Post-covid change towards more sustainable tourism?

Reflections from the perspective of consumers and politics

Christian Baumgartner
FH Graubünden / CIPRA International

Fachhochschule Graubünden
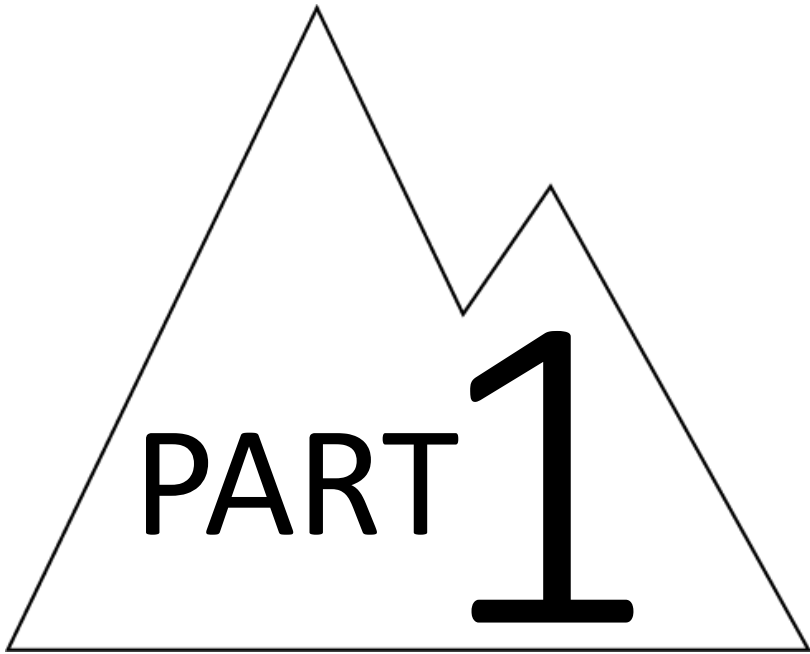University of Applied Sciences

CIPRA
LIVING IN
THE ALPS

Prof. Dr. Christian Baumgartner

Post-covid change towards more sustainable tourism?

