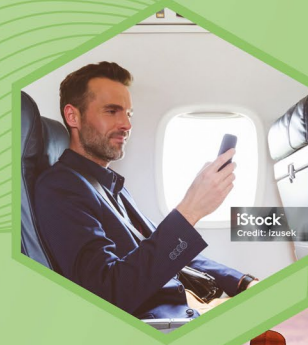


Workshop “Unbalanced Rollercoaster: EU Tourism tools for a Smoother Ride”

27 May 2025, 14.30 – 17.30 CET

Workshop Summary





Transition pathway for EU tourism

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Introduction

Scope and objectives of the workshop



Target audience

National, regional and local authorities, DMOs, industry associations and businesses in the tourism sector, with a focus on SMEs, academia, non-profits and any other tourism stakeholder interested in the topic.

Scope and objectives

Some want more, some want less, but all destinations want better tourism. Its benefit should be maximised and shared more widely, and there should be effective mitigation to minimise negative impact. The political and practical obstacles are familiar. What are the pre-conditions for progress?

This webinar aims to illustrate the opportunities arising from a collaborative approach to destination development and governance. Examples range from good practice sharing alliances, projects and pilot programmes to inter-departmental co-ordination and creative public-private sector dialogue.

We will also explore some of the problems: how does 'tourism policy' interact with culture and transport, housing and retail, licencing and tax? Where does regulatory competence sit: national, regional or local? How do we build consensus about what good looks like - a destination's vision for success - and the strategy and support for its implementation.

From funding to fostering good practice, what role can or should the EU play?

Expert panellists will explore these questions and share insights from the perspective of government and DMOs.

Agenda

Transition pathway for EU tourism

	Welcome and introduction
14:30 - 14:40	<ul style="list-style-type: none">• Maja Bakran, Deputy Director-General, DG MOVE, European Commission• Luís Campos, EU Affairs at the Portuguese Tourism Office - Belgium, Turismo de Portugal (Moderator)
	Context and definitions
14:40 - 15:00	<ul style="list-style-type: none">• Sandra Carvão, Director of Market Intelligence, Policies and Competitiveness, World Tourism Organization (UN Tourism)• Jan Van Der Borg, Academic, Dipartimento di Economia, Università Ca' Foscari of Venezia & Division of Geography and Tourism, KU Leuven and T4T Expert
	Causes and impacts
15:00 - 15:30	<ul style="list-style-type: none">• Oriol Freixa, Liaison Officer - Culture at UNESCO Representation to the EU• Esther Fructus, Advisor on EU & International Affairs (Department of Public Affairs, city of Amsterdam), European Alliance on Balanced Urban Tourism• Ralf Pastleitner, Director Public Policy Markets & Airline, Head of TUI Group Corporate Office EU and T4T Expert
15:30 - 15:50	Coffee Break
	Case studies
15:50 - 16:50	<ul style="list-style-type: none">• Alejandra Saenz de Miera, Executive Officer, European Federation of Tourist Guide Associations• Roberto Gualtieri, Mayor of Rome• Vicente Marí Torres, President, Island Council of Ibiza• Jelmer Peter, Program Manager Tourism, Economic affairs and Culture, City of Amsterdam• Françoise Guaspere, Senior policy advisor at the Île-de-France, Representation to the EU and member of the NECSTouR Board of directors, in charge of the advocacy• Ante Mandić, Professor, University of Split
	Conclusion and wrap up
16:50 - 17.10	<ul style="list-style-type: none">• Dolores Ordóñez, Director at AnySolution and T4T Expert• Olivier Ponti, Director, Intelligence and Marketing, ForwardKeys
	Closing remarks
17.10 - 17.20	DG MOVE , European Commission

Workshop “Unbalanced Rollercoaster: EU Tourism tools for a Smoother Ride”

Speakers

Moderates:



Luís Campos,
EU Affairs at the
Portuguese Tourism Office
- Belgium, Turismo de
Portugal



Maja Bakran,
Deputy Director-General,
DG MOVE, European
Commission



Sandra Carvão,
Director of Market
Intelligence, Policies
and Competitiveness,
World
Tourism Organization
(UN Tourism)



