tourism in Europe is booming and the arrivals as well as the overnight stays in Vienna are growing. However, the authors could not detect any significant negative impacts of the current tourism development as well as any significant issues related to crowding in Vienna²⁰⁸, compared to other European cities such as Venice, Prague, Florence, Barcelona or Amsterdam²⁰⁹.

Nevertheless, in peak seasons and in some major attractions (e.g. Schönbrunn, Christmas markets), some crowding effects could be identified. The city of Vienna as well as the Vienna Tourist Board place emphasis on balancing the needs of tourists and inhabitants (as a part of their “Smart City Wien” and Vienna Tourism 2020 strategies)²¹⁰ and by monitoring the crowding situation permanently they act as a role model among Destination Management Organisations.

What makes this case special?

Other than many European cities Vienna is not (yet) confronted with general negative impacts of overcrowding. Nevertheless, challenges of overcrowding occur in some of the city's major attractions, in particular during high season and peak times. Therefore, the city of Vienna as well as the Vienna Tourist Board take the topic seriously and are getting prepared for possible crowding effects by setting up a monitoring system (as of 2017). They study the situation in Vienna as well as in other European cities and take precautions in order to avoid crowding in the city.

²⁰² http://www.tourismusstrategie2020.wien.info/downloads/WT-Tourismusstrategie-2020_EN.pdf, p.6., 43-44

²⁰³ http://www.tourismusstrategie2020.wien.info/downloads/WT-Tourismusstrategie-2020_EN.pdf

²⁰⁴ http://www.tourismusstrategie2020.wien.info/downloads/WT-Tourismusstrategie-2020_EN.pdf, p. 8-10

²⁰⁵ <https://b2b.wien.info/de/presse/unternehmens-presse-info/2016/tourismusvertraeglichkeit-erforscht>

²⁰⁶ <https://b.wien.info/media/files-b2b/tourismusbewusstsein.pdf> (in German)

²⁰⁷ <https://b2b.wien.info/de/presse/tourismusgesinnung2016> (in German)

²⁰⁸ Cf.: <https://b.wien.info/media/files-b2b/tourismusbewusstsein.pdf> (in German),
http://www.tourismusstrategie2020.wien.info/downloads/WT-Tourismusstrategie-2020_EN.pdf, p. 48-49,
<http://diepresse.com/home/panorama/wien/5068611/Wie-Wien-den-Tourismus-zaeht>

²⁰⁹ Cf.: http://ec.europa.eu/environment/iczmpdf/tcca_material.pdf

²¹⁰ http://www.tourismusstrategie2020.wien.info/downloads/WT-Tourismusstrategie-2020_EN.pdf, p. 6, 43-44

Which measures seem to be the most promising? What are the most important findings for the industry/ for politics?

Considering the ticket sales of the analysed sights, it can be concluded that most of the visitors prefer to buy their tickets via a travel agency (Schönbrunn Palace) or at the cash desk (Schönbrunn Zoo) and that pre-ordering or online ticket-sales are not that popular yet. However, online promotion and sales might be crucial in order to shift visitors and to prevent crowding in the future.

Therefore, it might be useful to place emphasis on online promotion campaigns, such as pre-ordering possibilities, no waiting in line, better conditions, favourable prices and others.

Methodology

In addition to an extensive desk research interviews with the following experts have been conducted:

- Dr. Clemens Költringer, Marketing Analyst, Department of Strategic Destination Development, Vienna Tourist Board (Structured questionnaire with open questions, e-mail-exchange), Thursday, 15. December 2016
- Dr. Franz Sattlecker: Managing Director, Mag. (FH) Markus Wiesenhofer, MA: Strategy and Development, Schloß Schönbrunn / Schöbrunn Palace (Structured questionnaire with open questions, personal interview), Friday, 2. December 2016
- Prof. Dr. Dagmar Schratter, Managing Director, Tiergarten Schönbrunn / Zoo Schönbrunn (Structured questionnaire with open questions, personal interview), Thursday 22. December 2016
- Hans Köppen, Managing Director, Haus des Meeres / Aqua Terra Zoo (Structured questionnaire with open questions, personal interview), Thursday 26. January 2017

References

- Budapest (2016): Budapest, General Information about Budapest, available at: <http://budapest.hu/sites/english/Lapok/General-informations-about-Budapest.aspx>, accessed on 07.08.2016
- Dumbrovská, V., Fialová, D. (2014): Tourist Intensity in Capital Cities in Central Europe: Comparative Analysis of Tourism in Prague, Vienna and Budapest, In: Czech Journal of Tourism, 3 (1) pp. 5-26
- ECM (2015): The European Cities Marketing Benchmarking Report, 11th Official Edition 2014-2015, Dijon: European Cities Marketing
- Füller, H. and Michel, B. (2014): "Stop Being a Tourist!" New Dynamics of Urban Tourism in Berlin-Kreuzberg, In: International Journal of Urban and Regional Research, 38 (4), pp. 1304-1318
- HT (2016): Tourism in Hungary, With Preliminary Date, available at: http://itthon.hu/documents/880248/24451017/MTE_4001_105x210_LA4_StatElo_2015_ENG_TELJES_web.pdf/8ea4af1f-eed8-4101-aa05-bdbbc800a9f1, accessed on 07.08.2016
- MA23 (2016): Bevölkerung nach Bezirken 2007 bis 2015 (English: Population by districts from 2007 until 2015), available at: <https://www.wien.gv.at/statistik/bevoelkerung/tabellen/bevoelkerung-bez-zr.html>, accessed on 07.08.2016
- PCT (2016): 2015 Annual Report, Prague City Tourism, available at: http://www.praguecitytourism.cz/file/edee/en/annual-reports/pct_annual_report.pdf, accessed on 07.08.2016
- Praha (2016): About Prague, Past and Future, available at: http://www.praha.eu/jnp/en/about_prague/past_and_future/present_day_prague/index.html, accessed on 07.08.2016
- VTB (2016a): Vienna: Arrivals and bed nights in all types of accommodation, January – December 2015, available at: <https://b2b.wien.info/media/files-b2b/naechtigungen-kumuliert-2015.xlsx>, accessed on 07.08.2016
- VTB (2016b): Vienna: Hotel capacity & occupancy 2015, available at: <https://b2b.wien.info/media/files-b2b/auslastung-2015.xls>, accessed on 07.08.2016
- Zanad, A. (2015): ITB Berlin und IPK International: Trend zu Städtereisen ungebremst (English: ITB Berlin and IPK International: trend towards city trips unrestrained), available at: <http://www.presseportal.de/pm/6600/3134514>, accessed on 01.08.2016

4. Results

4.1. Similarities & differences

This chapter compares the different cases according to the framework for the analysis (see appendix 6.1). It provides an overview of the similarities and the differences between the cases in order to allow deriving interesting patterns and finding insights that can be generalised.

General information

The study analyses eleven cases from around the world representing different continents, countries, cultures, and economic as well as ecological systems. The cases differ with regard to the geographical scope, the number of people affected and or the type of tourism.

The spectrum ranges from classical tourism destinations (e.g. Cozumel, Juist, Ohrid) to cities (Baku, Soweto) and to single tourism attractions (Schönbrunn in Vienna, Rigi); from densely populated cities (Baku) to uninhabited natural ecosystems (GBR) and from very small (Rigi, Juist, Cozumel) to big areas (GBR, Muskoka). Besides some cities there were also island destinations and rural areas included.

From a geographical perspective the cases can be categorised as follows:

Cities	Islands	Rural areas
Baku	Juist	Rigi
Soweto	Cozumel	Muskoka
Vienna	Lombok	Kasane
Ohrid	Great Barrier Reef (GBR)	

An overview of the geographical location of the cases can be found on the map (Figure 2).

Tourism development in the countries of the case study

In all the countries represented tourism plays an important role. Still the volumes as well as the type of tourism differ amongst the destinations. Direct contribution of tourism to GDP ranges from 1.8% (Canada, Indonesia, and Macedonia) up to 5.6% (Austria) and 7.4% (Mexico). There are also differences with regard to the contribution of tourism to employment; for example in Mexico 7.9% of the population is employed by the sector and similarly 7.1% in Germany and 6.3% in Austria while in Indonesia and Macedonia the share is much lower (1.6% each).

According to the global tourism growth rank of the WTTC (2017), the emerging economies of Azerbaijan, Botswana and Macedonia lead the ranking. The ranking of long-term growth is headed by Azerbaijan followed by Indonesia and Botswana.

Table 2 shows tourism contributions to GDP, employment, visitor exports and investments for all the countries represented in the study, as well as the global ranking in regards to GDP, growth and long-term growth. Table 3 presents the rankings for all the countries participating in the study in regards to the same factors.

Table 2: Key figures of tourism in countries

2016	GDP Direct Contribution		GDP Total Contribution		Employment Direct Contribution		Employment Total Contribution		Visitor Exports	% of Total Exports	Investment	% of Total Investment	World Ranking (out of 185 countries) Relative importance of Travel & Tourism's total contribution to GDP			
	USD (bn)	%	USD (bn)	%		%		%					Absolute	Relative	Growth	Long-term Growth
Germany	138.1	4.0	376.7	10.8	3085000	7.1	6086000	14.0	46.7	2.9	27.2	3.9	3	78	168	166
Mexico	76.7	7.4	165.9	16.0	4059500	7.9	8659000	16.8	20.4	5.3	7.7	3.3	10	49	120	138
Australia	36.9	2.9	136.2	10.9	545000	4.6	1495000	12.5	20.3	8.5	16.1	5.1	12	77	129	159
Canada	27.9	1.8	96.3	6.3	543500	3.0	1374000	7.6	15.0	3.2	11.9	3.4	13	143	155	151
Austria	21.8	5.6	60.7	15.6	271500	6.3	734000	16.9	21.3	10.4	4.4	4.9	19	50	83	161
Indonesia	17.0	1.8	57.9	6.2	1944000	1.6	6708500	5.6	13.0	7.6	13.6	4.4	22	144	99	20
Switzerland	15.7	2.4	60.1	9.1	165000	3.3	598000	11.8	18.6	5.4	2.8	1.7	21	103	125	168
South Africa	8.7	3.0	27.3	9.3	716500	4.6	1533000	9.8	8.7	9.9	4.7	8.1	35	99	146	96
Azerbaijan	1.4	4.1	5.1	14.6	171000	3.7	609000	13.2	2.9	16.9	0.3	2.8	83	53	33	17
Botswana	0.6	3.9	1.6	10.9	25000	2.6	68500	7.1	0.6	5.8	0.3	8.5	124	75	35	52
Macedonia	0.2	1.8	0.7	6.7	12000	1.6	44000	6.1	0.3	5.4	0.1	2.4	151	139	66	92

Reference: WTTC country reports (2017)

Table 3: Country rankings

2016	GDP Direct Contribution		GDP Total Contribution		Employment Direct Contribution		Employment Total Contribution		Visitor Exports	% of Total Exports	Investment	% of Total Investment	World Ranking (out of 185 countries) Relative importance of Travel & Tourism's total contribution to GDP			
	USD (bn)	%	USD (bn)	%		%		%					Absolute	Relative	Growth	Long-term Growth
1	Germany	Mexico	Germany	Mexico	Mexico	Mexico	Mexico	Austria	Germany	Azerbaijan	Germany	Botswana	Germany	Mexico	Azerbaijan	Azerbaijan
2	Mexico	Austria	Mexico	Austria	Germany	Germany	Indonesia	Mexico	Austria	Austria	Australia	South Africa	Mexico	Austria	Botswana	Indonesia
3	Australia	Azerbaijan	Australia	Azerbaijan	Indonesia	Austria	Germany	Germany	Mexico	South Africa	Indonesia	Australia	Australia	Azerbaijan	Macedonia	Botswana
4	Canada	Germany	Canada	Australia	South Africa	South Africa	South Africa	Azerbaijan	Australia	Australia	Canada	Austria	Canada	Botswana	Austria	Macedonia
5	Austria	Botswana	Austria	Botswana	Australia	Australia	Australia	Switzerland	Indonesia	Indonesia	Mexico	Indonesia	Austria	Australia	Indonesia	South Africa
6	Indonesia	South Africa	Switzerland	Germany	Canada	Azerbaijan	Canada	Switzerland	Canada	Botswana	South Africa	Germany	Switzerland	Germany	Mexico	Mexico
7	Switzerland	Australia	Indonesia	South Africa	Austria	Switzerland	Austria	South Africa	Indonesia	Switzerland	Austria	Canada	Indonesia	South Africa	Switzerland	Canada
8	South Africa	Switzerland	South Africa	Switzerland	Azerbaijan	Canada	Azerbaijan	Canada	South Africa	Macedonia	Switzerland	Mexico	South Africa	Switzerland	Australia	Australia
9	Azerbaijan	Canada	Azerbaijan	Macedonia	Switzerland	Botswana	Switzerland	Botswana	Azerbaijan	Mexico	Botswana	Azerbaijan	Azerbaijan	Macedonia	South Africa	Austria
10	Botswana	Indonesia	Botswana	Canada	Botswana	Indonesia	Botswana	Macedonia	Botswana	Canada	Azerbaijan	Macedonia	Botswana	Canada	Canada	Germany
11	Macedonia	Macedonia	Macedonia	Indonesia	Macedonia	Macedonia	Macedonia	Indonesia	Macedonia	Germany	Macedonia	Switzerland	Macedonia	Indonesia	Germany	Switzerland

Reference: WTTC country reports (2017)

Tourism supply of the site

As diverse as the destinations are the different types of tourism in the cases analysed. The main differences can be found with regard to tourism supply, dependency on tourism and tourism development stage.

1. Tourism supply

There are many differences in the development and the number of tourism providers as well as in tourism supply (attractions, accommodation and restaurants available). Also growth rates differ a lot, but in all the cases tourism numbers have increased in the last years, and the tourism industry plays an important role for the local economy.

2. Dependency on tourism

Most of the destinations analysed depend heavily on tourism. Especially the small islands like Juist and Cozumel are greatly depended on tourism and are therefore under pressure to guard this important mainstay. In Juist 92% of the employees work in the tourism sector. On the other hand, in destinations like Baku or the Great Barrier Reef, tourism is only one important factor amongst others.

