Visitor Pressure and Events in an Urban Setting

Understanding and managing visitor pressure in seven European urban tourism destinations

CELTH Centre of Expertise leisure, tourism & hospitality

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Centre of Expertise Leisure, Tourism & Hospitality

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Executive summary

In the past years, the issue of visitor pressure and over-tourism in city destinations has reached worldwide media coverage. Although, it is very difficult to ascertain how and when visitor pressure becomes too high, preventing it should be a priority for city governments. Support of residents is a prerequisite for sustainable tourism development.

This report is a follow up study of a previous visitor pressure project conducted in six large urban destinations: Amsterdam, Berlin, Barcelona, Copenhagen, Lisbon and Munich. The current project focused on smaller city destinations: Tallinn, Salzburg and the five Art cities of Belgium: Leuven, Ghent, Mechelen, Antwerp and Bruges.

The report provides an overview of the theoretical background of over tourism (visitor pressure). It contains a short summary of the main outcomes of the research in each participating city (detailed analysis can be found in the individual city reports), furthermore it presents the future scenarios developed together with the partner DMOs. The report also contains a cross case analysis between Salzburg, Tallinn and the cities from the previous visitor pressure project. The analysis is based on the outcomes of the resident survey conducted in the participating cities.

In order to assist the cities with managing visitor flows and mitigating the negative impacts of tourism, the report lists 121 actions grouped under 17 overarching strategies. Furthermore, the logical framework matrix is introduced as a tool to help the cities develop concrete projects to solve specific problems. The 17 overarching strategies are placed into the matrixes to give directions on what steps need to be taken and how to measure achievements. Additionally the report contains a checklist that intends to help the cities to make self-assessment.

The results show, that in case of the Belgian art cities, visitor pressure is not an issue yet that requires significant attention. These cities are focusing on growth and development and are eager to attract more visitors on the long-term. Some of the art cities, such as Mechelen, are seen as rather new destinations, thus emphasis is on creating awareness and promoting the city more efficiently. Even though the Belgian cities currently do not face visitor pressure, certain areas were highlighted by the interviewed experts as sectors that may become problematic in the future. These sectors are mostly mobility and transportation. Besides the physical infrastructure, hotel supply was pointed out it some of the art cities. Due to increased demand, the accommodation sector may become insufficient and further developments are assumed to be necessary in the near future. Even though the current strategies are mostly focusing on growth, preventive actions are considered highly important and sustainability is a key aspect that plays a vital role in planning and development.

Similarities were discovered between Salzburg, Tallinn and the cities of the previous round. In the city of Salzburg, experts have highlighted a range of improvement points such as the traffic infrastructure. Signs of touristification and commodification can already be seen in the historic centre. Creation of shared space between locals and visitors is also challenging.

Compared to the opinion of key industry players, residents are more positive and optimistic. According to the residents survey carried out in the city of Salzburg, positive impacts of tourism development outweigh the negative impacts, except for the economic impacts.

In the city of Tallinn, visitor pressure is mostly concentrated around the Old Town. The Old Town, just like the historic centre of Salzburg, is on the UNESCO World Heritage List which makes planning and development of the area is much more complicated. Preservation of the authentic city scape is of vital importance and the impact of the large influx of tourists must be managed effiectively. In the city of Tallinn, visitor pressure is visible only in specific time periods and it is concentrated in the historic city centre. Pressure is mostly linked to cruise tourism and the large number of ferry passengers arriving to the port of Tallinn. Experts have pointed out a few areas that are, or may become, problematic in the future. Just like in the case of Salzburg and the Belgian cites, transport infrastructure and mobility is a key issue. Furthermore, increasing the economic benefits of tourism and contributing more towards heritage protection was also highlighted. Touristification and commodification can already be seen to a certain extent in the main touristic hot spots, which just like in case of Salzburg has led to increased prices and cost of services.

Finally, four plausible future scenarios were identified and developed together with the participating DMOS.

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1. Visitor pressure in urban destinations: the challenge

In the past decades, the tourism industry has become one of the most robust and rapidly growing sectors in the world. Today, it is one of the key drivers of socio-economic development through its contribution towards employment, infrastructure development and export revenue. The continuous growth of international arrivals worldwide reached 1186 million in 2015 and is estimated to further increase to 1.8 billion by 2030. (UNWTO, 2016) Europe received 615 million international arrivals in 2016. The European tourism sector has experienced steady growth in the past years and the arrival numbers are expected to further increase in the near future (ETC, 2016).

The above mentioned statistics represent well the volume of visitor flows destinations need to cater for, accommodate and entertain. Some destinations already face the impacts of increased visitation while others still have the time to prepare themselves.

Urban tourism due to its unique context represents an extremely challenging environment. Demand for city tourism has become significant due to the wide range of potential destinations (Law M. , 1996; Alegre & Juaneda, 2006). The rising demand has led to increased competition between the cities but also provided the opportunity for less popular destinations to introduce their unique product and join the competition (Ben-Dalia et al., 2013).

1.1 Urban tourism implications

Cities are multifunctional, complex, multi-user environments. Different types of tourists are attracted to cities due to the wide range of activities they have to offer (Edwards et al., 2008): visiting friends and relatives (VFR), leisure activities, business, nightlife, visiting sites/attractions, studying, shopping, attending events etc. (Carlisle et al., 2016). Urban facilities such as public transportation, infrastructure, roads and other services that are primarily created for local residents are used by tourists as well on a daily basis. Public space e.g.: city centres, events, festivals and historical areas are visited by both residents and tourists (Rasoolimanesh et al., 2017).

The continuous interactions between the city and tourists has a direct impact on the host community (Sharpley, 2014; Vargas-Sanchez et al., 2014). If not managed well, the above mentioned forces may have significant negative impacts on the local lifestyle, values, behaviour and quality of life of the residents (ALmeida-Garcia et al., 2016; Hall & Page, 2014) and may result contested environments. It has been argued, that the host community's perceptions of the impacts of tourists and their support is critical for tourism development (Jafaar et al., 2015; Nicholas et al., 2009).

Besides the social aspects, the environmental and economic impacts (both positive and negative) are also significant. Responding to the needs of the increasing number of tourists by providing infrastructure and public services (hotels, catering establishments, roads, entertainment facilities etc.) and the eagerness of the private sector to exploit the economic benefits of tourism can endanger the city's built and cultural heritage (Su & Wall, 2014), authenticity and identity.

Therefore, it is extremely important to find a balance and to act responsibly (Reid, 2003). Catering for people with different needs, motivations and perspectives and managing complex interactions between the various expectations of residents and tourists are challenging (Ashworth & Page, 2011) and requires strategic thinking and planning. In order to avoid having serious, un-reversible damages (e.g.: in Venice and Barcelona) destinations need to think long-term and their actors need to have a common strategic vision for their destination (Chettiparamb & Thomas, 2012).

1.2 Community support

The relationship between visitors and the host communities is often damaged by uncontrolled tourism development (Surinach & Wober, 2014). It is frequently reported by the media, that the perception of residents is turning into negative in numerous destinations and their level of support and acceptance towards tourists is declining. The example of Venice, Barcelona or Amsterdam is widely known. Over-tourism has led to increased negative impacts in these cities and resulted in protests against further tourism development. In extreme cases, notes such as ''Tourists go home!'' can be seen on the streets. Such actions may harm the image of the destination and can result in the loss of visitors on the long term.

Image 1. Protests against visitors across Europe

Tourism development is approached and perceived differently by different stakeholder groups. It has been proved that residents of urban destinations are more concerned about the cultural and social impacts of tourism development and are less worried about the economic impacts (Haley et al., 2005; Nunkoo & Ramkissoon, 2010). This is due to the fact that cities normally have a broad economic base with a range of businesses thus the economic benefits are only felt by those directly involved in the tourism sector (Ashworth & Page, 2011). To avoid reaching the saturation point, policy makers and practitioners need to engage more with the residents. In fact, community participation means more than just asking them what they want and then provide it. Active participation means that stakeholders, in this case the local community, has a good overall understanding of the issues and are capable of informed decision making (Marzuki & Hay, 2013; Mille et al., 2010). It has been argued that tourism development can only be sustainable if it is based on common-understanding (Chand & Vivek, 2012), thus education of the citizens is pivotal (Carmin et al., 2003). Residents' knowledge of potential impacts of tourism influences their willingness to participate in decision-making processes and makes them more supportive (Rasoolimanesh et al., 2017). Furthermore, participation of the local community has great benefits for the locals. It stimulates their pride and respect towards their own culture, heritage and lifestyle (Mitchell & Reid, 2001) and helps them to better understand the complexity of development related decisions.

2. Monitor, understand and mitigate the impacts of visitors on the destination

To fully understand the wide range of impacts of visitors on an urban destination a clear structure is provided below. The critical incident technique is a tool to characterize and group the perceptions of respondents into certain categories. Critical encounters refer to processes, events, problems or incidents that residents recognize between the host community and the tourism industry of a destination (Postma & Schmuecker, 2017). These changes are recognized on a personal level.

Perceptions of respondents can be grouped into the following categories:

Direct encounters:

Direct encounters refer to the way tourism manifest itself to the host community (Postma, 2013a; Postma & Schmuecker, 2017). The table below shows the main categories of direct encounters namely the economic, environmental and social aspects. The table contains examples of positive and negative encounters.

Direct encounters			
	Economic	**Environmental**	**Social**
Positive	Increased personal income Higher standard of living Higher employment rate Increased tax revenue	Restoration/maintenance of built heritage Protection of natural heritage Improved infrastructure Improved public facilities	Creation of recreation/entertainment facilities Stimulation of community identity Preservation of cultural heritage: arts, crafts, Revival of traditions, customs Generates pride
Negative	Higher cost of living Increased rental/sales price of properties Increased consumption costs Increased property taxes Increase of seasonal jobs Commercialisation	Overcrowding Traffic congestion Environmental pollution (air, water, etc.) Loss of authenticity and diversity	Shifting value systems Vandalism/crime Drug and alcohol usage Littering Noise pollution Market for prostitution

Table 1. Direct encounters (Koens & Postma, 2015)

Indirect encounters:

The category of indirect encounters refers to the way tourism interactis with personal and family life (Postma & Schmuecker, 2017). The table below shows examples of positive and negative indirect encounters.

Indirect encounters	
Positive	Better paid job Improved living conditions Higher educational level Improved language skills Improved social etiquette/behaviour towards others Openness to other cultures Greater personal pride
Negative	Changing lifestyles Changing family relationships Addiction to gambling/alcohol/drugs Violation of privacy Violation of personal safety Pressure on the health care system

Table 2. Indirect encounters (Koens & Postma, 2015)

Stakeholder encounters:

Stakeholder encounters refer to the role, actions, attitude and involvement of tourism stakeholders. Examples of parties include: the public sector, politicians, NGOs, entrepreneurs, tourism businesses, developers, fellow residents and the media (Postma, 2013). The table below introduces examples of stakeholder encounters. The actions in the table may be perceived positively or negatively depending on the exact situation thus no further categories were created.

Stakeholder encounters
Regulation/Non-regulation of the sharing economy (e.g.: Airbnb)
Development plans and policies
Rules and regulations with regards to mobility
Organization of events, festivals, activities
Promotional activities
Cooperation and collaboration with other stakeholders
Community involvement

Table 3. Stakeholder encounters (Koens & Postma, 2015)

Monitoring the impacts of tourism and the way they are perceived by the local community is not enough. It is highly important to understand the emotional and behavioural response of residents towards the critical encounters that they experience. In order to be able to anticipate the possible outcomes and react efficiently in a timely manner the table below gives an overview of the levels of responses towards critical encounters.

Level of emotional response **(irritation level)**	**Level of behavioural response** **(tolerance level)**
1.Respondent shows understanding and tones down the incident 2.Respondent is upset, surprised, taken off-guard, did not expect it	Respondent tolerates it: 1.Respondent accepts it (lets it happen, is used to it, accepts his/her fate, does not complain, has learned to live with it, has learned to bear it and to go on, says that it is part and parcel) 2.Respondent adapts his/her own behaviour (avoids the problem, chooses different times and/or places for the activity, moves to another village, books an earlier ferry, locks the bicycle, takes preventive measures, does not put up flags any more as they will be stolen)
--- irritation threshold ---	**--- tolerance threshold ---**
3. Respondent expresses (some) annoyance/irritation about what happened 4. Respondent expresses himself/herself very negatively about what happened: highly critical, calls it unacceptable, or uses rough language	Respondent does not tolerate it and undertakes action to remove the cause: 3. Respondent's reaction is aimed at the behaviour of the initiator of the problem with the intention of removing the direct cause (either person or organisation) 4. Respondent's reaction is aimed at influencing the institutional context, the conditions (policy and planning, future developments, general attitude of parties involved); either directed (specific plans or measures), or non-directed (public opinion)

Table 4. Dimensions of responses towards critical encounters: irritation and tolerance scale (Postma, 2013)

3. Stakeholder participation in managing visitor pressure

Due to the complexity of the industry, tourism products and services are delivered by a wide range of private and public actors. These actors include different stakeholders ranging from large international companies to local SMEs and micro businesses, from residents to tourists, and from private to (semi)public bodies. The public sector as well as the NGOs are busy dealing with social, cultural and environmental concerns. A thorough understanding of how the various stakeholder groups can work together has vital importance in delivering quality tourism, reducing visitor pressure and ensuring long term sustainability. The ability to create balance between a series of different interests can be challenging (Jamieson & Jamieson, 2014; Postma, 2002) .

Necessarily, stakeholders need to have a solid understanding of the complexity of the tourism industry, its processes, impacts and different stakeholder perspectives in order to generate informed decisions. Having little or no knowledge on how tourism evolves in a destination can create a barrier for participation (Marien & Pizam, 1997; Sofield, 2003).

"It is not enough to engage people in the development process if the conceptual orientation and the language of that process do not relate to their experience, and if they lack the tools to access their needs effectively and to know what options are available to them to bring about constructive change."
(Connell, 1997, p. 250)

The power of tourism to stimulate economic development has long been recognized as well as its role in reaching environmental, cultural and social goals. Tourism is often seen as the transforming force in many urban destinations (Jamieson & Jamieson, 2014). Due to the high importance of tourism development and its wide range of impacts, information, knowledge and experience sharing is of key importance. Education and creating awareness is a major step which should not be overloaded. This process should be practiced on an on-going basis and new stakeholders should be included in the process continuously (Simmons, 1994). Participatory approach is used in scenario planning as well, one of the most popular foresight-tools, where stakeholders with different background and expertise come together to share their views, perceptions and to collectively discuss and create possible future scenarios. Scenario planning will be discussed more in-depth in chapter 6 (Postma, 2013b).

The figure below shows, the stakeholder groups involved in visitor management:

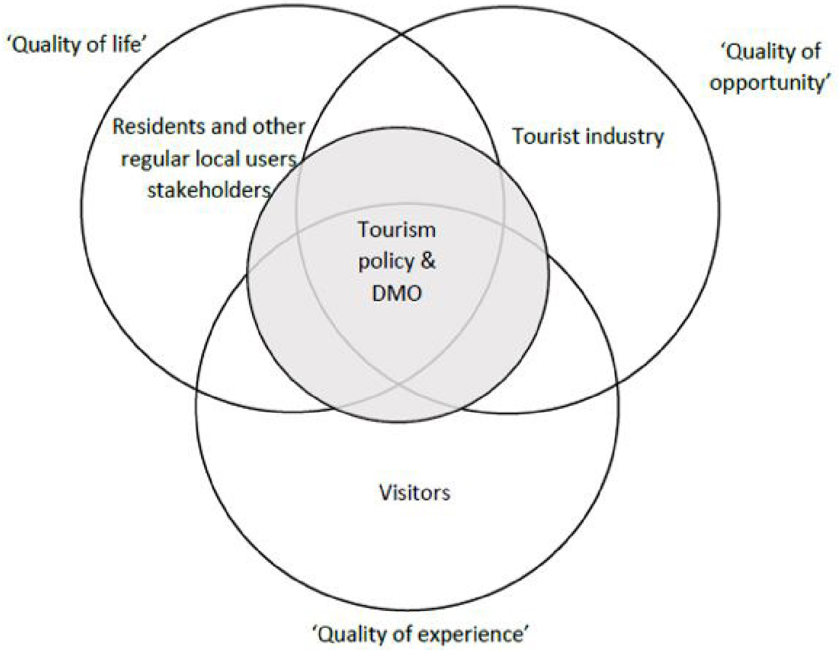


Figure 1. Stakeholder involved in managing visitor pressure (Koens & Postma, 2015; adapted from Postma, 2003)

The table below displays the composition of each stakeholder group and their predominant interests. It is important to highlight that these groups are not mutually exclusive and their interests are often overlapping. Close cooperation of the different parties is necessary to ensure long-term sustainability.

Stakeholder group	Composition	Predominant interest
Residents and other local users of the city	Permanent residents Temporary residents Commuters Representative organizations/unions of residents Representative organizations of natural environment/cultural heritage protection	Long-term liveability Protection and maintenance of natural and built heritage Quality of living
Domestic and international visitors	Day visitors Leisure tourists Business tourists **Their interests are normally represented by Tourist Info. Offices and DMOs, however this practice is changing.*	Quality of the city as a tourist destination Value for money Quality of products and services Safety and security
Industry players	Private businesses e.g.: hotels, museums, tour operators, event organizers etc. Transportation companies Trade unions and umbrella organizations	Economic prosperity Viability of the city
Policy makers and DMOs	Tourism policy makers Other public departments DMOs	Balanced development in all segments Economic prosperity Long-term sustainability

Table 5. Stakeholder groups: composition and predominant interest (Koens & Postma, 2015)

4. Visitor management strategies and their implementations

The management of a destination is a very complex task and it requires a range of parties to work closely together. The main responsibility of planning, monitoring, coordinating and evaluating the development processes lies with the tourism policy makers and DMOs. However, the involvement of stakeholders directly or indirectly linked to tourism (e.g.: mobility department, spatial planning department, private businesses etc.) is vital for successful management.

Having the right tools and methods at hand is crucial for strategic management. The table below contains 121 actions grouped under 17 overarching strategies. The strategies are based on extensive literature review, outcomes of the previous Visitor Pressure project and results of the current study.

It is important to mention that the strategies are context specific and are not suitable for all the destinations. Thorough evaluation and planning is needed to determine which strategies can be successfully applied to a destination. Scenarios could be a help to grasp the specific social, economic, spatial and organisational context (see chapter 10). Assessing the responsibility of the different parties involved is also crucial for the efficient implementation of the allocated tasks (Koens & Postma, 2015).

For self-assessment, please see the checklist (Appendix 13.3). The goal of the checklist questions is to help the destinations assess their current state of operations regarding operational standards, quality, conditions, procedures etc.

I. Stimulate and assist in the spreading of visitors around the destination and beyond
1. Move events to less visited parts of the destination and neighbouring areas
2. Develop and promote visitor attractions/facilities in less visited parts of the destination and neighbouring areas
3. Improve capacity and time spent at visitor attractions
4. Create joint identity of destination and neighbouring areas
5. Implement travel card for unlimited local travel
6. Market entire destination to stimulate visitation of less visited parts
7. Limit access or close off certain parts of the destination for a period of time
II. Facilitate and assist the implementation of time-based rerouting within and across destinations
8. Promote shoulder months and low season to visitors
9. Dynamic price differentiation (such as variable or tiered pricing) and encourage pre-booking
10. Stimulate events in the shoulder months and low season
11. Use timeslots for popular visitor attractions and/or events, possibly aided by real-time monitoring

12.	Use apps to create dynamic time-based rerouting
13.	Deploy reservations and ticketing systems
III. Stimulate and assist in the development of dynamic visitor itineraries within and across destinations	
14.	Provide multilingual information and itineraries by means of unmanned portals (digital – internet and apps - and analogue) at entrances of and within the destination, and use technology to nudge visitors in real time
15.	Provide tourist information centres (static and roaming)
16.	Offer combined discounts for specific low-impact itineraries
17.	Provide destination guides & books and (guided) tours highlighting hidden treasures
18.	Create dynamic experiences and thematic itineraries or routes for niche visitors
19.	Stimulate development of guided tours through less-visited parts of destination
20.	Use chat bots to provide advice on alternative attractions and use virtual reality and augmented reality for visits to famous sights
IV. Facilitate the development of financial regulations to manage, control and prevent overtourism	
21.	Tax accommodation in sharing economy such as Airbnb
22.	Tax service providers that bring a large number of visitors to the area (cruises, coaches)
23.	Introduce eco taxes, such as CO2 emission tax
24.	Use tourism revenues to create a fund to compensate for environmental degradation, pollution, heritage maintenance etc.
V. Facilitate the development of (uniform) operational regulations	
25.	Adjust the opening times of visitor attractions
26.	Regulate visitor products and services that cause disturbance such as specific modes of transport or activities; increase fines and surveillance for non-compliance
27.	Limit accommodation in sharing economy through regulation
28.	Secure time for the rehabilitation of the destination e.g. restrict access for a short period of time
29.	Create scarcity by capping capacity, such as the number of visitors, cruise ships, flights per day/week/month etc.
30.	Apply regulations such as a moratorium on hotel construction to manage the growth of the accommodation sector
31.	Regulate the operations of accommodation providers, e.g. with regard to carrying capacity, operational standards, working conditions, permits, etc.
32.	Promote/oblige the use of sustainable resources (e.g. sun panels, no plastic policy, water usage, waste management etc.)
33.	Establish certification measures for sustainable businesses practices
34.	Increase the number of on the ground staff, such as supervisors for crowd management, public advisors etc.