Jan Van Der Borg,
Academic, Dipartimento di
Economia, Università Ca'
Foscari of
Venezia & Division of
Geography and Tourism,
KU Leuven and T4T Expert



Oriol Freixa,
Liaison Officer -
Culture at UNESCO
Representation to the
EU



Esther Fructus,
Advisor on EU &
International Affairs
(Department of Public
Affairs,
city of Amsterdam),
European Alliance on
Balanced Urban Tourism



Ralf Pastleitner,
Director Public Policy
Markets & Airline, Head of
TUI Group
Corporate Office EU and
T4T Expert

Transition pathway
for EU tourism

Workshop “Unbalanced Rollercoaster: EU Tourism tools for a Smoother Ride”

Speakers



Alejandra Saenz de Miera,
Executive Officer, European
Federation of Tourist Guide
Associations



Roberto Gualtieri,
Mayor of Rome



Vicente Marí Torres,
President, Island Council
of Ibiza



Jelmer Peter,
Program Manager
Tourism, Economic affairs
and Culture, City of
Amsterdam



Françoise Guaspere,
Senior policy advisor at the Île-de-
France, Representation to
the EU and member of the
NECSTouR Board of directors, in
charge of the advocacy



Ante Mandić,
Professor, University of
Split



Dolores Ordóñez,
Director at
AnySolution and T4T
Expert



Olivier Ponti,
Director, Intelligence and
Marketing, ForwardKeys

Transition pathway
for EU tourism

Workshop in numbers



219 Registrations (114 in person & 105 online)



176 Participants (103 in person & 73 online)

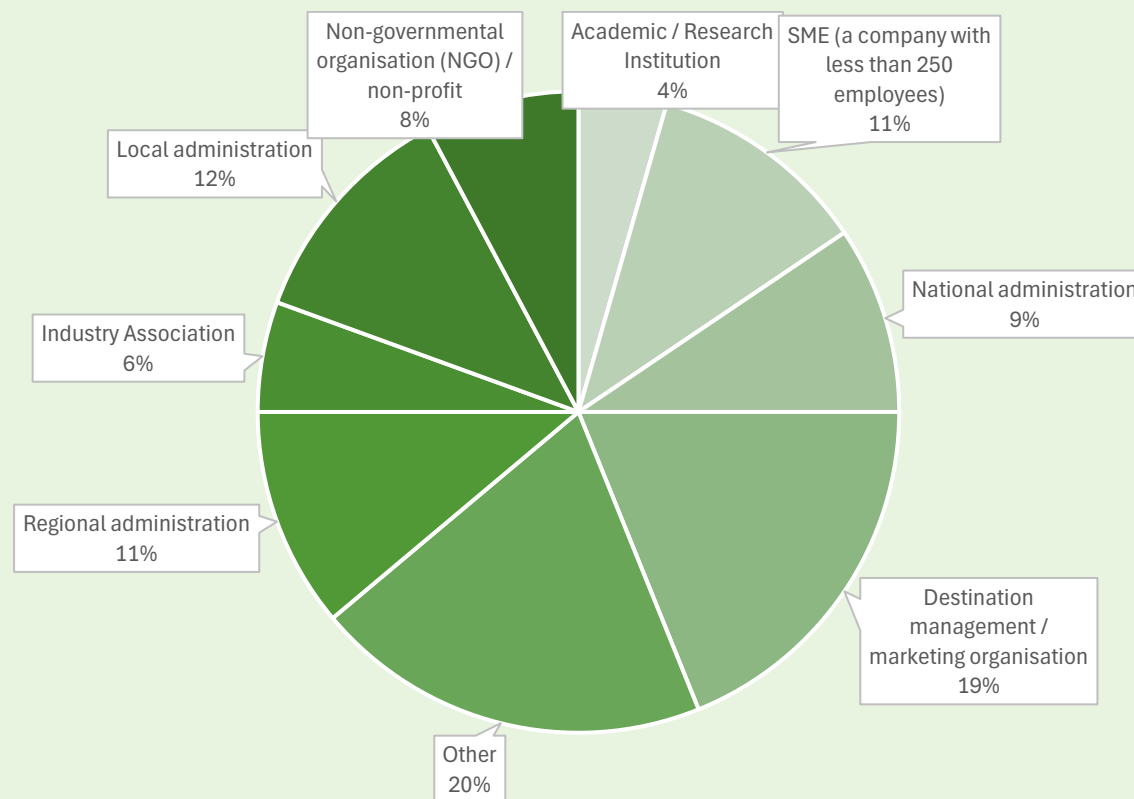


Participants from 23 EU MS



14 Speakers

Participants' Organisations



Results of the post-webinar survey



97% of the respondents were very satisfied/satisfied with the webinar.



96% of the respondents found that the webinar provided useful information.



96% of the respondents feel that they have obtained a better understanding and knowledge of the topic after attending.

Key discussion points (1/5)

Representatives from the **European Commission, World Tourism Organization (UN Tourism), KU Leuven, UNESCO, European Alliance on Balanced Urban Tourism, TUI Group Corporate Office EU, Municipality of Rome, Consell Insular d'Eivissa – Ibiza, City of Amsterdam, University in Split, NECSTouR, AnySolution and ForwardKeys** discussed the following:

1

Session 1: “Context and definitions”

- At the beginning, Maja Bakran, Deputy Director-General at DG MOVE, **opened the workshop by framing the discussion within the broader context of the EU’s sustainable tourism strategy**. The importance of finding a balanced approach to tourism development across European destinations was underlined, with reference made to the ongoing stakeholder consultation process and the forthcoming EU strategy on sustainable tourism, expected in early 2026.