3. Development stage

There are also differences with regard to the tourism life cycle of these destinations. Some destinations can develop new themes over time, for instance with the help of new brands and events. Still, the stages in the tourism life cycle vary from fast growing destinations to destinations that are in the consolidation stage and have to prevent a decline.

Most destinations consider themselves to be in the mature/consolidation stage with the exceptions of Lombok, Baku, Ohrid and Soweto, which are all in the development/growth stage. This is very much in line with the countries' ranking with regards to growth and long-term growth (s. above).

Tourism demand at the site

In line with the differences in tourism supply, tourism demand also differs amongst the cases; not only with regard to the volume of tourist arrivals and overnight stays (see Table 4), but also with respect to tourism growth, length of stay, motivation, guest satisfaction and seasonality.

All destinations experienced fast tourism growth in recent years. The islands Juist and Lombok seem to have many visitors staying for a longer time, while destinations like Mt. Rigi attract mainly day trippers. Domestic markets are usually the strongest, followed in many cases by neighbouring countries.

In most cases leisure tourism plays an important role, but in the cities an overlap with business tourism or event guests is observable. Depending on the destination, the motives vary from visiting a city (Baku), culture (Ohrid), nature (GBR), for hiking (Rigi) or cruise tourism (Cozumel). A special motivation was stated by visitors of the GBR, where 'Last chance to experience' was the first or second concern of 235 visitors to the reef in a recent study. Some destinations have very loyal guests. A survey in Cozumel showed that only 40% of cruise passengers were first time visitors to the island.

It is noteworthy that despite the challenges these destinations face, guest satisfaction levels seems to be generally quite high for most of them.

Most of the cases documented also experience seasonal fluctuations. Many cases experience a peak during the summer months, but there are also destinations with several peaks a year (e.g. during school holidays). The temporal concentration of tourists often leads to peaks with too many tourists in a too short time at a given place.

Table 4: Tourism demand in destinations analysed (2015)

Cases	Arrivals	Overnights	Length of stay	Origin countries (selection)	Seasonality
Baku	77'560	688'532	1-3	Russia, Georgia, Turkey	spring, summer, fall
Cozumel	3'391'241	575'000	3.4	USA, Canada	three peaks
GBR	1'189'000	10'425'000	7.9*	Australia, Asia, Continental Europe	school holidays
Juist	129'184	983'971	7.62	Germany, Switzerland	June-September
Kasane	1'511'898	n.d.	2.2	Zimbabwe, South Africa	May-October
Lombok	1'629'122	n.d.	4.8*	Indonesia (60%), Australia, Germany	May-August
Muskoka	2'900'000	n.d.	3.1	Canada, USA	July-September
Ohrid	219'944	868'644	4.5	Macedonia, Bulgaria, Turkey	July-August
Rigi	1'700'000**	45'474	1	Switzerland (75%), China, UK	June-October
Soweto	n.d.	n.d.	n.d.	South Africa, Mozambique, Zimbabwe	n.d.
Vienna	6'589'031	14'328'261	2.17	Germany, Austria, USA	August-September

Data for 2015 except for GBR=Year ended Sep 2016, Kasane=2012, Lombok=2014

*International visitors, ** frequencies of railway

n.d.=no data

Framework conditions

This section summarises local setting conditions that may influence the impact and/or the management of the site and factors determining tourist carrying capacity. The framework conditions differ a lot with regard to the political, legal, organizational or physical setting as well as with respect to the economic, social or environmental situation. But these conditions seem to have a major impact on tourism carrying capacity and the resilience of the tourism system at all places. While history and background are very individual in all the cases, there are certain drivers and factors that allow deriving general insights.

History and background

History and background of the location significantly influence how tourism developed over the years and contributed to current challenges. The summaries of the historical background show how past developments influence today's setting for tourism.

Framework conditions

The framework conditions differ a lot in regard to the political, legal, organizational or physical

setting as well as in regard to the economic, social or environmental situation. The preconditions at these places seem to have a major impact on tourism carrying capacity and the resilience of the tourism system.

The cases show well how the framework conditions affect the impacts of tourism. Some of the important special circumstances that influence impacts and tourism management are the following:

- Political situation: many communes in charge of development, difficult decision making process (Rigi)
- Zoning, monitoring and evaluation are crucial as well as many external factors (GBR)
- Absence of transparency, tough state control (Baku)
- Lack of communication and information (Kasane)
- Seasonality, overworking, unemployment (Muskoka)
- Dependency and focus on tourism (Juist)
- Set of regulations and programs, but insufficient coordination of stakeholders (Ohrid)

Drivers

The fast growth in tourism at many places is not only influenced by global economic growth and the increasing importance of emerging tourism markets, but also by new developments at the destinations. Drivers that lead to overcrowding can be very specific. While in Lombok (Indonesia) the new opening of the International Airport and new flight connections led to a massive increase in the number of tourists, in Switzerland the acceptance of the Swiss Federal Railway's Travel Card system of by the Rigi Mountain cable car company (Rigi Bahnen) led to a rise in the number of domestic visitors, and marketing efforts in Asia resulted in an increase in the number of tourists from China.

Cozumel in Mexico, on the other hand, fears that the lifting of travel restrictions and opening of Cuba to tourism might lead to a shift of cruise tourism that "might divert thousands of passengers from Cozumel to Cuba, leaving the island abandoned with expensive cruise tourism infrastructure and loss of thousands of jobs". (Cozumel)

Bottlenecks and constraints

In many places the main bottlenecks are access, transport and parking capacity issues (Cozumel, Rigi, Soweto, Ohrid, GBR, Juist), but also infrastructural capacities and utilities or accommodation capacity (Baku, Soweto, Juist) are mentioned several times. Other bottlenecks are overcrowded public places (Ohrid, Vienna), sensitive natural resources like natural parks or lakes (Juist, Muskoka), limited workforce (Lombok), difficult visa procedures (Baku) or service quality (Kasane, Rigi).

Challenges / Impacts

Main challenges

This section describes the most important challenges resulting from high tourism intensity on the site. Although tourism plays an important role in all the cases analysed, some of the challenges are also reinforced by problems such as climate change, local conflicts or pressures from other sectors.

Amongst others the following challenges were mentioned in the cases analysed:

- Volume pressure, traffic pressure, user-conflict pressure, infrastructural pressure (Soweto)

- New guest markets, overcrowding, traffic problems, undesired visitor behaviour (Rigi)
- Climate change, cumulative effects of combined impacts (GBR)
- Hotel capacity, damaged cultural heritage, unfavourable regulatory conditions for tourism development (Baku)
- Land degradation, poor waste management, lack of manpower (Kasane)
- Economic disparity (Muskoka)
- Strong dependence on tourism, skills shortage, seasonality, climate change (Juist)
- Safety and security, lack of participation of local communities, environmental issues (Lombok)
- Overcrowded places in particular during high season and peak times, negative perception of tourists (Vienna)
- Low tourism awareness of local population, insufficient tourism infrastructure, lack of strategic approach (Ohrid)
- Insufficient provision of fresh water (Cozumel)

Tourism intensity & seasonality

There are many ways of measuring tourism intensity (e.g. number of tourists per m², relation to permanent inhabitants, relation of day tourists vs. overnight stays, number of beds per 100 inhabitants, etc.). Since the cases analysed are not comparable in terms of the area covered or the number of people living in the area, no common indicators can be used in order to compare the tourism intensity at the different places.

While some places only experience overcrowding at few specific sites (Baku, Vienna, Soweto), others have enormous peaks resulting in very high tourism intensities as it is the case in Cozumel, where the relation of tourists vs. permanent population reaches 36:1 in a year. In many destinations tourism intensity has increased over the past years (e.g. Vienna, Rigi, Kasane).

At most destinations tourism intensity varies over the course of a year due to seasonality of tourism. The seasonality does not only lead to overcrowding, but also to a need for many employees in high season, while in other times of the year there is no work and the place is empty (e.g. Juist). To seek better balanced tourism across the year is a challenge for most of the places analysed.

Carrying capacity

Due to the qualitative nature of this study and diversity of cases analysed it is not possible to determine carrying capacity for each destination. Different types of carrying capacities can be distinguished:

- Physical carrying capacity: e.g. transportation, sewage, public services
- Social carrying capacity: e.g. perception of overcrowding, quality of life
- Ecological carrying capacity: e.g. national parks, water resources, waste management systems

Although in most of the cases there are different carrying capacity types affected, the following were the main types identified and mentioned in the cases:

Table 5: Carrying capacity affected

	physical	social	ecological
Baku		x	
Cozumel	x		x
GBR			x
Juist	x	x	x
Kasane		x	
Lombok	x	x	x
Muskoka		x	x
Ohrid	x	x	x
Rigi	x	x	
Soweto	x		
Vienna	x		

Influencing factors

There are many factors that influence carrying capacity and the impact of tourism. Amongst others, the following aspects have an influence on tourism carrying capacity and can contribute to challenges of overcrowding:

- Unfavourable tax conditions, visa procedure, festivals/ events (Baku)
- Economic dependence, lack of innovative tourism offers, low tourism awareness of local population, poor public transport (Cozumel)
- Sensitive environment, limitation of access points (GBR)
- Seasonality, sensitive environment (Juist)
- Poor waste management, increasing population, lack of facilities (Kasane)
- Concentration of capital, many different stakeholders and interests (Lombok)
- Low income level, economic disparity (Muskoka)
- Lack of facilities, unequal distribution of benefits (Soweto)
- Lack of qualified staff in planning institutions, lack of tourism awareness, lack of funding (Ohrid)
- Marketing, accessibility, acceptance of travel card by mountain railways (Rigi)

Physical impacts

There were different physical impacts observed such as impacts on infrastructure and parking (Rigi), on accommodation capacities (Juist), crowding (Baku), overcrowded public places and cultural sites, full beaches (Ohrid) or urban sprawl and aesthetic changes such as degradation of local built heritage (Cozumel).

Economic impacts

Positive economic impacts of tourism mentioned in the cases include amongst the well-known benefits such as value added (Muskoka, Vienna, Lombok), revenue from tourism taxes and increased income (Ohrid), new weather-independent guests (Rigi) or community development and creation of jobs (e.g. Juist, Rigi, Kasane),.

Examples for negative impacts are lack of funding and of work opportunities in off-season (Muskoka), businesses owned by people from outside (Soweto), leakages (Lombok, Kasane), low local investment (Baku), unemployment due to migration (Kasane), high dependency on tourism (Juist, Cozumel), increase in land prices (Lombok) and cost of life, displacement of traditional economic activities (Cozumel).

Social impacts on residents

High tourism intensities can have impacts on quality of life, housing issues, reduced resident satisfaction or perceptions of crowding amongst others. Some of the negative impacts observed in the cases analysed were:

- Higher prices, frustration of residents, crime (Soweto)
- Disturbance of residents, need to adapt to guests with different cultural backgrounds (Rigi)
- Movements restrictions during events (Baku)
- Changes in lifestyle (Kasane)
- Housing crisis, homelessness, social tensions (Muskoka)
- Many seasonal workers, high prices, emigration of young people (Juist)
- Changes in lifestyle, drugs, acculturation, weak social fabric (Lombok)
- Overcrowding during high season and peak times at certain sights (Vienna)
- Crowding, complaints about transport and public services (Ohrid)
- Social exclusion, lack of participation of stakeholders in tourism development, traffic congestion, loss of culture (Cozumel)

Social impacts on tourists

As mentioned above guest satisfaction is quite high in most of the places analysed. Nevertheless, high tourism intensities can have negative impacts on visitor satisfaction such as:

- Hassling of tourists (Soweto)
- Undesirable visitor behaviour, perception of crowding (Rigi)
- Complaints about restrictions (Baku)
- Noise, poor service quality (Lombok)
- Economic disparity and social tensions between locals and tourists (Muskoka)
- Overcrowding during high season and peak times at certain sights (Vienna)
- Complaints about service quality, littering (Ohrid)
- Crowding, low visitor satisfaction (Cozumel)

Environmental impacts

There are many different possible impacts on the environment. Negative impacts are often a result of a combination of tourism together with existing pressures from other sectors. Many destinations are also affected by impact of climate change (e.g. GBR, Cozumel, Rigi). Some of the negative effects mentioned are:

- Noise, air pollution, waste (Soweto)
- Coral reef degradation (resulting from climate change), overfishing, land-based run-off, tourism (GBR)
- Poor waste management, climate change (Kasane)
- Inappropriate waste management systems (Muskoka)
- Energy and water consumption, climate change (Juist)
- Lack of fresh water, solid waste management, illegal spread of buildings, climate change (Lombok)
- Changes in landscape, constructions (Ohrid)
- Stress on reefs, waste, water scarcity, loss of biodiversity (Cozumel)

While Juist can be seen as a good example how to actively manage these challenges, in most of the cases analysed the problems increased in the last 10-15 years due to rapid growth of tourism and management not being able to find locally suitable solutions.

Beneficiaries and sufferers

Who the beneficiaries and sufferers in the different cases are, depends a lot on the specific situation. The more unequal the distribution of the benefits, the wider the gap. Although the local economy and therefore also local communities seem to profit from tourism at most of the places, there are always people who cannot participate in the benefits. Therefore, local people generally both suffer and benefit. In many cases the winners are tourism businesses, land owners, foreign investors and sometimes politicians, while in almost all the cases the main sufferers are local residents and the environment. It was also mentioned that competitors with a similar tourism offer around the world could benefit in case of a decline in tourism due to overuse of the resources.

Measures / Responses

This section presents the solutions that have been or are being discussed and/or implemented to reduce conflicts related to overcrowding, competing land uses and visitor management. The approaches show how challenges can be successfully faced, managed and/or avoided. The measures and approaches mentioned are a non-exhaustive list that show examples mentioned in the reports. Details can be found in the single reports on the cases.

