



evaneos

Over-tourism index

September 2024

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OVER-TOURISM INDEX SYNTHESIS

Our index has been thought of as the starting point to a factual and solution-oriented approach to over-tourism realities across the globe

Over-tourism Index objectives

Over-tourism: Definition & impacts



« Impact of tourism on a destination, or parts thereof, that excessively influences perceived **quality of life of citizens** and/or **quality of visitor experiences** in a negative way”

Main impacts of excessive affluence:

- Damaged **ecosystems**: fragile environment, wildlife, etc.
- Deteriorated **quality of life for locals**: crowds, soaring prices, tensions on accommodation, etc.
- Depreciated **visitor experience**



Index objectives



GO BEYOND PERCEPTIONS

Adopt a **data-driven approach** to assess the phenomena, usually apprehended through international travelers’ perception and targeted outstanding examples



DE-AVERAGE OVER-TOURISM

IDENTIFY the **various types of over-tourism**, that must be apprehended differently as the phenomena covers **highly diverging realities across geographies**



BRING SOLUTIONS TO THE TABLE

Make the sector aware of its responsibilities to come up with and implement **destination-centric solutions** to overcome over-tourism; and contribute to **trigger the reflection**

Limits and (potential) next steps

• Current index

- Current index is **calculated at country-level**; while over-tourism should also be **apprehended at a more granular level**
- Calculation methodology (see detailed page) might under- or overstate over-tourism in **countries with very specific points of interest** (depending on country size and population)

• Next steps

- Extend the index to a more granular level – which would require a new methodology **proper definition of comparable destinations** (notably catchment area size): regions, points of interests, cities, ...

Our index is computed based on 4 criteria, overall assessing countries' international tourism density (in space and time) and maturity on sustainability

Methodology overview – Scope and criteria

Scope

70 destinations covered

- **Top 100** countries in 2019 international tourist arrivals
- **Excluding specific cases** (all out of Top 40), e.g.
 - Geopolitical conflicts
 - Missing / unreliable data
 - Difficult to isolate international tourists flow (vs. transit or int. workers)
- **Isolating specific destinations** (namely Bali, Hawaii), due to:
 - Highly diverging over-tourism exposure vs. country average
 - Sufficient volume of international tourists
 - Sufficient surface (i.e. no specific city / touristic site)
- **Next step:** refine geographical granularity by touristic point of interest (city, regions, ...)

Scoring scale

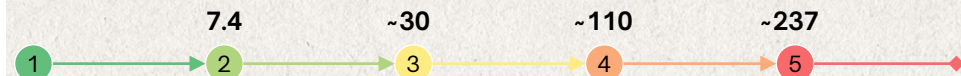
1 [bottom 20%] 2 3 4 5 [Top 20%]

Low exposure to over-tourism High exposure to over-tourism

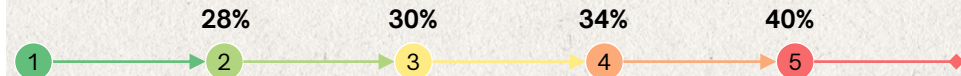
1 Int. tourists /inhabitant
Balance between international tourists and local population



2 Int. tourists /km²
Territorial concentration of international tourists ['000 tourists]



3 Seasonal concentration
International tourists breakdown by Quarter



4 Sustainability maturity
Maturity on sustainability: infrastructures, social impact, transport, etc.

Ranked in **Top** 20%

Ranked in **Bottom** 20%

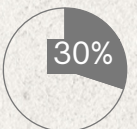
Main source(s)

- UNWTO
- Euromonitor (from national statistics)
- World Bank
- World Development indicators

- OECD
- UNWTO
- National statistics

- Composite index based on cross-studies analyses [Roland Berger x Evaneos]