- Sandra Carvão, Director at UN Tourism, introduced the session by **framing the global context of unbalanced tourism**. Emphasis was placed on three key dynamics: the exponential growth of both international and domestic tourism, the spatial concentration of tourist flows in a limited number of destinations, and the temporal concentration during peak seasons. It was noted that concerns around overtourism are not new, with reference made to a 1993 UNWTO report on saturation and carrying capacity. However, a shift in recent years was highlighted, with increasing attention given to the social impacts of tourism, particularly resident sentiment and media narratives. The need to redefine carrying capacity at the local level was underlined, incorporating not only infrastructure and environmental thresholds but also social and cultural dimensions. Findings from a 2018 Ipsos survey were presented, indicating that nearly half of respondents in key cities already perceived tourism levels as excessive, with calls for improved infrastructure and greater community engagement. A multi-dimensional, evidence-based approach to tourism governance was advocated, supported by robust data, inclusive planning, and a rethinking of tourism narratives to reflect shared values and responsibilities.
- Jan Van Der Borg, academic at Ca’ Foscari University and KU Leuven, **provided a critical analysis of unbalanced tourism development, drawing on decades of research and policy advisory experience**. It was argued that both overtourism and undertourism represent systemic failures in managing tourism commons. The concept of tourism capital—comprising public spaces, cultural assets, and infrastructure—was discussed as being largely unregulated by market forces, leading to either overuse or neglect. Reference was made to Butler’s Tourism Area Life Cycle (TALC) and Raworth’s Doughnut Economics to illustrate how destinations oscillate between underdevelopment and unsustainable growth. The notion that unbalanced tourism is caused by unruly tourists or exploitative entrepreneurs was challenged, with emphasis placed instead on the absence of strategic policymaking and governance. A shift towards long-term, quality-driven tourism models was proposed, prioritising local communities and entrepreneurs. The importance of continuous monitoring, inclusive governance, and a redefinition of success in tourism beyond short-term economic gains was stressed. Tourism development was framed as a serious, interdisciplinary endeavour requiring coordinated action from academics, policymakers, and industry leaders.