General measures**Social measures**

With regard to the different stakeholders involved and in particular to the local communities there are many different ways in reducing negative impacts. Some measures mentioned are:

- Communication and information to tourists, local volunteers, co-creation process for product development (Rigi)
- Guidelines for reef tourists and tour operators (GBR)
- Promotion of local culture (Baku)
- Participation of different interest groups, strong networks between safari operators and local people (Kasane)
- Muskoka Homelessness Task Force (Muskoka)
- Participation of local population for developing tourism vision, participation of tourists in a guest-parliament (Juist)
- Participation of stakeholders, availability of facilities to residents, promotion of local culture, raising awareness among locals (Lombok)
- Tourism cluster EDEN to coordinate stakeholders and support sustainable tourism (Ohrid)
- Participation of stakeholders in the monitoring and management of tourism impacts (Cozumel)
- Open Innovation and co-creation by involving the public as well as independent experts into the development of the tourism strategy (Vienna Tourism 2020 strategy) (Vienna)

Economic measures

Most of the destinations support tourism in order to strengthen the regional economy. Some of the measures presented are:

- Support for SMME (Small, Micro and Medium Enterprises) (Soweto)
- Masterplan for tourism development, including visitor management measures (Rigi)
- Environmental management charge (GBR)
- Strengthening regional economy (Baku)

- Government aided program for youth kickstarts (Kasane)
- Promotion of culinary tourism, strengthening agriculture sector (Muskoka)
- Support of regional products, visitor's taxes (Juist)
- Investment program, marketing measures, designing new tourist experiences (Lombok)
- Subventions for small scale businesses (Ohrid)

Environmental measures

The environmental challenges are not of same importance in all the cases. Still, many destinations have ecological problems to deal with. Some of the approaches implemented are as follows:

- Guards, nature protection areas, sanitary facilities (Rigi)
- Strict usage guidelines, restricted access, monitoring the coral (GBR)
- Special regulations, state reserves, coordination commission (Baku)
- Signalling and stickers for visitor information (Kasane)
- Muskoka Watershed Council (Muskoka)
- Measures to become climate-neutral such as reduction of energy consumption, water consumption, waste management and others, Project "Climate island Juist" (Juist)
- Resource saving projects, green procurement, waste management (Lombok)
- Ecological zoning plans (Cozumel)

Specific measures

Expand and improve the capacities and infrastructure

As a response to a lack of facilities and limited capacities there are many measures presented in order to extend and improve infrastructure:

- Improve infrastructure and roads (Soweto)
- Separate mountain trains, increase of temporal sanitary facilities (Rigi)
- Development and modernization of tourism industry, develop Muskoka Airport (Muskoka)
- Plans for climate-neutral buildings and improving the accessibility of businesses (Juist)
- Develop tourism-supporting infrastructure such as water and ground transportation, roads, hospitals and others (Lombok)
- Construction of new arrival zone, construction of additional lift (Vienna)
- Subsidies for tourism businesses, new bike trails (Ohrid)
- Development of first accessible beach in Mexico (Cozumel)

Disperse tourist attractions

Another approach is to develop new attractions and tourist facilities and diversify the tourism product. Most of the destinations analysed are implementing measures in this direction:

- Expansion of tourism (Soweto)
- Masterplan that aims at creation of new attractions (Rigi)
- Marketing, further development of southern reef (GBR)
- Develop cultural tourism products (Kasane)
- Improve passenger rail service (Muskoka)
- Increase guest beds (Juist)
- Development of new attractions and facilities (Lombok)
- Open up new area of the park, develop digital visitor experiences (Vienna)
- Project "active tourism", development of rural and alternative forms of tourism (Ohrid)
- Diversification, sport-events, tournaments, renovation of historic downtown, new aquarium (Cozumel)

Restrictions

There are many possible restrictions in order to avoid negative impacts of tourism activities (e.g. define acceptable level of crowding, access restriction, activity restriction, establish quotas, prohibitions, regulations).

- Restricted access, reduction of chemicals, reducing carbon footprint, eco-certifications (GBR)
- Legal regulations for all types of attractions, many restrictions (Baku)
- Car speed limits (Kasane)
- Several restrictions (cutting trees, size of boathouses, construction on shorelines) (Muskoka)
- Access restrictions in nature conservation areas (Juist)
- Environmental feasibility analysis (Lombok)
- Slow down ticketing process at peak times (Vienna)
- Access restriction for cars in summer, parking zones with different prices, entry fees (Ohrid)

However, when access is restricted to specific areas, it has to be considered that the impact to other areas might increase.

Information and communication

Information and communication to guests and residents can help to better manage the visitors and to prevent negative impacts. To make good use of information techniques is an important topic in all the cases analysed:

- Improve information between stakeholders, information on funding and training (Soweto)
- Information sheets, information of tour guides, new signs, loudspeakers (Rigi)
- Information on board, accurate reporting (GBR)
- Develop communication strategies (Muskoka)
- Information for guests about sustainability through various channels (Juist)
- Online communication and reservation systems (Lombok)
- Guides to lead visitors and avoid crowding (Vienna)
- Development of tourism observatory (Cozumel)

Optimize temporal distribution of tourists

Where there is a clear seasonality, there are attempts to extend visit season and to strengthen the off-season. There are several measures mentioned in the reports:

- New weather-independent guest segments, special trains (Rigi)
- Attempts to make destination a year-round hot-spot, marketing, diversification (Muskoka)
- Extend season by attracting sustainable interested travellers (Juist)
- Open attraction 365 days, computer controlled ticketing program, reduced annual tickets, promoting online booking (Vienna)
- Marketing, new guest segments, development of new events (Ohrid)

Optimize spatial distribution of tourists

As effects of overcrowding often occur at some special attractions only, to optimize the spatial distribution of tourists through visitor management, guest segmentation, valorisation of alternatives or technological solutions are an important goal in many destinations. Some approaches presented are:

- Ticketing system (Soweto)
- Installation of new photo points, signalling, new attractions (Rigi)
- Marketing of southern reef (GBR)

- Diversification of small scale businesses (Kasane)
- No charge for parking in downtown to bring in more visitors (Muskoka)
- Visitor management concepts (Juist)
- Financial support for start-up businesses (in new places), strengthening linkages to other sectors (Lombok)
- Open up new area in Schönbrunn, develop new attraction outside the tourism hot-spots (Vienna)
- Improved signalling, visitor management, education points (Ohrid)
- Attract new guest segments (Cozumel)

Organisational Measures

In regards to organisational measures management plans and appropriate zoning as well as certification programs and monitoring tools exist in many destinations. In addition the following measures are mentioned:

- Customer surveys, Masterplan Rigi (Rigi)
- Zoning, operating permits, funding for ecological surveying, scientific research (GBR)
- District development plan, national park management plan, eco-certifications (Kasane)
- Planning processes to protect shorelines (Muskoka)
- Certifications, awards (Juist)
- Sustainable Tourism Master Plan (Lombok)
- Continuous monitoring of residents' attitudes towards tourism and of the crowding situation, support of research focusing on crowding, surveys on tourism awareness (Vienna)
- National Tourism Strategy (Ohrid)
- Management plans, studies, certification programs, training programs, monitoring tools (Cozumel)

Innovative solutions

There are some measures presented that have a potential for innovation. Especially the fast growth of new technologies allows new approaches to manage visitor flows. Some of the actions and proposals listed are:

- More interactive experiences in museum (Soweto)
- Scientific research (GBR)
- E-marketing and pricing policies (Baku)
- Social media marketing (Muskoka)
- Innovation and research, climate-cent project (Juist)
- Zoning plans, human resource development, access to finance (Lombok)
- Open innovation and co-creation development of tourism strategy (Vienna)
- Apps for different sites, interactive maps (Ohrid)
- Smart destination (Cozumel)

Outlook

Trends and prospects for tourism development

Besides the global mega trends such as climate change, demographic changes, new technologies or sustainability that will impact the future of tourism, many authors of the case studies also expect an increased demand for alternative forms of tourism particularly more authentic tourism experiences.

The prospects in the different destinations are very specific and differ a lot. Most authors of the case studies expect an ongoing increase in visitor numbers, but are unsure whether the good intentions towards a more sustainable tourism development described in strategies and masterplans will be implemented.

While new investments and improvements in tourism legislation, stakeholder management or environmental measures are expected to lower the pressure on the communities, the ongoing impact of climate change and planned further investments to attract more people – such as the construction of a fourth cruise terminal in Cozumel – might jeopardise the good efforts and further enhance negative impacts at some destinations.

Conclusions

Which measures seem to be the most promising?

Some successful measures are strict monitoring and implementation of standards, establishing institutions (e.g. sustainability board), marketing, involvement of guests, stakeholder information and participation provided that there's a strong commitment of all the partners. Clear policies and guidelines are helpful, integration of stakeholders and transparent information seems to be crucial.

In addition the following measures are considered to be promising in the cases analysed:

- Involving and informing all parties, information and guidelines for visitors (Rigi)
- Zoning for all uses, policies and procedures (GBR)
- Technology, pricing strategies (Baku)
- Stakeholder participation, financial assistance programs (Kasane)
- Community engagement, shift to year round destination (Muskoka)
- Energy and water saving measures and waste prevention, data collection (Juist)
- research, empowerment of local population (Lombok)
- Pre-ordering or online ticketing in order to shift visitors and prevent overcrowding (Vienna)
- Measures that aim at attracting different types of tourists, events, luxury (Cozumel)

What are the main barriers that hamper a sustainable development in the case?

On the other hand, barriers that hamper a sustainable development mentioned are amongst others:

- Lack of statistics (Soweto)
- Many different stakeholders and interests (Rigi)
- Delayed introduction of restrictions (GBR)
- Corruption, absence of transparency, monopoly (Baku)
- Influx of citizens, lack of capacity building skills (Kasane)
- Seasonality (Muskoka)
- Financial resources, having to convince all the service providers (Juist)
- Coordination of stakeholders and cultural boundaries (Lombok)
- Seasonality, pressures from other sectors, lack of pro-active role of tourism (Ohrid)
- Political instability, corruption, lack of monitoring systems (Cozumel)

Sustainable tourism should consider most of the solution approaches mentioned above. The integration of the local stakeholders and the consideration of local needs as well as the distribution of profits seem to be crucial for a balanced tourism development.

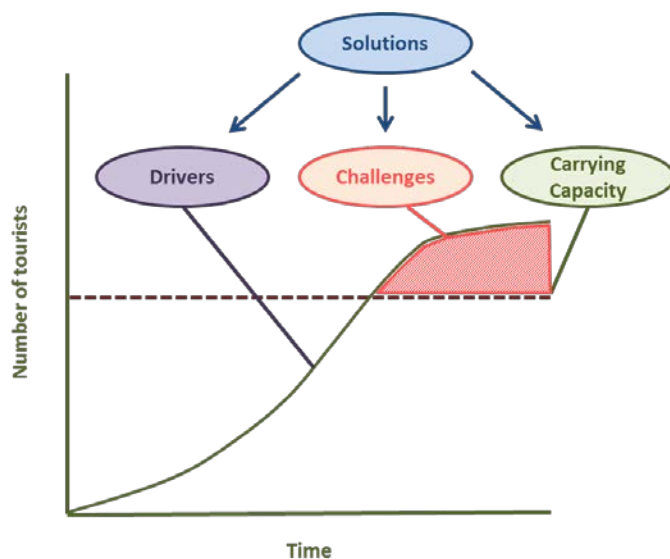
4.2. Challenges & solutions

Instead of focusing on the transferability of the causal propositions to other contexts in a comparative case study the goals should be: generalizing from one case to a wider set of cases" (Goodrick, 2014). This means to "have an emphasis on generalizing propositions about the characteristics that are predictive of success and failure." (Goodrick, 2014)

The analysis of the different cases show that the destinations deal with the pressures differently. While Juist can be seen as a good example in being one of the first islands to take action against climate change and tourist overuse, other cases state that there are more costs than benefits due to overcrowding (Cozumel). Some destinations have implemented hardly any measures yet (Ohrid) and in others (GBR) tourism is only one problem among many others. Even though the cases analysed are very different in many respects, the analysis allows deriving patterns and factors that can be generalised.

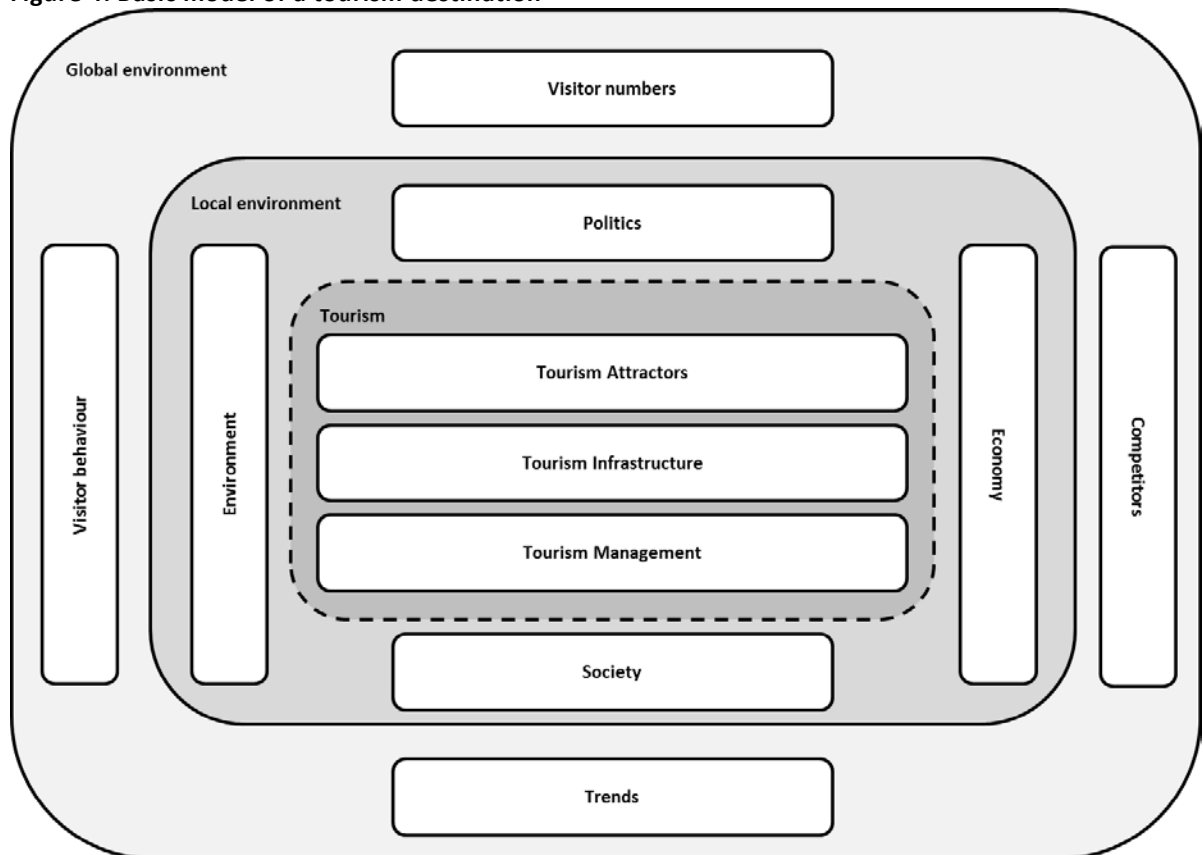
Overtourism can be seen as a function of the numbers of tourists as well as of the carrying capacity of the tourism system. Major challenges occur when carrying capacity is exceeded. Therefore, solution approaches can proactively aim at increasing carrying capacity and influencing the drivers of tourism growth as well as at better managing the challenges.