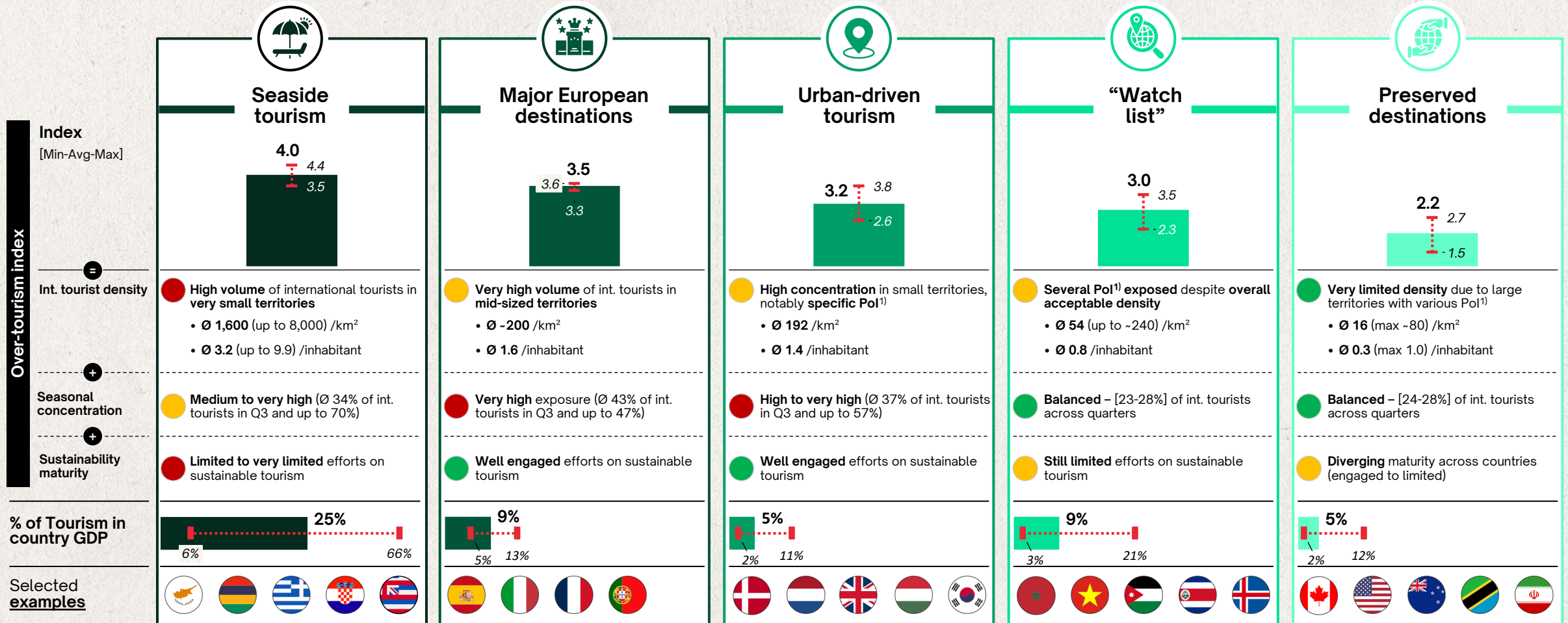
Weight



Exposure and impact of over-tourism varies across 5 main clusters of countries within main touristic destinations in the World (70 countries sampled)

Country segmentation – Overview

Sample: 70 countries

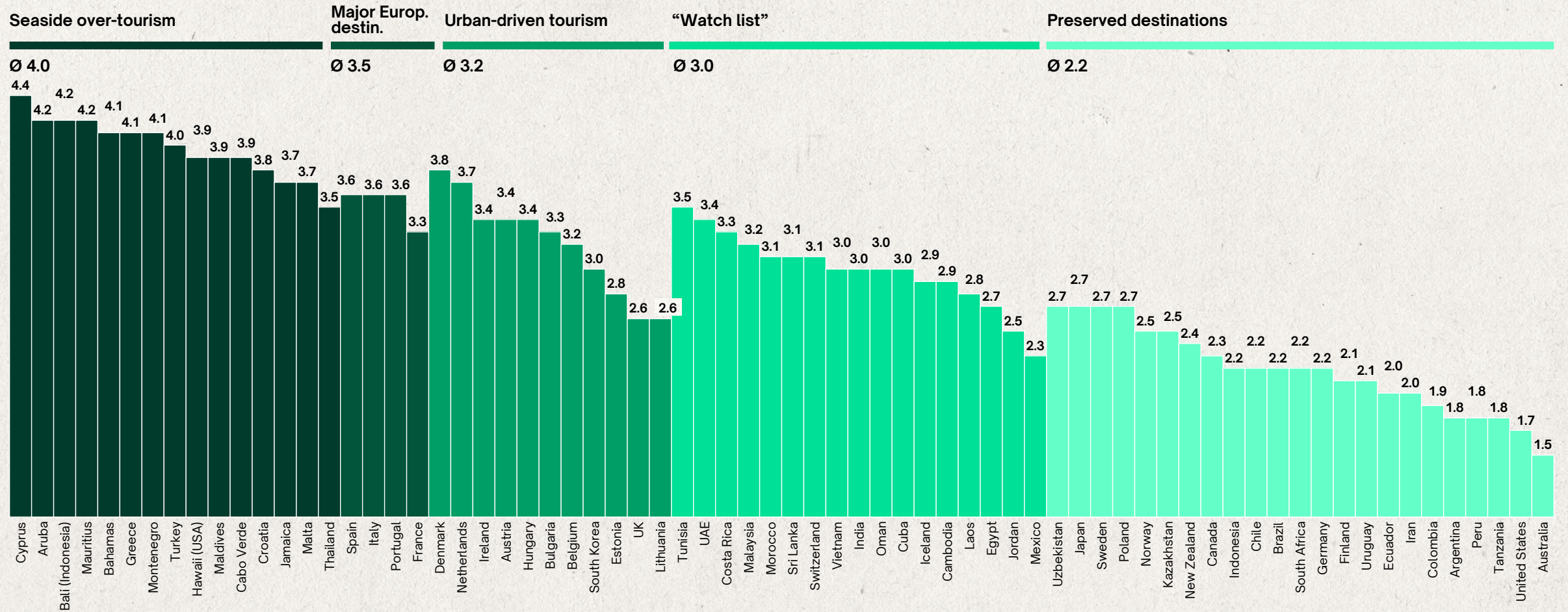


1) Point of Interest (PoI)