Key discussion points (2/5)

Representatives from the **European Commission, Vienna Tourist Board, Dublin City Council, Gdansk Tourism Organisation, Visit Flanders and Region of Attica** discussed the following:

2

Session 2: “Causes and impacts”

- Oriol Freixa, Liaison Officer for Culture at UNESCO, **presented the cultural heritage perspective on unbalanced tourism, with a focus on UNESCO-designated sites**. The dual nature of tourism as both an opportunity and a challenge was emphasised. While tourism was acknowledged as a driver of cultural exchange and economic development, its negative impacts on infrastructure, local identity, and community life were also highlighted. Common challenges such as overcrowding, the influence of social media, and lack of coordination among stakeholders were outlined. A range of tools and strategies were introduced, including time-based entry systems, community-based tourism models, and improved storytelling to enhance visitor understanding. The “V-MUST” tool was presented as a method for assessing visitor flows and identifying pressure points. The importance of monitoring, reporting, and cross-sectoral collaboration was stressed, with reference made to the European Alliance on Balanced Urban Tourism and recent Council initiatives. A balanced tourism model was advocated—one that protects cultural identity while ensuring inclusive benefits for both residents and visitors.
- Esther Fructus, representing the City of Amsterdam and the European Alliance on Balanced Urban Tourism, **addressed the urban management challenges posed by high visitor volumes**. Tourism was acknowledged as a driver of economic and cultural exchange, but its negative impacts on infrastructure, social cohesion, and local economies were also underlined. The formation of the European Alliance on Balanced Urban Tourism was described as a response to growing concerns among cities such as Amsterdam, Barcelona, Florence, and Prague. The alliance’s objectives were outlined, including knowledge exchange, joint research, and EU-level advocacy. Key messages were shared, calling for policies that prioritise liveability, protect local retail, and reduce environmental footprints. The need for shared European indicators and coordinated governance across all levels was emphasised. Specific policy recommendations included regulating tourist shops, promoting sustainable transport, and supporting business model transformation. A call for a dedicated EU budget line for sustainable tourism was issued, alongside an invitation for other cities to join the alliance.
- Ralf Pastleitner, representing TUI Group and chair of the T4T Green Transition Subgroup, **presented the private sector’s perspective on managing unbalanced tourism**. Tourism was described as a force for good, capable of generating jobs, education, and cultural exchange. However, the environmental and social impacts of tourism were acknowledged, with emphasis placed on the need for holistic sustainability—balancing economic, social, and environmental dimensions. Key causes of unbalanced tourism were identified, including ineffective visitor flow management, unregulated accommodation, and the influence of social media. A range of impacts were outlined, from overcrowding and traffic congestion to erosion of local identity and resident dissatisfaction. Examples of good practice were shared, including the case of Dubrovnik’s cruise ship management and TUI Care Foundation’s local integration programmes.

Key discussion points (3/5)

Representatives from the **European Commission, Vienna Tourist Board, Dublin City Council, Gdansk Tourism Organisation, Visit Flanders and Region of Attica** discussed the following:

2

Session 3: “Case studies”

- Alejandra Sáenz de Miera, Executive Officer at the European Federation of Tourist Guide Associations, **offered insights from the perspective of tourism professionals. The role of tourist guides as frontline actors** in managing visitor experiences was highlighted. Daily challenges such as overcrowding, logistical constraints, and safety concerns were described. The importance of collaboration with authorities was acknowledged, with appreciation expressed for efforts to manage tourism pressures. Participation in EU-funded projects such as HECTOR, focused on safety in public spaces, was mentioned as an example of proactive engagement. The value of guided experiences in enhancing visitor understanding and promoting responsible tourism was emphasised. A call was made for continued support and recognition of professional guides as key stakeholders in sustainable tourism.
- Antonio Preiti, speaking on behalf of the Mayor of Rome, **presented the case of “Giulia”, Rome’s AI-powered virtual tourist assistant.** The tool was introduced as a strategic response to managing tourism flows and promoting lesser-known areas of the city. Giulia was described as an integrated, multilingual chatbot based on GPT technology, accessible via WhatsApp, Telegram, and web platforms. It was explained that the assistant provides real-time information on transport, health services, restaurants, and cultural sites, with content directly sourced from local businesses. This approach was positioned as a means of ensuring data accuracy and supporting local stakeholders. The assistant’s conversational interface and multilingual capabilities were highlighted as key features for enhancing visitor experience. The initiative was framed as part of Rome’s broader digital transformation strategy, aimed at improving both resident and tourist satisfaction through smart governance and inclusive technology.
- Vicente Marí Torres, President of the Island Council of Ibiza, **presented a comprehensive strategy for managing tourism success and ensuring long-term sustainability.** The fragility of Ibiza’s ecosystem and the pressures of high tourist volumes were outlined, with reference made to the island’s limited size, high visitor-to-resident ratio, and growing vehicle congestion. Two key measures were highlighted: the regulation of vehicle entry during peak months and the reduction of illegal tourist accommodation. A new law was introduced to cap the number of vehicles allowed on the island, with specific limits for rental cars and caravans. Investments in electric public transport and infrastructure upgrades were also described. In parallel, a crackdown on illegal rentals was detailed, including collaboration with online platforms and the use of tourism intelligence tools. The importance of data-driven policymaking, social consensus, and inter-institutional cooperation was emphasised. Tourism was framed not as a threat, but as an opportunity—provided it is managed with ambition, unity, and responsibility.