VI. Facilitate the development of (uniform) traffic regulations	
35.	Regulate/limit access for large groups
36.	Regulate/limit traffic in busy parts of the destination
37.	Ensure car visitors use parking facilities at the edge of the destination
38.	Determine/communicate the physical carrying capacity of critical areas
39.	Create specific drop-off zones for coaches in suitable places
40.	Create pedestrian-only zones
VII. Stimulate the business environment, specifically in the case of alternative businesses and businesses actively tackling the issue of overtourism	
41.	Create creative incubators/labs for innovative businesses
42.	Create an attractive business environment for innovative start-ups, such as funding and financial assistance programmes
43.	Provide support and incentives for innovations in the business environment, such as funding, financial assistance programmes, ICT development, crowd funding, matching grants, PPPs
44.	Provide support and incentives for domestic businesses
45.	Provide an online guide with an overview of main funding opportunities available for the sector
46.	Provide incentives for domestically owned hotel developments
VIII. Stimulate the development of a diversified economy that is not overdependent on tourism	
47.	Ensure that the economy is based on multiple pillars
48.	Focus on resource-based development
49.	Develop/promote the circular economy locally
IX. Stimulate the use of the "ladder of sustainable development" for the spatial planning of tourism development	
50.	Focus on adaptive-reuse e.g. assign new functions to public spaces and un-used buildings/areas, removing street furniture that hamper the movement of crowd
51.	Prioritize brown-field developments
X. Stimulate visitor segmentation and target marketing that emphasise local sustainable values	
52.	Target visitors with limited impact for the specific destination context
53.	Diversify the tourism product with an emphasis on e.g. sustainable, alternative or ecotourism products matching the DNA of the destination, and target visitors accordingly
54.	Target repeat-visitors
55.	Target local residents and the local business community
56.	Discourage visitation of the destination of certain groups of visitors

57.	Align with neighbouring destinations to each target a specific market
58.	Develop joint marketing projects with surrounding destinations/areas
59.	Actively monitor, manage and evaluate the content of social media platforms
60.	Launch online campaigns to enhance online presence
61.	Run targeted campaigns to provide fresh perspectives on the destination
62.	Adjust branding and marketing strategies to differentiate the destination
63.	De-market the destination for hot spots and high season
64.	Raise awareness of local culture by means of dedicated marketing techniques
65.	Employ sufficient security measures
66.	Favour responsible businesses in marketing
XI. Stimulate regional/cross-border cooperation and facilitate alliances	
67.	Conduct webinars, seminars, and workshops for knowledge sharing and co-creation between destinations (cities, regions, countries), for example to exchange best practices
68.	Develop trans-national and interregional (cross border) partnerships and develop joint promotion, incentives, discounts
69.	Participate in voluntary online information exchange mechanism to e.g. improve the coordination of school holidays in the EU member states
70.	Participate in a virtual tourism observatory to support and coordinate research activities by national research institutes and provide socioeconomic data on tourism
XII. Make residents benefit from the visitor economy	
71.	Increase the level of employment in the visitor economy and strive to create permanent jobs
72.	Make positive impacts of tourism visible, create awareness and knowledge amongst residents
73.	Involve local residents in new tourism products
74.	Conduct an analysis of supply-demand potential of the local community
75.	Improve quality and frequency of public transport due to effective marketing to visitors
76.	Give residents free entry, reduced tariffs, special permits or access passes for example attractions, public transport or other facilities
77.	Stimulate development of impoverished neighbourhoods through visitor economy facilities
XIII. Facilitate the creation of destination experiences that benefit both visitors and local residents	
78.	Develop the destination in line with the residents' needs and desires (e.g. housing, shops, leisure facilities) and treat tourists as temporary residents (once needs and desires are similar tourists disappear into the local)
79.	Give residents the opportunity to become tourists in their own destination, e.g. by creating space for residents at events, markets and/or visitor attractions and integrate locally oriented products into tourist markets

80.	Integrate visitor facilities within local festivities and activities
81.	Involve local volunteers, for example as destination ambassadors for the enjoyment of residents
82.	Make use of temporary 'guerrilla art' to provide fresh perspectives on the destination
83.	Prolong opening times of visitor attractions and cafes
XIV. Facilitate the coordination and development of a consistent destination infrastructure and public facilities	
84.	Create a destination-wide plan for a well-balanced, sustainable/green infrastructure and traffic management
85.	Improve and expand infrastructure facilities to ensure that major routes are suitable for extensive tourism activity and that secondary routes are available at peak times
86.	Improve the destination's cultural and museum infrastructure
87.	Improve directional signage, interpretation materials and notices e.g. to a wide variety of attractions
88.	Make public transport better suited for visitors (e.g. better and faster connections)
89.	Set up specific transport facilities for visitors during busy periods
90.	Foster the use of sustainable transportation for tourism purposes (e.g. tourist buses, sightseeing buses etc.)
91.	Provide adequate infrastructure for alternative vehicles such as hybrids, all-electric vehicles etc.
92.	Provide adequate public facilities, such as public toilets, Wi-Fi
93.	Create safe cycling routes and stimulate bicycle rent
94.	Set up specific safe and attractive walking routes
95.	Ensure that routes are suitable for the physically impaired or elderly visitors to avoid adverse impacts
96.	Guard the quality of cultural heritage and attractions
97.	Ensure cleaning services and regimes fit with visitor disturbance in public space and visitor facilities
XV. Stimulate tourism businesses to communicate with and involve visitors	
98.	Create awareness of issues of visitor pressure / overtourism amongst visitors, such as encouraging visitors to walk or to make use of public transport
99.	Educate visitors on local etiquette and code of conduct, such as in public facilities, public transport
100.	Provide adequate information about traffic restrictions, parking facilities, fees, shuttle bus services
101.	Unite disjointed communities (e.g. by setting up a local DMO)
102.	Create participation and co-creation opportunities for loyal guests
XVI. Stimulate tourism businesses to communicate with and involve local stakeholders	
103.	Ensure that a tourism management group (that includes all stakeholders, including residents) is regularly convened
104.	Ensure that the DMO takes the role of a consultant for decisions needing political support

105. Enhance local organizational structure: organize professional development programs for private-public partnerships, networking events, ICT development, etc.	
106. Organise local discussion platforms for residents	
107. Conduct research among residents and other local stakeholders, for example to investigate what they see as interesting attractions in potential new destinations or what they perceive as impacts of overtourism	
108. Encourage locals to share interesting content about their destination on social media	
109. Communicate with residents about their own behaviour	
XVII. Facilitate the coordination and development of responsive measures in organization and planning	
110. Provide an (adaptive) long-term future vision and tourism master plan, and make use of forecasting and alternative collaborative methods such as strategic foresight and scenario planning to prevent fragmentation of the sector and to be better prepared for the future	
111. Apply zoning to create dedicated development areas	
112. Establish an early warning system and appropriate KPIs	
113. Monitor seasonal fluctuations in arrival numbers and produce relevant data	
114. Consider the use of big data to monitor and track visitor flows, to identify crowded areas, to evaluate industry performance and its volatility, and to refine tourism strategies or to create smart specialisation strategies	
115. Apply methods such as ''visitor journey mapping'' to fully understand the characteristics and behaviour of visitors	
116. Integrate policy domains and make a shift from tourism as ''goal'' to tourism as ''means", provide guidelines	
117. Create contingency plans for peak periods	
118. Consider monitoring all operators (tour operators, guides, etc.) and focus on, for example, operational standards, permits, qualification requirements, awareness raising) in conjunction with an operator's licence system	
119. Prepare a comprehensive operational management plan (including operational practices) to coordinate awareness, conservation, management and tourism activities	
120. Coordinate the tour schedule of operators/excursion organizers who regularly bring groups to the destination	
121. Ensure that event management plans are in place to manage large crowds	

Table 6. Visitor management strategies (Based on: Koens & Postma, 2015; LAgroup & RBOI, 1997; UNWTO, 2004)

5. Logical framework approach – indicators to achieve success

Following the problem analysis and formulation of the main objectives, destinations need to decide on the strategies and methods they want to use. The 17 overarching strategies, presented above, were placed into Logical Framework Matrixes in order to assist with developing logical, feasible and measurable projects.

The Logical framework approach helps to develop concrete projects to solve specific problems. The approach enables us to set up a logical order for the activities carried out, to define the direction of activities towards the main objective, to select key performance indicators while keeping in mind certain risks/assumptions that may affect the implementation of the project (Lei, Sirotina, & Bobrov, 2013).

Interpretation of the logical framework

In the columns, the ''goal'' represents the higher-order objective that the project intends to achieve. The ''outcome'' represents the purpose and the impact the project will have. The ''output'' refers to the deliverables of the project while the ''activities'' show what steps are required to implement the project. The approach is based on the cause-effect logic thus certain activities will lead to certain outputs that will help to reach the main objective (University of Wolverhampton, n.d.). The columns can be interpreted as a hierarchy of objectives.

The first column contains the project summary. The ''indicator'' column contains performance measures while the ''means of verification'' column demonstrates the sources of information that can help to evaluate what has been accomplished. The last column ''assumptions'' contains information related to factors that may have influence on the implementation of the project and may break the link between the statements (University of Wolverhampton, n.d.).

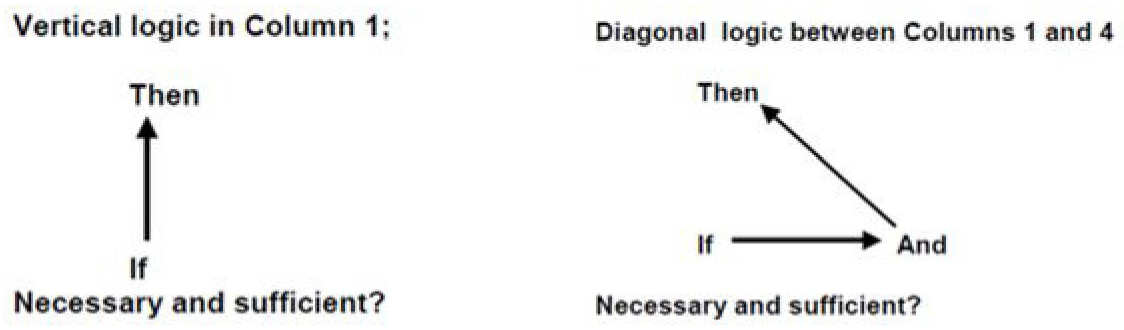


Figure 2. Vertical and diagonal logic (University of Wolverhampton, n.d.)

Please see an example matrix below (see Appendix 13.4 for the complete list). It is important to keep in mind, that the matrixes displaying the application of each strategy in the form of a potential project is just an indication. It intends to form a basis for a more elaborated development program. Consequently, quantity, quality and time dimensions have not been applied and performance budget is not displayed. Using the matrixes as a stepping stone, the above mentioned criteria need to be developed at a later stage based on the specific context/project.

Stimulate and assist in the spreading of visitors around the destination and beyond

	Summary	Indicators	Means of Verification	Risks/Assumptions
Goal	Even spatial distribution of visitors	Diversification of tours and visits – X new areas are mentioned as must see	Visitor surveys	N/A
Outcome	To contribute to reducing pressure on the touristic hot spots by spreading the visitors in the city and beyond	Visitor numbers to newly promoted areas increase by X%	Tourism statistics	The government has capacity/willingness to cooperate
Outputs	New neighbourhoods included in the tourism offer	X new attractions/areas included in the tourism offer	Inventory of tourism products/attractions/hot spots	There is support from the local stakeholders
	Awareness created about less visited areas	X successful awareness campaigns launched	Campaign results	The right audience is reached
Activities	Offer special incentives (e.g.: tasting coupons)	X New promotions launched	Number of coupons used	Local businesses are cooperative
	Relocate events to new areas	X events relocated	Statistics - event visitors	Spatial conditions are appropriate
	Launch campaigns to promote new areas	X Visitors reached via campaigns	Campaign statistics	The target market is responsive
	Develop new visitor attractions and facilities	X new attractions and public facilities developed	Inventory of attractions and facilities	There are adequate financial resources
	Conduct research on community perceptions in the new areas	X research projects launched	Resident surveys	The residents are supportive and willing to get engaged
	Prepare inventory of areas with tourism potential	X potential areas identified	Portfolio of tourism activities/facilities	There are areas with tourism potential

Table 7. Example of a Logical Framework Matrix

6. Future proof urban destinations - scenario planning

Recently, scenario-based planning has become one of the most popular foresight-tools in tourism development (Fernandez-Guell & Collado, 2014; Gossling & Scott, 2012). Foresight is an approach where the probability of unknown surprises and unsure developments are seen as the starting point for the exploration of the future (Postma, 2013b). Scenario planning is a complex, dynamic planning approach built on Triangulation, a multi-method approach that combines quantitative and qualitative aspects (Gossling & Scott, 2012). Based on multi-method studies, plausible pictures of the future are created. These scenarios represent what will happen if major uncertainties develop into different directions. Usually, the most unpredictable driving forces of change are thoughtfully selected and the complex environment is simplified to two dimensions with the possible contrary outcomes of the major uncertainties (Postma, 2013b). This process results in four future scenarios. It is advisable to work with longer time horizons when developing scenarios (Varum & Melo, 2009) and continuously monitoring signs that may lead to changes in the scenarios (Postma, 2013b).

At destination level, strategic planning is performed by the public sector/DMOs as they are the policy makers, regulators, managers and facilitators of developments. They are responsible for the coordination of a range of activities and operations. To use scenario planning for strategic planning, the involvement of stakeholders is crucial (Simao & Partidario, 2010). Participation and interaction of the different stakeholders is a vital part of the learning process. Future uncertainties are identified collectively by the participants while their individual perceptions, opinions and interests are shared. The participatory approach allows the stakeholders to develop a better understanding of their environment and helps them to become pro-active, resilient and more future proof (Postma, 2013b).

In the creative sessions that form part of this process, industry players can re-evaluate their strategic decisions and assess the business environment they work in (Varum & Melo, 2009). The results (future scenarios) can be used to create new strategies and policies or to re-assess the existing ones. Scenarios have to be reviewed and updated on a regular basis.

A scenario-planning workshop was organized with representatives of the DMOs of the participating cities. Chapter 10 will introduce the future scenarios developed by the participants for urban destinations.

7. The project

The project ''Managing visitor pressure and events in an urban setting'' is a follow up study of a previous research conducted in large urban destinations (Amsterdam, Barcelona, Berlin, Copenhagen, Lisbon and Munich) in 2015 (Koens & Postma, 2015). The second round of the project was initiated by CELTH (Centre of Expertise in Leisure, Tourism and Hospitality) and was implemented by the European Tourism Futures Institute in cooperation with the NHTV Breda University of Applied Sciences. The project ran between March 2017 and November 2018.

With the aim of building on the findings of the first project, the current study focuses on smaller city destinations. The project involved seven European cities: Salzburg, Tallinn and the five Art Cities of Belgium: Antwerp, Mechelen, Ghent, Leuven and Bruges. The local Destination Management Organizations acted as main partners and contact points in each location.

The main goals of the project:

- **to form a thorough understanding of the situation with regards to visitor pressure in each city**
- **to determine community-tourism relationships at each location**
- **to identify improvement points in visitor management for the participating cities**
- **to formulate future scenarios for small urban destinations**
- **to provide efficient tools and strategies for managing visitor pressure**

7.1 Methodology

In order to get reliable results, a multi-method approach was used. To have a thorough understanding of visitor pressure and over-tourism and to learn more about the unique characteristics of urban tourism extensive literature research was conducted. Besides the theoretical background, the context of the participating cities was examined via reports, statistics, development plans and existing strategies. The desk research was followed by extensive fieldwork. The field research consisted of two parts:

Semi-structures in-depth interviews with key industry players

A total of 50 interviews were conducted with key industry actors (an average7 interviews per city). The interviews were conducted face to face (29), via phone (3), via Skype (16) and two participants answered in writing. The interviewees were selected with the help of the local DMOs. For the selection of the interview participants, purposeful sampling was applied and members of the stakeholder groups below were considered:

- Destination Management Organizations
- Tourism related businesses (event organisers, hotels,catering establishments, tour operators, travel agencies)
- Transportation service providers
- Public sector (involved in spatial development, tourism management etc.)
- Tourist attractions (museums, heritage locations, art centres, exhibition/conference centres)
- Resident groups or representatives
- Community centres

The main goals of the interviews were to learn about the perceptions of key stakeholders with different expertise and background concerning visitor pressure and tourism development in their city, to identify existing strategies and future development plans. The main topics covered during the interviews were the followings:

- Is visitor pressure a problem in the city (or may become a problem in the future)?
- How does the problem manifest itself (or may do so in the future)?
- Governance of visitor pressure
- Strategies and methods of visitor management
- Future vision and developments

Semi-structured interviews were chosen as a method in order to provide more flexibility for the interviewers. The interview was based on a structured interview guide that contained the main topics to be discussed. The interviews lasted for approximately 40-60 minutes and were held in English (except in a few cases due to language barriers, in these cases the interview was conducted in Dutch). The interviews were recorded in each case and the recordings were analysed at a later stage.

The interviews were transcribed and analysed using a very detailed answer sheet following the same structure as the interview guide. In order to be able to compare the results of the current study to the outcomes of the previous visitor pressure project, the same structure was followed throughout the whole process

Self-completion online resident surveys
To be able to examine the relationship between the tourism industry and the local community the method of self-completion online questionnaire was chosen. In order to benchmark between the destinations of the previous and the current project the same questionnaire (with slight changes) was used in two of the cities: Salzburg and Tallinn. In case of the Art Cities of Belgium, a combination of the ETFI survey and a survey from Visit Flanders was used and the data collection was coordinated by Visit Flanders. In the city of Bruges no survey was conducted in the framework of the project due to a previously conducted research. A total of 515 responses were received to the survey conducted in Tallinn and Salzburg and 5354 responses were collected in the Belgium cities together.

The surveys were distributed with the help of the local DMOs and contained questions related to:

- Personal characteristics
- Attachment to the city
- Positive critical encounters
- Negative critical encounters
- Behavioral response to these encounters
- Attitude towards future tourism development
  in the city and in the respondents' neighborhood
- Support for strategies to deal with tourism development

In order to gain a better understanding of the local context, each city was visited by a researcher. Unstructured observations were made during the visit. The observations were documented (photographs and video recordings) and field notes were taken.
The information collected during the site visit formed part of the interpretation process.

8.Results and analysis per city

The chapter below will present the main findings per city. The main points are discussed for each city in a precise, compact way. The detailed analysis of the findings for each city can be found in the individual city reports.

