‘Overtourism’? Understanding and Managing Urban Tourism Growth beyond Perceptions

Workshop on the occasion of the UNWTO Regional Commission for Europe, May 2019
‘Overtourism’?
Framing the issue

- 544,000 Google entries + headlines worldwide
- 54% population lives in cities (2015)
- 1.8 billion international tourists by 2030
- + mobility, middle class, affordable transport and accommodation
‘Overtourism’?

Rebuffing myths

1. Tourism congestion is not only about the number of visitors but about the capacity to manage them

2. Tourism congestion is commonly a localised issue rather than a citywide one

3. Tourism congestion is not a tourism-only problem

4. Technology is important but alone it will not solve the issue of tourism congestion
‘Overtourism’?

Key conclusions

• Urban tourism makes an important contribution to the socio-economic development of cities and should contribute to create better cities for all.

• ‘Overtourism’ = buzzword for tourism congestion management and carrying capacity.

• To monitor & manage congestion, carrying capacity and ‘the limits of acceptable change’ we need to consider quantitative & qualitative indicators.
‘Overtourism’?

Key conclusions

• Urban tourism needs to be part of the wider urban agenda

• Tourism congestion needs to be addressed through cooperation: tourism & non-tourism administrations + private sector + communities + tourists

• Measures cannot focus only on tourist numbers & behaviour – they should also focus on local stakeholders.

• Understanding residents’ attitude towards tourism & engaging communities is central.
Global survey on the perception of residents towards city tourism: impact and measures

Executive Summary
Methodology

Online survey. December’s IPSOS Global @dvisor wave. Fieldwork from 21st December 2018 to 14th January 2019.

Sample

In each country 1,000/500 individuals representative of global population.

Statistically significance differences noted in the survey are calculated with a confidence level of 95%.

Participants

Adults aged 18-64 in the US and Canada, aged 16-64 in all other countries.

15 Countries

<table>
<thead>
<tr>
<th>Country</th>
<th>Sample</th>
<th>Country</th>
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</thead>
<tbody>
<tr>
<td>Argentina</td>
<td>500</td>
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<td>1000</td>
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<td>Australia</td>
<td>1000</td>
<td>Poland</td>
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<td>Belgium</td>
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<td>Italy</td>
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</table>
Q1. Do you think you live in a city with a high number of tourists?

47% of respondents think ‘they reside in cities with a high number of tourists’.

Yes 47%
Q2. How does tourism impact your city?

On the positive side, 52% of respondents think tourism has a big or moderate impact in generating wealth and income. On the other spectrum, 46% of respondents think it ‘creates overcrowding’.
Q4. What measures do you think are more adequate to deal with the increase in the number of tourists to your city?

‘Improve infrastructures and facilities’ (72%) and ‘create experiences and attractions that benefit both residents and visitors’ (71%) – the most important measures to address the growing number of visitors.
Q4. What measures do you think are more adequate to deal with the increase in the number of tourists to your city? (by country)