Overall index by destination

Over-tourism index by destination

Sample: 70 countries





**LOOKING FORWARD:
POTENTIAL SOLUTIONS TO COPE
WITH OVER-TOURISM**

Various solutions already exist or can be implemented to address over-tourism, mainly by re-balancing demand, driving transformation & implementing capacity constraints

Potential solutions to over-tourism – Overview

Tourism Actors (Tour operators, travel agencies, travel platforms...)

Destinations

REBALANCE DEMAND

Promote **shoulder seasons**

Promote **new Points of Interest** at destination



- Creation of **off-season itineraries**
 - Fall and winter in Greece
 - Summer in Finland
- Promotion of **off-peak activities** (different times of the day)

- Promotion of **unsolicited destinations** (region, city) instead of capitals/beach
- Focus on **slow travel**, with low carbon impact:
 - Activities (hiking, biking)
 - Accessibility (close, train)
- Fostering of **longer stays outside crowded Poles** (rather than city breaks)

DRIVE TRANSFORMATION

Support **local players** in their sustainable knowledge and actions



- **Partnerships with local suppliers/agencies** fostering responsible travel experiences
- Providing of **guidelines, training & workshops** to support them in their transformation and offer creation
- **Align with & support** local agencies to promote alternative and off-season tourism

IMPLEMENT CAPACITY CONSTRAINTS

Implement **quotas and/or permits**

Impose **taxes**



- **Limited (sea) arrivals**
 - Dubrovnik (Croatia)
- **Capped daily visitors** in several points of interest:
 - Machu Pichu (Peru)
 - Maya Bay (Thailand)
 - Cassis Calanques (Fra)
- Capped **infrastructures**

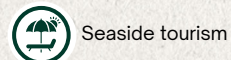
- **Venice:** 5€ /daily visitors
- **Mount Fuji:** 12€ /visitor
- **Bhutan:** 100€ /night

Example(s)

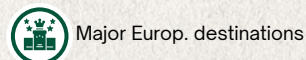
Most relevant for...



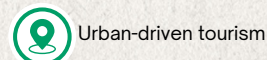
potentially relevant for...



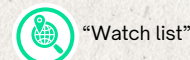
Seaside tourism



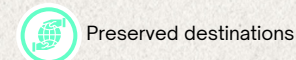
Major Europ. destinations



Urban-driven tourism



"Watch list"



Preserved destinations

Rebalance demand: Evaneos contributes to creating new POIs by promoting lesser-known destinations, focusing on low-carbon activities, and encouraging longer stays

New Points of Interest – Selection of examples

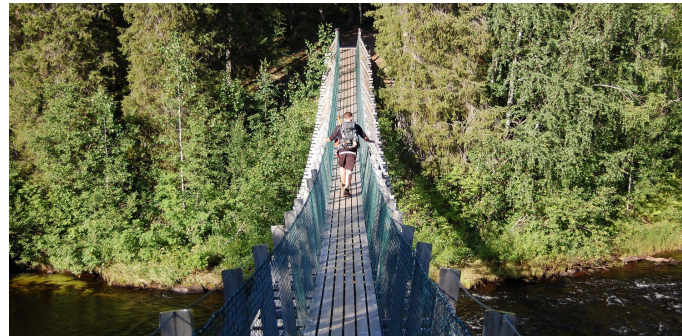
Promotion of unsolicited destinations



Development of itineraries in less-visited regions and countries :

- France: Dordogne, Finistère, Charente
- Italy: Abruzzo, Cilento, Basilicata
- Finland: the Southern region (Lakelands, coastline) during the summer instead of the Lapland Region in winter
- Wales
- Albania
- Uzbekistan

Focus on slow travel



- Focus on slow travel activities, with low carbon impact :
 - Hiking (e.g., coastline of Pembrokeshire National Park in Wales)
 - Biking (e.g., Tyrol in Austria)
 - Train journeys (e.g., Great Baltic Sea tour)
- Creation of itineraries for nearby destinations (Wales and England), or accessible by train (Austria for the French and German markets)

Fostering of longer stays rather than city breaks



Stop selling city breaks to encourage longer stays in less crowded POIs

- Discovery auto tour in Austria
- Green escape in the Baltic States (Lithuania, Latvia, Estonia)
- Road trip in the Balkans (Bulgaria and Macedonia)