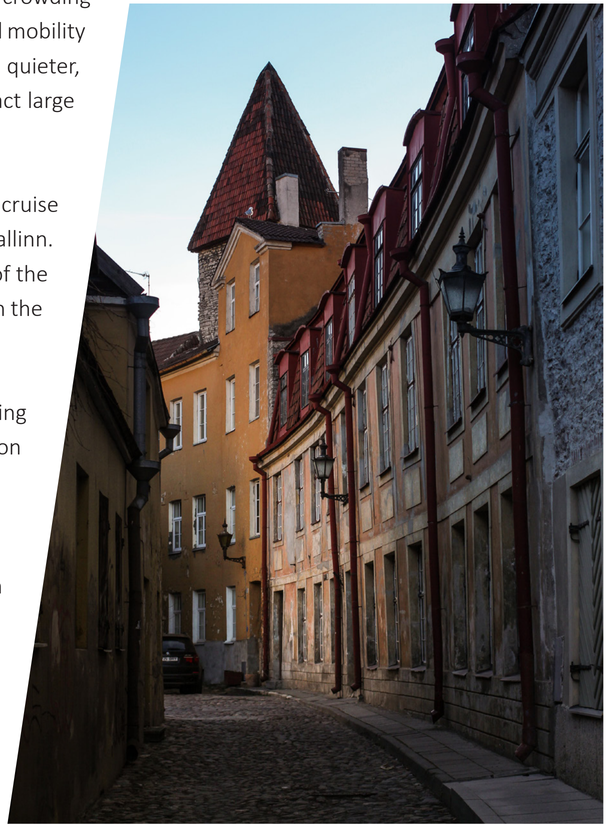
8.1 Tallinn

Underlying Issues
In the city of Tallinn, visitor pressure is most visible in the historic city centre. Due to the specific layout and the narrow, medieval streets, congestion and overcrowding is one of the main issues the city is dealing with. Besides infrastructure and mobility problems, seasonality is also challenging. The winter period is generally quieter, however the Christmas holiday and the New Years' Eve celebrations attract large number of visitors, mainly from the neighbouring countries.

According to the interviewed experts, the main problems are linked to cruise tourism and the large number of ferry passengers arriving to the Port of Tallinn. Tallinn receives 300+ cruise ships yearly. Due to the first time visit, most of the passengers are interested in the touristic hotspots. It was reported that on the busiest days residents tend to leave the Old Town.

It has to be noted, that while cruise tourism is constantly growing (including the arrivals by ferry) other segments are also increasing placing pressure on the city.

Encounters with tourism and visitor pressure
In Tallinn, positive encounters outweigh the negative encounters based on the residents' responses to the survey.



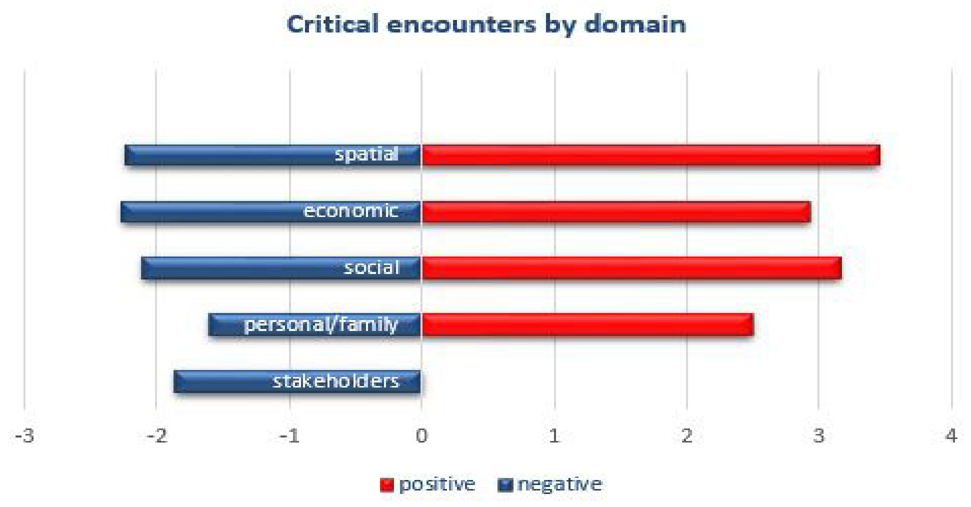


Figure 3. Critical encounters by domain - Tallinn

Spatial encounters

Tourism in Tallinn is concentrated in the Old Town. To protect the UNESCO world heritage site and to ensure a peaceful living environment for the residents of the historical town centre the main goal is to make the Old Town completely car free.According to experts, in some cases, directional signage and the amount of public facilities need improvements.

The residents were most positive about the restoration of traditional architecture (M=3.81), protection of historical parts of the city (M=3.68) and the events organized (M=3.52). Amongst the negative impacts, overcrowding of streets/sidewalks (M=2.62), overcrowding of shops/restaurants (M=2.35) and pollution/littering/noise (M=2.32) scored the highest

Economic encounters

The positive economic encounters of tourism were recognized and acknowledged by all the interviewed experts. Whether the economic encounters have been maximized is perceived in a varied way. It was argued that tourism should contribute more towards heritage protection. The tendency of rising rental prices and real estate value is visible in the Old Town, although, it is not solely the result of tourism development. Due to the rising costs, not only the residents are in an unfortunate situation but traditional stores are also facing difficulties. According to the resident survey, greater number of tourist accommodation (M=3.38), more seasonal jobs (M=3.27) and economic development (M=2.89) are seen as a positive outcome of tourism. However, the increase of price level/affordability of restaurants, cafes, shops, leisure facilities, rental houses and private homes are seen as the most significant negative economic impacts.

Social encounters

Touristification of the historic centre is getting more and more visible. Furthermore, due to seasonality, demand is not balanced throughout the year. This trend results in difference in quality and service standards of catering establishments in the peak and the shoulder months. Concerning the impacts of tourists on safety and security, it was reported that crime and vandalism did not increase in the city due to tourism development.

An issue often raised by the interviewed experts was the high concentration of entertainment facilities in a specific area within the Old Town. These facilities contribute to significant noise pollution.

The lack of qualified tour guides is also seen as an issue. In the peak months, guides without licences and students who speak one or two languages fluently are often employed as guides.

According to the surveys, residents ranked “more cultural supply” (M=3.57) the highest amongst the positive direct social encounters, followed by “greater international touch’’ (M=3.55) and “revitalization of local arts and events’’ (M=3.54). Amongst the negative implications “misbehaviour of visitors’’ (M=2.63) was ranked the highest, followed by “commercialization of residents’ hospitality” (M=2.18).

Personal encounters

Residents were asked to evaluate the positive and negative encounters of visitors on their personal life as well. The most highly ranked positive personal encounters are “greater personal pride (M=3.04), “more pleasant contacts with visitors’’ (M=3.02) and “improvement of my understanding of other people/visitors’’ (M=2.72). The most highly ranked negative personal encounters are “waiting time in shops/facilities” (M=2.06), “it frequently takes me extra time to go to work” (M=1.66), and “my safety/comfort is frequently violated’’ (M=1.61).

Stakeholder encounters

Residents were asked to evaluate their personal experience with the attitude/actions/plans of different stakeholder groups on a Likert scale ranging from neutral to very negative. “Attitude of taxi drivers’’ got the least positive feedback (M=2.02) followed by “attitude of other residents towards visitors” (M=1.97). The “attitude of tour guides’’ (M=1.73) got the least negative ranking.

Governance

It was emphasized that the Visit Tallinn 2017-2020 strategy is based on the National Tourism Development Plan and the Tallinn Development Plan thus the strategy is aligned with other developments taking place in the city.

The main party involved in tourism related decision-making processes is the Tallinn City Tourist Office and Convention Bureau. In general there is close cooperation between the tourism sector and other stakeholders. However, certain issues were raised by the stakeholders such as lack of adequate strategies and methods to deal with problems as well as lack of smart technology in planning and development. It was revealed that in general the citizens are not consulted when it comes to tourism planning and development.

8.2 Salzburg

Underlying Issues

In the city of Salzburg visitor pressure is already present. The problem becomes visible mainly in the main season: July and August and in the winter season when the Christmas market opens its gates.

In general, the problem is caused by two main phenomenon. Not only tourists are responsible for congestion problems. Commuters (50-60 thousand people per day) increase the volume of traffic significantly combined with day visitors arriving from the nearby holiday destinations and the river cruises (one or two days a week 20-30 buses). Besides infrastructure issues, it was reported that the cityscape is changing at a fast pace. The offer is oriented more towards tourists, especially in the Old Town.

The negative voice of citizens is occasionally strengthened by the media. This practice harms the possibility to handle the problems in a confidential, effective way.

It was highlighted during the interviews, that cooperation between the different stakeholder groups is often lacking and it hinders the implementation of new ideas.

Encounters with tourism and visitor pressure

In Salzburg, the positive encounters outweigh the negative encounters based on the residents' responses to the survey.

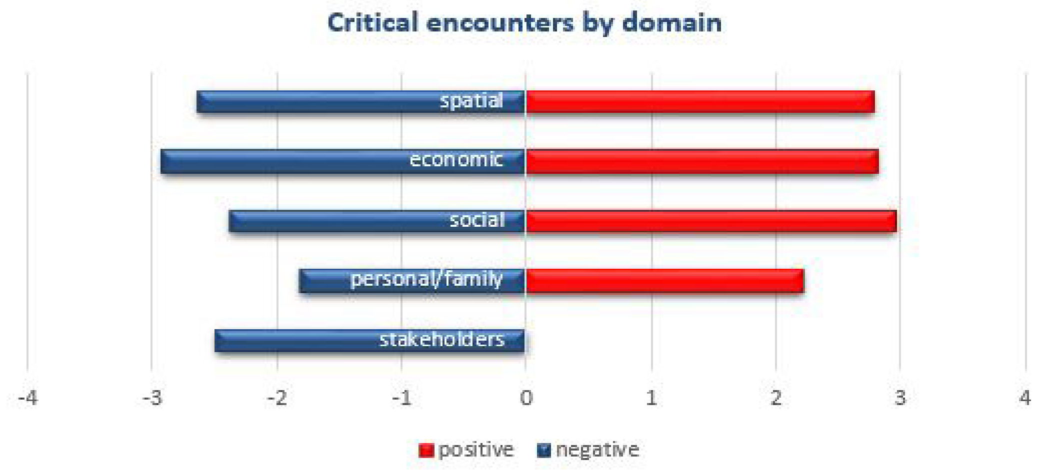


Figure 4. Critical encounters by domain - Salzburg

<u>Spatial encounters</u>

As a positive encounter, it was highlighted that tourism contributes towards the maintenance of built heritage and architecture in the city. Infrastructure problems are seen as the main negative encounters. Besides the large number of commuters and mobility issues, coach parking facilities and drop off points are not seen as adequate.

Respondents of the resident survey were most positive about the ''restoration of traditional architecture'' (M=3.10), ''the protection of the historical parts of the city'' (M=3.02) and the number of events organized (M=2.98). Amongst the negative impacts, overcrowding in general scored the highest that refers to significant congestion problems.

<u>Economic encounters</u>

Concerning the economic encounters, it was emphasized by most of the experts, that tourism is a very important sector that contributes towards the economic well-being of the city. However, negative impacts, such as touristification, rising rental prices and lack of daily infrastructure for residents in the city centre were also mentioned.

Just like in case of the spatial encounters, in the resident survey positive economic encounters scored higher than the negative ones. More jobs in general are seen as a positive outcome of tourism as well as jobs indirectly linked to tourism. However, the increase of price level/affordability of real estate, cafes and restaurants, shops and other services such as taxis are considered the most significant negative economic impacts.

Social encounters

Based on the opinion of experts, vandalism is not a major problem in the city.

The citizens of Salzburg have great pride in their city. Engaging the locals with visitors and to create shared space is considered challenging though.

When the experts were asked about the identity of the city, the answers were controversial. It was emphasized that it has to be a joint effort of the tourism office, the government, the stakeholders and the residents to create a real identity for the city that everyone can associate with.

According to the survey, residents ranked "greater international touch" (M=3.60) as the highest amongst the positive direct social encounters, followed by "more positive image'' (M=3.42) and "more cultural supply'' (M=3.34). As mentioned already in relation to the economic implications, less affordable housing for residents is seen problematic (M=2.84). "Commercialisation of residents hospitality'' was also ranked high amongst the negative social encounters (M=2.43).

Persona encounters

Residents were asked to evaluate the positive and negative encounters of visitors on their personal life as well. The most highly ranked positive personal encounters are: "greater personal pride of the city'' (M=2.88), "more pleasant contacts with visitors'' (M=2.84) and "improvement of my understanding of other people/visitors'' (M=2.49). The most highly ranked negative personal encounters are: "it frequently takes me extra time to go to work" (M=2.11), "waiting time in shops/facilities'' (M=2.11), and "obstruction of my daily schedule/planning'' (M=2.06).

Stakeholder encounters

Residents were asked to evaluate their personal experience with the attitude/actions/plans of different stakeholder groups on a Likert scale ranging from neutral to very negative. Attitude/plans of tourism service providers such as tour operators and tour guides got the least positive feedback followed by the attitude/plans of tourism marketing/promotion organizations (M=2.53). The "attitude of owners/managers of tourist accommodations'' (M=2.04) got the least negative ranking.

Governance

Tourism related decisions are made mainly by the authorities/organizations responsible for tourism planning, development and promotion without engaging too much with other industry players or the residents. Industry players are informed about changes and new plans on a continuous basis; however, it is more of a one-way conversation than a discussion between the parties. In general, it was agreed on by the interviewed experts that predominantly, there is no close cooperation between the different departments within the public sector.

A major problem is the lack of clear division of tasks between the different parties responsible for decision-making and a common vision. Residents in general do not have the opportunity to participate or engage in decision-making processes.

8.3 Antwerp

Underlying Issues

According to the interviewed experts, visitor pressures was not experienced in the city in the past years and it is not foreseen that it will become a problem in the near future.

However, since Antwerp attracts many shopping tourists, experts warn about excessive visitor pressure during sales and the Christmas holidays. It was reported that the city center and the shopping areas are very busy, especially during the weekends. Therefore, in the center, including the shopping streets, visitor pressure is most likely to appear.

It has also been highlighted, that events organized in the proximity of Antwerp generate significant visitation to the city, e.g. Tomorrowland. Besides large events, day tourism was also pointed out by the interviewed experts. Day-trippers, shopping tourists and overnight tourists often travel to Antwerp by car. This in combination with the local users of the city causes congestion problems.

Encounters with tourism and visitor pressure

This subchapter will provide insight into how visitor pressure manifest itself (or may do so in the future) in the city of Antwerp.

Spatial encounters
Mobility and the traffic infrastructure were highlighted as the most problematic sector. Since many people travel by car to Antwerp, congestion is often a problem. It was also reported, that public transportation in Antwerp does not always work efficiently. The directional signage as well as signs and announcements on the vehicles are not always understandable and clear for visitors so many of them do not see public transport as an alternative option for travelling.
Besides highlighting some issues, the interviewed experts also reported that infrastructure and public transportation is continuously improving and investments are made to create more park & ride facilities. Another positive impact on the physical aspects is linked to the cityscape. The opening of new stores as well as the renovation and maintenance of old buildings and built heritage are making the city more attractive.

Economic encounters
It can be stated that the encounter on the local economy is seen mainly positive. The contribution of tourism towards job creation was acknowledged by all the experts. Furthermore, tourism generates revenue for the city and attracts new businesses. Stimulation of the local economy has high importance as the city continuously invests into attracting new entrepreneurs and businesses.

Social encounters
Tourism is seen as an industry that contributes towards intercultural exchange and diversity. However, it is hard for local residents to distinguish between tourists and the expat community working and living in the city.
It was argued that the increasing number of visitors will actually help to reduce vandalism due to the fact that there will be more eyewitnesses and it will discourage improper behavior.

Governance
It was reported that the Flemish government regulates all accommodation facilities in the city. This is the first step in managing the sharing economy. It was pointed out by some of the interviewees that politicians, especially the vice mayor, play an important role in managing the tourism industry in the city. Furthermore, most of the interviewees mentioned the directors of the main tourism sites and attractions as key players. The police and security companies are seen as important stakeholders as well since they manage visitor flows e.g.: during major events.

Without doubts, Visit Antwerp is considered the most important player in managing visitor pressure and tourism in the city. It was reported, that stakeholders of the tourism sector usually meet up 4 to 6 times a year. Moreover, workshops are organized so that all parties are involved in reaching solutions.

8.4 Ghent

Underlying Issues
Visitor pressure is currently not considered a significant issue, however it is slowly becoming more and more visible.

The carrying capacity of the city was pointed out by some of the interviewed experts. Ghent has the ability to grow, however thorough planning is needed in order to avoid reaching the saturation point. Balancing the use of urban space has high importance as certain times of the year pressure is already visible to a certain extent. Due to the fact that Ghent is a student city the different user groups need to share the same space and balancing the different needs is challenging. Due to the excellent railway connections the city has become of interest for international visitors as well.

Visitor pressure is only visible at certain times. Currently congestion problems may arise and the maximum hotel capacity is reached. It was reported that this tendency can have a negative impact on the image of the city as visitors may have the impression that Ghent is a tourist city.

Encounter with tourism and visitor pressure
This subchapter will provide insight into how visitor pressure manifest itself (or may do so in the future) in the city of Ghent.

Spatial encounters

The main spatial encounter highlighted by most of the interviewees was linked to mobility and traffic infrastructure. The city is lacking adequate drop off points including basic public facilities for coaches. The new circulation plan was mentioned as a solution for mobility issues in the city. However, it was reported that besides making the central area accessible for pedestrians, some of the shop owners perceive the new plan as a limitation for tourists to access the city.

It was mentioned during the interviews that the various ongoing restoration and renovation projects can help to stimulate the identity of the city.

Economic encounters

Due to the improvement and development works that have been carried out in the past 20-25 years Ghent, from being an industrial city has turned into an attractive city destination mainly for day trips and shorter city trips. Due to the uplifting of the city, the price of real state has increased significantly. However, as other factors played a key role in the affordability of real estate it is not seen solely as a consequence of tourism development. It was reported that a few businesses did leave the city due to affordability, but on the other hand, this opened up new possibilities for upcoming local start-ups introducing more innovative concepts.

The sharing economy and specifically Airbnb is seen as an issue in Ghent as well. Due to lack of rules and regulations, Airbnb represents unfair competition to local hoteliers.

Social encounters

It was reported by most of the interviewees that there is an overall feeling of safety and security in the city. Due to the new circulation plan, the number of cars that can enter the city centre is limited allowing both residents and visitors to walk around safely. Smaller crimes and occasionally vandalism does happen, although it is not attributed to tourists and tourism.

The interviewed experts believe that the local community and the city is open, tolerant and progressive however, as Ghent has recently received greater attention after being named the best kept secret of Europe, locals who feel threatened by the increased flow of visitors may show unsupportive, discouraging behaviour.

Governance

It was mentioned that two times a year a general meeting is convened where stakeholders from different sectors of the tourism industry come together. The local tourism office, the Flemish government and the city council were mentioned as key industry players. Besides policy and decision makers, the importance of the private sector was also highlighted. Having a common strategic vision for the city is of absolute importance.

8.5 Leuven

Underlying Issues

Over-tourism is currently not seen as a problem in the city of Leuven. However, there are certain times when pressure becomes more visible. In case of events organized in the city centre, due to the specific setting it is very important to manage visitor flows and noise pollution efficiently. The city centre is compact and small thus, problems may arise in the future concerning overcrowding.

Due to ongoing developments, the city is continuously being refreshed and new neighbourhoods are being developed. Nonetheless, this process is not seen as an outcome of tourism development. It is considered to be the result of thorough planning, restoration works and changed traffic scheme aiming at reducing the number of cars in the inner city.

Encounters with tourism and visitor pressure

This subchapter will provide insight into how visitor pressure manifest itself (or may do so in the future) in the city of Leuven.

Spatial encounters
Due to the recently introduced new circulation plan, the inner city became a pedestrian zone.
The main goal of the new plan is to provide a safe and pleasant environment for both residents and visitors. The importance of providing sufficient information on parking facilities, fares and possible routes/directions to visitors who travel to Leuven by car was highlighted by most of the interviewees. The parking lots are located on the edge of the pedestrian zone, however it was argued that in some cases accessibility and directional signage to these parking lots are not clear.
Based on the opinion of some of the interviewees, Leuven's infrastructure is insufficient when it comes to large events and festivals. Just like the infrastructure, hotel capacity is also lacking behind due to the continuously increasing popularity of Leuven as a business tourism destination.

Economic encounters
It was reported that in the past couple of years the number of tourist-oriented shops has increased, however, we cannot talk about touristification yet. The number of restaurants and cafés also increased but this is rather beneficial and contributes to the quality of everyday life.
It was highlighted that the price of real estate in the city is rather high but it is not seen as a consequence of tourism development. Several factors play a key role in the increasing value of properties.
In order to maximize the economic benefits of tourism, some of the interviewees argued that it would be highly important to increase the average length of stay as most of the current visitors are day visitors and spend only a couple of hours, half a day in the city.