- Reflections from the perspective of consumers and politics

October 08, 2021

response&ability
working for: tourism
development
sustainability

PART 1

Part 1: Some preliminary remarks
Part 2: Trends after COVID
Part 3: Current Policies
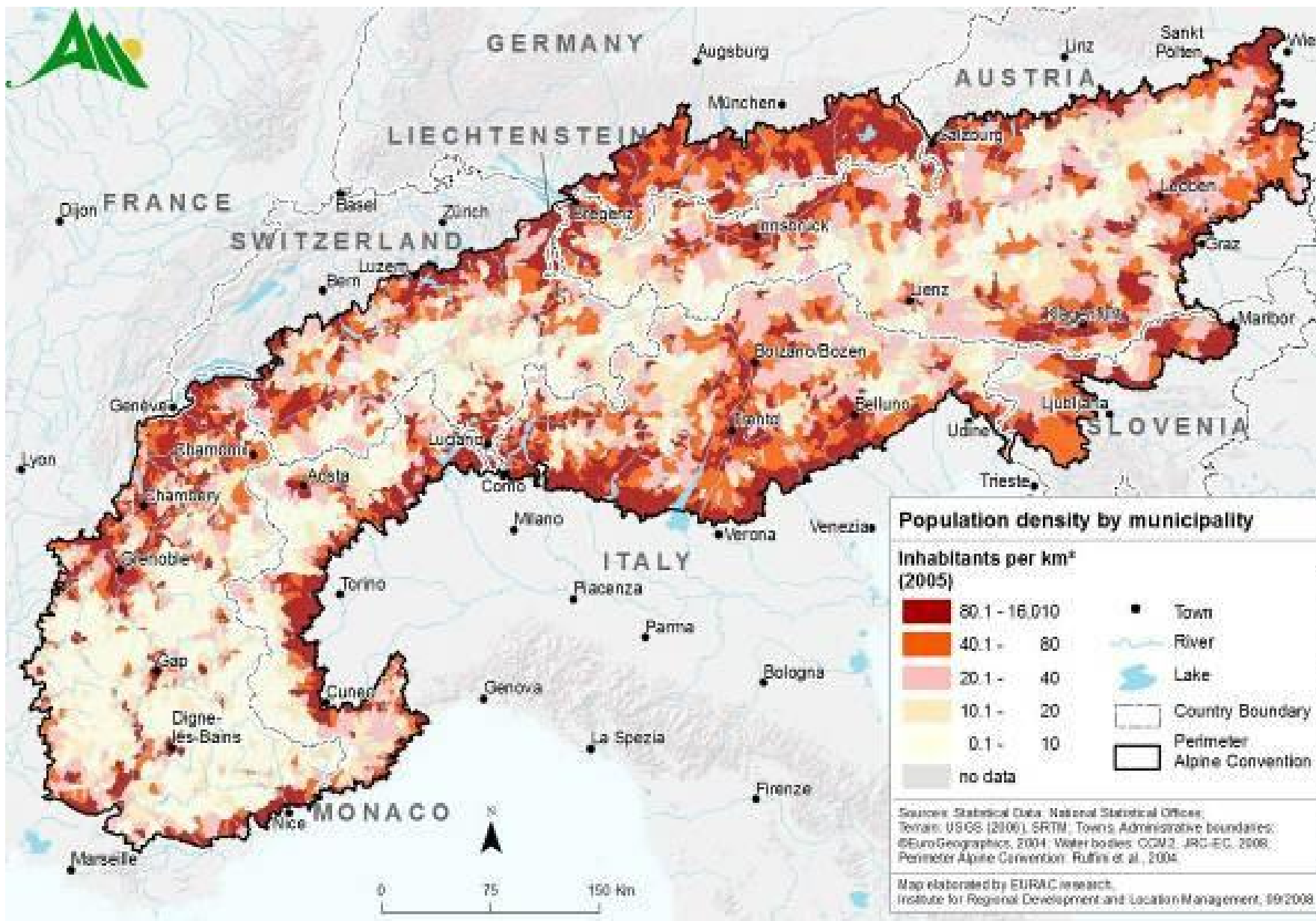Part 4: Conclusions & Necessities

PRELIMINARY REMARKS

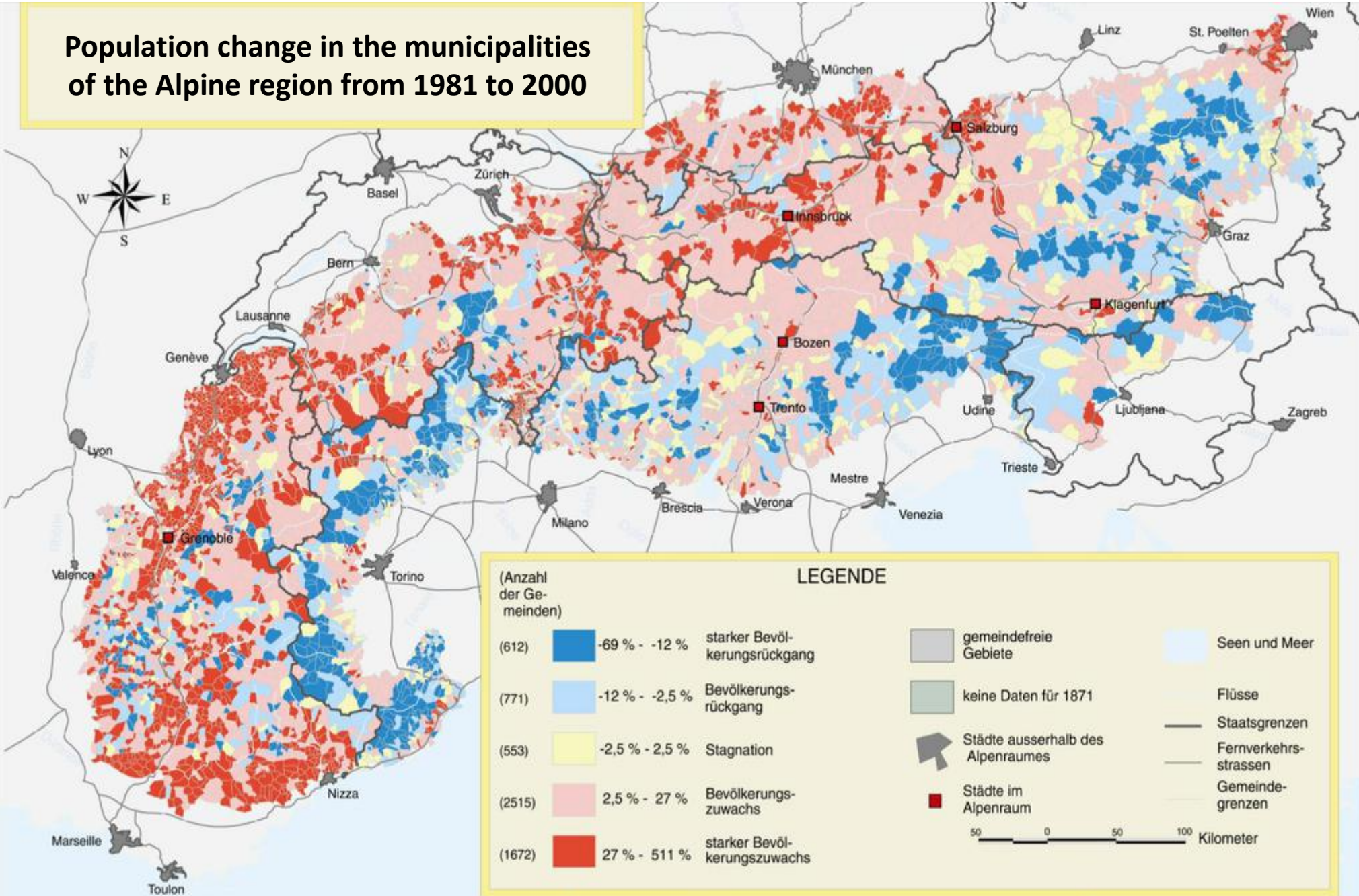The Alps
-
A mountain range connects 8 countries ...