<table>
<thead>
<tr>
<th>Measure</th>
<th>Argentina</th>
<th>Australia</th>
<th>Belgium</th>
<th>Canada</th>
<th>France</th>
<th>Germany</th>
<th>Hungary</th>
<th>Italy</th>
<th>Japan</th>
<th>Poland</th>
<th>Rep. of Korea</th>
<th>Spain</th>
<th>Sweden</th>
<th>United Kingdom</th>
<th>USA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improve infrastructures and facilities</td>
<td>79%</td>
<td>75%</td>
<td>64%</td>
<td>68%</td>
<td>66%</td>
<td>66%</td>
<td>69%</td>
<td>89%</td>
<td>70%</td>
<td>74%</td>
<td>68%</td>
<td>69%</td>
<td>73%</td>
<td>61%</td>
<td>67%</td>
</tr>
<tr>
<td>Create experiences and attractions that benefit residents as well as visitors</td>
<td>75%</td>
<td>70%</td>
<td>63%</td>
<td>82%</td>
<td>65%</td>
<td>62%</td>
<td>82%</td>
<td>71%</td>
<td>68%</td>
<td>72%</td>
<td>74%</td>
<td>68%</td>
<td>2%</td>
<td>65%</td>
<td>71%</td>
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<tr>
<td>Ensure local communities benefit from tourism</td>
<td>71%</td>
<td>77%</td>
<td>61%</td>
<td>75%</td>
<td>66%</td>
<td>50%</td>
<td>57%</td>
<td>69%</td>
<td>66%</td>
<td>57%</td>
<td>66%</td>
<td>55%</td>
<td>67%</td>
<td>74%</td>
<td>71%</td>
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<tr>
<td>Communicate with and engage local communities</td>
<td>33%</td>
<td>52%</td>
<td>48%</td>
<td>50%</td>
<td>55%</td>
<td>36%</td>
<td>67%</td>
<td>60%</td>
<td>45%</td>
<td>42%</td>
<td>61%</td>
<td>48%</td>
<td>48%</td>
<td>49%</td>
<td>53%</td>
</tr>
<tr>
<td>Communicate with and engage visitors</td>
<td>46%</td>
<td>47%</td>
<td>38%</td>
<td>47%</td>
<td>47%</td>
<td>50%</td>
<td>52%</td>
<td>60%</td>
<td>55%</td>
<td>36%</td>
<td>55%</td>
<td>37%</td>
<td>55%</td>
<td>47%</td>
<td>49%</td>
</tr>
<tr>
<td>Promote tourism to other type of visitors</td>
<td>54%</td>
<td>33%</td>
<td>46%</td>
<td>42%</td>
<td>49%</td>
<td>41%</td>
<td>50%</td>
<td>48%</td>
<td>38%</td>
<td>43%</td>
<td>46%</td>
<td>47%</td>
<td>53%</td>
<td>42%</td>
<td>41%</td>
</tr>
<tr>
<td>Promote dispersal visitors all year long</td>
<td>47%</td>
<td>27%</td>
<td>47%</td>
<td>40%</td>
<td>35%</td>
<td>48%</td>
<td>34%</td>
<td>48%</td>
<td>70%</td>
<td>24%</td>
<td>43%</td>
<td>33%</td>
<td>34%</td>
<td>27%</td>
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</tr>
<tr>
<td>Set a System to measure and monitor tourism</td>
<td>27%</td>
<td>43%</td>
<td>44%</td>
<td>37%</td>
<td>42%</td>
<td>27%</td>
<td>29%</td>
<td>29%</td>
<td>22%</td>
<td>32%</td>
<td>57%</td>
<td>36%</td>
<td>28%</td>
<td>38%</td>
<td>42%</td>
</tr>
<tr>
<td>Promote the dispersal of visitors within the city and beyond</td>
<td>41%</td>
<td>31%</td>
<td>36%</td>
<td>32%</td>
<td>32%</td>
<td>40%</td>
<td>28%</td>
<td>30%</td>
<td>48%</td>
<td>46%</td>
<td>20%</td>
<td>42%</td>
<td>42%</td>
<td>31%</td>
<td>33%</td>
</tr>
<tr>
<td>Limit the number of tourism establishments</td>
<td>11%</td>
<td>18%</td>
<td>22%</td>
<td>10%</td>
<td>17%</td>
<td>34%</td>
<td>4%</td>
<td>11%</td>
<td>18%</td>
<td>15%</td>
<td>13%</td>
<td>20%</td>
<td>23%</td>
<td>18%</td>
<td>17%</td>
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<tr>
<td>Limit the number of visitors</td>
<td>9%</td>
<td>18%</td>
<td>19%</td>
<td>13%</td>
<td>14%</td>
<td>29%</td>
<td>3%</td>
<td>4%</td>
<td>11%</td>
<td>10%</td>
<td>5%</td>
<td>18%</td>
<td>13%</td>
<td>17%</td>
<td>16%</td>
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<tr>
<td>Stop tourism promotion</td>
<td>6%</td>
<td>6%</td>
<td>13%</td>
<td>5%</td>
<td>11%</td>
<td>20%</td>
<td>2%</td>
<td>5%</td>
<td>10%</td>
<td>9%</td>
<td>9%</td>
<td>13%</td>
<td>12%</td>
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</tbody>
</table>
Residents’ perspectives