Social encounters
It was stated by most of the interviewees that vandalism and crime is not a major issue in the city and it cannot be linked to tourism in most cases. Disturbances caused by tourists can be mostly linked to the age group between 20-30 who are often attracted by the beer culture and choose Leuven as the destination of their bachelor parties.

Governance
Tourism is not a priority sector for the city of Leuven. The main partners involved are the public sector and private businesses from different sectors: mobility, cultural heritage, tour operation, tour guides, hotels, catering establishments and retail. It was reported that in general, there is a close cooperation between the different stakeholders and sectors. This is mainly due to the small size of the city.
There are individual initiatives as well by some of the businesses however, the centralized coordination of these actions is missing.
The tourism department do not actively engage or communicates with the residents. Other sectors such as events also reported the lack of communications towards the residents

8.6 Mechelen

Underlying Issues
All the interviewees agreed that Mechelen has not reached the point yet when it has to face visitor pressure. There is still space for more visitors. Tourism experts are actively working on creating more awareness of the city.

It was mentioned by most of the interviewees that Mechelen is seen as a day trip destination. Sometimes visitors spend only a couple of hours or half a day in the city. In reality, the city has a lot more to offer, even for two, three days. Extending the stay of the visitors would be highly important in order to maximize the economic benefits.

Encounters with tourism and visitor pressure
This subchapter will provide insight into how visitor pressure manifest itself (or may do so in the future) in the city of Mechelen.

Spatial encounters

The city has great railway connections and it is easily reachable. The inner city is car-free (not everywhere) and is a low emission zone, thus having sufficient parking is extremely important. The care-free centre is seen as an asset to the city and it is often used as promotional material. Despite of the pedestrian-zones, hotels are easily reachable, except the ones in the historic centre. It is important to mention, that the city has developed underground parking lots in the city centre. On the long term, it would be advisable to move these parking lots to the edge of the city.

Economic encounters

According to the interviewees, there is great cooperation between the local economy and tourism. The city is eager to provide opportunities for young start-ups and innovative businesses.

As tourism realized the positive evolution of the local economy, they have decided to involve local retail in their products. A coupon book is now available. The coupons are focusing on the old, traditional businesses. Tourism gives these businesses a recognition. It is a strategy that tourism can sustain and enhance on the long run.

In general, the number of trendy shops, cafes, restaurants and brasseries has increased in the past couple of years. This is a result of the increase in the number of young families and couples who moved to the city recently due to its affordable housing market. The increase of the quality of living has of course direct impact on the image of the city.

Social encounters

According to the interviewees, there are no safety and security issues in the city due to tourism development. The city is very proud of its diverse society thus, radicalism and similar issues are not significant.

Governance

The interviewees agreed that there is close cooperation between the different parties when it comes to planning and development.

There is particularly close cooperation between the tourism board and the hotel sector. In the past 2 years relationships with other sectors, such as attractions, excursion organizers were built systematically by the tourism board. Mechelen is a shopping city, thus the retail and business sector is also closely linked to the tourism department.

On the other hand, it was also reported, that decisions are often made by politicians who act as experts in certain areas. These decisions do not always match the needs of the specific sectors.

Concerning community engagement, currently there is no active communication with the residents. There is space for improvement in this aspect.

8.7 Bruges

Underlying Issues

Due to the high interest in the must see attractions and small distances between the heritage sites in the city centre, most visits are concentrated in a rather small area. While residents try to use the same area for everyday purposes encounters between tourists and residents often result in annoyance amongst the local community.

Moreover, the city attracts domestic shopping tourists from a 40 km radius around Bruges. These tourists often arrive by car that leads to mobility and parking problems. It was reported that parking costs are relatively high due to high demand. This has resulted in the inhabitants avoiding the city centre.

A major problem that was pointed out is the situation of the sharing economy, namely Airbnb. Besides representing unfair competition to local hoteliers, local business owners are also negatively affected.

Furthermore, experts reported that cruise tourists and day tourists form the core of the problem, and mainly those arriving in groups. It was argued that during their short visits tourists do not show real interest in the local culture or contribute towards the heritage of Bruges. As a result of increased demand, signs of touristification can already be seen. The number of souvenir shops and shops selling chocolate and beer has significantly increased.

Encounters with tourism and visitor pressure

This subchapter will provide insight into how visitor pressure manifest itself (or may do so in the future) in the city of Bruges

Spatial encounters

Clashes do occur between the various user groups of the city. Infrastructure and mobility problems were mentioned by most of the interviewees as well as the lack of infrastructure for accommodating large groups. The high price of on-street parking has also been highlighted.

Economic encounters

The increasing value of real estate was pointed during the interviews. It was mentioned that the housing/rental prices are rising by the year. Besides changes in the real estate market, the situation of small retailers is also challenging. Big franchises and other foreign investors are eager to obtain real estate in Bruges. This tendency results in increased operational costs for small businesses.
It was pointed out, that souvenir shops have become monotonous and destroy the 'old' image of Bruges.
On the other hand, the cleanliness of the city centre and the wide range of restaurants and events were highlighted as a positive impact. Due to the high number of catering companies, a lot of opportunities for employment arose, therefore, many of Bruges inhabitants work in the tourism sector.

Social encounters

When it comes to social and personal encounters, the experts reported that residents feel more open and intercultural due to the encounters with people visiting from different countries. As a consequence of interactions between different cultures the inhabitants feel more connected to the outside world.
The liveliness of the city was also pointed out as a positive implication.

Governance

According to the interviewed experts, the major stakeholders actively involved in managing tourism in the city of Bruges are hotel associations, Visit Bruges, the heritage conservation unit, tourist organizations, the chamber of commerce, UNESCO and the local government. As it can be seen there is a high involvement of stakeholders from various sectors of the tourism industry. There is a close cooperation between the key players that is well represented by the fact that these organizations are directly involved in forming the long-term strategic vision of the city.

However, some of the experts suggested that the tourism board of Bruges, the Bruges City Council should take more initiatives on the field of visitor management and provide solutions for reducing over-tourism and visitor pressure.
According to the experts' opinion, citizens are involved in the decision-making processes and they have the opportunity to express their opinion.

9. Cross case analysis - critical encounters related to visitor pressure amongst the residents

This chapter contains a cross case analysis highlighting differences and similarities between the perception and opinion of residents in city destinations. The analysis contains information from the cities participating in the current round of the visitor pressure project and where possible, compares the results to the outcomes of the previous round. Due to incompatibility of the survey, results from the Belgium cities could not be compared. Tables containing data from the Art cities can be found in the appendix. In the first visitor pressure project Copenhagen, Berlin, Munich, Amsterdam, Lisbon and Barcelona were studied.

9.1 Demographics and other descriptive characteristics of the sample

The first subchapter introduces the demographic and other descriptive characteristics of the respondents. The first table shows the response rates in each city. It can be seen that the sample size was very similar in case of the cities participating in the first round. The sample size in the Belgium Art cities was significantly higher while the response rate in Tallinn was the smallest amongst all the cities.

City	Respondents
Antwerp	1174
Bruges	1248
Ghent	1476
Leuven	880
Mechelen	576
Tallinn	108
Salzburg	407
Copenhagen	422
Lisbon	406
Barcelona	406
Munich	406
Berlin	514
Amsterdam	484
Total	**8507**

Table 8. Response rate - resident survey

Table 9 shows the age structure of the sample while table 10 reveals the location of their work place, either inside or outside of the city. Finally yet importantly, table 11 highlights the period the respondents have been living in the city. Compared to the other cities, respondents in the city of Salzburg, Amsterdam and Copenhagen were slightly older, as in their case, the majority of the respondents belong to the 55+ age group. The majority of the respondents in the Belgium Art cities also belong to the 55+ age category.

Age structure of sample in different cities in % (n=3135)

Years	Tallinn	Salzburg	Copenhagen	Lisbon	Barcelona	Munich	Berlin	Amsterdam
15 – 34	27.8	29.7	21.2	44.1	42.3	44.5	41.1	28.3
35 – 54	52.2	28.1	36.9	38.8	44.2	39.1	38.0	30.4
55+	20	42.2	41.9	17.1	13.5	16.4	20.9	41.3

Table 9. Age structure - resident survey

From table 10 it can be seen that most of the respondents work inside the city (central city), however in case of Amsterdam, Copenhagen and Salzburg, the percentage of respondents working outside the city is relatively high.

Work location of respondents in different cities in % (n=3140)

Location	Tallinn	Salzburg	Copenhagen	Lisbon	Barcelona	Munich	Berlin	Amsterdam
Inside the city	84.2	62.8	51.9	86.7	78.3	73.4	85.6	62.0
Outside the city	15.8	37.2	48.1	13.3	21.7	26.6	14.4	38.0

Table 10. Work location - resident survey

Most of the respondents reported that they have been living in their city for a year or longer. In case of the Belgium cities, the great majority of the respondents are long-term residents, meaning they have been living in their city for 10 years or longer.

Period of living in the city in % (n=3147)

Period	Tallinn	Salzburg	Copenhagen	Lisbon	Barcelona	Munich	Berlin	Amsterdam
Less than 1 year	5.9	1.6	1.9	4.4	8.4	5.9	7.6	5.2
1 year or more	94.1	98.4	98.1	95.6	91.6	94.1	92.4	94.8

Table 11. Period of living in the city - resident survey

9.2 Perceptions regarding the city and tourism in general

As it can be seen from the table below, most of the respondents have long-term relationship with the city as they were born and raised there. The second largest category was those respondents who moved to the city for work or study. However, this type of attachment was significantly lower in case of Tallinn (2.8%), Salzburg (0.5%) and Barcelona (17.5%). Proportion of respondents who moved to the city for family reasons was the highest in Salzburg (36.6%) and Tallinn (32.4%). Percentage of respondents who stated that they moved to the city simply because they liked it was the highest in Munich (25.4%) and Berlin (22%).

Attachment to the city in % (n=3153)

Attachment	Tallinn	Salzburg	Copenhagen	Lisbon	Barcelona	Munich	Berlin	Amsterdam
I was born and raised in the city	49.1	50.1	40.0	52.7	63.1	37.9	46.1	45.2
I moved to the city because of my work or study	2.8	0.5	37.7	32.5	17.5	47.5	31.1	29.8
I moved to the city because of family reasons	32.4	36.6	10.2	9.4	11.8	16.5	15.8	13.0
I moved to the city because I like the city	7.4	17.7	17.5	9.9	9.9	25.4	22.0	14.3
I moved to the city because it offers (affordable) housing	16.7	28.5	3.1	5.7	2.7	1.2	4.5	3.1
I moved to the city for another reason	3.7	2.6	4.3	3.7	2.2	1.7	1.6	4.5

Table 12. Attachment to the city - resident survey

To the question whether they are happy to live in the city, in average the respondents answered positive to very positive in all the cities. Respondents in Copenhagen (M=3.75) appear to identify less with their city than the other respondents do. This might be correlated with the fact that a relatively large proportion of the respondents in Copenhagen moved to the city for work or study. Respondents in the Belgium cities reported that they are proud of their city and they are happy to tell others about what the city has to offer. I general most of the respondents said that they are pleased to share their unique culture. Interestingly, the statement ''I feel special because people travel to see this unique city'' scored the lowest on a scale ranging from ''completely disagree'' to ''completely agree'' in all the Art cities.

Identification with the city (mean on scale: 1=completely disagree to 5=completely agree) (n=3153)

Identification	Tallinn	Salzburg	Copenhagen	Lisbon	Barcelona	Munich	Berlin	Amsterdam
I am happy to be living in the city	4.34	4.59	4.38	4.45	4.44	4.48	4.39	4.42
I feel I am a Tallinner/ Salzburger/Copenhagener/ Lisboner/ Barelonaer/ Municher/ Berliner/ Amsterdammer	4.23	4.31	3.75	4.20	4.22	4.04	4.10	4.12

Table 13. Identification with the city

Whether people work in tourism or are conscious that their income is generated by tourism could affect the way they perceive tourism. According to social exchange theory, people tend to be more positive when they benefit from tourism exchanges (Andereck et al., 2005; Postma, 2013a; Slikker & Koens, 2015). It is therefore useful to see the extent to which people have a direct relation to tourism. Table 14 shows that the sample is not biased towards people closely connected to tourism (Koens & Wood, n.d.). Although, compared to the other cities, in Tallinn, Barcelona and Lisbon more respondents work in tourism, and in Tallinn and Barcelona, more respondents think their income is related indirectly to tourism. In case of the Belgium Art cities the majority of the respondents do not work in tourism and their income is not related to tourism in their city.

Working in tourism in % (n=3138)

Work in tourism	Tallinn	Salzburg	Copenhagen	Lisbon	Barcelona	Munich	Berlin	Amsterdam
Yes	10.2	6.5	3.1	10.3	11.1	3.2	6.0	8.3
No	87.8	93.5	96.0	89.2	86.7	95.8	93.6	89.0
Don’t know	2	X	0.9	0.5	2.2	1.0	0.4	2.7

Table 14. Working in tourism - resident survey

Household income related to tourism in % (n=3138)

Income tourism	Tallinn	Salzburg	Copenhagen	Lisbon	Barcelona	Munich	Berlin	Amsterdam
Yes	10.1	9.7	2.8	7.9	10.1	4.4	8.0	8.3
No	86.9	90.3	94.5	90.9	86.5	93.8	89.7	88.8
Don’t know	3	X	2.6	1.2	3.4	1.7	2.3	2.9

Table 15. Household income related to tourism - resident survey

Respondents of the resident survey were asked to give their opinion on tourism in their city. In table 16, results show that across all cities, respondents are proud that people from different parts of the world visit their city. This appreciation is slightly less in Berlin (M=3.95) and Munich (M=4.03) and higher in Tallinn (M=4.37), Lisbon (M=4.56) and Barcelona (M=4.38). Interestingly, opinion of the respondents about the hospitableness of the city is most positive in Barcelona (M=4.38) and Lisbon (M=4.49) and least positive in Copenhagen (M=3.76) and Salzburg (M=3.97). The respondents think most positively about the residents of the city as hosts in Lisbon (M=4.30), Barcelona (M=4.12) and Munich (M=4.10), and least positive in Copenhagen (M=3.62), Tallinn (M=3.61) and Amsterdam (M=3.81). Most respondents are quite neutral about the fact that they live in a touristic part of the city; however, respondents from Salzburg (M=2.04) think the least that their neighborhood would be touristy.

Attitude towards tourism (mean on scale: 1=completely disagree to 5=completely agree) (n=3153)

Attitude	Tallinn	Salzburg	Copenhagen	Lisbon	Barcelona	Munich	Berlin	Amsterdam
I am proud that people from different parts of the world visit my city	4.37	4.10	4.25	4.56	4.37	4.03	3.95	4.14
I think that my city is a hospita-ble city	4.01	3.97	3.76	4.49	4.38	4.19	4.05	4.04
I think people from my city are good hosts	3.61	3.81	3.62	4.30	4.12	4.10	3.87	3.83
The part of the city where I live is very touristy	2.93	2.04	2.36	3.23	3.54	2.65	3.32	2.84

Table 16. Attitude towards tourism - resident survey

The tables on the following two pages show the positive and negative encounters across the cities. It can be seen, that in general, the residents of Salzburg were slightly less positive about the positive implications of tourism amongst the cities, while Tallinn residents in general were slightly less negative about the negative implications. It can be seen from table 17 that greater international touch, more events and a more positive image scored high in case of the large urban destinations and Salzburg. It is important to point out, that in Salzburg residents also acknowledged the contribution of tourism towards employment. The Tallinn residents consider the restoration and protection of the historical heritage as the most significant positive impacts of tourism followed by more cultural supply and greater international touch.

In case of the negative encounters (table 18), across all cities, respondents were the most negative about the increase of price level/affordability of real estate/housing and services. It needs to be highlighted, that while residents of large urban destinations and Salzburg are most concerned about the real estate market, residents of Tallinn are more bothered about the increase of the price level in restaurants, cafes, shops and other leisure facilities.

Top 10 positive critical encounters

	Cities 1st round		Salzburg		Tallinn	
1	Greater international touch	3.67	Greater international touch	3.60	Restoration of traditional architecture	3.81
2	More events	3.62	More seasonal jobs in tourism	3.51	Protection of historical parts of the city	3.68
3	More positive image	3.60	More positive image	3.42	More cultural supply	3.57
4	Protection of historical parts of the city	3.57	More cultural supply	3.34	Greater international touch	3.55
5	Restoration of traditional architecture	3.54	More permanent jobs in tourism	3.30	Revitalization of local arts and events	3.54
6	More seasonal jobs in tourism	3.51	Increased liveliness	3.21	More events	3.52
7	More cultural supply	3.50	Restoration of traditional architecture	3.10	More leisure facilities	3.45
8	Greater numbers of tourist accommodations	3.47	More opportunities to share culture with visitors	3.04	More positive image	3.40
9	More opportunities to share knowledge and culture with visitors	3.44	Revitalizations of local arts and events	3.04	Greater number of tourist accommodation	3.38
10	More leisure facilities /increased liveliness	3.41	Protection of historical parts of the city	3.02	More opportunities to share culture with visitors	3.34

Table 17. Top 10 positive encounters - resident survey

*Cities 1st round: Copenhagen, Munich, Berlin, Amsterdam, Barcelona, Lisbon

Top 10 negative critical encounters

	Cities 1st round		Salzburg		Tallinn	
1	Increase of price level/affordability of rental houses	3.82	Increase of price level/affordability of private houses	3.93	Increase of price level/affordability of restaurants and cafes	3.16
2	Increase of price level/affordability of private houses	3.73	Increase of price level/affordability of rental houses	3.79	Increase of price level/affordability of shops	3.04
3	Increase of price level/affordability of taxis	3.39	Increase of price level/affordability of restaurants and cafes	3.63	Increase of price level/affordability of leisure facilities	2.84
4	Increase of price level/affordability of shops	3.38	Increase of price level/affordability of shops	3.45	Increase of price level/affordability of rental houses	2.69
5	Increase of price level/affordability of restaurants and cafés	3.37	Overcrowding/obstruction of streets/side walks	3.27	Misbehavior of visitors	2.63
6	Increase of price level/affordability of public transportation	3.35	Increase of price level/affordability of leisure facilities	3.19	Overcrowding/obstruction of streets/side walks	2.62
7	Increase of price level/affordability of leisure facilities	3.32	Attitude of tour operators	3.08	Increase of price level/affordability of private houses	2.57
8	Less housing for residents	3.29	Increase of price level/affordability of public transportation	3.03	Overcrowding of shops/restaurants/leisure facilities	2.35
9	Overcrowding of public transportation	3.22	Increase of price level/affordability of taxis	2.98	Pollution/littering/noise	2.32
10	Pollution, littering, noise	3.22	Overcrowding of public transportation	2.95	Tourists on bicycles/Segways	2.20

Table 18. Top 10 negative encounters - resident survey

*Cities 1st round: Copenhagen, Munich, Berlin, Amsterdam, Barcelona, Lisbon

9.3 Behavioural response to drawbacks of tourism

From the graphs below, it can be seen that residents have very similar behavioural response to negative critical encounters of tourism. In both large and smaller urban destinations, residents mainly avoid specific places or moments of the day or in many cases, they did not experience drawbacks in the past 3 years. What stands out is that more than 60% of Tallinn residents do avoid specific places or moments of the day. More serious actions such as moving to another place in the city or influencing public opinion and speaking up to visitors scored lower across all cities.