Figure 3: Different aspects of overtourism



Source: Authors

Based on the analysis this chapter presents drivers on the demand side, factors that determine tourist carrying capacity as well as the main categories of challenges and solution approaches. All these aspects will be located in the following model showing a simplified representation of a tourism destination embedded in and influenced by the local micro and global macro environment.

Figure 4: Basic model of a tourism destination

Source: Authors

This basic model of a tourism destination shows the core areas of a destination and its environments in a simplified way. The core of the tourism system are the attractors, supporting providers, the tourism as well as general infrastructure and the steering and management of the destination. The local micro environment with the framework conditions (economy, society, environment and politics) is part of the destination and has a relevant impact on tourism development. The macro environment comprising global trends, competitors and numbers and behaviour of visitors can also have a direct or indirect impact on local tourism influencing tourism demand. With the core of tourism business in the centre, the scope of action for destination management organisations and tourism authorities decreases towards the outer circles.

Drivers, factors that determine tourist carrying capacity as well as the main categories of challenges and solution approaches will be presented in the following sections and located in the model in each case.

4.2.1. Drivers of overcrowding

There are several factors that can lead to an increase in the numbers of tourist or to a shift in visitor segments. The tourism system is driven by several external as well as internal factors. On the one hand, there are global developments like growth in tourism, changes in travel behaviour, new competitors and general trends that influence tourism. On the other hand, tourism is also driven by internal factors such as existing and new attractions, improved accessibility or marketing efforts.

Figure 5: Drivers of overcrowding

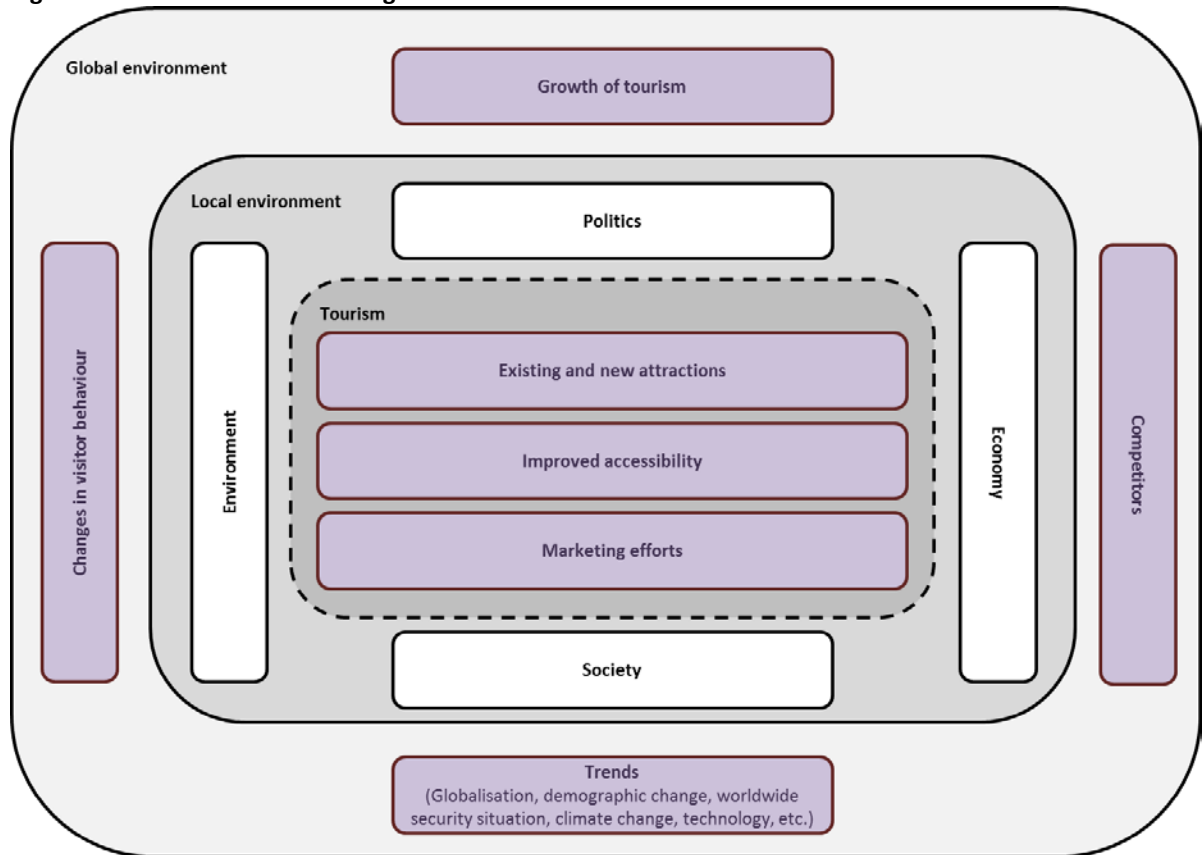


Table 6: Drivers of overcrowding

	Factors	Description
Global environment	Growth of tourism	Worldwide growth of tourism leads to more people travelling, new markets participating in tourism and new destinations being discovered as tourist spots.
	Changes in visitor behaviour	Changes in preferences and safety issues can lead to changes in travel behaviour and to concentrations of tourists in certain places.
	Competitors	New competitors on the world market and emerging destinations with high tourism growth rates can lead to a shift in visitor flows and new dynamics and competition in the world tourism market.
	Trends	All the global mega trends like globalisation, changes in demography & lifestyles, new technologies, climate change or worldwide security situation can have an impact on visitor flows and travel behaviour.
Tourism	New and existing attractions	New tourist attractions or new areas opening up for tourism can attract more people and lead to higher visitor numbers. Also new service providers on the supply-side (like e.g. Airbnb) can lead to new types of tourism, new guest segments and different visitor behaviour.
	Improved accessibility	Improved accessibility - e.g. through new flight connections, low cost carriers or the expansion of infrastructure -, can result in higher numbers of tourists.
	Marketing efforts	Intensifying marketing efforts can lead to higher numbers of tourists and to changes in the market segments.

Also environmental, societal or cultural aspects can be drivers for tourism and would then be included as tourism attractors. While some developments can hardly be foreseen, there are others that can be influenced directly when recognised early. It is especially sudden changes (e.g. new flight connection) that can lead to challenges and where adaptation measures have to be prepared.

4.2.2. Factors determining carrying capacity

The carrying capacity determines the vulnerability and the resilience of a system. There are many factors that have a direct impact on tourism carrying capacity. Not only tourism itself but also the local environment and the ecological, social, economic and political situation have an impact on the fragility of the system and on how well visitor flows can be absorbed.

Figure 6: Factors determining carrying capacity

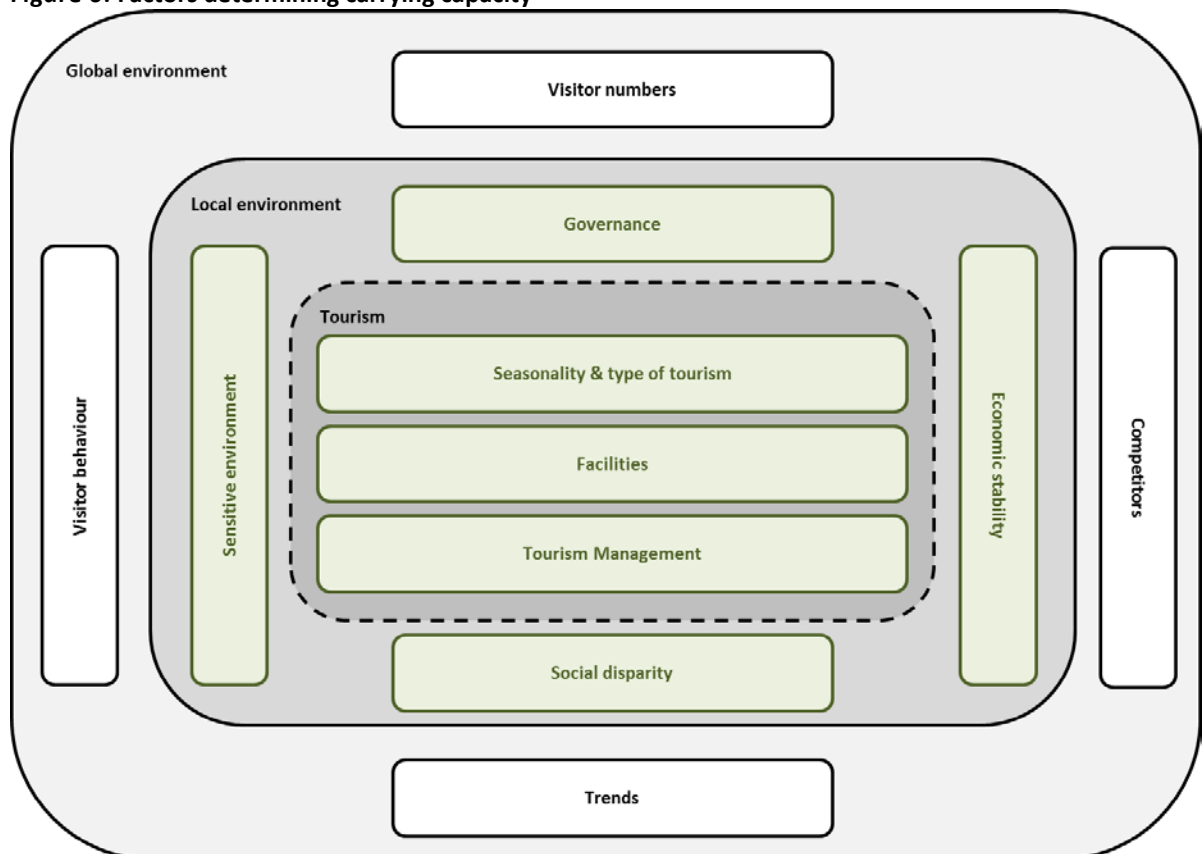


Table 7: Factors determining carrying capacity

	Factors	Description
Local environment	Governance	Political steering and according framework conditions have a huge influence on the vulnerability of tourism. Systems seem to suffer in particular when there is a lack of qualified staff in planning positions, poor public services, a lack of strategic approaches and concepts, a lack of data and monitoring, inadequate implementation, low transparency or even repression and corruption that can be summarised under the term bad governance. Also political instability and poor public services might have a negative influence on the resilience of a system. Furthermore, state policies and legal regulations, tax conditions, visa procedure,

		local investment or (missing) economic support programs can have an influence on the flexibility and resilience of a system.
	Sensitive environment	First of all, where the environment is especially sensitive resilience is naturally reduced. This applies for certain types of landscape and fragile natural systems such as reefs, dunes and others as well as for cultural heritages under pressure as are many UNESCO world heritage sites.
	Social disparity	Social inequality If there is social inequality between different local groups, between locals and tourists or between locals and foreign investors, the system becomes particularly vulnerable; especially when there are large groups with a low level of education and income, poor working conditions, high unemployment, insufficient healthcare and social services and a lack of tourism awareness. Cultural, religious and ethnic disparities can also lead to social tensions and to lower resilience.
		Diversity of stakeholders Since the tourism product is a bundle of many different service providers, the variety of different stakeholder and conflicting interests is sometimes hard to unite. Especially where there is a lack of communication and information, a lack of participation and empowerment of the local population, insufficient coordination and no existing networks, tourism systems become vulnerable to sudden changes and negative impacts.
	Economic stability	Dependency on tourism High dependency on tourism or certain types of tourism makes a tourism system susceptible to errors. If dependency is high, economic losses cannot easily be compensated.
		Concentration of capital Another important factor is the concentration of capital and benefits from tourism. If many tourism businesses are owned by foreigners or external persons and revenues don't stay in the region or country or if only few bigger companies benefit from tourism, this can lead to tensions within the community and to negative side effects (e.g. unemployment).
		Existing pressures from other sectors When the system is already stressed by existing pressures from other sectors (e.g. constructions, agriculture) or mega-events, it operates closer to capacity limits and cannot absorb a lot more additional pressure.
Tourism	Seasonality & type of tourism	The resilience of a tourism system can also depend on seasonality & type of tourism. Seasonal, weekly or daily peaks lead to a concentration of various kinds of impact in a relatively short time. Facilities and workforce have to be focused on these peaks. In addition, the type of tourism (day tourists, second homes, event tourists, loyal guests, different lengths of stay) and relating activities can play a role whether impacts can be absorbed or not.
	Facilities	Sometimes a lack of facilities or limited capacities (access, public transport, accommodation) leads to bottlenecks. This could be limited transport or accommodation capacities or a lack of infrastructure (e.g. parking, water facilities, cash withdrawal, restrooms, shade, shelter, sewage, etc.).
	Tourism Management	The way tourism is managed has an impact on the resilience to overtourism. If there is a lack of capacity building skills, manpower and motivation, poor quality of tourism services, a lack of qualified staff and strong institutions which enable knowledge exchange and networking (e.g. sustainability board), a lack of data and monitoring or insufficient implementation of strategies and concepts, vulnerability is much higher.

