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Short Version

Tourism destinations under pressure

Challenges and innovative solutions

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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. 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. 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).

Each participating university contributed with a case from their country and submitted a report of the analysis. The following eleven destinations 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).

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 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 were summarised and categorized into drivers of overcrowding, factors determining carrying capacity, challenges of overtourism and solutions. Based on these categories and reflecting the differences and similarities in the cases analysed, some general conclusions were drawn:

Cases

In order to analyse the phenomenon of overtourism eleven university partners analysed a case from their country. The cases selected for analysis are very diverse and most of them do not represent classical overtourism destinations, but still are confronted with corresponding challenges. The map shows the different cases analysed. All the case study descriptions are to be found in the full version of the report.

World map with cases analysed
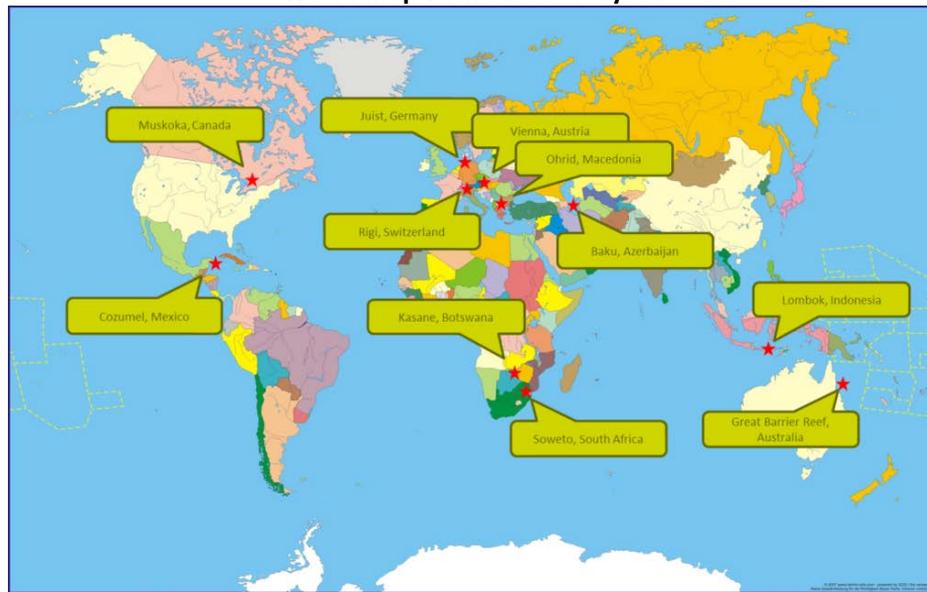
Baku, Azerbaijan

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. Together with the impacts of tourism, 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.

Results

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. 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.