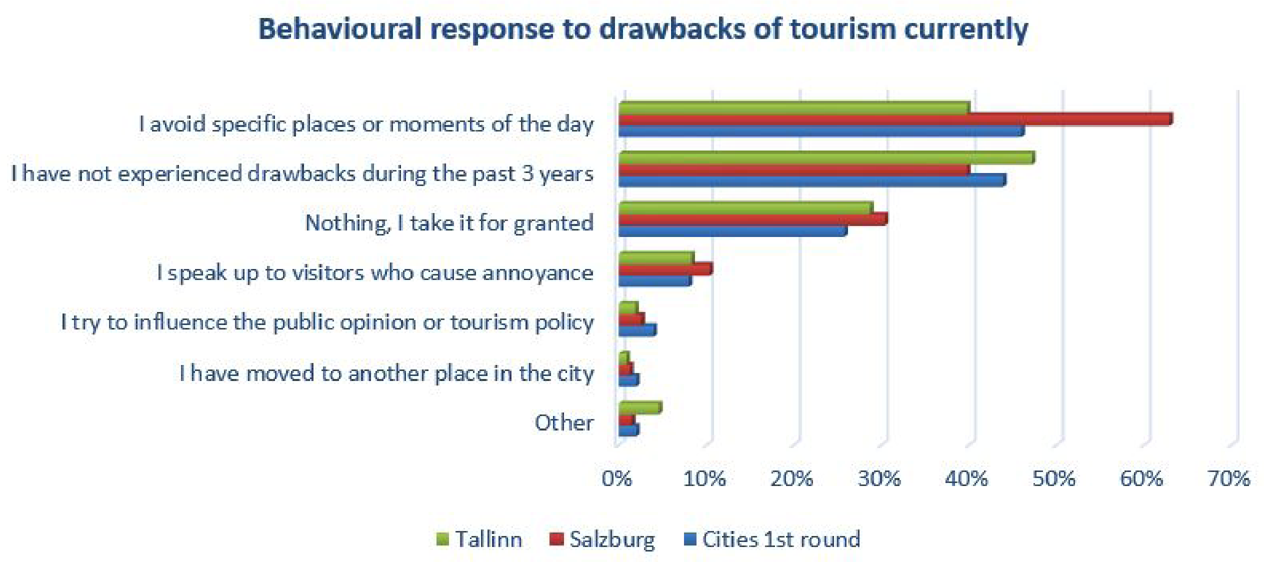


Figure 5. Behavioral response to negatvie critical encounters currently - resident survey

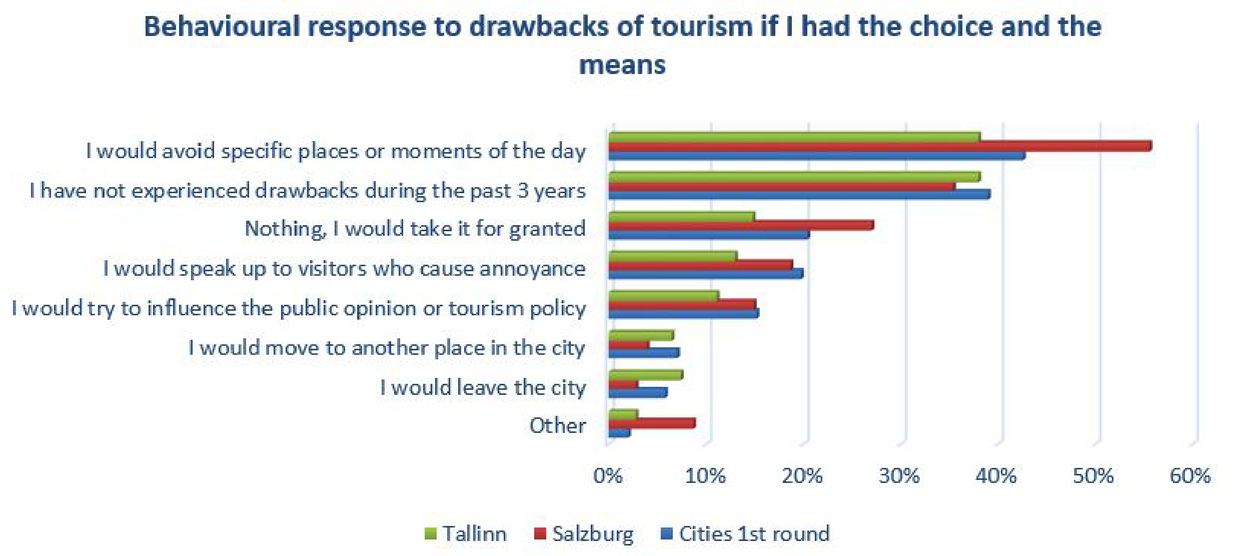


Figure 6. Behavioral response to negatvie critical encounters if I had the means - resident survey

When residents were asked about how they would respond if they had the choice and the means (figure 6) their behaviour slightly changes and they would be more likely to undertake action. This indicates that there is a sense of powerlessness to a certain extent amongst the residents. More active engagement and clear communications with the local community is suggested in order to mitigate this impact.

As it can be seen from the figures above, across all the cities, large number of residents said that they did not experience any negative critical encounters in the past 3 years. The statement ''I would do nothing, would take it for granted'' also scored high. These two statements are the lowest levels of the irritation and tolerance scale developed by Postma (2013a).

Level of emotional response (irritation level)	Level of behavioural response (tolerance level)
1.Respondent shows understanding and tones down the incident 2.Respondent is upset, surprised, taken off-guard, did not expect it	Respondent tolerates it: 1.Respondent accepts it (lets it happen, is used to it, accepts his/her fate, does not complain, has learned to live with it, has learned to bear it and to go on, says that it is part and parcel) 2.Respondent adapts his/her own behaviour (avoids the problem, chooses different times and/or places for the activity, moves to another village, books an earlier ferry, locks the bicycle, takes preventive measures, does not put up flags any more as they will be stolen)
--- irritation threshold ---	**--- tolerance threshold ---**
3. Respondent expresses (some) annoyance/irritation about what happened 4. Respondent expresses himself/herself very negatively about what happened: highly critical, calls it unacceptable, or uses rough language	Respondent does not tolerate it and undertakes action to remove the cause: 3. Respondent's reaction is aimed at the behaviour of the initiator of the problem with the intention of removing the direct cause (either person or organisation) 4. Respondent's reaction is aimed at influencing the institutional context, the conditions (policy and planning, future developments, general attitude of parties involved); either directed (specific plans or measures), or non-directed (public opinion)

Table 19. Dimensions of responses towards critical encounters: irritation and tolerance scale (Postma, 2013)

9.4 Perceived impact of tourism on life aspects

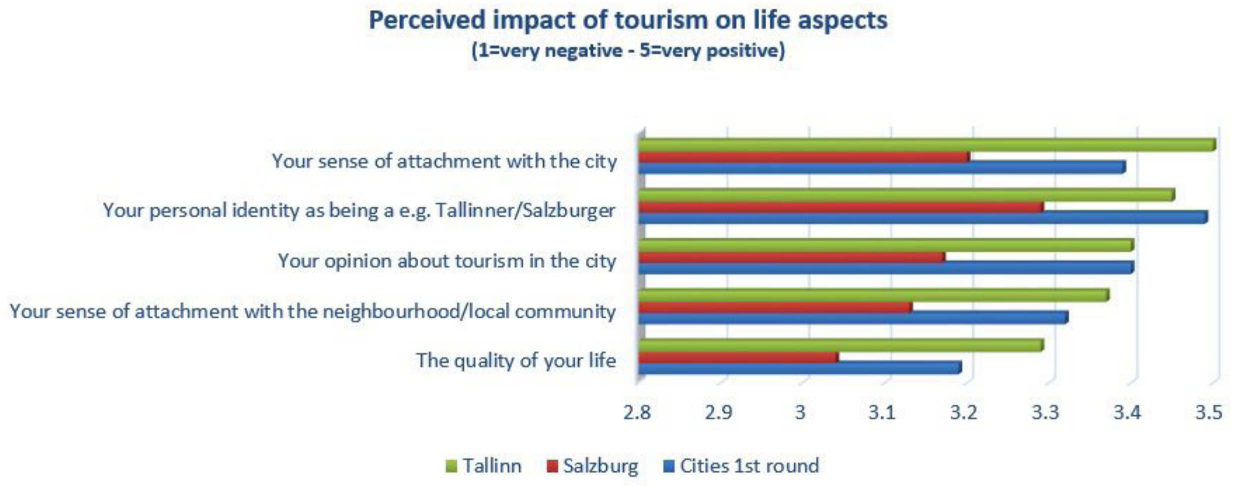


Figure 7. Perceived impact of tourism on life aspects - resident survey

According to the social exchange theory people who experience positive impacts of tourism are willing to accept and tolerate more negative implications than people who do not. This might also affect the way in which respondents perceive the effect of tourism on their life. Figure 7 shows the perceived impacts of tourism on the different life aspects across large and smaller urban destinations.

The graph above shows, that residents of Tallinn are more positive about the impact of tourism on the quality of their life in general. Their sense of attachment with the city was the strongest across all cities; however, their identity as a Tallinner is slightly less strong than the identity of the residents of larger urban destinations. Respondents of Salzburg were the least positive concerning impacts on their quality of life, sense of attachment with the city, their neighborhood and their identity. In general, Salzburgers see the perceived impacts of tourism on life aspects more negative than residents of Tallinn and the large urban destinations.

Critical encounters and the perceived impacts on people's life affects the attitude towards tourism. The attitude towards the growth of the number of visitors is illustrated in figure 8 and figure 9. Figure 8 shows the attitude towards growth of visitor numbers in the city as a whole and figure 9 represents the attitude towards growth in the respondents' own neighborhood. The graph shows a scale from unconditional growth to a halt on the growth of visitor numbers.

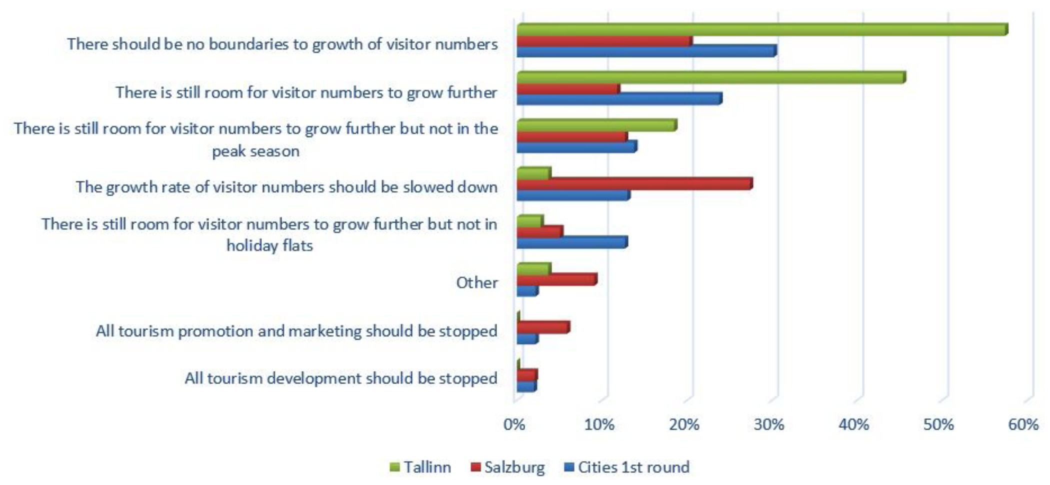


Figure 8. Attitude towards further growth in the city - resident survey

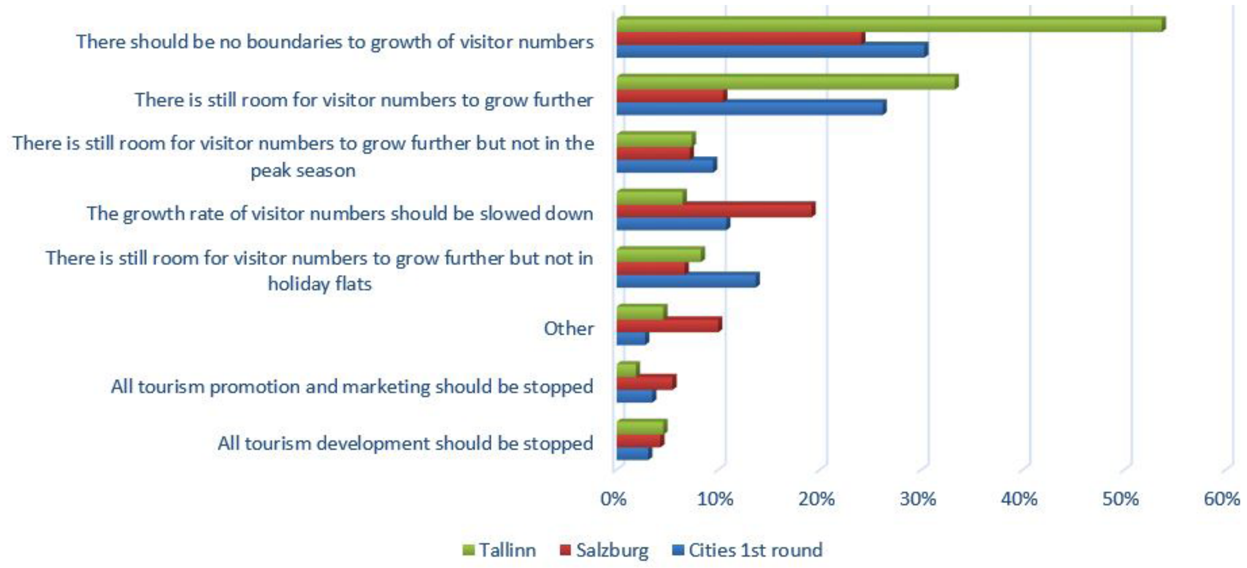


Figure 9. Attitude towards further growth in the respondents' own neighborhood – resident survey

The largest group of respondents feel that it is not necessary to put boundaries on the growth of visitors. In fact, most respondents feel that there is room for unconditional further growth. It stands out that Tallinn residents are the most supportive towards further growth, while the Salzburg residents think that the growth rate of visitor numbers should be slowed down.

On the other hand, a significant proportion thinks that further growth is possible only when it happens outside the peak season, while another group emphasises, that visitor numbers in holiday flats (such as Airbnb) should not grow further.

Attitude towards the growth of visitor numbers in the city or in the respondents' own neighbourhood does not differ very much. Even in their own neighbourhood, residents are positive concerning the growth of visitor numbers however, they become slightly more cautious when it is about their direct environment.

These results further outline the complexity of the perceptions of visitor pressure. While the majority of all residents do not see a particular issue with further growth of tourism, there is a minority, for whom tourism growth is an issue.

9.5 Governance

The table below measures the opinion of residents concerning the attitude/plans of various key stakeholders on a Likert scale ranging from 1(neutral) to 5(very negative). It can be seen that residents of Barcelona (M=3.03) are the most negative about the attitude/plans of the government. The Barcelona residents (M=2.93), followed by the Amsterdam (M=2.78) and Berlin (M=2.67) respondents, receive the actions of tourism marketing/promotion organizations most negatively. Concerning the attitude of tour operators, the residents of Salzburg (M=3.08) are the least satisfied, followed by Amsterdam (M=3.02) and Barcelona (M=2.93). In case of the actions of tour guides respondents in Salzburg (M=2.82) are also amongst the most concerned. Regarding the attitude of taxi drivers, residents of Munich (M=3.59), Amsterdam (M=3.41) and Lisbon (M=3.41) are the most negative. In general, residents of Tallinn have the least negative opinion on the actions of the industry players.

Stakeholder encounters (mean on scale: 1=neutral to 5=very negative) (n=3153)

Stakeholder encounters	Tallinn	Salzburg	Copenhagen	Lisbon	Barcelona	Munich	Berlin	Amsterdam
Attitude/tourism plans of the government	1.86	2.41	2.21	2.78	3.03	2.44	2.75	2.96
Attitude/plans of tourism marketing or tourism promotion organisations	1.78	2.53	2.11	2.56	2.93	2.45	2.67	2.78
Attitude of tour operators	1.92	3.08	2.39	2.71	2.93	2.52	2.75	3.02
Attitude of tour guides	1.73	2.82	2.2	2.53	2.86	2.4	2.69	2.9
Attitude of taxi drivers	2.02	2.45	2.4	3.41	3.12	3.59	2.72	3.41
Attitude of owners/ managers of tourist accommodations	1.75	2.04	1.89	2.66	2.92	2.35	2.62	2.85
Attitude of other residents towards visitors	1.97	2.08	2.13	2.48	3.09	2.44	2.62	2.81

Table 20. Stakeholder encounters - resident survey

9.6 Residents' attitude towards visitor management strategies

Figure 10 shows the residents' preferences towards the proposed visitor management strategies. In general, residents are in more favour of the so-called soft strategies rather than the hard strategies such as restricting access, or demotivating certain groups of visitors to visit the city. Stimulating the itineraries of visitors or spreading them more evenly across the city seems to be preferred strategies across all cities. Communicating and engaging more with stakeholders is also amongst the most favoured strategies. The emphasis placed on communications may be, to a certain extent, due to misinterpretation and lack of knowledge. Destination Management Organisations seem to be well placed to take upon them such a role. It can also be seen, that the respondents prefer that the attention is directed at the improvement of wider infrastructure and facilities. These management strategies may not always be easy to pursue in cities, as they do not relate exclusively to tourism and will require cooperation with multiple government departments and other stakeholders.

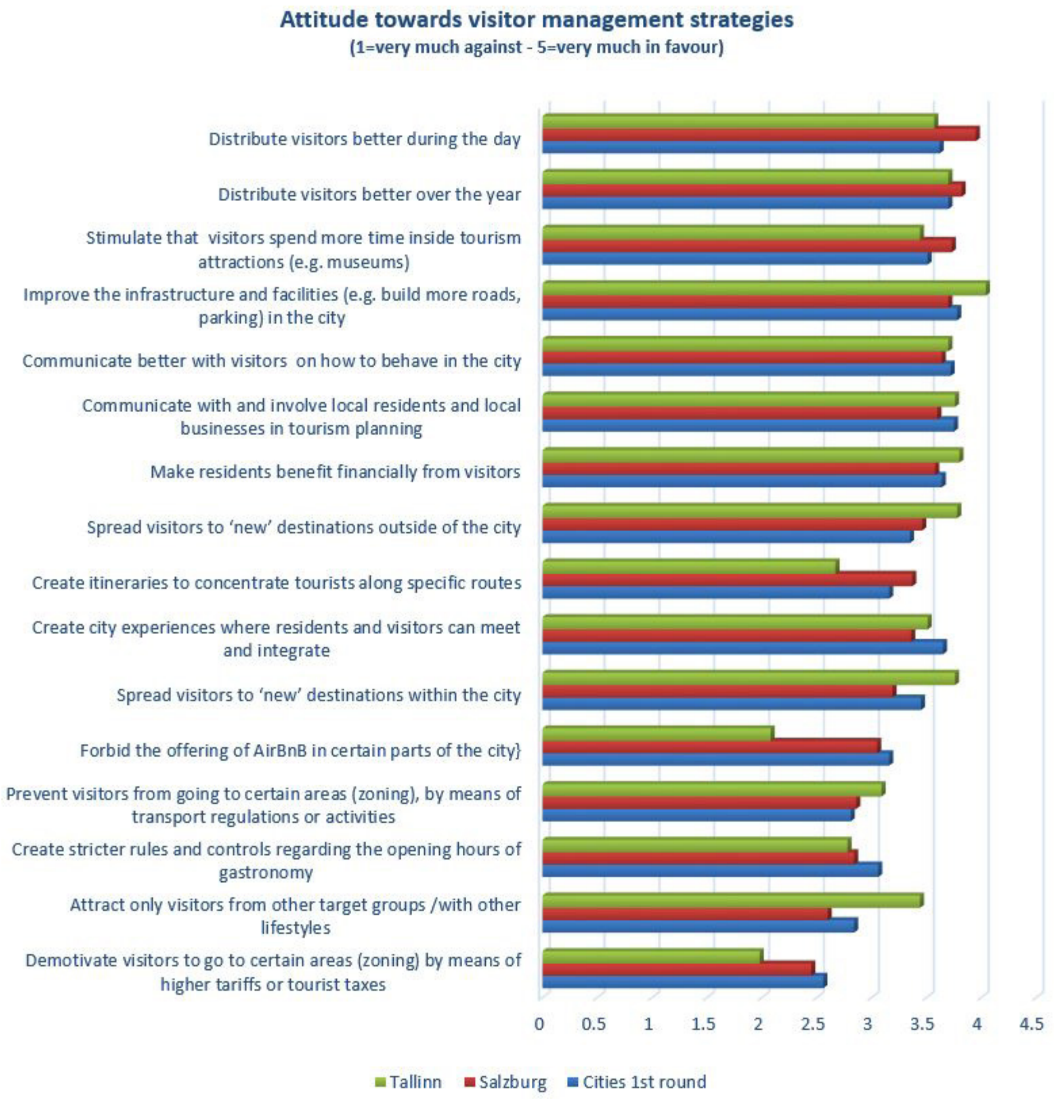


Figure 10. Attitude towards visitor management strategies - resident survey

10. Strategic outlook – future scenarios

10.1 Anticipating the future

In chapter 4 many strategies and tactics are listed with which tourism, e.g. overtourism, can be managed and controlled. However, these measures are largely related to our present understanding of the nature and scope of this phenomenon. There are many reasons to argue that these measures might be inadequate to deal with tourism and overtourism in the years to come. Globalisation and informatisation have made tourism interdependent on what happens across the borders of political territories, domains and industries. Many developments in the global society have implications for tourism, whether they are demographic (size and nature of the population, urbanisation), economic (such as emerging economies, recessions, labour issues, etc.), social (such as changing value patterns, customer behaviour), technological (such transport technology, robotization, virtual reality), ecological (climate change, see level rise, precipitation, drought), and political (such as populism, power shift to Asia, measures to fight CO2 emissions). Such implications will affect the size of travel flows and the distribution of tourist origins and destinations around the world, and thus stimulate or lower tourism in specific destinations. The developments go fast and the interrelations between all these factors are volatile, ambiguous and complex. So, in fact it is quite uncertain how tourism to cities such as Tallinn, Salzburg, Ghent, Antwerp, Bruges, Mechelen or Leuven will develop in the long term, let alone how they could prepare themselves and take anticipatory measures.