The overall vulnerability of a destination also depends a lot on existing pressures and impairment (e.g. air pollution, noise, traffic, etc.) and on the degree of exhaustion already reached. The above drivers together with the factors determining tourism carrying capacities can lead to tourism destinations being under pressure and facing the following challenges.

4.2.3. Challenges of overtourism

Although many of the cases analysed may not be the most typical cases with regard to overcrowding problems, they all represent different perspectives that make the cases interesting and instructive. There were many similar aspects appearing in different contexts that allowed categorizing the following challenges of overtourism.

Figure 7: Challenges of overtourism

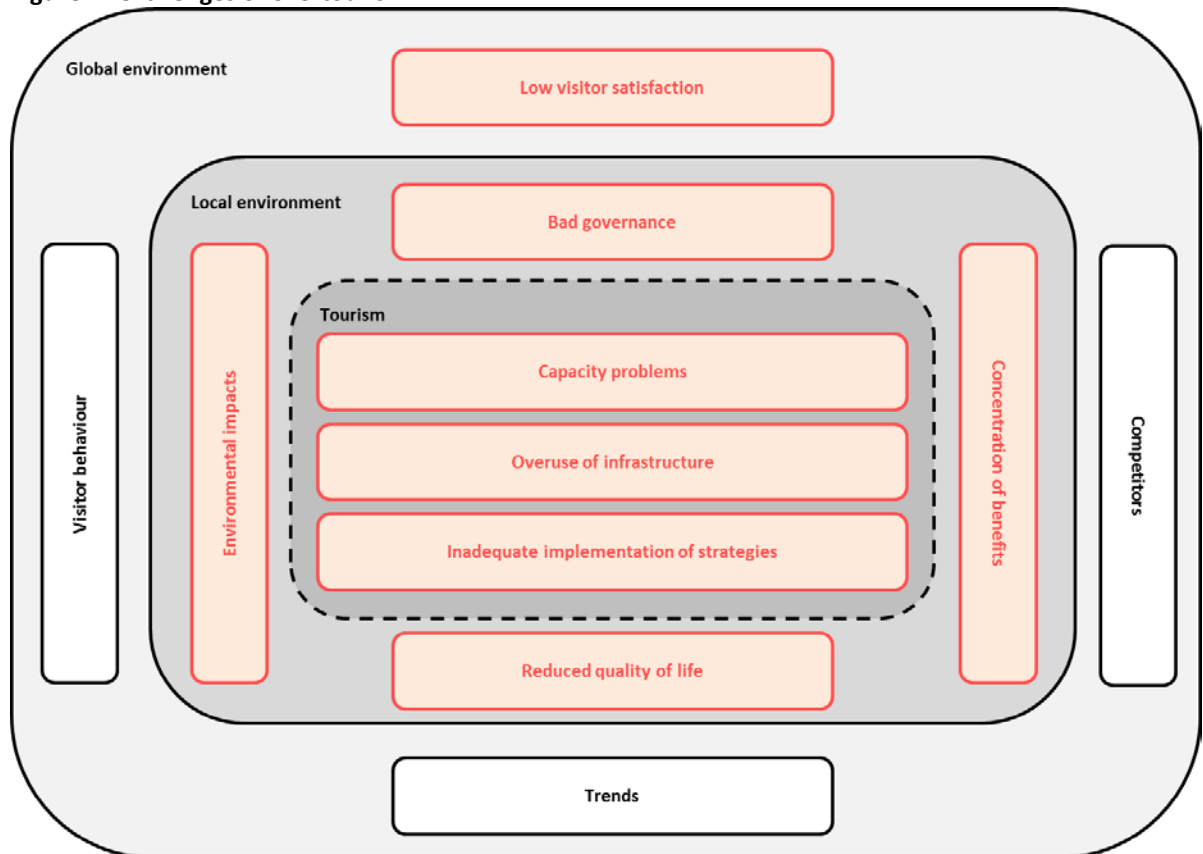


Table 8: Challenges of overtourism

	Challenges	Description
Global	Low visitor satisfaction	Perception of overcrowding, overused infrastructure, poor service quality or a lack of safety or hygiene issues can lead to low visitor satisfaction and negative word of mouth and therefore to a decrease of tourist numbers.
Local environment	Bad governance	With regard to policies and regulations unfavourable framework conditions, incompetent management, corruption or repression are some aspects that may lead to negative effects on residents, tourists and tourism development.
	Environmental impacts	There is a broad range of possible negative environmental impact depending on the ecological situation as well as on type of tourism and visitor behaviour. Possible negative impact includes: waste, littering, noise, pollution of sea, water, air, lack of fresh water, habitat destruction, land degradation or emissions.
	Concentration of benefits	In many destinations where there is a monopolistic economy and a strong concentration of capital, often with an accumulation of foreign owned businesses, there are problems of financial leakages, unilateral benefits and hardly any jobs on managerial level for locals.

	Reduced quality of life	Insufficient involvement Local communities may be affected by restrictions for locals, by missing opportunities for participation and little say by residents with regard to tourism development.
		Poor working conditions Overtourism can result in overworking as well as unemployment during the off-season, in a domination of the labour market by immigrants and a lack of high paying jobs for locals and in emigration of young people due to missing perspectives.
		High prices High tourism attractiveness often goes hand in hand with higher costs of living and of real estate. As a consequence, housing and rents are no longer affordable for locals and shifts from residential to tourism areas or even homelessness might result.
		Low level of tourism awareness A low level of tourism awareness among the local population leads to a lack of understanding of tourism. If the community has no experience with tourists, if there is a lack of qualification or religious and intercultural concerns by residents this may lead to intolerance towards tourists and social conflicts.
		Inappropriate visitor behaviour Too many visitors and undesired visitor behaviour as well as intercultural misunderstandings can lead to perception of overcrowding and affect the local population (and other visitors) negatively.
		Crime Crime, hassling or prostitution may affect the feeling of safety and the well-being of locals as well as of tourists in the destination.
		Tourism
Overuse of infrastructure	Infrastructure has to be dimensioned for peak-periods. High demand of utilities can lead to heavy wear and demolition. Especially with regard to traffic and transport there are many negative effects of overtourism such as congestions, lack of parking spaces or blocked parking places for coaches.	
Inadequate implementation of strategies	Where tourism strategies and masterplans are missing or inadequately applied and measures are not implemented, tourism is prevented from developing properly. Poor tourism management can even affect businesses with good performances and be a challenge for the whole destination.	

Some of the challenges are similar to the factors determining carrying capacity. While a limited carrying capacity can result in challenges, at the same time existing challenges can again have an impact on tourism carrying capacity.

Furthermore, trends like climate change and external factors like changes in travel behaviour and the emergence of new guest segments might indirectly represent challenges or enforce existing ones, so that as a consequence tourism destinations have to adapt their strategies and product development.

Many of the aspects mentioned above (e.g. low visitor satisfaction) may lead to a reduction of attractiveness of the destination and maybe to relief of overcrowding in the short term. This would, however, not be a desirable long-term development for the destination, so that successful solution approaches have to be sought.

4.2.4. Solutions

There was a broad range of solutions that have been discussed or implemented in the case reports in order to reduce conflicts related to overcrowding. There are approaches necessary on different levels in order to influence not only the tourism core system but also the local environment and framework condition.

Figure 8: Solutions

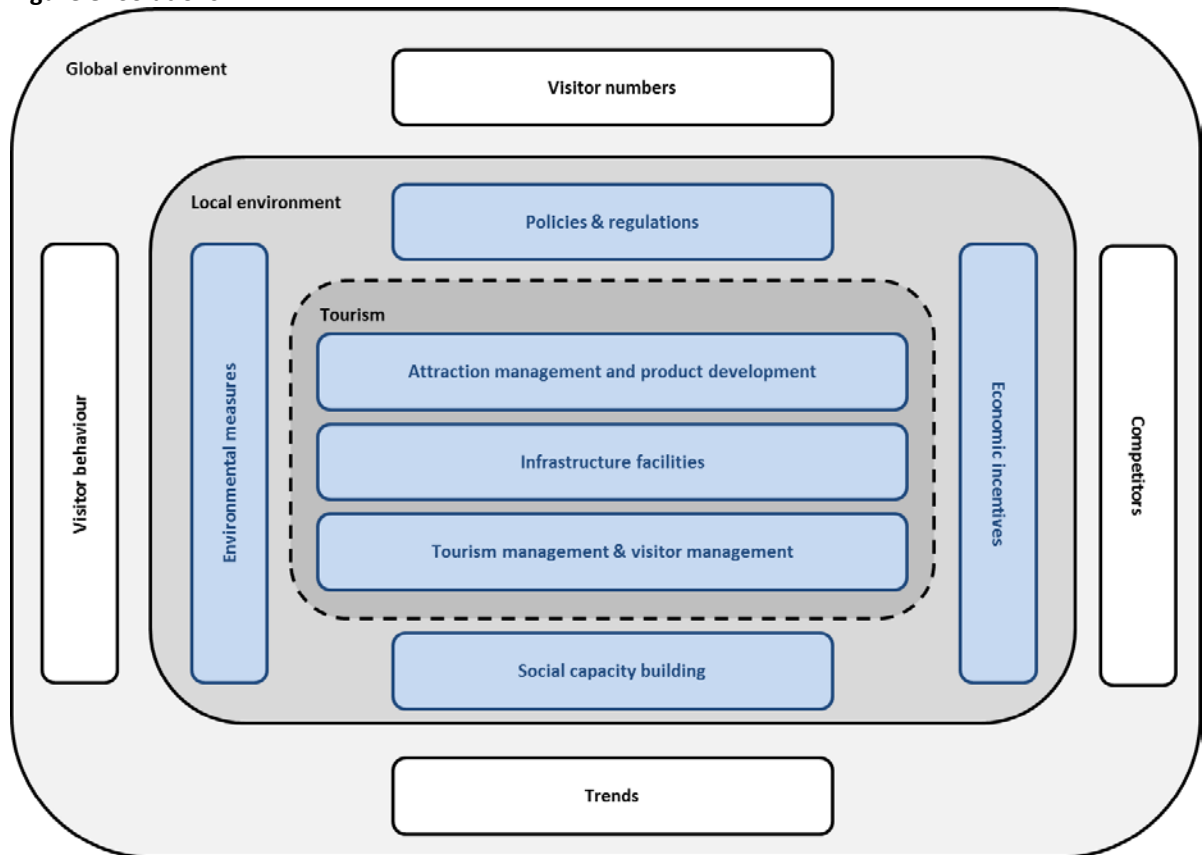


Table 9: Solutions

	Solutions	Description
Local environment	Policies & regulations	Good management and proper implementation of policies are crucial in responding to the challenges presented by overtourism. Restrictions (control amount of visitors, access restriction, closing of sites, protected areas, traffic regulations, speed limits), laws, guidelines, special permits or charges are instruments to regulate tourist flows and to deal with occurring challenges.
	Economic incentives	Funding of projects, financial assistant programs for start-ups and small scale projects, subsidies or market support are possible measures to achieve an equal distribution of benefits and a diversified economy.
	Social capacity building	<p>Community engagement To address the social needs of locals and to develop community capacity has to be a goal in order to reduce vulnerability of a system. New organisational structures, institutions and networks, the promotion of local entrepreneurship or the empowerment of women are important measures.</p> <p>Participation & involvement In order to develop community capacity participation programs, involvement of local institutions and businesses as well as the integration of civil society, the</p>

		public, NGOs and traditional leaders are important. Also coordination und information measures, participation opportunities for loyal guests, special permits for locals or to involve local volunteers are interesting measures mentioned.	
		Awareness raising & training Raising awareness among locals and tourists, the development of guidelines for tourists and tour operators, raising awareness among all the stakeholders as well as education and training of service providers help to strengthen resilience of a destination.	
	Environmental measures	Water and energy saving measures, use of renewable energy, waste management, visitor information, eco-taxes, certification and standards are important measures in the ecological dimension.	
Tourism	Attraction management and product development	From a tourism point of view it is crucial to diversify products and markets, to develop new attractions and events, to promote local products, materials and culture and to develop alternative forms of tourism (travelling with a mission, volunteering, Community Based Tourism). With regard to new traveller experiences there is also a lot of potential with respects to new approaches (e.g. co-creation) and new technologies (e.g. digital experiences like virtual reality or augmented reality).	
	Infrastructure facilities	Since infrastructure is often one of the main bottlenecks, the expansion and improvement of infrastructure facilities is a central strategy in order to increase carrying capacity and to be able to better absorb visitor flows.	
	Tourism management	Strategic planning Destination managers have an important role to play when it comes to strengthening resilience of a destination. Tourism masterplans, zoning plans or ecotourism strategies are only a few possible measures mentioned in the case reports.	
		Monitoring & evaluation In order to detect possible challenges early and to be able to respond pro-actively it is crucial to monitor and evaluate the situation constantly, to collect data, support research, to measure impacts and effectiveness of measures implemented and to report accurately about it.	
		Certifications & concepts Destinations with more sustainable businesses are probably better prepared and more resilient towards potentially negative impacts. It is therefore helpful to initiate and support eco-certifications, concepts and standards for sustainable development, guidelines and programs for responsible tourism development or code of conducts for visitors.	
	Visitor management	Marketing & de-marketing Marketing and de-marketing are ways of better managing and distributing tourists. Possible measures are: promoting new regions and attractions, marketing off-seasons, favouring responsible businesses in marketing, implementing pricing policies or even running an active de-marketing strategy.	
		Visitor guidance Visitor management concepts, signalling, guiding, visitor information (website, brochures, screens, signs, stickers etc.) or new ticketing processes are measures to better guide and distribute guests.	
		Temporal distribution Since many destination are confronted with high seasonality the extension of tourist season, seasonal distribution, strengthening the off-season by the development of new products, events and markets in the off-season are measures to strive for.	
			Geographical distribution Often the phenomenon of overtourism is very concentrated. Therefore, enlarging the site, opening up new areas, expanding tourism products or creating new ones might be promising measures to better distribute visitor flows.