Population density by municipality

The Alps
-
A mountain range connects 8 countries ...
-
... but does not form a homogeneous space

Population change in the municipalities of the Alpine region from 1981 to 2000

The Alps
-
A mountain range connects 8 countries ...
-
... but does not form a homogeneous space

LEGENDE

(Anzahl der Gemeinden)

(612)	-69 % - -12 %	starker Bevölkerungsrückgang
(771)	-12 % - -2,5 %	Bevölkerungsrückgang
(553)	-2,5 % - 2,5 %	Stagnation
(2515)	2,5 % - 27 %	Bevölkerungszuwachs
(1672)	27 % - 511 %	starker Bevölkerungszuwachs

gemeindefreie Gebiete

keine Daten für 1871

Städte ausserhalb des Alpenraumes

Städte im Alpenraum

Seen und Meer

Flüsse

Staatsgrenzen

Fernverkehrsstrassen

Gemeindegrenzen

50   0   50   100 Kilometer

© 2002 W. Bätzing / Y. Dickhörner, Institut für Geographie der Friedrich-Alexander-Universität Erlangen-Nürnberg. Erarbeitet im Rahmen des Projektes 200 11 226 "Umsetzung der sozioökonomischen und ökologischen Aspekte des Nachhaltigkeitsprinzips bei der Ausarbeitung des Schwerpunktthemas der Alpenkonvention 'Bevölkerung und Kultur'", im Auftrag des Umweltbundesamtes.

Source: 2002: W. Bätzing, Y. Dickhörner, im Auftrag des UBA

**Population change in the municipalities of the Alpine region from 2000 to 2010**

ALPINE CONVENTION
5th Report on the State of the Alps

Population growth rate - 10 years' annual average (%)

>= 5.01	No data available
1.01 - 5.00	National border
0.01 - 1.00	Perimeter Alpine Convention
- 0.99 - 0.00	City
- 4.99 - - 1.00	River
<= - 5.00	Lake

EURAC research   Institute for Regional Development and Location Management
Author: RAMAZZOLI, E., August 2014

The Alps

-

A mountain range connects 8 countries ...