8 cities – online questionnaire - 3153 respondents

Residents’
• Direct perceptions (living environment)
• Indirect perceptions (quality of life)
• Stakeholder perceptions
## Most positive and negative perceptions

<table>
<thead>
<tr>
<th>Positive (+)</th>
<th>Negative (-)</th>
</tr>
</thead>
<tbody>
<tr>
<td>greater international touch</td>
<td>increase of price level/affordability of rental houses</td>
</tr>
<tr>
<td>more events</td>
<td>increase of price level/affordability of private houses</td>
</tr>
<tr>
<td>more positive image</td>
<td>increase of price level/affordability of taxis</td>
</tr>
<tr>
<td>protection of historical parts of the city</td>
<td>increase of price level/affordability of shops</td>
</tr>
<tr>
<td>restoration of traditional architecture</td>
<td>increase of price level/affordability of restaurants and cafés</td>
</tr>
<tr>
<td>more seasonal jobs in tourism</td>
<td>increase of price level/affordability of public transportation</td>
</tr>
<tr>
<td>more cultural supply (museums, cultural activities, etc.)</td>
<td>increase of price level/affordability of leisure facilities</td>
</tr>
<tr>
<td>greater numbers of tourist accommodations</td>
<td>less housing for residents</td>
</tr>
<tr>
<td>more opportunities to share knowledge/culture with visitors</td>
<td>overcrowding of public transportation</td>
</tr>
<tr>
<td>more leisure facilities</td>
<td>pollution, littering, noise</td>
</tr>
<tr>
<td>increased liveliness</td>
<td>overcrowding/obstruction of streets/sidewalks</td>
</tr>
</tbody>
</table>

**All are direct perceptions:** Spatial, Economic, Social
Attitude towards further tourism growth

- 30%: I feel that there should be no limitations to the growth of visitor numbers
- 24-26%: I feel that there is still room for visitor numbers to grow further
- I feel the growth rate of visitor numbers should be slowed down
- I feel all tourism development should be stopped
- I feel all tourism promotion and marketing should be stopped
- I feel that there is still room for visitor numbers to grow further, but not in the peak season
- I feel that there is still room for visitor numbers to grow further, but not in holiday flats
- Other, please specify
Attitude towards visitor mngt strategies

Top 5

- Improve the infrastructure and facilities (e.g. build more roads, parking) in the city
- Communicate with and involve local residents and local businesses in tourism planning
- Communicate better with visitors on how to behave in the city
- Distribute visitors better over the year
- Create city experiences where residents and visitors can meet and integrate
Visitor management strategies

1. Promote the dispersal of visitors within the city and beyond
2. Promote time-based dispersal of visitors
3. Stimulate new visitor itineraries and attractions
4. Review and adapt regulation
5. Enhance visitors’ segmentation
Visitor management strategies

6. Ensure local communities benefit from tourism
7. Create city experiences that benefit both residents and visitors
8. Improve city infrastructure and facilities
9. Communicate with and engage local stakeholders
10. Communicate with and engage visitors
11. Set monitoring and response measures
'Overtourism'? – Understanding and Managing Urban Tourism Growth beyond Perceptions – Volume 2: Case Studies
### Case studies (examples of measures)

<table>
<thead>
<tr>
<th>Strategy</th>
<th>Objectives</th>
<th>Measures implemented</th>
<th>Stakeholders involved</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monitor and Measure</td>
<td>Use big data to forecast tourism flows and promote dispersal</td>
<td>- Big data platform to estimate demand and flows before peak season</td>
<td>Hangzhou Tourism Committee</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Release of forecast regarding number of visitors + agglomeration areas + peak times</td>
<td>Hangzhou Tourism Economy Laboratory</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Inform tourist online and by SMS if they are already in town</td>
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<tr>
<td>Promote time dispersal</td>
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</tr>
</tbody>
</table>

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Thank you!

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