Different aspects of overtourism
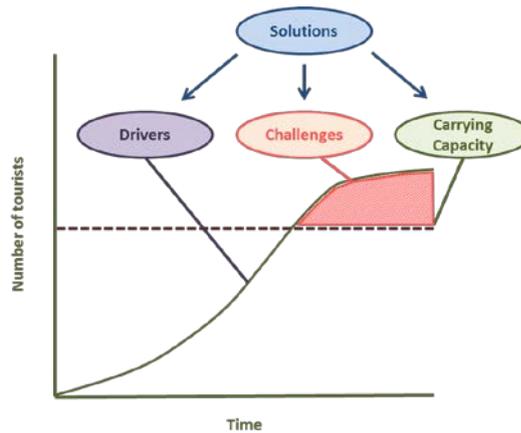
Even though the cases analysed were very different, the analysis allowed deriving interesting patterns and factors that could be generalised. The findings of this cross comparative case study can be summarised according to the following simplified model of a tourism destination.
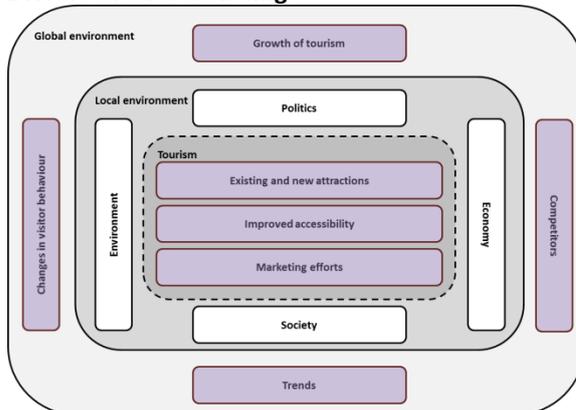
Drivers of overcrowding   **Factors determining carrying capacity**
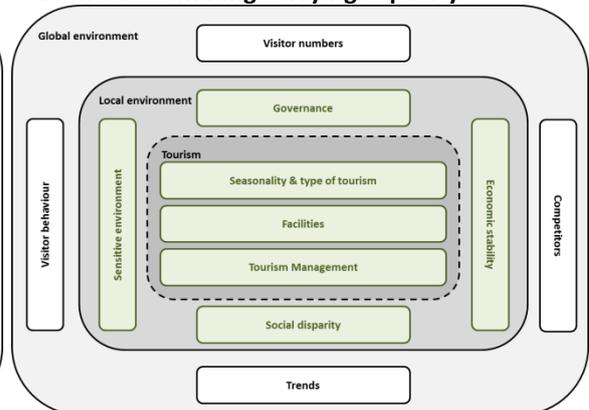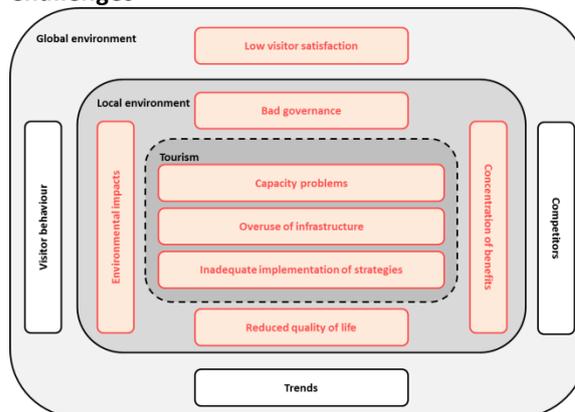

Drivers of overcrowding

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.
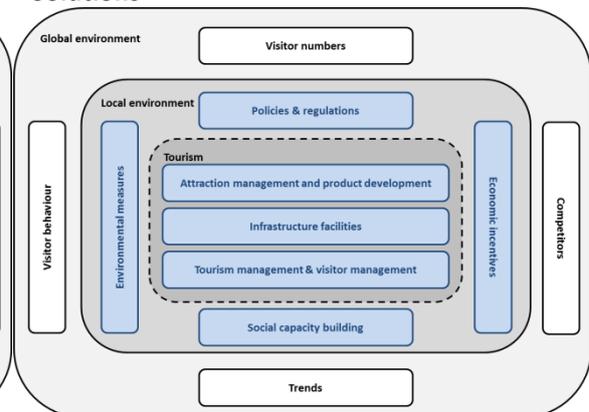
Factors determining carrying capacity

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	Solutions
Global environment	**Global environment**
Low visitor satisfaction	Visitor numbers
Local environment	**Local environment**
Bad governance	Policies & regulations
Tourism	**Tourism**
Capacity problems	Attraction management and product development
Overuse of infrastructure	Infrastructure facilities
Inadequate implementation of strategies	Tourism management & visitor management
Reduced quality of life	Social capacity building
Trends	Trends

(Left diagram side labels: Visitor behaviour, Environmental impacts, Concentration of benefits, Competitors)
(Right diagram side labels: Visitor behaviour, Environmental measures, Economic incentives, Competitors)

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. 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. 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.

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.

Recommendations

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.