There is no universal way to deal with challenges of overcrowding. In order to evaluate the success of measures it is important to monitor their problems as well as the impact of any management solutions implemented. In many destinations there was no data available or it was too early to consider the results of measures implemented.

Although many of these measures are well known to tourism professionals, there seems to be room at numerous destinations to implement them and monitor their effectiveness. The latter is not done to a great extent as some destinations tolerate the adverse impacts of overtourism due to the economic benefits they gain from it.

Some measures have an effect on different levels of the destination model. Marketing and visitor management for example can influence tourism flows to the destination as well as within the destination. Also monitoring is important not only on tourism but also on a local and national level. Moreover, participation is important not only within tourism stakeholders but also on a higher level including public authorities and representatives from other sectors and the civil society.

Consumer expectations are rapidly changing along with new modes of consumption. Combined with the use of new communication technologies, this creates many business opportunities for stakeholders at destinations to develop crowd management strategies. Alongside marketing and crowd management strategies, destinations need to consider different pricing scenarios to decentralise visitors at certain times thereby creating new opportunities for tourism businesses.

Innovation, quality and use of new technologies are cross-sectoral issues that cannot be located in the model. They can play an important role and should be considered within all the categories presented above. The same applies to sustainability. Sustainable tourism considers mostly of the approaches mentioned above. Furthermore, the integration of the local stakeholders and the consideration of local needs as well as the distribution of profits seem to be crucial for a balanced tourism development.

4.3. Limitations of the study

The comparative case-study design is a good choice for the investigation of complex variables and to formulate contingent generalisations and theories (Muno, 2009). Nevertheless, there are certain limitations to the method in general and to the methodological setting of this study in particular. The following points might have an influence on the results and have to be considered when interpreting the findings presented:

Selection of cases: The criteria for the selection of the cases left much leeway for choosing a case to be analysed. This resulted in very different cases and contexts with diverging framework conditions and challenges.

Evaluation teams: Different evaluation teams from universities all over the world have been involved in the study. They all had different cultural backgrounds and contributed different skills and expertise.

Data collection: Although the framework for the analysis was the same for all the case studies, there were some differences in the availability of data and the methodological approaches implemented. Beside the resource-intensive collection of data, in some cases additional interviews were conducted.

Level of detail & quality of information: The partners contributing to the study all had a wide scope of action with regards to collecting data. Since in many destinations data availability was poor and there is often no monitoring of the success of measures, depth and quality of the information differs a lot. Often, it seemed easier to address existing needs and how this should be done rather than analysing the success of actual measures implemented.

Simplified destination model: A simplified destination model is used to locate the aspects analysed and to highlight the areas affected and possible fields of action. Together with the reduction of complexity comes a reduction of the information content which leads to a simplification of the complex tourism system.

Synthesis: According to Goodrick (2014) good synthesis relies on good description and analysis. The personal background of the researchers might also play a role when interpreting data and generalising results. This can be critical when the conclusions are drawn by a research team that was not directly involved in the evaluation of all the case studies – as was the case here.

Despite these limiting factors the coordinated procedure, the common framework for the analysis, the opportunities for all the partners to give feedback to the results and the great expertise of all the researchers brought in compensated for possible shortcomings.

Furthermore, future research will contribute to improve the methodological framework for the analysis and to consolidate the results of this comparative case study.

4.4. Conclusions & recommendations

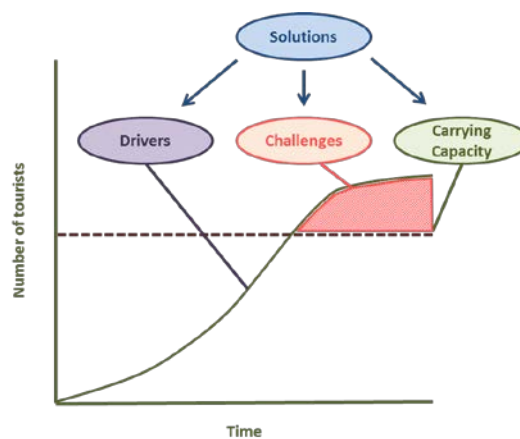
The study shows that every country seems to have so called tourism hot spots with many visitors coming to these sights or places during peak times. Sometimes certain effects of crowding are considered as a positive sign and make visitors conclude that the destination or attraction is worth visiting. Nevertheless, when carrying capacities of the tourism system are reached, too many visitors can lead to serious problems for the destination. This phenomenon seems to have increased in the last years and is sometimes referred to as “overtourism”.

The following chapter presents a summary of the main results (4.4.1), some general conclusions (4.4.2) as well as some recommendations for tourism industry (4.4.3).

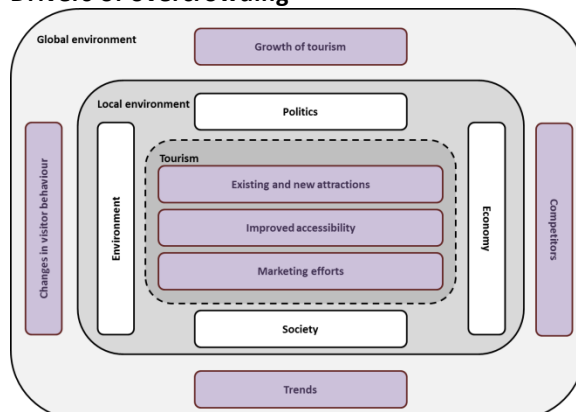
4.4.1. Summary of results

Even though the cases analysed are very different in many perspectives, it is still interesting that many conditions and challenges are similar in many places all over the world. The findings of this cross comparative case study can be summarised according to the following model.

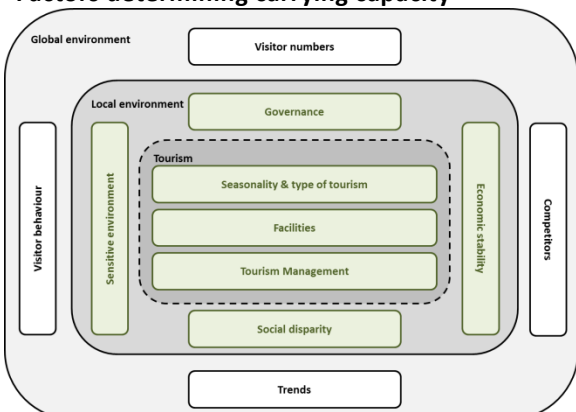
Figure 9: Components analysed



Drivers of overcrowding



Factors determining carrying capacity



Drivers of overcrowding

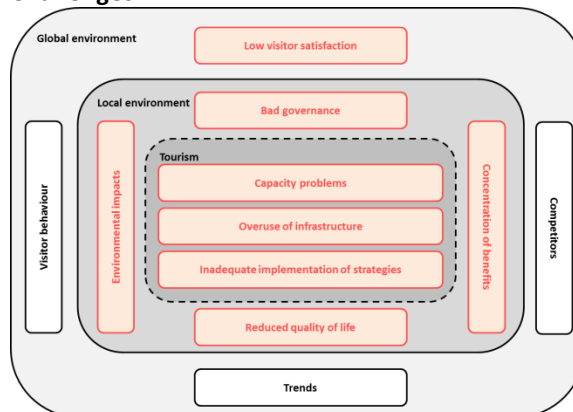
There are several possible drivers on the demand side such as general growth in tourism, changes in visitor behaviour, new competitors and global trends. But there are also some internal drivers such as new and existing tourism attractions, improved accessibility or marketing efforts.

Together with inadequate capacity of the tourism system this can lead to problems in several respects. General growth in tourism is probably the biggest driver in many destinations. Especially many emerging countries register high tourism growth rates. These destinations are well advised to adapt early to new conditions, since tourism destinations in an early development stage are especially vulnerable.

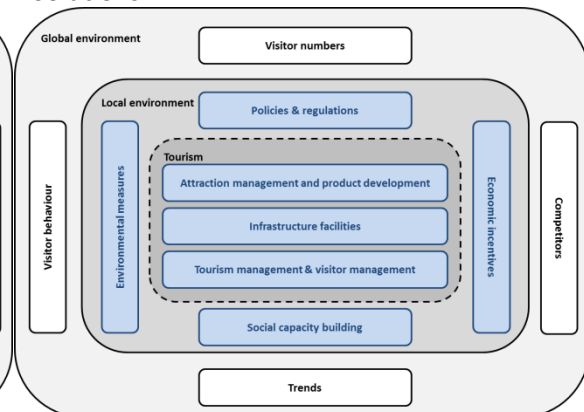
Factors determining carrying capacity

In analogy with biology, where food availability, water, ecological conditions and space are the minimum requirements for species to survive, tourism carrying capacity is influenced by many social, economic and environmental factors. Much depends on how the system is steered on a political as well as on destination level. Social disparity, economic stability and the sensitiveness of the environment also play a role with regard to the resilience of a tourism destination. Further, the vulnerability of a tourism system depends on seasonality and type of tourism encountered. Sometimes a lack of facilities or limited capacities leads to bottlenecks. And finally, the way tourism is managed has a direct impact on carrying capacity and the resilience to overtourism.

Challenges



Solutions



Challenges of overtourism

The challenges destinations under pressure have to face depend on the drivers and the volume of tourists but also on the factors determining carrying capacity. Depending on the specific situation, different challenges can occur, as seen in the case studies.

There are challenges caused by external factors such as changes in visitor behaviour or low visitor satisfaction that could lead to a sudden decline in tourism numbers. Also new competitors or general trends (e.g. climate change, demographic changes, etc.) can increase pressure on destinations.

Furthermore, a reduced quality of life due to overcrowding, poor working conditions, high prices or inappropriate visitor behaviour, environmental impacts (waste, noise, pollution, etc.), undesirable economic effects such as leakages or unilateral benefits as well as crime, corruption and safety issues may occur. In addition, aesthetic impairment, overuse of infrastructure, traffic problems or inadequate implementation of tourism strategies are often encountered challenges.

Solutions

Since a chain is as strong as its weakest link, it can be a single attraction that causes a bottleneck. Therefore it is important to look at these bottlenecks. Sometimes, it takes only little to increase capacity without negatively influencing visitor experiences. But measures can also be aimed at reducing visitor numbers, influencing the drivers or reacting to challenges that already exist. The

big variety of different challenges lead to a range of different measures implemented or discussed in the cases analysed.

While external factors and global developments can hardly be influenced, the policies and regulations on the political level have much impact on how tourism develops. Alongside environmental measures economic incentives and social capacity building are also important measures to manage tourism on a local level well and to improve the framework for tourism development.

Additional measures are the involvement of all the interest groups including non-touristic stakeholders, the expansion of infrastructure, and diversification of tourism products as well as visitor distribution on a temporal and geographical level. Finally, to promote sustainability certifications and to develop concepts and masterplans for sustainable tourism, regular monitoring of impacts, marketing and de-marketing measures are important approaches to cope with challenges due to overtourism.

4.4.2. General conclusions

Despite the differences in the framework conditions there are some general conclusions applicable to most tourism destinations.

- **It's a matter of perspective**

The case studies have shown that it is not always easy to distinguish between tourism induced and other effects. Factors determining tourism carrying capacity can at the same time result in challenges and have a self-reinforcing effect. Perception and assessment of challenges and of the urgency for regulating measures depends on the perspective and varies between stakeholders. Generally tourism professionals are more positive in assessing the situation than other stakeholders. The concern seems to differ according to the degree of involvement in tourism. Only through a broad participation of all stakeholders can it be guaranteed that all perspectives are considered.

- **There's no one-size-fits-all solution**

The cases analysed are very diverse in many respects and so the approaches for solutions have to be diverse too. To adapt to the specific situation in the best way and to find the most suitable solution approaches it is necessary to know the situation well and to constantly evaluate and monitor changes. This applies to the impacts of tourism as well as to measures realised, since often very little is known about the effectiveness of the implemented measures.

- **It's not only about tourism**

Many of the factors leading to a higher vulnerability of tourism cannot be managed by tourism destination management organisations or tourism businesses alone. The contextual setting (political, environmental, social and economic situation) is crucial for a proper tourism development. A constant dialogue between industry representatives and public authorities is needed to cope with the challenges of overtourism. Only when an overall strategic approach and tourism development are not considered to be the task of the industry only is there a chance of improving the overall framework.

- **Tourism is an opportunity for community development**

In the same way tourism is influenced by contextual setting, tourism itself has an important impact on the community in many respects. In order not to reinforce inequalities tourism planning has to be oriented on common good and not focus on single key players in tourism. It is only when many different stakeholders benefit from tourism and help establishing favourable conditions that

challenges from overtourism can effectively be managed and a sustainable tourism development can be achieved.

- **Courageous solutions are necessary**

The fear of overreacting and bad press sometimes seems to paralyse tourism authorities and make them neglect critical voices. More courageous solutions with regard to restrictions and to new innovative approaches as well as active de-marketing could not only improve the situation in the destination but also make a product more valuable and create new chances to attract new more interesting visitor segments.

4.4.3. Recommendations

There are many destinations that have rich cultural and natural resources and face similar challenges as some of the cases analysed. There are numerous aspects other destinations can learn from the experiences reported in the case studies. Some key insights can be generalised and seem to apply to all destinations.

- **Think outside the box**

Although tourism carrying capacity depends strongly on tourism attractions, supporting infrastructure and tourism management, there are also many factors that can only be influenced with an overall strategic approach. The contextual setting and the political situation have a central impact on tourism development opportunities. Tourism authorities have to think outside the box and maintain a continuous dialog with all stakeholders including decision makers and higher-ranking authorities.

- **Stakeholder participation is key**

The case study analyses showed that lack of tourism awareness is a problem in many places. The involvement of different tourism and non-tourism stakeholders allows the needs and perspectives of different interest groups in the planning and development of a destination to be considered. The participation of many stakeholders is crucial for a successful development and implementation of strategies, since local communities often both benefit and suffer from tourism. When people are involved and networks to maintain the dialog are established, tourism awareness can be raised and tolerance increased.