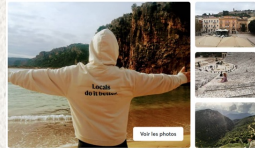
Evaneos successfully rebalanced demand in Greece by creating off-season itineraries and promoting less-visited regions

Seasonality in Greece – Case study

Creation of off-season itineraries and promotion of less visited regions

Creation of itineraries in winter and fall

"Continental Greece winter trip"



- Visit of Nafplio, first picturesque capital of independent Greece
- Exploration of Epidaurus & Mycenae with their UNESCO-listed archaeological treasures

"Journey into Greek winter warmth"



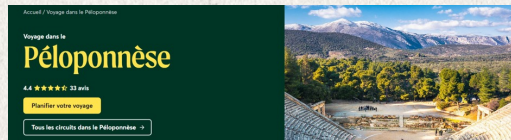
- Discovery of Athens and Crete's archaeological sites and cities
- Visit of historic Venetian centers of Chania and Rethymnon

"Autumn landscape between Athens and Santorini"



- Visit of Athens and its museums in the peaceful autumn
- Hiking between Fira and Oia (Santorini) for spectacular views

Promotion of **Continental Greece** (Peloponnese) or **Northern Greece** instead of Cyclades

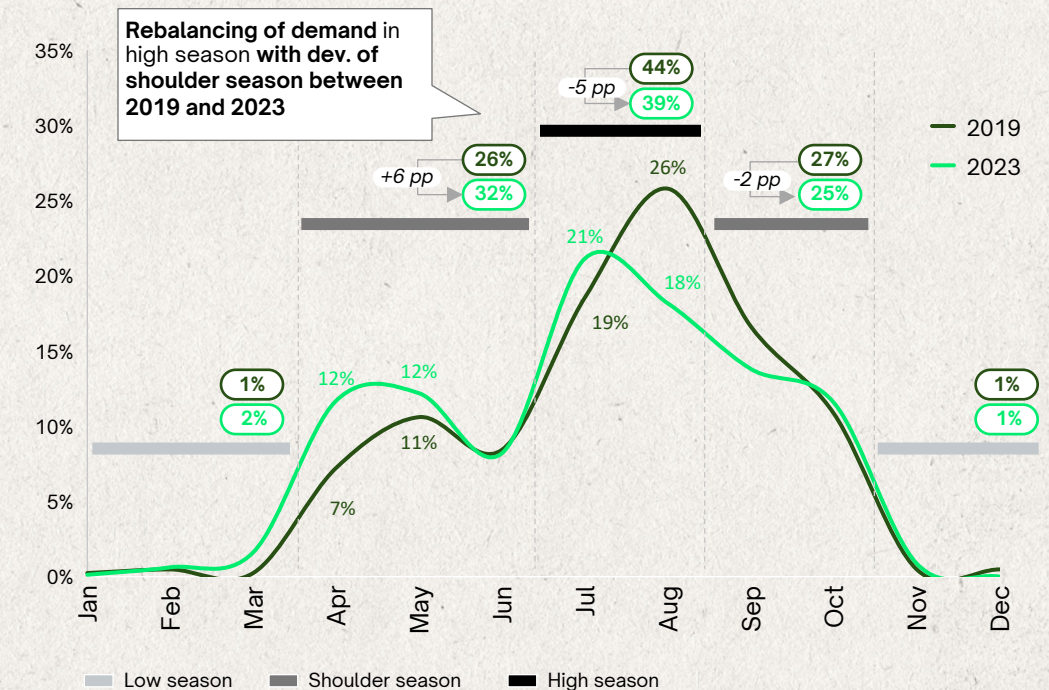


Dedicated region page with various itineraries:

- ~20 itineraries in Continental Greece
 - **Multi-activity** tours: mythological tour, night walk, hiking, climbing, kayaking etc.
 - **Out-of-the-ordinary** tours: olive oil tasting, agro-tourism experience, cooking classes etc.
- ~10 itineraries in Northern Greece including;
 - **Sea and mountains** tours
 - **Hiking** tours: mount Olympus, perched monasteries in Meteora, gorges of Zagori etc.

Seasonality evolution

[Greece; % of Evaneos annual bookings; 2019-2023]



Evaneos drives transformation by aligning with and supporting local actors to promote alternative, and off-season tourism

Support local players – Selection of examples



Partnering with local players (agencies, DMOs, DMCs) to help them adapt their offering

Examples



Partnership with Planeterra to support community tourism experiences and connect them to agency partners, fostering authentic and responsible travel through integration within Evaneos itineraries around the world.



Partnership with **England Originals** to **adapt train circuits for the French market**, with Evaneos' partner agency High Point Holidays



Providing of **guidelines, training & workshops** to help them in their transformation

Examples



Workshop in Jordan with agencies, inviting **Wild Jordan** nature positive and community tourism activities to share their catalogue



On-site Workshop in Bangkok with our Partner Travelife for 50+ Evaneos partner agencies in Southeast Asia to learn about responsible supplier selection, development and community-based tourism.