Strategic foresight is an approach that could help city destinations to become more resilient and future proof. It assumes that the forcefield impacting upon tourism is continuously monitored. Regular analysis of this forcefield helps cities to identify the key or even critical uncertainties the cities must prepare for. Key uncertainties refer to driving forces of change that will have a major impact but whose development is unpredictable. Key uncertainties are critical if they cause a transition that brings the tourism system out of balance, e.g. takes it to another equilibrium. Scenarios are a useful instrument to frame this unpredictability within limits of plausibility. Scenarios describe alternative futures. They help the cities to grasp what would happen with tourism if the major forcefield would move in specific directions. These insights would help cities to take timely measures to anticipate surprises and disruptions. Because of evolving developments in society, based on the ongoing monitoring of the forcefield, such scenarios have to be updated regularly to stay ahead of the developments.

10.2 Scenarios

In the context of the current project, the DMOs of the cities of Tallinn, Salzburg, Ghent, Antwerp, Bruges, Mechelen and Leuven have collaboratively worked on the development of a set of four scenarios. Facilitated by scenario planners at the European Tourism Futures Institute (ETFI) and the Centre of Expertise in Leisure, Tourism and Hospitality (CELTH) they have mapped the forcefield impacting upon city tourism till 2030, have identified the key uncertainties. The driving forces identified with the DMOs of Copenhagen, Berlin, Munich, Amsterdam, Barcelona and Lisbon in the first round of visitor pressure study were taken into account again and re-evaluted. Thus a framework of 4 scenarios was created that can be regarded as the evolvement of the scenarios in the first phase. The scenario planners have elaborated the scenarios in four lively yet plausible storylines of 2030.

The two key uncertainties that the DMOs identified as the basis for the scenarios are :

- Physical and perceived safety
- Interaction between tourists and locals

Five driving forces were identified of which the development is quite predictable. However, these developments might work out differently in each of the scenarios:

- Transport related carbon pollution
- Changing role of DMOs and policy making
- Overuse of local destinations and environmental impact
- IT and data driven society

Below you will find the scenario cross and the story lines of each scenario.

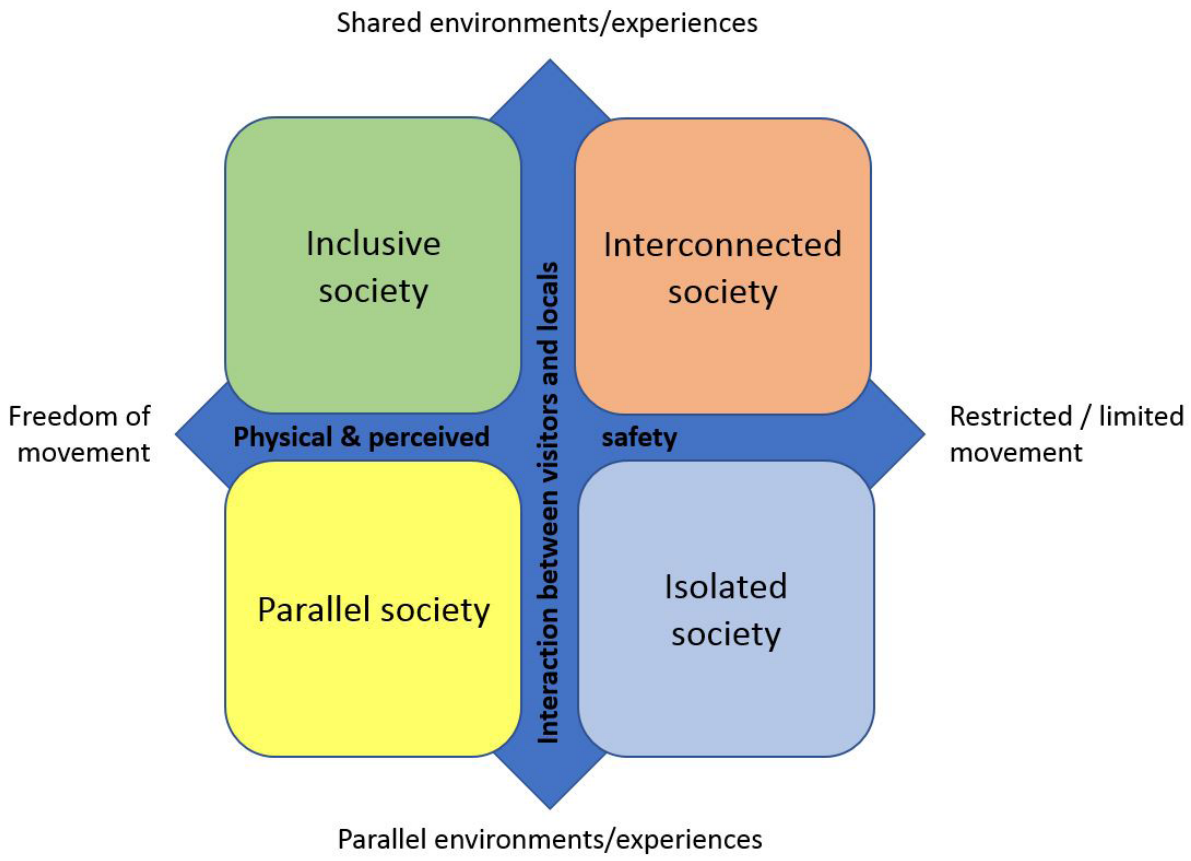


Figure 11. Scenario cross

Inclusive Society

It is 2030. Globally, people have begun to realise that they have to work together for mankind to survive. Society has developed into an open community where differences, be it cultural, religious, political, economic, social etc. are respected and tolerated. People value each others differences and celebrate equality. They are happy to exchange values, beliefs, ideologies and opinions which is reflected in high levels of human interactions and high levels of personal contact, without having the fear to lose ones identity. This "society for all" is blended and characterised by complete social integration, social inclusion and social cohesion. As it makes people proud to show to others how much they go along with others, social media are intensively used to show their altruism.

Society has developed into one global village in which people are free to travel and to visit places where they have the opportunity to engage with the locals. Fuelled by the booming experience economy, and the quest to enrich the personal quality of life, travelling between the districts of the global village has become so massive and so common, that the tourist market has become highly diversified and fragmented and includes various new visitor groups. As human relations prevail, automatization and robotization is limited and all kinds of actors profit from tourism: they all contribute in their own personal way to the experience of visitors. An experience and sharing economy pur sang. Speaking about local, regional or national identity and authenticity is something from the past. They reflect jargon from the old days.

Governments are facilitating the process in inclusiveness and tourism. The huge demand for international travel leads to massive investments in new green CO2-free transport technology which has become cheap because of the big demand.

Interconnected society

It is 2030. The tension between cultural realms of the world during the past decades, and the feelings of unsafety that are associated with it, caused the Europeans to have primarily an inward look and they are proud to experience the cultural identity they share. The inward orientation is enforced by rules and regulations that make travel across the borders of Europe complicated. These outer borders have been closed to protect Europe's identity. Yet at the national borders within Europe, passport controls were reintroduced.

The international unsafety of the past decade, and the current difficulty to travel internationally, encourage many people to stay home or to travel within their own familiar environment of the region or country, which allows locals and tourism to blend, to enjoy personal services and to share their common identity. Travel between European countries is mediocre and outside Europe extremely limited. The intra European travel is mainly by means of train. Travelling by trains has become safer than flying, and the European high speed train network is nearly complete.

Nevertheless, governments try to restore faith in travel and tourism because they perceive tourism as a means for bridging and bonding between different nations, societies and cultures, and between locals and tourists. They view tourism as a means to create mutual understanding of each others' unique characteristics, and to learn from each other. Thus people are encouraged to travel and to learn about other cultures beyond their own familiar environment, beyond Europe, and across the globe, to exchange ideas, beliefs, ideologies, and to connect with cultures and society that are significantly different. one another.

Isolated societies

It is 2030. The global tension of the past decades have led to xenophobia, an irrational and / or obsessive fear of strangers, foreigners or foreign objects / cases. Because of the distrust between cultures people do not feel the need to interact and to connect with “strangers” and the idea of environments that are shared between locals and tourists cause anxiety. Thus, the level of contact with people external to the community is minimal or non-existent.
Governments do no longer regard tourism as an engine of the economy but as a source of diseases and potential danger. There is not only fear for terrorism, but also for losing ones identity, local habits and authenticity, and degradation of the environment and overuse of resources. To protect the community from external threats that are caused by tourism, visitors are unwelcome, there is ignorance to adapt to new visitor groups and the leisure economy is primarily locally oriented. The visitors who do come are preferably isolated in “gated tourist enclaves”, i.e. controlled environments, yet with a high level of service. To ensure a low level of human interaction between hosts and guests, these services are primarily robotised. If people want to travel they have to be extremely dedicated to overcome all the barriers and the public opinion. Because locals and visitors do not mix, the sharing economy is on the verge of extinction.
Travel takes place with conventional modes of transport and its associated levels of CO_2 emissions. Investments in transport are limited to additional safety measures.

Parallel society

It is 2030. In the society at large, the age of big international tensions has ceased. However, interactions with people from other cultural groups are not valued yet and they mostly live parallel to each other without much interaction or connection. Social, spatial and intercultural contact is minimal.
Despite there is some fear left on the tourist market, people want to catch up with their backlog and to discover the world again, starting with the most important tangible highlights/ USPs that were left at the bucket list for so many years. However, travelers are different than ten years ago. They have become highly individualized and independent and favor individual autonomy over social inter-connectedness; they stay separated from locals and different tourist groups stay separated from each other. Technological advancements and robotized services do facilitate this attitude. The feeling that they conquered fear and travel again, gives the tourists personal satisfaction that contributes to their personal quality of life. There is great interest to share these experiences with friends, fans and followers via the social media in their own parallel society.
Governments have also overcome their scruples and try to facilitate and even stimulate tourism again. The renewed interest in international tourism offers new market opportunities for tourism businesses after so many years, and they invest in new products and services and in new, affordable, accessible and fast transport technology, just to benefit from the renewed travel interest as much as possible. The investments lead to a vicious circle of considerable tourism growth endangering the identity and authenticity of destinations and thus its core attraction value. Market driven actors across the tourism opportunity spectrum profit from the new tourism wave. The consumptive attitude of tourists and the willingness of tourism businesses to fulfill their needs, puts the core product identity and authenticity under pressure.

10.3 Towards strategies that prepare for an uncertain future

Each of the scenarios has specific implications for city tourism. In a Delphi-like procedure the most important direct and indirect implications were identified, and each one was interpreted as a future opportunity or threat. The opportunities and threats that were identified by more than one of the participating cities are listed in the table below. Tables were prepared for each city separately as well. Those tables can be found in the individual city reports.

For cities to become more resilient and future proof concerning visitor pressure (or overtourism), the challenge is to identify actions that anticipate combinations of one or more of these future opportunities and/or threats. The more scenarios an action will cover and prepare for, the more robust and future proof the action will be. In fact, strategies and tactics ideally prepare for all scenarios, i.e. for “any” future. These are referred to as “robust strategies”. If strategies and tactics would prepare for only one scenario they are referred to as “betting strategies”, if for two or three scenarios then “semi-robust strategies”. However, the final strategy mix will also depend on how suitable (concerning aims and objectives of the city, DMOs competences and strengths, and the extent to which the problem of visitor pressure or overtourism is addressed), feasible (concerning resources – finances, manpower, etc., aptitude and abilities of the DMO, and markets) and acceptable (concerning the stakeholders, both financially and non-financially, returns and risks) the strategies or tactics might be.

	Major opportunities	Major threats
Inclusive society (shared environment & freedom of movement)	• Co-operation with local population • Big data: crowd control & optimal use of spare capacity in attractions • DMO Manage instead of market	• No diversification – more budget needed to be successful, it can win shares only by more intense advertising • Loss of authenticity
Interconnected society (shared environment & restricted movement)	• Start creating alliances • Formal accommodation: Many small locally owned hotels for domestic leisure tourism • Every town co-operates with neighbouring green areas to lengthen stay • Job growth due to personalised services	• Domestic tourism: no social but physical pressure • Shortage of international knowledge, intelligence and workforce • International tourism: decline
Isolated society (parallel environment & restricted movement)	• Needs to find ways to have locals explore their own city • DMO will focus on city marketing to locals • Raising international awareness via internet: e.g. ‘dreaming of Ghent’ or ‘dreaming of Antwerp’ • New types of businesses will rise to accommodate new needs	• No need to internationally promote local culture – only homogeneous entertainment is requested • Protocol takes over hosting international visitors
Parallel society (parallel environment & freedom of movement)	• Development of specific products for every market of origin • Promoting hidden gems for domestic market & major attractions for foreign markets • Foster service providers to become more experimental • Higher diversity of means of transportation	• Dealing with complaints by locals • No informal accommodation • Increase of regulations to lead specification development in a certain direction

Table 21. Opportunities and threats per scenario

10.4 Conditions of adaptivity

In order to become adaptive and more future proof and resilient to change, strategies and tactics need to be regularly adapted to changing circumstances, e.g. regularly be reviewed and reconsidered on the basis of new scenarios. There are a number of conditions that apply (Hartman, 2018):

- Environmental sensitivity

Cities have to develop a “radar system” with which the “outside” contextual environment is continuously scanned, in order to identify and analyse the drivers of change of tourism to the city, to adjust the scenarios to changes in the forcefield and to adapt the strategies to respond to or, even better, to anticipate changes in order to avoid and reduce negative impacts and seize opportunities that stem from positive outcomes.

- Incorporate thinking in adaptive systems

Developing strategies and tactics with which future uncertainties can be anticipated, requires a perspective on city destinations, and how they develop, as systems, that are constantly changing and adapting to forces from the outside, and have the power to become resilient.

Moreover, within the city destination system there are interlinkages between local societies (people), the local economy (profit) and the local environment (planet) and a need to create synergies. To adopt an adaptive perspective it is required to embrace and “choose” for complexity.
De regio is te herkennen en te beleven als eenheid. Ruimtelijk is er een mate van coherentie waardoor men herhaaldelijk (op subtiele wijze) wordt bevestigd in het gevoel dat hij/zij in het Vechtdal is. Deze eenheid is niet alleen van belang wanneer men al in de regio is, maar ook voor de beeldvorming naar buiten toe om mensen naar de regio te trekken. Een koppeling met brand identity of gebiedslabels zoals ‘natuurpark’, ‘landschapspark’, ‘vrijetijdslandschap’ of ‘beleefomgeving’ ligt voor de hand.

- Adaptive learning & reflexivity

To be able to develop strategies and tactics to adapt to changing (contextual) circumstances requires capacity to learn from relations and feedbacks in the system. This assumes that not only the contextual environment but also the interactional environment and how it relates to the contextual environment is constantly monitored, understood and reflected upon.

- Variety & redundancy

To be able to cope with shocks and disturbances the city tourism system needs variety and redundancy. This is not self-evident and requires to be actively supported and promoted by (assemblages of) entrepreneurs, governments and (branch) organizations to result in new initiatives, innovations and experiments (such as development of new niches in tourism, leisure, recreation and/or crossover with other sectors) and allow for processes of self-organization (growth of niches, emergence of industry subsectors, emergence of (organizational) structures). DMOs, governments and tourism planners should provide a ‘possibility space’ in institutional and policy frameworks that is restrictive on the one hand and enabling on the other. Entrepreneurs should seize this possibility space (agency, entrepreneurship) and ensure that the possibility space is taken (supportive organization that creates bridges and bonds between actors).

- Connectivity

Destination development is a multi-actor, multi-domain and multi-scale undertaking. This presumes to involve many stakeholders and operate as inclusive as possible. Inclusiveness and broadening participation implies an enhanced possibility that support, motivation and commitment is sustained for ideas for a longer period of time. Tourism destinations should be well connected by means of interaction (moments) and coalitions. This enables them to share mutual or opposing perspectives, identify potentially shared urgencies, build trust and to conclude that there is added value in building coalitions and to take collective action. Stimulating participation, dialogue and connectivity requires leadership and the ability to tell credible and salient stories about trends and developments, emergent (shared) urgencies, future visions and concrete actions because it stimulates the identification of (autonomous) development directions at the scale of the destination. To manage connectivity, actors should devote some or even a substantial amount of their precious resources (time, money, capacity) to networking, meetings, building platforms which do not necessarily result directly in concrete results on the short term.

- Promote polycentric governance systems

The complexity and dynamisms of today’s society implies that no single actor is or should be in control. With an eye on the long term it is recommended to not center responsibilities, resources and decision-making power around one party but to link multiple scales of government, spatial scales and (policy) domains by means of an extensive multi-sector, multi-actor and multi-level governance system. Such a governance system implies a self-steering, self-correcting capacity that manifests itself through interaction, negotiations and consensus building to achieve individual as well as collective goals. It enables the possibility to identify trends and development (also see previous condition) and evaluating how their implications can be addressed at each scale.

11. Conclusion

In the second round of the Visitor Pressure project, seven European cities: Salzburg, Tallinn, Ghent, Leuven, Mechelen, Antwerp and Bruges were studied. This report is an outcome of the project conducted in the above mentioned urban destinations. The project aimed at analysing the current situation, building plausible future scenarios and advising the participating DMOs on how to manage/avoid visitor pressure in their destinations.

One main report and seven individual city reports have been written based on the results of the project. This report, the main report, contained the theoretical explanation of the emerging issue of visitor pressure. It highlighted the importance of community involvement as well as stakeholder participation.

Furthermore, the report included a brief analysis of the main outcomes of the expert interviews and resident survey conducted in each city. A cross-case analysis was also included that allows for comparison between the participating destinations.
One of the main goals of the project was to provide hands-on recommendations, strategies, policy measures for managing over-tourism. Therefore, this report provided a list of strategies that cities may apply in order to manage visitor flows/tourism. The report also highlighted the use of logical framework matrixes and provided example matrixes to serve as a stepping stone for the implementation of the suggested strategies/actions. Furthermore, the report contains a check-list that aims to provide support for the DMOs to carry out self-assessment.

To help the cities become more future proof, the innovative method of scenario planning was introduced in the framework of the project. In a dedicated workshop, 4 plausible future scenarios were created together with the participating cities. The implications of these scenarios were thoroughly analysed.

