

Overtourism update - Lessons learnt from Europe

Overtourism and its related effects continues to rattle the travel and tourism industry, causing uncertainties and potential tensions amongst destination stakeholders, visitors, and residents. While most of the U.S. have been relatively spared from the “Barcelona syndrome” until now, it must however face anticipated risks from overtourism and associated sustainability issues.

Based on a first of its kind global Resident Survey (*Resident Sentiment Index*), the UNWTO-endorsed Research Agency TCI Research has scrutinized sentiment on tourism development among 7000+ resident across TOP European touristy destinations -a region that has been home of a growing tourismophobia sentiment. Between media noise and reality, TCI Research dispels seven stereotypes commonly heard about the overtourism impact and its roots.

Tourismophobia is NOT a dominant opinion among citizens

In overall, tourism growth acceptance remains a mainstream opinion with 8 in 10 residents stating their city should continue promoting for attracting more visitors in the future; Tourism rejection touches barely 1 in 20 residents in average (but can exceed 10% in cities under highest pressure). Moreover, about two third of citizens say they wish to take part in the tourism development in their town.

Overtourism resentment is NOT concentrated in highly touristy areas

30% of tourismophobiacs DO NOT LIVE in busy touristy places. Wherever they live, citizens can have their say even without having the pressure from tourism at their doorstep. Overtourism has become as much a societal citizen concern as "just" a place management and tourism issue.

Private rental speculation is NOT the number one area of complain

Crowding-related mobility and environmental issues (noise, traffic, cleanliness...) rank on top of nuisances caused by tourism, way ahead of city center depopulation or housing prices increase. The wide diversity and magnitude of problems fueling tourism rejection in each city calls for city-specific appropriate measures.

Overtourism is NOT only a Europe-centric reputation issue

While European destinations like Barcelona, Palma, Amsterdam and Venice dominates in the ranking of destinations mostly associated to overtourism issues in social web conversations, the phenomenon is also impacting destinations' reputation in other parts of the world (particularly in Asia) and tends to disseminate from local to country level brand e-reputation. Social web sentiment analysis also reveals that the U.S. see the overtourism debate growing steadily.

Overtourism is LESS a spatial dispersion management problem than a temporal one

Nearly half of tourism detractors in Europe consider that tourism causes problems in their city only at certain times of the year only. Overtourism is as much a "spatial" as a "temporal" problem. While addressing or mapping risks of overtourism issues, destinations should make sure that you develop agile solutions that are activated or scalable at certain periods of the year, instead of taking a sledgehammer to crack a nut...

Visitors understand residents' protest while anticipating overtourism issues when planning

International travellers show both resilience and understanding towards the overtourism phenomenon. A large majority agrees to say that residents' protests against "overtourism" in their city are legitimate, and 2 in 3 state they tend to choose less crowded destinations when travelling. Also, pre-booking tickets or skip-the-line tickets for popular attractions as well as checking live waiting time online have become the new normal among smart travellers adopting tactical strategies for limiting the negative impact on their experience. This partly explains why cities suffering from overtourism issues still record high levels of visitor satisfaction in general (*source: TRAVELSAT Competitive Index*).

In conclusion: fully aware that locals' hospitality is the number one driver influencing visitor experience and destination reputation, DMOs and city policy makers in Europe take actions to better include residents in their development strategies for keeping tourism growth sustainable. One transverse challenge found in each city is to map and address concerns expressed by a minority of tourism detractors who talk much louder than the vast silent majority of supporters. On a positive note, the survey confirms that the problem is usually not growth itself (or a rejection of the tourism concept as such), but the way tourism growth is managed as integral part of the city planning.

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About TCI Research – www.tci-research.com

TCI Research is an independent UNWTO-Awarded market intelligence agency leading in international destinations and travel brands competitive analysis. It provides 100+ public and private players of the visitor economy with innovative research solutions and insights taking the pulse of visitor experience, destination reputation and resident sentiment, combining conventional surveys with controlled Big Data analysis covering the whole visitor journey.

Methodological note: *The Resident Sentiment Index is a global standard tracking 30+ essential KPIs that help destinations monitor and anticipate their residents' mood, perceptions and acceptance towards local tourism development.*