DEEP DIVES BY CLUSTER

Key seaside destinations are highly exposed to over-tourism (high volumes of tourists over small territories), and show economic dependency to Tourism

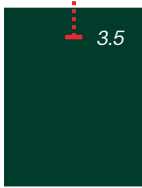
Seaside tourism – Cluster synthesis

Sample: 70 countries



Seaside tourism

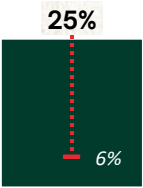
4.0



Index

66%


25%



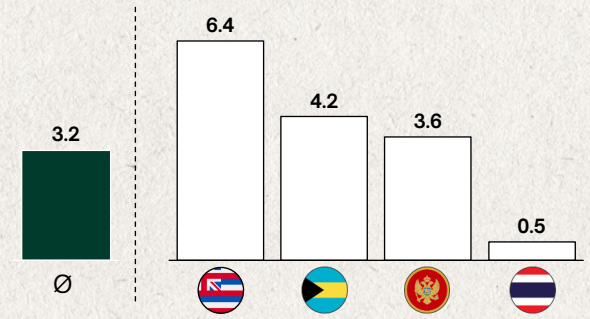
Tourism in GDP

- High volumes of int. tourists (Ø 11 m p.a.) over small territories (Ø -86,000 km²), with limited to very limited efforts on sustainability
- Diverging seasonal concentration: from medium (Caribbean, Asia) to very high (Europe)
- Clear economic dependency to Tourism

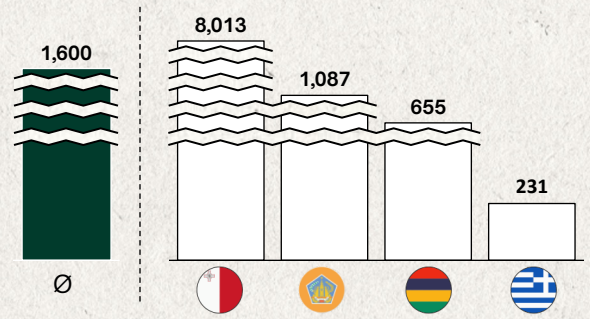
Country list



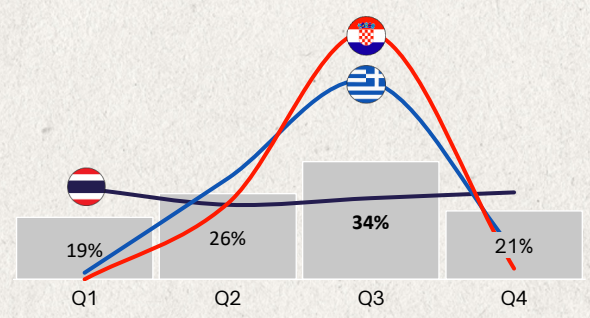
1 Int. tourists /inhabitant



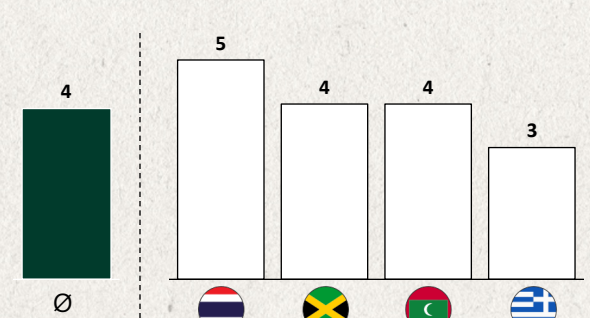
2 Int. /km² [‘000 tourists]



3 Int. tourism seasonal concentration



4 Sustainability maturity* [scoring]



*High score indicates low maturity



Potential solutions: Illustrative measures vs. over-tourism

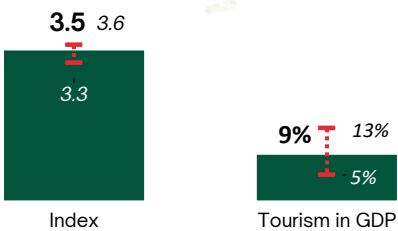
- 
Support local players, for example in Bali, Evaneos and Planeterra supporting the development of PKP Community Centre, a community-based tourism organization
- 
Promote new points of interest, e.g.
 - Continental Greece
 - Continental Croatia
- 
Promote shoulder seasons, notably spring and fall in **European destinations**: Croatia, Greece, Cyprus, Malta, Montenegro...
- 
Implement quotas with capped:
 - sea arrivals in **Dubrovnik**
 - daily visits in **Maya Bay** (Thailand)

Major European destinations are highly exposed to over-tourism in Q3 but show well engaged efforts on sustainable tourism