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13. Appendix

13.1 Profile of the interviewees

Name	City	Expertise	Organization/Company
Nicolas Westen	Antwerp	Hotel Development Consultant	Building Today for Tomorrow
Marieke Van Bommel	Antwerp	Director	MAS Museum
Miek de Roeck	Antwerp	Director	Visit Antwerpen
Didier Boehlen	Antwerp	Chairman Owner/General Manager	Antwerp Hotel Association Hotel Rubens
Floor Peeters	Antwerp	Manager – retail and hospitality	Stad Antwerpen
Tom Bosman	Antwerp	Manager- destination development	Visit Antwerpen
Marc Volckaerts	Antwerp	Senior Marketing and Event Manager	Touristram
Marlies Moerkens	Antwerp	Junior Marketing and Event Manager	Touristram
Carl Bonte	Bruges	District Manager	Interparking NV
Renaat Landuyt	Bruges	Mayor	Stad Bruges
Dieter Dewulf	Bruges	Managing Director	Visit Bruges
Peter Serru	Bruges	Director	GUIDEA: Kenniscentrum Toerisme en Horeca
Els Verlinde	Bruges	Board Member	Hello Bruges
Dr. Erwin Van de Wiele	Ghent	Director	Visit Gent
Dr. Kurt Neyrynck	Ghent	Deputy Chairman	Horeca Vlanderen

Jo Lefebure	Ghent	City Architect Monument care and architecture	Stad Gent
Dr. Johan Van de Wiele	Ghent	Head of Culture, Sports and Leisure Department	Stad Gent
Joris van Eeckhoven	Ghent	District Director – Inner city	Stad Gent
Margriet van Houtte	Ghent	Board Member	MKG Sint-Baafs Cathedral
Karolien Hellemans	Leuven	Head of Department	Visit Leuven
Leen Tyrions	Leuven	Advisor- city marketing	Visit Leuven
Kris Peeters	Leuven	Project Manager - communications	Leuvenement
Philippe Jacobs	Leuven	Manager – mobility & external relations	De Lijn
Hai-Chay Jiang	Leuven	Head of Department – diversity & equal opportunities	Stad Leuven
Michel Warlop	Leuven	Centrum Manager	Stad Leuven
Sebastiaan Cloet	Leuven	Tour Guide	Leuven Leisure
Jana Kerremans	Mechelen	Head of Business Management	Kazerne Dossin
Paul Boenne	Mechelen	Director	Visit Mechelen
Tom Depuydt	Mechelen	Director – city, planning & development Member	Stad Mechelen Retail and Mobility working group
Anneke Verbelen	Mechelen	Project Coordinator – retail & business development	Stad Mechelen
Koen Leemans	Mechelen	Director – culture centre	Stad Mechelen
Steven Defoor	Mechelen	Head of Department – cultural development	Stad Mechelen
Arnold Fellinger	Salzburg	Organizer	Salzburg Christmas Market

Stefan Herzl	Salzburg	Owner President	Panorama Tours & Travel GmbH Salzburg Convention Bureau
Stefanie Habersatter	Salzburg	Manager – traffic, sales promotion & quality assurance	Salzburg AG
Philipp Bluthl	Salzburg	Assistant to the division manager - traffic	Salzburg AG
Max Brunner	Salzburg	Managing Director	Hohensalzburg Fortress
Herbert Brugger	Salzburg	Managing Director	Tourismus Salzburg GmbH
Klemens Kollenz	Salzburg	Sales & Marketing Manager	Tourismus Salzburg GmbH
Ingrid Sonvilla	Salzburg	Managing Director	Helbrunn Palace
Alexander Wurfl	Salzburg	UNESCO World Heritage Coordinator	City of Salzburg
Liivi Soova	Tallinn	Member of the board	Estonian Folk Art and Craft Union
Külli Karing	Tallinn	Managing Director President Board Member	Hansa Estonia Ltd. Estonian Travel & Tourism Association Estonian Convention Bureau
Sirle Arro	Tallinn	Head of Marketing and Communication	Port of Tallinn
Boris Dubovik	Tallinn	Head of Division Member	National Heritage Protection Unit Tallinn Urban Planning Department/ UNESCO Tallinn Old Town Management Committee
Eero Kangor	Tallinn	Chief Specialist	National Heritage Protection Unit Tallinn Urban Planning Department

Mark Sepp	Tallinn	Manager – research and development	Tallinn City Administrations
Evelin Tsirk	Tallinn	Head of Department	Tallinn City Tourist Office & Convention Bureau
Kristina Lukk	Tallinn	Analyst	Tallinn City Tourist Office & Convention Bureau
Jüri Kuuskemaa	Tallinn	Member Advisor to the Mayor of Tallinn	Society of the Tallinn Old Town UNESCO Tallinn Old Town Management Committee

Table 22. Profile of the interviewees

13.2 Descriptive statistics - Tables, Belgium cities

Age structure of sample in % (n=5354)

	Antwerp	Bruges	Ghent	Leuven	Mechelen
<=34	26.7%	20.6%	20.6%	33.6%	27.4%
35-54	32.4%	31.3%	31.3%	30.2%	31.8%
55+	40.9%	48.1%	48.1%	36.2%	40.8%

Gender in % (n=5354)

	Antwerp	Bruges	Ghent	Leuven	Mechelen
Female	48.6%	51%	49%	50%	49%
Male	51.4%	49%	51%	50%	51%

Period of living in the city in % (n=5354)

	Antwerp	Bruges	Ghent	Leuven	Mechelen
Less than 10 years	23.8%	16.8%	21.5%	23.5%	23.2%
More than 10 years	76.2%	83.2%	78.5%	76.5%	76.8%

Identification with the city (mean on scale: 1=completely disagree to 5=completely agree) (n=5354)

	Antwerp	Bruges	Ghent	Leuven	Mechelen
I feel special because people travel to see this unique city	3.63	3.80	3.62	3.52	3.57
I want be involved in keeping the city special	3.81	3.87	3.76	3.66	3.70
I want to share our unique culture with others	3.79	4.01	3.83	3.67	3.70
I want to tell others what the city has to offer	4.05	4.13	4.03	3.92	3.97
I am proud to be a resident of the city	4.07	4.13	4.11	4.01	4.10
The city gets more positive image	3.88	x	3.85	3.90	4.13

Working in tourism in % (n=5354)

	Antwerp	Bruges	Ghent	Leuven	Mechelen
Yes	3.70%	4.10%	4.00%	10.70%	7.20%
No	96.30%	95.90%	95.90%	89.30%	92.80%

Attitude towards further growth (mean on scale: 1=completely disagree to 5=completely agree) (n=5354)

	Antwerp	Bruges	Ghent	Leuven	Mechelen
Further growth of tourism will cause annoyance between residents and visitors	2.41	3.11	2.66	2.34	2.18
Further growth of tourism will make the city center less attractive to live	2.71	3.25	2.94	2.64	2.41
I support tourism and want tourism in the city to stay important	4.08	4.04	3.89	3.93	4.01
The city should remain a tourist destination	4.35	4.38	4.18	4.20	4.26

Household income related to tourism in % (n=5354)

	Tourism in the city helps me to pay my bills			Part of my income is related to tourism in the city			I would benefit economically if tourism would grow further			The financial future of my family is related to tourism in the city		
	Disagr	Neutral	Agr	Disagr	Neutral	Agr	Disagr	Neutral	Agr	Disagr	Neutral	Agr
Antwerp	68.39%	22.9%	8.7%	77.3%	13.8%	8.9%	63.4%	24.0%	12.7%	75.7%	19.0%	5.4%
Bruges	65.7%	21.9%	12.4%	72.5%	14.2%	13.3%	59.2%	29.4%	11.4%	68.3%	20.6%	11.1%
Ghent	68.8%	25.0%	6.2%	79.2%	14.1%	6.7%	68.2%	22.7%	9.1%	81%	15.1%	3.9%
Leuven	73.1%	22.1%	4.8%	81.8%	13.6%	4.7%	69.9%	21.7%	8.4%	80.3%	16.2%	3.6%
Mech.	65.3%	28.2%	6.5%	75.6%	17.6%	6.8%	58.6%	28.0%	13.4%	76.7%	17.3%	6.1%

13.3 Checklist

Major influence on visitor management	Checklist questions
Visitor flows	• Are the major source markets domestic or international? • Are there differences in visitor pressure throughout the year? Is it predictable? • Is the volume of visitors increasing or decreasing? Why?
Governance/responsibility	• Which actors are involved in the management of tourism? Do they have adequate resources and political support? • Is there a close cooperation between the private and public sector? • Is a meeting with all the stakeholders regularly convened?
Regulation	• Is there a standardized operators' licence system? (e.g. tour operators, guides etc.) • Is there adequate tax system in place to maximize the benefits? (e.g.: accommodation taxes, tax on cruise ships, coaches etc.)
Mobility	• How do most tourists arrive at the destination? (Car, coach, rail, air, cruise (river/sea) etc.) • Do the major entry points e.g. train station, coach station, port, harbour operate efficiently at peak times? • Are there adequate visitor information/booking services available around the main entry points? • Can visitors easily transfer to local public transportation? • Is the language, fees, signage on public transport easily understandable and clear?
Physical infrastructure	• Is the physical infrastructure capable of handling high-level tourism activity? • Is the road system suitable for large crowds? • Is there adequate number of parking lots? Is their size and location appropriate? • Are there clashes between the use of infrastructure between visitors and the residents? • Is there an efficient traffic management system in place and does it respond adequately at peak times?
Directional signage	• Are there enough directional signage, interpretation materials and notices placed along the main tourist routes?
Efficiency of visitor services & facilities	• Do you provide efficient and adequate visitor services and facilities? e.g.: public toilets, walkways, public Wi-Fi, etc.
Efficiency of high level tourism activity management	• Are there efficient strategies and plans in place for managing large crowds? e.g.: during large events
Tourism impact assessment	• Are the perceptions of local residents continuously examined? Are they supportive? • Do you monitor fluctuations in arrival numbers and produce relevant data? • Do you make use of big data for monitoring and evaluating industry performance? • Have you determined the carrying capacity of critical areas?

Table 23. Checklist (Based on: UNWTO, 2004)

13.4 Logical Framework Approach - matrixes

Stimulate and assist in the spreading of visitors around the destination and beyond

	Summary	Indicators	Means of Verification	Risks/Assumptions
Goal	Even spatial distribution of visitors	Diversification of tours and visits – X new areas are mentioned as must see	Visitor surveys	N/A
Outcome	To contribute to reducing pressure on the touristic hot spots by spreading the visitors in the city and beyond	Visitor numbers to newly promoted areas increase by X%	Tourism statistics	The government has capacity/willingness to cooperate
Outputs	New neighbourhoods included in the tourism offer	X new attractions/areas included in the tourism offer	Inventory of tourism products/attractions/hot spots	There is support from the local stakeholders
	Awareness created about less visited areas	X successful awareness campaigns launched	Campaign results	The right audience is reached
Activities	Offer special incentives (e.g.: tasting coupons)	X New promotions launched	Number of coupons used	Local businesses are cooperative
	Relocate events to new areas	X events relocated	Statistics - event visitors	Spatial conditions are appropriate
	Launch campaigns to promote new areas	X Visitors reached via campaigns	Campaign statistics	The target market is responsive
	Develop new visitor attractions and facilities	X new attractions and public facilities developed	Inventory of attractions and facilities	There are adequate financial resources
	Conduct research on community perceptions in the new areas	X research projects launched	Resident surveys	The residents are supportive and willing to get engaged
	Prepare inventory of areas with tourism potential	X potential areas identified	Portfolio of tourism activities/facilities	There are areas with tourism potential

Facilitate and assist the implementation of time-based rerouting within and across destinations

	Summary	Indicators	Means of Verification	Risks/Assumptions
Goal	Even distribution of visitors in time	Difference between number of visitors in peak season/day/hours and quite times reduced by X%	Yearly tourism statistics	N/A
Outcome	To reduce visitor pressure during peak times	Decrease in visitor numbers in the peak months/days/hours by X% Increase in visitor numbers in the shoulder months/days/hours by X%	Tourism statistics/environmental assessment reports	Visitors have the ability/willingness to travel in alternative time periods
Outputs	Increased visitation in the shoulder months/days/hours	Increase in visitor numbers by X%	Tourism statistics	Visitors find the right motivation to travel in alternative time periods
	Better informed visitors – improved visitor experience	X% increase in the number of visitors reached via awareness campaigns	Visitor surveys	There is adequate knowledge of efficient information provision techniques
	Innovative pricing strategies and creative incentives	X new strategies implemented	Financial strategies/reports/product development plans	Visitors have sufficient discretional income
Activities	Launch campaigns to create awareness of discounted prices and special incentives	X new incentives offered	Statistics on booked tours/excursions/tickets etc.	There is responsive audience
	Create new pricing strategies (e.g.: discounts for certain time-slots, days, months etc.)	X new strategies created	Strategies/development plans	Other key motivations to visit coincide with low prices
	Identify peak hours/days/months	X data bases created/extended	Market intelligence database	There are sufficient financial resources
	Apply specific techniques to monitor visitor flows and to collect data	X new tools used to collect data	List of measurement tools/techniques	Sufficient, high quality data is available

Stimulate and assist in the development of dynamic visitor itineraries within and across destinations

	Summary	Indicators	Means of Verification	Risks/Assumptions
Goal	Increased interest in alternative/ niche tourism products	X% of total number of visitors book alternative tours	Tourism statistics Booking statistics	N/A
Outcome	To increase the number of low impact tour bookings	X% of inquiries turned into bookings	Tourism statistics Booking statistics	Visitors are interested in low-impact itineraries
Outputs	New special interest tours created and offered	X% Increase in the number of tours offered	Portfolio of products offered	Industry partners are committed to sustainable tourism
	New partnerships formed between tour operators, DMOs, travel agents etc.	X% Increase in the number of partnerships	List of business partners	There is willingness for cooperation between industry partners
Activities	Launch campaigns to promote new products	X campaigns launched	Campaign statistics	The right distribution channels are used
	Create information materials	X information materials distributed (e.g.: booklets, flyers)	Inventory of information materials	There is sufficient budget
	Create virtual reality visits and use other SMART technology	X Virtual reality visits available online X SMART technology applied	Inventory of available digital information	There is sufficient knowledge on available innovative technology
	Provide combined discounts for low-impact itineraries	X discounts offered	Portfolio of combined offers	The right products are combined
	Together with the partners develop low-impact itineraries	X new itineraries developed	Portfolio of products offered	There is potential for further product development
	Partner with excursion organizers, tour operators, tour guides and other potential businesses	X newly formed partnerships	List of business partners	There is interest in new collaborations

Stimulate visitor segmentation and target marketing that emphasise local sustainable values

	Summary	Indicators	Means of Verification	Risks/Assumptions
Goal	Diversification of visitors	Balanced arrival numbers of e.g.: mass tourists and niche tourists or short stay and long stay etc. Discrepancy reduced by x%	Tourism statistics	N/A
Outcome	Increased number of special interest tourists/high spenders/long stays	X% increase in the number of special interest tourists/long stays etc.	Tourism statistics	The right target market is reached and motivated
Outputs	Higher visitor spending	X% increase in visitor spending	Tourism statistics	The target market has sufficient discretional income
	Longer average length of stay	X% increase in the average length of stay	Tourism statistics	The target market has sufficient disposable time
Activities	Together with the industry partners launch targeted campaigns	X inquiries turned into actual bookings	Booking information	Responsive target audience
	Partner with the right inbound tour operators/ agents	X new partnerships	Partnership database	Industry partners are willing/able to cooperate
	Run market research projects	X number of potential markets covered	Market intelligence database	Sufficient, high quality data is available

Facilitate the development of regulations (financial, operational, traffic) to manage, control and prevent overtourism

	Summary	Indicators	Means of Verification	Risks/Assumptions
Goal	Coordinated, sustainable tourism development	X% decrease in the number of haphazard practices	Operational manuals/plans/strategies	N/A
Outcome	Increased economic benefits and decreased negative environmental/social impacts	X% increase of taxes paid by service providers X% decrease in the number of environmental/social problems reported	Financial reports Environmental/social risk assessment reports	The increased tourism revenue is used for the right purposes
Outputs	Better regulated business environment	X number of problems eliminated	Inventory of regulatory procedures	Businesses are willing/able to adjust to the new procedures
	Stricter environmental regulations	X problematic areas revised (e.g.: water pollution, air pollution, noise pollution, littering, traffic)	Inventory of regulatory procedures	The new regulations are followed by everyone
	Increased cooperation between the public and private sector	X new joint projects	List of collaborations	There is active cooperation/communication between the partners

Activities	Update the tax system (tax accommodation and service providers) to increase the economic benefits	X new additions to the tax system	Rules and regulations - Tax system	There is no resistance from service providers
	Create regulations for the sharing economy	X new regulations	Inventory of regulatory procedures for accommodation providers	There is no resistance from property owners
	Together with the right partners create a comprehensive management plan (e.g.: traffic)	X problems eliminated	Available traffic management plans/strategies	Government departments are willing to finance the planned developments
	Identify the right departments/industry players to partner with	X new partnerships formed	List of partners	There is willingness for cooperation between industry players
	Create an inventory of critical areas, issues etc.	One full inventory created	Assessment reports	There is transparency and accountability

Stimulate the business environment and the development of a diversified economy that is not over dependent on tourism

	Summary	Indicators	Means of Verification	Risks/Assumptions
Goal	A diversified economy that is not over-dependent on tourism	GNP of the city evenly spread over different sectors	Turnover figures and statistical analysis per industry sector	A diversified economy is less vulnerable that a less diversified economy
Outcome	Location of new and innovative types of businesses in and outside tourism	# start-ups # relocated businesses # new businesses	Stats Chamber of Commerce	The city has ample attractive space to accommodate new businesses
Outputs	Attractive for business to start in or move to the city	# information requests # rented or sold property to new businesses	Information desk local government Data from estate agents	The city is sufficiently attractive as compared to competing cities / business environments
Activities	Funding and financial assistance Business incubator centre	Incentives for PPP constructions Incentives for innovations Incentives for domestic businesses and hotels Crowd funding programme Matching grants Business incubator services Online guide	Formal registration of programmes, services and incentives by local government / Chamber of Commerce	Local government is politically and financially willing to support new businesses

Stimulate the use of the "ladder of sustainable development'' the for spatial planning of tourism development

	Summary	**Indicators**	**Means of Verification**	**Risks/Assumptions**
Goal	Expansion of the tourism offer in a highly sustainable way	X new assets, properties, attractions developed by re-using/re-purposing existing properties, locations etc.	Portfolio of tourism offer	N/A
Outcome	To increase visitor yield and economic viability while preserving valuable assets	X% increase in tourism revenue as result of adaptive re-use	Tourism statistics/ databases on tourism revenue	Appropriate measures and monitoring procedures in place
Outputs	Promotion of enhanced use of redeveloped buildings by locals and visitors alike	X new projects finalized and communicated towards the public	Visitor statistics/guest nights etc.	Good match between demand and the new functions, services, attractions etc. offered
	Heritage assets preserved for generations to come	X assets/properties preserved	Inventory of assets/ properties under heritage protection	Regulations facilitating heritage protection and adaptive re-use
Activities	Integrate the re-developed properties/areas into the existing tourism offer	X re-developed locations, attractions, areas integrated into the tourism offer	Portfolio of available tourism products and services	Fit with the existing offer/image
	Find potential investors, form public-private partnerships	X new projects approved	Portfolio of development projects	Efficient public-private partnerships
	Together with other departments e.g. spatial planning, design and assign new functions to un-used buildings/areas	X new project ideas generated for adaptive re-use	Portfolio of development projects	There is consensus on the re-development plans of the available properties/areas
	Conduct a thorough analysis of un-used/underutilized buildings/areas	X number of buildings identified for adaptive re-use	Inventory of un-used buildings/areas	Knowledge and desire to apply adaptive re-use in planning and development

Stimulate regional/cross-border cooperation and facilitate alliances

	Summary	Indicators	Means of Verification	Risks/Assumptions
Goal	Improved knowledge/awareness and alliances between destinations	X number of shared databases/projects/training programs etc.	Quantity and quality of available data	N/A
Outcome	To share knowledge and co-create between destinations	X number of joint promotional campaigns, incentives etc.	Portfolio of projects/ campaigns etc.	Trust and openness towards sharing knowledge/data/ best practices etc.
Outputs	Improved cooperation on trans-national/interregional level	X new partnerships formed	List of partnerships	Shared vision
	Improved socioeconomic data on tourism on regional/ national level	X improved databases	Available databases/ tourism statistics	Accessible to shared data banks
Activities	Participate in virtual tourism observatory to support research activities by national research institutes	Involvement in X number of research projects to provide socioeconomic data	List of partnerships (research institutes)	Shared interest of the public and private sector
	Develop trans-national/interregional partnerships	X new partnerships	List of partnerships	Openness to new alliances/ partnerships
	Conduct/participate in webinars, seminars, workshops etc.	X number of seminar/webinars conducted/attended per year/quarter etc.	Events calendar	Available financial means to cover the costs of organizing or attending workshops/ seminars etc.
	Participate in online information exchange mechanisms	Improved coordination of e.g. school holidays between destinations	Number of databases open for access	Valuable/accurate data available for sharing
	Discover the possibilities for knowledge sharing, professional/scientific networks etc.	X new memberships in professional/scientific networks	Membership catalogue	Interest/willingness/available time to participate