- **Diversification means resilience**

A central strategy to prevent negative effects of overcrowding is to reduce dependency on (one type of) tourism and on single attractions and to diversify the tourism product. Diversification not only allows to spread potential risks but also better distribution of visitors in the destination and defusing bottlenecks. Active marketing and de-marketing measures might enable to target new interesting guest segments and to reduce vulnerability of a destination.

- **It's all about responsibility**

The tourism industry has to show a high degree of responsibility not only towards tourism business but also towards environment, social community and future generations. All tourism stakeholders have to commit themselves and be pro-active and not wait for politics and state regulations. They should take responsibility and orient themselves towards sustainable development, for instance by implementing eco-certifications. On a destination level, tourism

masterplans can be considered good instruments to reach a common understanding and determine strategic goals for tourism development.

- **You can't manage what you don't measure**

Potential negative impacts have to be recognised at an early stage. Evaluation and monitoring are crucial to understand the current and future state of development and to assess current and potential future impacts of tourism on a destination. Also the effectiveness of measures implemented has to be observed on a regular basis in order to best adapt to challenges of overtourism.

5. References

- Byers, J. (2016). Is "overtourism" killing popular travel destinations? Retrieved from <http://jimbyerstravel.com/2016/12/16/is-overtourism-killing-popular-travel-destinations/>
- Clampet, J. (2017). Overtourism goes mainstream, destinations get smarter about solving it. In: skift Megatrends 2017.
- Coccosis, H., Mexa, A., Collovini, A., Parpairis, A., Konstandoglou, M. University of the Aegean. (2001). Defining, measuring and evaluating carrying capacity in European tourism destinations. Final Report. Athens
- Coccosis, H., Mexa, A., Collovini, A., Parpairis, A., Konstandoglou, M. University of the Aegean. (2002). Defining, measuring and evaluating carrying capacity in European tourism destinations. Material for a document. Athens
- Cooper, C., Fletcher, J., Gilbert, D., Shepherd, R., & Wanhill, S. (1998). *Tourism principles and practice* (2nd ed). Harlow: Longman.
- De Urioste-Stone, S. M., Scaccia, M. D., & Howe-Poteet, D. (2015). Exploring visitor perceptions of the influence of climate change on tourism at acadia national park, maine. *Journal of Outdoor Recreation and Tourism*, 11, 34--43. doi: 10.1016/j.jort.2015.07.001
- Eugenio-Martin, J. L. (2011). Assessing social carrying capacity of tourism destinations with random utility models. *Estudios de Economía Aplicada*, 29(3), 881-902.
- European Commission (2002), Defining, measuring and evaluating carrying capacity in European tourism destination. Material for a document, prepared by Coccosis H., Mexa A. and Collovini A, University of the Aegean, Department of environmental Studies, Laboratory of Environmental Planning, Greece.
- Goodrick, D. (2014). Comparative Case Studies, Methodological Briefs: Impact Evaluation 9, UNICEF Office of Research, Florence. https://www.unicef-irc.org/KM/IE/impact_9.php
- Goodwin, H. (2016). A new challenge "overtourism" in: Responsible Tourism Blog. Retrieved from <http://news.wtm.com/a-new-challenge-overtourism/>
- GSTC. Global Sustainable Tourism Council Criteria. Retrieved from <https://www.gstcouncil.org/en/gstc-criteria/sustainable-tourism-gstc-criteria.html>
- Huang, H.-C., Lin, T.-H., Lai, M.-C., & Lin, T.-L. (2014). Environmental consciousness and green customer behavior: An examination of motivation crowding effect. *International Journal of Hospitality Management*, 40, 139-149. doi: <http://dx.doi.org/10.1016/j.ijhm.2014.04.006>
- Jordan, P. (2016). Overtourism in European Cities: The Pressure is On. Retrieved from <http://www.toposophy.com/insights/insight/?bid=432>
- Kaarbo, J., Beasley, R. K. (1999). A Practical Guide to the Comparative Case Study Method in Political Psychology. In: *Political Psychology*, Vol. 20, No. 2 (Jun., 1999), pp. 369-391, <http://www.jstor.org/stable/3792081>
- Klaric, Z., Mangion, M., Satta, A., & Travis, A. (2003). Guide to good practice in tourism carrying capacity assessment.
- Lee, T. H., & Hsieh, H.-P. (2016). Indicators of sustainable tourism: A case study from a taiwan's wetland. *Ecological Indicators*, 67, 779-787. doi: <http://dx.doi.org/10.1016/j.ecolind.2016.03.023>
- Lim, L. Ch. (1998). Carrying Capacity Assessment of Pulau Payar Marine Park, Malaysia - Bay of Bengal Programme. (Appendix 1. Framework guidelines for assessing carrying capacity) <http://www.fao.org/docrep/x5626e/x5626e00.htm#Contents>
- López Bonilla, L. M., & López Bonilla, J. M. (2008). Measuring social carrying capacity: An exploratory study. *Tourismos: an International Multidisciplinary Journal of Tourism*, 3 (1), 116-134.

- Maggi, E.; Fredella, F. L. (2010). The carrying capacity of a tourist destination. The case of a coastal Italian city. 50 International Congress of European Regional Science Association (ERSA)
- Martin B.S. and Uysal M. (1990), An examination of the relationship between carrying capacity and the tourism lifecycle: Management and policy implications. *Journal of Environmental Management* 31, 327–33.
- Muno, W. (2009). Fallstudien und die vergleichende Methode. In Pickel, S., Pickel, G., Lauth, H.-J., Jahn D. (2009). *Methoden der vergleichenden Politik- und Sozialwissenschaft*. Wiesbaden.
- Navarro Jurado, E., Damian, I. M., & Fernández-Morales, A. (2013). Carrying capacity model applied in coastal destinations. *Annals of Tourism Research*, 43, 1-19.
doi: <http://dx.doi.org/10.1016/j.annals.2013.03.005>
- Neuts, B., & Nijkamp, P. (2012). Tourist crowding perception and acceptability in cities: An applied modelling study on bruges. *Annals of Tourism Research*, 39(4), 2133-2153.
doi: <http://dx.doi.org/10.1016/j.annals.2012.07.016>
- O'Reilly A.M. (1986), Tourism carrying capacity. Concepts and issues. *Tourism Management* 7(3), 254-258.
- Ragin, Ch. C., Berg-Schlosser, D., de Meur, G. (1996). *Political Methodology: Qualitative Methods*. In *A New Handbook of Political Science*, ed. Robert E. Goodin and Hans-Dieter Klingemann. Oxford: Oxford University Press pp. 749-768.
- Rahmani, A., Fakhraee, A., Karami, S., & Kamari, Z. (2015). A quantitative approach to estimating carrying capacity in determining the ecological capability of urban tourism areas (case study: Eram boulevard of hamadan city). *Asia Pacific Journal of Tourism Research*, 20(7), 807-821. doi: 10.1080/10941665.2014.934702
- Santana-Jiménez, Y., & Hernández, J. M. (2011). Estimating the effect of overcrowding on tourist attraction: The case of canary islands. *Tourism Management*, 32(2), 415-425.
doi: <http://dx.doi.org/10.1016/j.tourman.2010.03.013>
- Sartori, G. (1994): *Compare Why and How. Comparing, Miscomparing and the Comparative Method*. In Dogan, Mattei/Kazancigil, Ali (Hrsg.): 14-34.
- Saveriades, A. (2000). Establishing the social tourism carrying capacity for the tourist resorts of the east coast of the republic of cyprus. *Tourism Management*, 21(2), 147-156.
doi: [http://dx.doi.org/10.1016/S0261-5177\(99\)00044-8](http://dx.doi.org/10.1016/S0261-5177(99)00044-8)
- Shelby, B., & Heberlein, T. A. (1984). A conceptual framework for carrying capacity determination. *Leisure Sciences*, 6(4), 433-451. doi: 10.1080/01490408409513047
- Simón, F. J. G., Narangajavana, Y., & Marqués, D. P. (2004). Carrying capacity in the tourism industry: A case study of hengistbury head. *Tourism Management*, 25(2), 275-283.
doi: [http://dx.doi.org/10.1016/S0261-5177\(03\)00089-X](http://dx.doi.org/10.1016/S0261-5177(03)00089-X)
- Soy, S. K., (1997). The case study as a research method. Unpublished paper, University of Texas at Austin. <https://www.ischool.utexas.edu/~ssoy/usesusers/l391d1b.htm>
- Stake, R. E. (2000). Case studies. In Norman K. Denzin & Yvonna S. Lincoln (Eds.), *Handbook of qualitative research* (pp.435-453). Thousand Oaks: Sage.
- Stake, R. E., (1995). *The Art of Case Study Research*, Sage, Thousand Oaks.
- Stem, C. J., Lassoie, J. P., Lee, D. R., & Deshler, D. J. (2003). How 'eco' is ecotourism? A comparative case study of ecotourism in costa rica. *Journal of Sustainable Tourism*, 11(4), 322-347. doi: 10.1080/09669580308667210
- Sustainable Development Goals (SDG). 17 Goals to transform our world. Retrieved from <http://www.un.org/sustainabledevelopment/sustainable-development-goals/>
- UNEP/MAP/PAP (1997), *Guidelines for Carrying Capacity Assessment for Tourism in Mediterranean Coastal Areas*, Priority Action Programme, Regional Activity Centre, Split.
- UNWTO, (2016). *Tourism and the SDGs*. Retrieved from <http://icr.unwto.org/content/tourism-and-sdgs>

- Weber, Fabian & Taufer, Barbara (2016). Assessing the sustainability of tourism products - as simple as it gets. *International Journal of Sustainable Development and Planning*, 2016(Vol. 11, No. 3), 325-333. doi: 10.2495/SDP-V11-N3-325-333
- WTTC (WORLD TRAVEL & TOURISM COUNCIL) (2017). Travel & tourism. Economic impact 2017. Australia
- WTTC (WORLD TRAVEL & TOURISM COUNCIL) (2017). Travel & tourism. Economic impact 2017. Austria
- WTTC (WORLD TRAVEL & TOURISM COUNCIL) (2017). Travel & tourism. Economic impact 2017. Azerbaijan
- WTTC (WORLD TRAVEL & TOURISM COUNCIL) (2017). Travel & tourism. Economic impact 2017. Botswana
- WTTC (WORLD TRAVEL & TOURISM COUNCIL) (2017). Travel & tourism. Economic impact 2017. Canada
- WTTC (WORLD TRAVEL & TOURISM COUNCIL) (2017). Travel & tourism. Economic impact 2017. Germany
- WTTC (WORLD TRAVEL & TOURISM COUNCIL) (2017). Travel & tourism. Economic impact 2017. Indonesia
- WTTC (WORLD TRAVEL & TOURISM COUNCIL) (2017). Travel & tourism. Economic impact 2017. Macedonia
- WTTC (WORLD TRAVEL & TOURISM COUNCIL) (2017). Travel & tourism. Economic impact 2017. Mexico
- WTTC (WORLD TRAVEL & TOURISM COUNCIL) (2017). Travel & tourism. Economic impact 2017. South Africa
- WTTC (WORLD TRAVEL & TOURISM COUNCIL) (2017). Travel & tourism. Economic impact 2017. Switzerland
- Yin, R. K. (2014). *Case study research: Design and methods*. (5th ed.). Newbury Park, CA: Sage Publications.
- Yin, R. K. (1994). *Case study research: Design and methods*. (2nd ed.). Newbury Park, CA: Sage Publications.
- Yin, R. K. (1984). *Case study research: Design and methods* (1st ed.). Beverly Hills, CA: Sage Publications.
- Zehrer, A., & Raich, F. (2016). The impact of perceived crowding on customer satisfaction. *Journal of Hospitality and Tourism Management*, 29, 88-98.
doi: <http://dx.doi.org/10.1016/j.jhtm.2016.06.007>

6. Annex**6.1. Analysis framework**

General information
Title / Name of the site/destination
Region, country
Area size (km ²)
Geographic coordinates
Population and scope (if inhabited)
Short description of the case <i>(Please summarize the situation and the main challenges in a few sentences.)</i>
Pictures <i>(Add some pictures of the site in high resolution, preferably illustrating the challenges)</i>
Further remarks

Tourism development in the country of the case study
Short description of the importance of tourism in the country <i>(e.g. main tourist areas, type and volume of tourism)</i>
Arrivals, Overnight stays (year)
GDP
Tourism value added (% of GDP)
Employment in tourism (%)
Further remarks:

Tourism supply of the site
Short description of tourism on the site <i>(e.g. type of tourism, amenities, value added, jobs, environment (rural, urban, seaside etc.))</i>
Access (how to get there?)
Main attractions
Accommodation offer (number, type, quality)
Restaurants (number, type, quality)
Other tourism service providers <i>(museums, tour guides, souvenir shops etc.)</i>
Stage of the tourism life cycle <i>(exploration stage, growth/development stage, mature/consolidation stage, decline stage)</i>
Further indicators/ remarks

Tourism demand at the site
Short description of tourism demand <i>(e.g. type of tourists, main travel purpose, countries of origin)</i>

Volume of tourists (<i>day visits, frequencies, tourist arrivals, overnight stays</i>)
Development of tourist numbers (<i>last 10 years</i>)
Length of stay
Origin countries of tourists
Tourism image
Motives / target groups
Visitors' activities, activity patterns
Seasonality (peaks)
Visitors' opinions, attitude and behaviour, expectations and preferences, satisfaction (<i>if possible</i>)
Additional data (<i>e.g. customer satisfaction surveys, rating on tripadvisor</i>)
Further indicators/ remarks