Major European destinations – Cluster synthesis

Sample: 70 countries

Major European destinations




Index: 3.3 (Target: 3.5, Range: 3.6)

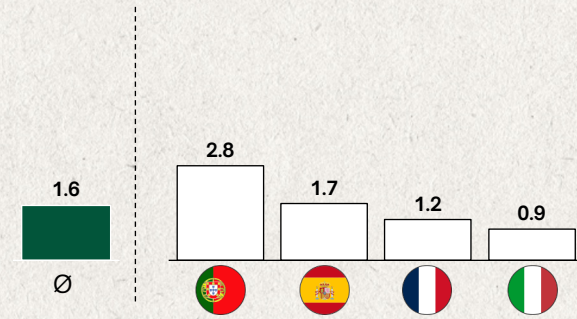
Tourism in GDP: 9% (Target: 13%, Gap: 5%)

- **Very high volume of int. tourists** (Ø 1.6 per inhabitant) in **mid-sized territories** (Ø ~200 tourists / km²), with **well engaged efforts** on sustainable tourism
- **High to very high seasonal concentration** in all countries, notably due to European seasonality

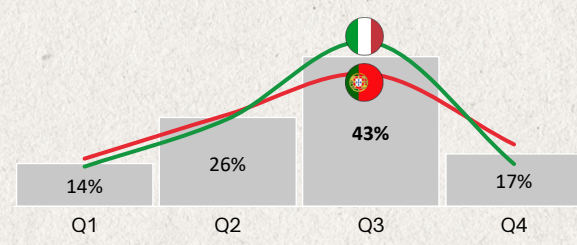
Country list



1 Int. tourists /inhabitant

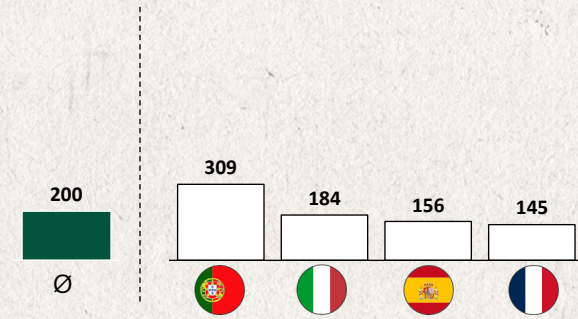


3 Int. tourism seasonal concentration

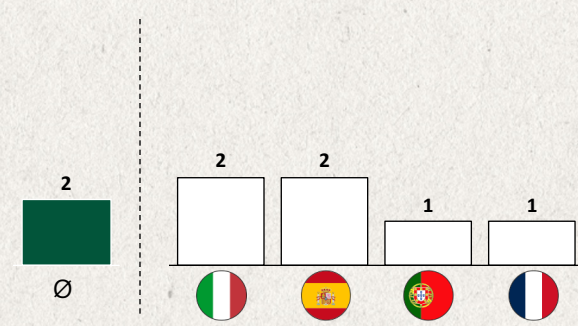


Cluster average

2 Int. /km² [·1000 tourists]



4 Sustainability maturity* [scoring]



*High score indicates low maturity

Potential solutions: Illustrative measures vs. over-tourism

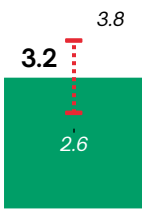
- Promote **new points of interest**, e.g.
 - France: Dordogne, Finistère, Charente
 - Italy: Abruzzo, Cilento, Basilicata
- Foster longer stays outside crowded Pals: Loire Atlantique (France)
- Promote **shoulder seasons**, notably spring and fall
- Implement **quotas** with capped daily visits in **Cassis Calanques** (France)

Urban-driven tourism show high concentration in small territories, notably in specific PoI¹⁾, with well engaged efforts on sustainable tourism

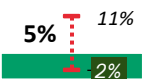
Urban-driven tourism – Cluster synthesis

Sample: 70 countries

Urban-driven tourism




Index



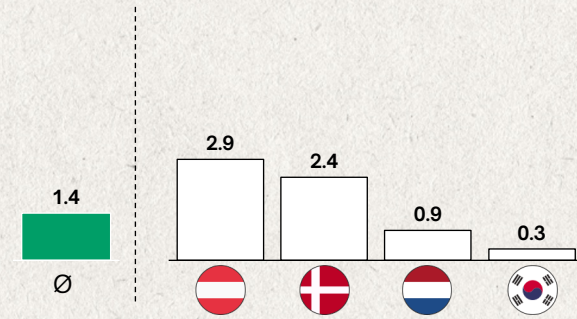
Tourism in GDP

- High concentration in small territories (Ø 192 tourists /km²), notably specific points of interest, with well engaged efforts on sustainable tourism
- High to very high seasonal concentration in all countries, notably due to European seasonality