Key discussion points (4/5)

Representatives from the **European Commission, Vienna Tourist Board, Dublin City Council, Gdansk Tourism Organisation, Visit Flanders and Region of Attica** discussed the following:

2

Session 3: “Case studies”

- Jelmer Peter, Programme Manager at the City of Amsterdam, **presented the city’s evolving approach to managing tourism through regulation, spatial planning, and community engagement**. The origins of Amsterdam’s tourism policy were traced to a resident-led petition during the COVID-19 pandemic, which led to the adoption of a “Tourism Balance Regulation”. This regulation mandates action when overnight stays exceed 20 million annually. A wide range of measures was outlined, including a hotel and bed cap, strict short-term rental regulations, a high tourist tax, and restrictions on tour buses and cruise ships. Behavioural campaigns and zoning plans to protect local retail diversity were also described. The city’s efforts to promote spatial dispersal and long-term investment in cultural infrastructure were highlighted. Tourism was positioned as a cross-cutting issue, requiring coordination across housing, mobility, taxation, and urban development. The need for a holistic, SDG-aligned approach was stressed, alongside the importance of shared European frameworks for carrying capacity and sustainable tourism governance.
- Françoise Guaspere, representing the Île-de-France Region and NECSTouR, **presented strategies for spatial and seasonal rebalancing of tourism in the Paris metropolitan area**. The **Grand Paris Express project** was introduced as a transformative mobility initiative, connecting peripheral cultural sites and reducing travel times. Trends such as the rise of slow tourism, cycling, and river tourism were discussed as opportunities to diversify visitor experiences. Initiatives like SNCF’s #cpasloinentrain campaign were cited as examples of encouraging exploration beyond central Paris. The integration of tourism into broader mobility, climate, and spatial planning policies was emphasised. Challenges such as communication, first- and last-mile connectivity, and digital ticketing were acknowledged. The legacy of the 2024 Olympic Games was referenced as a catalyst for sustainable transport and tourism innovation. A call was made for continued investment in infrastructure, cross-sectoral collaboration, and data-driven decision-making to support balanced regional development.
- Professor Ante Mandić, from the University of Split, presented the Croatian Ministry of Tourism and Sport’s **newly adopted methodology for calculating a destination’s carrying capacity**. The initiative was **framed as part of a broader reform of Croatia’s tourism governance**, grounded in a three-pillar model: legislative foundation, operational planning instruments, and systemic monitoring. The carrying capacity methodology was described as multidimensional, encompassing ecological, socio-cultural, economic, psychological, and infrastructural thresholds. A six-phase operational framework was outlined, guiding destinations from territorial zoning and methodology selection to scenario modelling and policy formulation. Three methodological approaches—quantitative, qualitative, and combined—were introduced, with examples provided from Dubrovnik and Split. A set of 67 sustainability indicators and 71 carrying capacity indicators was detailed, supported by official guidelines and technical documentation.