Make residents benefit from the visitor economy

	Summary	Indicators	Means of Verification	Risks/Assumptions
Goal	Increased support from the community	X% increase in the level of community support	Resident surveys	N/A
Outcome	More balanced distribution of benefits in the community	Benefits of tourism is acknowledged/felt X% stronger in the community	Market research	There is active communication between the community and the decision makers
Outputs	More local businesses involved in tourism	X% increase in the number of private businesses directly/indirectly involved in tourism	Research amongst industry players	There is sufficient demand for new products/ services
	Benefits are more visible for the residents	discounts/special offers for locals	Resident surveys	The local community is interested in tourism related activities
Activities	Provide reduced entry fees for locals in museums, attractions etc.	Provide X discounts/special offers	Data base – entry fees of attractions	Attractions are able/ willing to provide discounts for residents
	Launch awareness campaigns amongst the residents about the benefits of tourism	Launch X awareness campaigns	Resident surveys	The local community is aware of the tourism offer
	Based on the analysis, develop new tourism products involving the local community	Develop X new, community based tourism products/services	Portfolio of tourism products	The local community is interested in/ willing to cooperate
	Analyse the supply-demand potential of the local community/businesses	Identify X new, potential, local service providers	Market intelligence database	There are available authentic products/ services

Facilitate the creation of destination experiences that benefit both visitors and local residents

	Summary	Indicators	Means of Verification	Risks/Assumptions
Goal	A balanced, multi-user environment	The concept of multi-user environments included into tourism and event strategies	Tourism development/event strategies	N/A
Outcome	Balanced use of space between residents and visitors	The city creates shared space – visitors seen as temporary residents	Market research	There is mutual understanding and respect
Outputs	Tolerance level of residents towards tourists is increased	Level of acceptance/support increased by X%	Resident surveys	Visitors act with respect towards local culture/ way of life
	Residents can also enjoy tourism related activities	Number of residents at attractions/sites/events increased by X%	Tourism statistics	Residents are open to experience their city as a tourist
	Visitors are more satisfied with the visitor experience	Level of satisfaction increased by X%	Visitor surveys	Visitors' needs and wants are satisfied
Activities	Integration of visitor facilities within local festivities and activities	Ratio of visitor oriented programs/ activities/services at local festivities increased by X%	Event management strategy Tourism development strategy	Locals are tolerant towards tourists
	Create space for residents at visitor attractions and events	Number of special offers/discounts for locals increase by X%	Portfolio of special offers/discounts	Residents have a sense of pride in their city
	Launch an ambassador program for residents/involve more locals in the existing programs	Rate of community involvement in tourism development/promotion is increased by X%	Resident surveys	Residents are willing to participate

Stimulate tourism businesses to communicate with and involve visitors

	Summary	Indicators	Means of Verification	Risks/Assumptions
Goal	Reduced disturbance to local life	Visitors are made aware of their responsibilities in maintaining the livability of the visited destinations	Visitor surveys	N/A
Outcome	Visitors are aware of the negative impacts of their visits	Level of awareness increased by X%	Visitor surveys	Visitors are eager to reduce negative impacts of their visit
Outputs	Awareness and knowledge of visitors on local etiquette increased	Level of knowledge increased by X%	Visitor surveys	Visitors would like to live like locals
	Crime and vandalism decreased	Number of atrocities reported decreased by X%	Police reports	Visitors have respectful behavior
	Amount of resident complaints decreased	Number of complaints decreased by X%	Registry of complaints	There is mutual understating and respect between residents and locals
Activities	Prepare information booklets on mobility within the city	X booklets distributed	Inventory of information materials	Visitors seek information on mobility
	Prepare information booklets on local etiquette	X booklets distributed	Inventory of information materials	Visitors are interested in learning about local etiquette
	Build awareness campaigns	X visitors reached	Campaign results	There is sufficient financial resources
	Launch visitor surveys to find out knowledge gaps (e.g.: local customs, negative impacts of tourists on local life)	X visitors surveyed	Visitor surveys	Visitors are responsive and willing to participate

Facilitate the coordination and development of a consistent destination infrastructure and public facilities

	Summary	Indicators	Means of Verification	Risks/Assumptions
Goal	More efficient, secure and conscious urban areas	The city develops its infrastructure and improves the conditions/number of public facilities	Assessment reports	N/A
Outcome	Enhanced societal living conditions and visitor facilities	Satisfaction level of residents/visitors increased by X%	Market research	Users of the city help to maintain the living conditions
Outputs	Increased amount of public facilities (public toilets, parking lots, Wi-Fi hot spots etc.)	e.g.: number of Wi-Fi hot spots increased by X%	Inventory of public facilities	Sufficient financial resources
	Enhanced accessibility/mobility (e.g. roads, zoning etc.)	e.g.: X new pedestrian zones	Spatial planning/development plans	Residents are cooperative (e.g.: car free zones)
	Increased amount of directional signage	Amount of directional signage increased by X%	Spatial planning/development plans	Visitors are eager to collect information
	The length of cycling and walking routes increased/conditions improved	Length of cycling and walking routes increased by X%	Spatial planning/development plans	The responsible public departments are supportive
	Increased cooperation between the public and private sector	X new joint projects	List of collaborations	There is active communication between the partners
Activities	Improve cultural and museum infrastructure	e.g.: X new attractions/sites made accessible for disabled visitors	Studies of cultural/museum infrastructure Development plans	Sufficient financial resources
	Improve directional signage, interpretation materials	X new signposts installed/information hot spots	Inventory of directional signage/information hot spots	Visitors are interested in background information
	Extend the existing cycling and walking routes	X km cycling and walking routes added	Spatial planning/development plans	Residents and visitors are willing to walk/cycle instead of driving
	Develop new public facilities	X new public facilities developed (e.g.: number of Wi-Fi hot spots)	Inventory of public facilities	Sufficient financial resources
	Identify the right departments/industry players to partner with	X new partnerships formed	List of partners	There is willingness for cooperation between industry players
	Create an inventory of critical areas, issues etc.	One full inventory created	Assessment reports	There is transparency and accountability

Stimulate tourism businesses to communicate with and involve local stakeholders

	Summary	Indicators	Means of Verification	Risks/Assumptions
Goal	Future vision based on common values/interests	Pace of decision making and development	Number of partners/residents involved in decision making processes	N/A
Outcome	More efficient industry partnerships and better cooperation with residents	Ratio of involvement in tourism development	Registry of planned and implemented changes/developments	Key stakeholders have similar interests/visions
Outputs	Increased communications between industry partners	X partners involved in the tourism management group	Registry of the management group meetings	The responsible partners are supportive
	Increased involvement of industry players	X actors participating in development programs	Portfolio of development programs	Employees are eager to learn and develop
	Increased community involvement	X residents present on discussion platforms	Registry of discussion platforms	Residents have supportive attitude
Activities	Set up a tourism management group and convene regular meetings	X meetings organized	Registry of the management group meetings	Industry players are willing to cooperate
	Organize professional development programs for industry players	X development courses organized	Portfolio of development programs	There are sufficient financial resources
	Organize discussion platforms for residents	X discussion platforms organized	Registry of discussion platforms	Residents are willing/able to participate
	Conduct research amongst stakeholders and residents	X research projects launched	Market intelligence database	Sufficient, high quality data is available

Facilitate the coordination and development of responsive measures in organization and planning

	Summary	Indicators	Means of Verification	Risks/Assumptions
Goal	Better monitored an managed industry based on stakeholder participation	Databases, management plans, licenses issued	Market research	N/A
Outcome	Improved industry performance	X KPIs identified	Market research	Shared vision amongst the partners
Outputs	Extended data bases	X new databases created	Market intelligence database	Data collection is carried out on a continuous basis
	New management/contingency plans	X new plans created	List of management plans available	Thorough knowledge about critical operations and risks
	Centralized operation of service providers	X licenses issued	Registry of licenses issued	Service providers are willing to cooperate
Activities	Monitor seasonal fluctuations in arrival numbers and produce relevant data	X new data collection techniques used	Market intelligence database	Sufficient, high quality data is available
	Use big data for monitoring and evaluating industry performance	X evaluation reports produced	Industry reports	Sufficient knowledge on data collection and analysis
	Prepare contingency plans for peak periods	X peak periods covered	Registry of contingency plans	Industry partners understand the importance of contingency planning
	Create an operators' licence system	One new system launched	Registry of license systems	Government support for reinforcing the law
	Create comprehensive management plans	X management areas covered	Registry of management plans	Thorough understanding of the economic/social/natural environment
	Create an event management plan	One new plan created	Event management strategy	Event organizers are willing to assist and adjust to the new system
	Create an inventory of critical areas, issues etc.	One full inventory created	Assessment reports	There is transparency and accountability

13.5 Resident survey - English version

Intro

Dear resident of {#city}. Currently, TV and other media pay a lot of attention to residents' feelings about visitors in cities across Europe. We want to know more about the situation in {#city} because this can help the city to guide visitors in a better way. Therefore, we would like to know from you how you feel about tourism in {#city} and about your personal experiences. For a good understanding, we will also ask you a few general questions about your relation with the city. We hope that you are willing to give an answer to all the questions. This will take about 10-15 minutes.

Q1. For how long have you lived in the city?

o (_1) Less than a year

o (_2) 1 year or more, please insert numbers of years

Q2. What is your connection to {#city}? (Please tick all that apply)

☐ (_1) I was born and raised in {#city}

☐ (_2) I moved in {#city} because the city offers (affordable) housing

☐ (_3) I moved to {#city} because of my work/studies

☐ (_4) I moved to {#city} because I like the city

☐ (_5) I moved to {#city} because of family reasons

☐ (_6) I moved to {#city} for another reason, namely: .....

Q2b. Please indicate to what extent you agree or disagree with the following statements?

	Completely disagree	Disagree	Neither disagree nor agree	Agree	Completely agree	Don't know
I am happy to be living in {#city}						
I feel I am a Tallinner						

Q3. What are the first 2 words that come up if you think of visitors to {#city}?

☐ (_1) Word 1

☐ (_2) Word 2

Q4. Please indicate to what extent you agree or disagree with the following statements?

	Completely disagree	Disagree	Neither disagree nor agree	Agree	Completely agree	Don't know
I am proud that people from different parts of the world visit my city						
The part of {#city} where I live is very touristy						
I think that {#city} is a hospitable city						
I think people from {#city} are hospitable people						

Q5a. During the past 3 years, how positive did you personally experience the following spatial impacts of tourism in your living environment in {#city} (e.g. infrastructure, city space, facilities in the city, etc.)

	1 - Neutral	2	3	4	5 - Very positive	6. - I did not experience this/ I don't know
... better infrastructure (roads, sidewalks, parking facilities, etc.)						
... more shops						
... more events						
... more leisure facilities						
... protection of historical parts of the city						
... restoration of traditional architecture						

Q5b. During the past 3 years, how positive did you personally experience the following economic impacts of tourism in your living environment in {#city}

	1 - Neutral	2	3	4	5 - Very positive	6 - I did not experience this/ I don't know
... more permanent jobs in tourism						
... more seasonal jobs in tourism						
... more jobs outside tourism						
... economic development of my neighbourhood						
... greater numbers of tourist accommodations (hotels/ pensions/ hostels/ apartments/ etc.)						
... increase of price level of real estate						
... wealth of residents						

Q5c. During the past 3 years, how <u>positive</u> did you <u>personally experience</u> the following social impacts of tourism in your living environment in {#city}?

	1 - Neutral	2	3	4	5 - Very positive	6 - I did not experience this/ I don't know
... increased liveliness						
... better liveability/living conditions						
... more cultural supply (museums, cultural activities, cultural events, etc.)						
... greater international touch						
... more positive image						
... growth of the population						
... change in the composition of the population (age, gender, ethnicity)						
... improvement/revitalisation of social and cultural life						
... increase of community's pride						
... better understanding of other people (decrease in prejudice, stereotypes)						
... revitalisation of local arts, crafts and cultural events						
... more opportunities to share knowledge and culture with visitors						

Q5d. During the past 3 years, how <u>positive</u> did you <u>personally experience</u> the following impacts of tourism in {#city} on your personal or family life?

	1 - Neutral	2	3	4	5 - Very positive	6 - I did not experience this/ I don't know
... a nicer / better job						
... improvement of my educational level						
... improvement of my language skills						
... improvement of the family income						
... improvement of my housing conditions						
... improvement of my understanding of other people/visitors						
... improvement of my attitude towards other people/visitors (politeness, social etiquette)						
... greater personal pride of the city						
... more pleasant contacts with visitors						

Q6a. During the past 3 years, how <u>negative</u> did you <u>personally experience</u> the following spatial impacts of tourism in your living environment in {#city}? (such as infrastructure, city space, facilities in the city, etc.)

	1- Neutral	2	3	4	5- Very negative	6 - I did not experience this/ I don't know
… overcrowding/obstruction of streets/sidewalks						
… overcrowding of shops/restaurants/leisure facilities						
… overcrowding of public transportation						
… change of appearance of the neighbourhood; loss of authenticity						
… pollution, littering, noise						
… tourists on bicycles/ Segways						
… a loss of diversity on the high-street						

Q6b. During the past 3 years, how <u>negative</u> did you <u>personally experience</u> the following economic impacts of tourism in your living environment in {#city}?

	1- Neutral	2	3	4	5- Very negative	6 - I did not experience this/ I don't know
… increase of price level/affordability of public transportation						
… increase of price level/affordability of taxis						
… increase of price level/affordability of rental houses						
… increase of price level/affordability of private houses						
… increase of price level/affordability of shops						
… increase of price level/affordability of leisure facilities						
… increase of price level/affordability of restaurants and cafés						
… decrease of permanent jobs						
… decrease of seasonal jobs						
… increase of seasonal/migrant workers						
… increase of tourist accommodations (such as hotels, hostels, B&B, holiday flats, etc.)						
… increase of businesses						
… big events causing peak moments of crowding						

Q6c. During the past 3 years, how <u>negative</u> did you <u>personally experience</u> the following social impacts of tourism in your living environment in {#city}?

	1- Neutral	2	3	4	5- Very negative	6- I did not experience this/ I don't know
... change/loss of culture/lifestyle/local customs						
... commercialisation of residents' hospitality						
... attitude of visitors (e.g. arrogant, indecent, brutal, dissatisfied, complaining, disrespectful, unfriendly, intolerant)						
... misbehaviour of visitors (e.g. noise, throwing up, drunk)						
... less housing for residents						

Q6d. During the past 3 years, how <u>negative</u> did you <u>personally experience</u> the attitude/behaviour of various tourism stakeholders in your living environment in {#city}? (stakeholders are persons/companies/organisations which have an interest in tourism)

	1- Neutral	2	3	4	5- Very negative	6- I did not experience this/ I don't know
... attitude/tourism plans of the government						
... attitude/plans of tourism marketing or tourism promotion organisations (e.g. choice of target groups)						
... attitude of tour operators (e.g. buses)						
... attitude of tour guides (e.g. group size)						
... attitude of taxi drivers						
... attitude of owners/managers of tourist accommodations (such as hotels, hostels, B&B, holiday flats, etc.)						
... attitude of other residents towards visitors n(e.g. pushy behaviour, aggressive behaviour)						

Q6e. During the past 3 years, how <u>negative</u> did you <u>personally experience</u> the following impacts of tourism in {#city} on your personal or family life/

	1- Neutral	2	3	4	5- Very negative	6 - I did not experience this/ I don't know
… obstruction of my daily schedule/planning						
… waiting time in shops/facilities						
… it frequently takes me extra time to go to work						
… my privacy is frequently violated/infringed						
… my safety/comfort is frequently violated						
… my family life is frequently infringed						
… my social and cultural life is frequently infringed						
… I experience unfair competition on the accommodation market						

Q7. During the past 3 years, how did tourism affect…?

	1- Very negatively	2	3- Neutral	4	5- Very positively	6 - I don't know
… the quality of your life?						
… your sense of attachment with the city?						
… your sense of attachment with the neighbourhood/ local community?						
… your personal identity as being a Tallinner?						
… your opinion about tourism in {#city}?						
… your opinion about visitors in {#city}?						

Q8. How do you deal with the drawbacks of tourism? (Please tick all that apply)

- ☐ (_1) I have not experienced drawbacks during the past 3 years
- ☐ (_2) Nothing, I take it for granted
- ☐ (_3) I avoid specific places or moments of the day
- ☐ (_4) I speak up to visitors who cause annoyance
- ☐ (_5) I try to influence the public opinion or tourism policy (newspapers articles, petitions, demonstrations, etc.)
- ☐ (_6) I have moved to another place in the city
- ☐ (_7) Other, namely: …

Q9. What would you do against the drawbacks of tourism if you had the choice and the means? (Please tick all that apply)

- ☐ (_1) I have not experienced drawbacks during the past 3 years
- ☐ (_2) Nothing, I would take it for granted
- ☐ (_3) I would avoid specific places or moments of the day
- ☐ (_4) I would speak up to visitors who cause annoyance
- ☐ (_5) I would try to affect the tourism policy or the public opinion
- ☐ (_6) I would move to another place in the city
- ☐ (_7) I would leave the city
- ☐ (_8) Other, namely: ...

Q10. Overall, what is your opinion about further growth of the number of visitors to <u>{#city}</u> in the future? (Please tick all that apply)

- ☐ (_1) I feel that there should be no boundaries to the growth of visitor number in {#city}
- ☐ (_2) I feel that there is still room for visitor numbers to grow further in {#city}
- ☐ (_3) I feel that there is still room for visitor numbers to grow further in {#city} but not in the peak season
- ☐ (_4) I feel that there is still room for visitor numbers to grow further in {#city} but not in holiday flats (such as Airbnb)
- ☐ (_5) I feel the growth rate of visitor numbers in {#city} should be slowed down
- ☐ (_6) I feel all tourism promotion and marketing for {#city} should be stopped
- ☐ (_7) I feel all tourism development in {#city} should be stopped
- ☐ (_8) Other, namely: ....

Q11. Overall, what is your opinion about further growth of the number of visitors to <u>your neighbourhood</u> in the future? (Please tick all that apply)

- ☐ (_1) I feel that there should be no boundaries to the growth of visitor numbers in my neighbourhood
- ☐ (_2) I feel that there is still room for visitor numbers to grow further in my neighbourhood
- ☐ (_3) I feel that there is still room for visitor numbers to grow further in my neighbourhood but not in the peak season
- ☐ (_4) I feel that there is still room for visitor numbers to grow further in my neighbourhood but not in holiday flats (such as Airbnb)
- ☐ (_5) I feel the growth rate of visitor numbers in my neighbourhood should be slowed down
- ☐ (_6) I feel all tourism promotion and marketing for my neighbourhood should be stopped
- ☐ (_7) I feel all tourism development in my neighbourhood should be stopped
- ☐ (_8) Other, namely: ...

Q12. Various solutions have been proposed to deal with visitors in a city such as {#city}. Please indicate to what extent you would support the following "solutions".

	1- Very much against	2	3	4	5- Very much in favour	6- Don't know
Spread visitors to 'new' destinations outside of {#city}						
Spread visitors to 'new' destinations within {#city}						
Stimulate that visitors spend more time inside tourism attractions (e.g. museums)						
Distribute visitors better during the day						
Distribute visitors better over the year						
Prevent visitors from going to certain areas (zoning), by means of transport regulations or activities						
Demotivate visitors to go to certain areas (zoning) by means of higher tariffs or tourist taxes						
Create itineraries to concentrate tourists along specific routes						
Attract only visitors from other target groups /with other lifestyles						
Make residents benefit financially from visitors						
Create city experiences where residents and visitors can meet and integrate						
Communicate with and involve local residents and local businesses in tourism planning						
Communicate better with visitors on how to behave in {#city}						
Improve the infrastructure and facilities (e.g. build more roads, parking) in {#city}						
Create stricter rules and controls regarding the opening hours of gastronomy						
Forbid the offering of Airbnb in certain parts of {#city}						

Q13. In what area of the city do you live? Please give your post code: …

Q14. Is your place of work located in the city?

- (_1) Yes
- (_2) No

Q14a. What is the postcode of your working place?

Q15. Do you work in the tourism business? (government, marketing, business)

- (_1) Yes
- (_2) No
- (_3) Don't know

Q16. Is your household income dependent from tourism?

- (_1) Yes
- (_2) No
- (_3) Don't know

Q17. What is your gender?

- (_1) Male
- (_2) Female

Q18. How old are you?

- (_1) Please insert your age
- (_2) I don't want to give my age

Thank you very much for your willingness to answer these questions. With your insights you help your city!

Visitor Pressure and Events in an Urban Setting

Understanding and managing visitor pressure in seven European urban tourism destinations

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