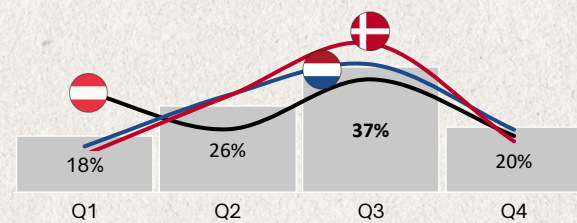
Country list



1 Int. tourists /inhabitant ●

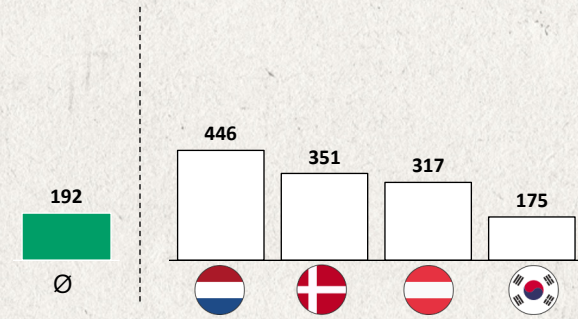


3 Int. tourism seasonal concentration ●



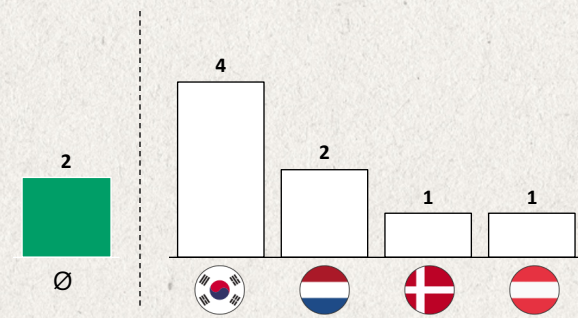
■ Cluster average

2 Int. /km² [‘000 tourists] ●




4 Sustainability maturity* [scoring] ●

*High score indicates low maturity



Potential solutions: Illustrative measures vs. over-tourism




Fostering of **longer stays** outside crowded POIs (rather than city breaks)

- Rotterdam instead of Amsterdam
- Coastal routes instead of Dublin
- Bristol and Cornwall instead of London

• Focus on low-carbon

- Activities:
 - Hiking in England
 - Biking in Austria
 - Train journey around the Great Baltic sea
- Accessibilities (e.g., destinations in Austria accessible by train)



Implement **quotas** with capped daily visits

1) Point of Interest (PoI)

“Watch list” cluster show diverging realities but overall acceptable density (excl. specific PoI¹⁾), with dependency to Tourism to be monitored

“Watch list” – Cluster synthesis

Sample: 70 countries

“Watch list”

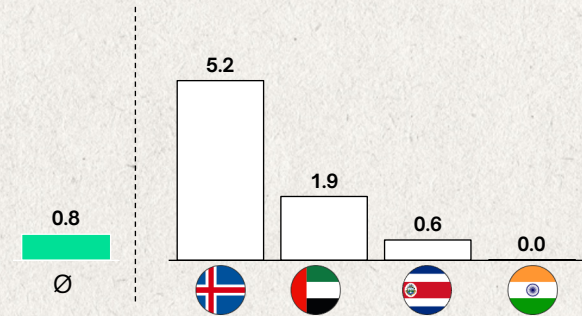
Index: 3.0 (range 2.3-3.5)

Tourism in GDP: 9% (range 3%-21%)

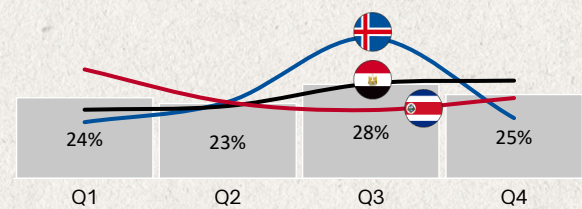
- **Diverging realities** but overall acceptable density, with **several points of interest particularly exposed** in most countries
- **Balanced seasonality** [23-28%] of int. tourists across quarters, **apart from selected examples** (up to 41% in Q3)
- **Still limited** efforts on sustainable tourism