Key discussion points (5/5)

Representatives from the **European Commission, Vienna Tourist Board, Dublin City Council, Gdansk Tourism Organisation, Visit Flanders and Region of Attica** discussed the following:

2

Session 4: “Conclusions and Wrap up”

- Dolores Ordóñez, Director at AnySolution and Co-chair of the T4T Digital Subgroup, **delivered a comprehensive wrap-up of the workshop, highlighting key themes and introducing two major EU-funded projects.** The importance of sustainable destination management was reiterated, with emphasis placed on the need for better governance, stakeholder collaboration, and data-driven decision-making. It was noted that tourism must be understood as a dynamic system, with pressures varying across time and space. The need for a shared vocabulary and consistent indicators was stressed, alongside the importance of measuring impacts beyond perceptions. The EU Competence Centre for Data Management in Smart Destinations (D3HUB) was introduced, supporting 40 pilot destinations across Europe in developing dashboards, skills, and community engagement tools. **The DEPLOYTOUR project was also presented,** aimed at deploying the Common European Tourism Data Space. Five geographically diverse use cases were described, each addressing specific sustainability challenges. The integration of tourism data with other sectors—such as mobility, agriculture, and culture—was highlighted as essential for holistic planning. A call was made for continued collaboration, standardisation, and the ethical use of technology to support the transition towards more resilient and balanced tourism models.
- Olivier Ponti, Director at ForwardKeys, concluded the workshop **with a data-driven reflection on tourism trends and destination management.** It was confirmed that tourism continues to grow, with air capacity and demand increasing across Europe. The need for proactive destination management was underlined, particularly in achieving better dispersal of tourist flows in time and space. A case study from Valencia was presented, demonstrating how geolocated data can be used to identify overcrowded areas, understand visitor profiles, and promote alternative experiences. **The importance of targeting specific visitor segments and adjusting communication strategies** accordingly was emphasised. The role of data in flattening seasonality was also discussed, with examples of how connectivity and demand analysis can inform strategic planning. It was concluded that sustainable tourism requires differentiated approaches for high and low seasons, with a focus on both mitigation and opportunity creation. The session closed with a strong endorsement of data as a critical enabler of balanced tourism, alongside the political will and collaborative frameworks needed to implement meaningful change.

Conclusions and next steps

Conclusions

1	Unbalanced tourism is not a new phenomenon, but its social impacts—particularly on residents—have become increasingly visible and politically urgent.	
2	Both overtourism and undertourism are symptoms of systemic governance failures, often rooted in the mismanagement of tourism commons and lack of strategic planning.	
3	Carrying capacity must be redefined as a multidimensional concept, encompassing environmental, social, cultural, and infrastructural thresholds—tailored to each destination.	
4	Resident sentiment is emerging as a critical metric for sustainable tourism, with several cities and countries integrating it into policy frameworks and monitoring tools.	
5	Urban destinations are calling for stronger regulatory powers, shared European indicators, and coordinated governance to manage tourism pressures effectively.	
6	A shift from volume-based to value-based tourism models is essential, prioritising long-term liveability, quality of experience, and local benefit over short-term growth.	
7	Collaboration is the key: governance at local and global level, with all stakeholders, in a holistic approach..	
8	Tourism is an opportunity for economic and social development.	

Next steps

1	Strengthen cross-sectoral collaboration and governance at all levels—local, national, and EU—to align tourism with broader sustainability and mobility goals.
2	Accelerate the deployment of data-driven tools and frameworks (e.g. carrying capacity assessments, digital twins, tourism data spaces) to support evidence-based decision-making.
3	Words matter; Tourism should face the present narrative.
4	Local communities are a positive for a balanced solution. Looking for social consensus is a must-do.
5	All stakeholders in the tourism sector should connect to the EU Tourism Platform to access resources, participate in discussions, and stay updated on EU tourism policies, fostering a collaborative environment.

Thank you!

The draft document has been prepared for the European Commission in the context of the project “Transition Pathway Stakeholder Support Platform: Implementation for Tourism Ecosystem” (the Project) in accordance with the signed contract No EISMEA/2022/OP/0018. This report reflects the views and results of the workshop discussion between the tourism stakeholders and do not necessarily represent the views of the European Commission. The action recommendations, however, do not necessarily represent the position or endorsement of all stakeholder groups nor the position of individual Member States or the European Commission.