Framework conditions <i>What are the framework conditions that might influence the impact and/or the management of the site?</i>
History and background (<i>Provide a short description of the history of the site</i>)
Political situation (<i>e.g. political issues, plans and programmes, policy priorities, receptiveness to change, assistance given to development</i>)
Legal issues (<i>e.g. laws and regulations that are of special importance for the specific case</i>)
Organisation (<i>e.g. organisation of tourism, responsibilities, stakeholders, involvement of stakeholders</i>)
Physical setting (<i>e.g. general infrastructure, facilities, utility services, transportation</i>)
Economic situation (<i>e.g. return on investment, number and types of jobs, local/foreign investment, tourism expenditure, sources of income, wage and salary levels, cost of living and cost of tourism services</i>)
Social/cultural situation (<i>e.g. indigenous environment, cultural attractions, festivals, celebrations, religious occasions, or other special events, crafts and food, involvement of local communities/residents, encounters between residents and tourists, local access to tourism facilities</i>)
Environmental situation (<i>e.g. potential for ecological damage, fragility of the environment, resilience of ecosystem/species, built environment size, need for conservation, wildlife resources, natural habitat, biodiversity, protection areas, topography, vegetation, land use pattern and mix, quality of air, water, soil, climate change</i>)
Bottlenecks and constraints (<i>e.g. access capacity, commercial capacity, construction capacity, service capacity, transport capacity, others</i>)
Other factors/ Further remarks

Challenges / Impacts <i>What are the most important challenges resulting from high tourism intensity on the site?</i>
Short description of main challenges (<i>What are the main challenges and problems in tourist destinations under pressure? How do the problems</i>

<i>manifest themselves? (Examples)</i>
Tourism intensity <i>(Chose relevant indicators, e.g. number of tourists per m², relation to permanent population, relation day tourists vs. overnight stays)</i>
Influencing factors <i>(How do framework conditions influence the impact of tourism? What are the preconditions that lead to an overcrowding of tourist attractions? What factors are affecting incidence and severity of visual or non-visual impacts the most?)</i>
Classification of carrying capacity affected <i>(physical carrying capacity, ecological carrying capacity, social carrying capacity, economic carrying capacity, psychological/ perceptual carrying capacity)</i>
Type of capacity affected <i>(e.g. peak capacity, daily capacity, weekly capacity, seasonal)</i>
Physical impacts <i>(e.g. impact on infrastructure, facilities, resources, built environment)</i>
Economic impacts <i>(e.g. economic benefit for the community, jobs for local residents, opportunities for local investments in businesses serving tourists, drain-off by outside investors)</i>
Social impacts on residents <i>(e.g. impacts on quality of life, traditions, on housing availability and rents, resident satisfaction, perceptions of crowding, complaints, working conditions, job skill training)</i>
Social impacts on tourists <i>(e.g. tourist satisfaction levels, visitor satisfaction, tourists perceptions of crowding, visitor complaints, undesirable visitor behaviour, littering)</i>
Environmental impacts <i>(e.g. landscape, soil, soil erosion, pollution, noise, loss of species, landslides, biodiversity, wildlife, vegetation, ground cover density, litter, waste, demand for land, water consumption, energy consumption)</i>
Development of impacts/ Changes over time
Summary: Beneficiaries and sufferers from tourism in the case study <i>(Who and how?)</i>
Other impacts/ Further remarks

Measures / Responses

What are the solutions that have been or are being discussed and/or implemented to reduce conflict between competing uses and to manage tourist masses? How can the challenges successfully be faced, managed and/or avoided?

General measures

Who (public, private, tourism organisation, etc.)? On which level (national, regional)? How?

Social measures

(e.g. participation of stakeholders, availability of facilities to residents, encourage local resident participation in tourism, integration and promotion of local culture, consideration of specific guest needs, working conditions for employees, ensure that the community profits from tourism development)

Economic measures

(e.g. strengthening of the regional economy, improve economic efficiency, new customer benefits, locally produced goods, considering the whole value chain)

Environmental measures

(e.g. conscious use of energy, environmentally friendly mobility, protection of nature, landscape and environmental resources, managing water demand and waste disposal)

Specific measures
Who (public, private, tourism organisation, etc.)? On which level (national, regional)? How?
Expand and improve the capacities and infrastructure <i>(e.g. capacities of utility services, transport facilities, new infrastructure, careful design of infrastructure, increase durability of resources)</i>
Disperse tourist attractions <i>(e.g. develop new attractions and tourist facilities, new trails, purpose-built tourist resort complexes, etc.)</i>
Restrictions <i>(e.g. define acceptable level of crowding, access restriction, activity restriction, establish quotas, speed limits, prohibitions, regulations)</i>
Information and communication <i>(e.g. provide adequate information, communication to guests and to residents)</i>
Optimize temporal distribution of tourists <i>(e.g. extend visit season, encourage wet or off-season use, seasonal closure, time separation)</i>
Optimize spatial distribution of tourists <i>(e.g. visitor management, signalisation, guest segmentation, technological solutions, valorisation of alternatives)</i>
Organisational Measures <i>(e.g. management plans, zoning, determine protection areas, certifications, measuring and monitoring tools)</i>
Reflection on measures implemented and/or discussed <i>(What are the experiences with the implemented approaches? Success, barriers etc.)</i>
New innovative solutions <i>(Technology, pricing, new offers etc.)</i>
Other measures/ Further remarks

Outlook
<i>How will tourism on the site develop in future? What are the expected changes?</i>
Important future trends
Prospects for tourism development
Expected changes?
Further remarks

Conclusion
<i>What are the central conclusions that can be drawn?</i>
General conclusions
What makes this case special?
How do the framework conditions affect impact and management?
Why are the measures implemented successful/ not successful?
What are the main barriers that hamper a sustainable development in the case?
Which measures seem to be the most promising? What are the most important findings for the industry/ for politics?
What are the findings/conclusions other destinations could learn from?
Further remarks

Further remarks/ additional data

References

Please make sure your citations and references comply with APA-style.

6.2. Technical Appendix

The following tables show some selected examples of citations from the case study reports that underpin the categories and subcategories analysed and presented.

Table 10: Citations (Factors determining carrying capacity)

	Factors	Subcategory	Examples (citations)
Local environment	Governance		- the biggest problem despite all adopted legislation in the field of urban planning is their implementation and monitoring, evaluation activities and reprocessing (Ohrid) - monopoly, absence of free market conditions, high level state regulations, bribes, corruption, etc. (Baku)
	Sensitive environment		- due to the fragility of the reef, the ecological carrying capacity is minimized through strict monitoring of use. (GBR) - 80% of the area of Juist for example is a nature reserve. (Juist)
	Social disparity	Social inequality	- there is an economic disparity between local people and cottagers, or tourists. (Muskoka) - most of them are Muslims who still see tourism as a business that is close to disobedience and sins so that its presence must be rejected. (Lombok)
		Diversity of stakeholders	- insufficiently coordination activities of stakeholders. (Ohrid) - lack of communication between residents, local businesses and government is apparent (Soweto)
	Economic stability	Dependency on tourism	- tourism is the main source of income for the island. Juist does not have any other economic sector (...). 92% of the employees are working (directly or indirectly) in the tourism sector (Juist) - highly dependent on cruise tourism (Cozumel)
		Concentration of capital	- international travel and tourism companies dominate the tourism industry in Botswana. Research and the media have suggested that this domination limit opportunities for local people to benefit economically from the presence of international tourists due to its enclave nature (Kasane) - those that tend to gain the most from tourism are the minority (Soweto)
		Existing pressures from other sectors	- during international events the city is being more noisy, the roads close, local transports' route change, roadside litters are more visible (Baku) - evident increase of number of private accommodation capacities (Ohrid)
Tourism	Seasonality & type of tourism		- most of the tourists travel to Juist during the summer time (...) too many tourists in a too short time (Juist) - the seasonality of the destination causes many local people to be unemployed in the off-season (Muskoka)
	Facilities		- lack of efficient public transport (Ohrid) - there are also no public water facilities (i.e. drinking water fountains) available should tourists require water. (Soweto)
	Tourism Management		- Lombok has no concept of integrated marketing that can be adopted by all tourism entrepreneurs. (Lombok) - what is lacking is a strategic approach to improve the situation by leading actors of tourism in Ohrid (Ohrid)

Table 11: Citations (Challenges of overcrowding)

	Challenges	Subcategory	Examples (citations)	
Global	Low visitor satisfaction		<ul style="list-style-type: none"> - most complaints are about transport, public services and noise in the night particularly in the old part of the city. (Ohrid) - uncontrolled growth of businesses in Kasane lead to poor service delivery (Kasane) 	
Local environment	Bad governance		<ul style="list-style-type: none"> - tough state control over any business as well as tourism sector creates additional barriers (Baku) - lack of funding opportunities or support from government (Soweto) 	
	Environmental impacts		<ul style="list-style-type: none"> - Kasane is undergoing growing incidences of land degradation due to occurrences of poor waste management, water resource reduction, habitat destruction (Kasane) - one of the main challenges is the capacity of the island to provide fresh water (Cozumel) 	
	Concentration of benefits		<ul style="list-style-type: none"> - all of the hotels and restaurants in Gili Air are managed by Paradiso hotel management (Lombok) - international travel and tourism companies dominate the tourism industry in Botswana. (Kasane) 	
	Reduced quality of life	Insufficient involvement		<ul style="list-style-type: none"> - residents seem to have very little say on what is developed around the area (Soweto) - cultural boundaries (Lombok)
		Poor working conditions		<ul style="list-style-type: none"> - many young people leave the island (Juist) - lack of high paying jobs in the tourism industry (Muskoka)
		High prices		<ul style="list-style-type: none"> - transportation, hotels, restaurants are expensive and not available for middle class (Baku) - Muskoka has an affordable housing crisis (Muskoka)
		Low level of tourism awareness		<ul style="list-style-type: none"> - certain groups still considers tourism is negative (Lombok) - lack of displaying appropriate ethics by some employees (Kasane)
Inappropriate visitor behaviour			<ul style="list-style-type: none"> - some of the guests mount on the toilet seats or throw the toilet paper in the trash instead of flushing it (Rigi) - Arabian tourists' behaviour, the noise crowd, littering, soiling swimming pools are widely discussed in the social media. (Baku) 	
Crime		<ul style="list-style-type: none"> - crime (theft, extortion, and robbery) (Lombok) - they tend to hassle tourists in attempts to sell their goods. (Soweto) 		
Tourism	Capacity problems		<ul style="list-style-type: none"> - some historical buildings, private houses demolished for creation new hotels or entertainment places. (Baku) - (illegal) spread of buildings (Lombok) 	
	Overuse of infrastructure		<ul style="list-style-type: none"> - Muskoka's septic system is reaching capacity (Muskoka) - these pressures lead to overuse of limited municipal infrastructure such as sanitation. (Kasane) 	

	Inadequate implementation of strategies		<ul style="list-style-type: none"> - insufficient staff in the institutions (Ohrid) - lack of effective manpower, skills, and motivation from stakeholders to enable structures that conserve the natural resources (Kasane)
--	---	--	--

Table 12: Citations (Solutions)

	Solutions	Subcategory	Examples (citations)	
Local environment	Policies & regulations		<ul style="list-style-type: none"> - only a certain number of permits granted (GBR) - Mount Rinjani, the mountain usually closed for three months (Lombok) - Der Kalfamer: in summer, entering this area is only permitted with a guide of the National Park (Juist) 	
	Economic incentives		<ul style="list-style-type: none"> - Government aided programs that focus on enabling youths kick start variety of business in Botswana, including Kasane. (Kasane) - financing small scale tourism projects (Ohrid) 	
	Social capacity building	Community engagement		<ul style="list-style-type: none"> - the Tourism Cluster EDEN is an independent, non-political and non-profit association, which brings together representatives from the private, public and civil sectors from Southwest Macedonia with an idea of a successful development and management of sustainable tourism. (Ohrid) - local volunteers called oRIGInals (Rigi)
		Participation & involvement		<ul style="list-style-type: none"> - Guest-parliament takes place annually. The guest-Parliament has a consultative role and can make suggestions (Juist) - by involving the public/ crowd as well as independent experts into the development of the tourism strategy (Vienna)
		Awareness raising & training		<ul style="list-style-type: none"> - provide community empowerment in education tourism knowledge (Lombok) - Project Aware have guidelines available to reef tourists and GBRMPA have guidelines in place for tour operators to the GBR for sustainable business. (GBR)
Environmental measures		<ul style="list-style-type: none"> - the main target of Juist is to become a climate-neutral island by 2030 therefore ("Climate island Juist") (Juist) - water utilities department places stickers in water tap which says, "Conserve water drop" (Kasane) 		
Tourism	Attraction management and product development		<ul style="list-style-type: none"> - packaging of weekend or longer events as well as product development workshops/ more long term stays (Muskoka) - RigiPlus AG is thinking about starting a co-creation process with tourism service providers, local residents and guests to develop new products. They also plan to implement a platform where people can place their feedbacks, ideas (Rigi) 	
	Infrastructure facilities		<ul style="list-style-type: none"> - weatherproof catering facilities, temporary picnic zone, number of waste bins etc. (Rigi) - improve infrastructure provision in the township (Soweto) 	
	Tourism management	Strategic planning	<ul style="list-style-type: none"> - Botswana National Ecotourism Strategy (Kasane) - the GBR Marine Park Zoning plan 2003 provides for a range of ecologically sustainable recreational, commercial and research opportunities and for the continuation of traditional activities. (GBR) 	

		Monitoring & evaluation	- evaluation and monitoring becomes crucial (Soweto) - current measures are successful due to strict monitoring and evaluation of tourism practices. (GBR)
		Certifications & concepts	- having all operators become eco-certified will create consistency amongst all operators' use of the GBR (GBR) - grading and Eco-certification of tourism establishments is carried out by a committee (Kasane)
		Marketing & de-marketing	- with more development and marketing, these land-based and cultural attractions could continue to grow and become the new focus of the region. (GBR) - to make the destination a year-round hot-spot, through marketing outdoor winter experiences, (Muskoka)
	Visitor management	Visitor guidance	- signs in foreign languages have been placed. Signs are posted that aim at educating foreigners about Western toilet etiquette (Rigi) - the cashier will slow down the ticketing process (Vienna)
		Temporal distribution	- promotion of Macedonia on Turkish market resulted with increased number of tourists from Turkey in Ohrid in off season (Ohrid) - annual passes valid only from Monday to Friday (Vienna)
		Geographical distribution	- other unaffected reefs, may be opened up for tourism purposes in the future. (GBR) - opening of the second half of the Schönbrunn Park. (Vienna)