Country list

1 Int. tourists /inhabitant

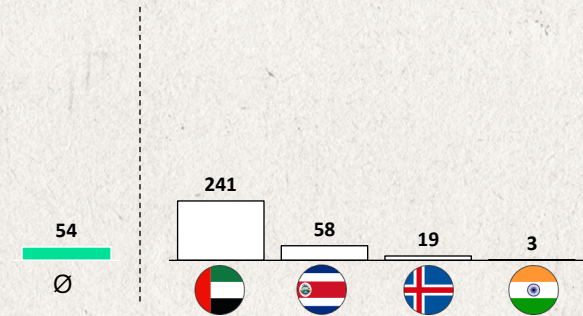


3 Int. tourism seasonal concentration

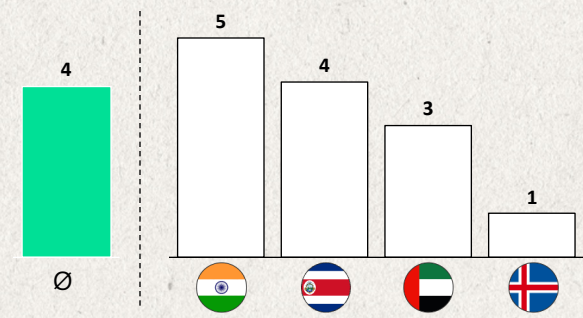


■ Cluster average

2 Int. /km² [‘000 tourists]



4 Sustainability maturity* [scoring]



*High score indicates low maturity

Potential solutions: Illustrative measures vs. over-tourism

- **Support local players** by providing of guidelines, training & workshops to help them in their transformation (e.g., workshop in Jordan inviting Wild Jordan)
- **Promote new points of interest**, e.g.
 - Oaxaca in Mexico
 - High Atlas in Morocco
 - Karnataka in India

1) Point of Interest (PoI)

Preserved destinations show limited exposure to over-tourism due to large territories with various PoI¹⁾, with overall low exposure to Tourism

Preserved destinations – Cluster synthesis

Sample: 70 countries

Preserved destinations

Index: 2.2 (range -1.5 to 2.7)

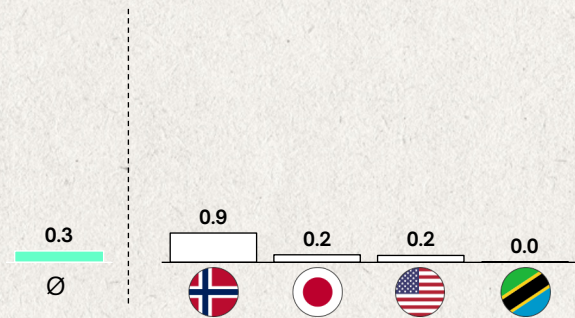
Tourism in GDP: 5% (range -2% to 12%)

- Very limited density due to large territories with various points of interests
- **Balanced seasonality** [24-28%] of int. tourists across quarters, **apart from selected examples notably in Europe** (up to 41% in Q3)
- **Diverging sustainability maturity** across countries (engaged to limited)

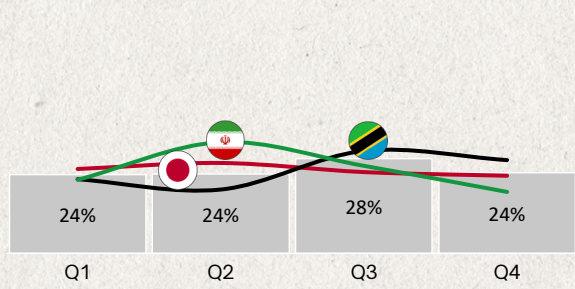
NB : some POIs such as Machu Pichu in Peru face overtourism situations that need to be addressed locally.

Country list

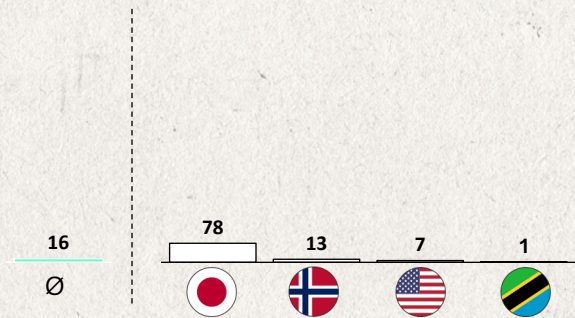
1 Int. tourists /inhabitant



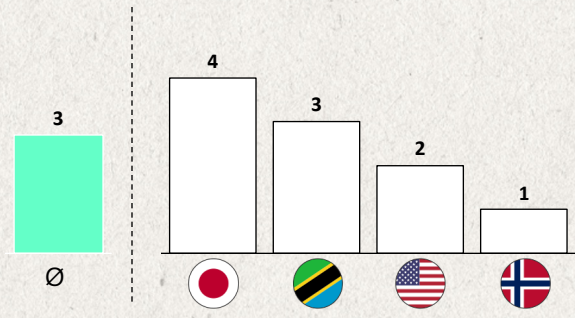
3 Int. tourism seasonal concentration



2 Int. /km² [‘000 tourists]



4 Sustainability maturity* [scoring]



*High score indicates low maturity

Potential solutions: Illustrative measures vs. over-tourism

- **Support local players**, by providing workshops to help them in their transformation such as "Connection Days" gathering 10+ Evaneos agency partners in Peru in June 2024
- Implement **quotas** with capped daily visits in **Machu Pichu** (Peru)
- Impose **taxes** such as for **Mont Fuji** (Japan), reaching 12€ / visitor

1) Point of Interest (PoI)

evaneos