-

... but does not form a homogeneous space

TOURISM INTENSITY – NUMBER OF BEDS

Tourism Intensity: beds in hotels and similar establishments per population
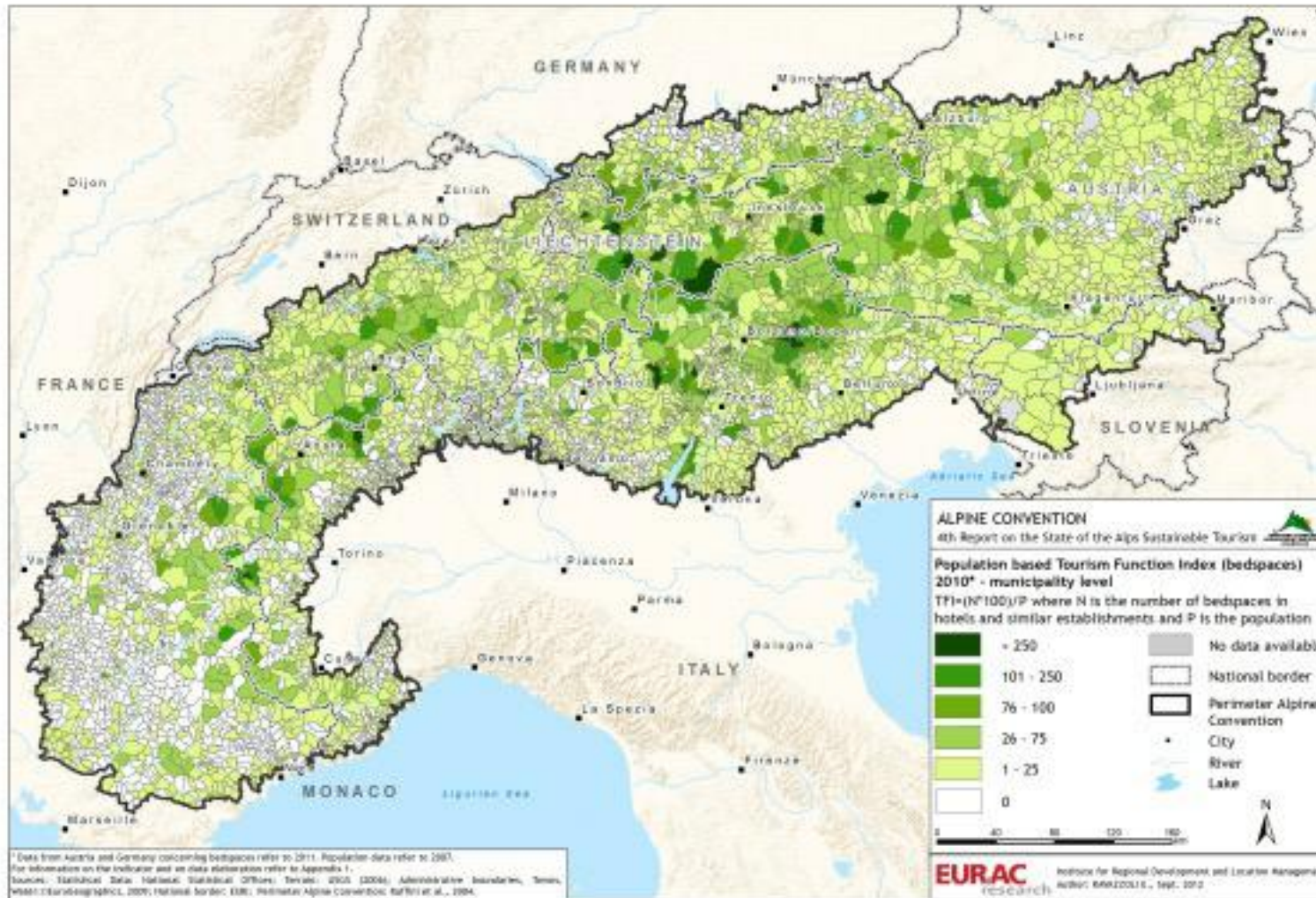
"Tourism Intensity" based on the number of beds per inhabitant represents the classic offer-oriented indicator.

This is due to the good availability of data compared to the demand-oriented maps.

But there is a lot of inconsistencies between statistical system in the countries.

Source: Permanent Secretariat of the Alpine Convention, (2014): Sustainable Tourism in the Alps, 5th Report on the state of the Alps
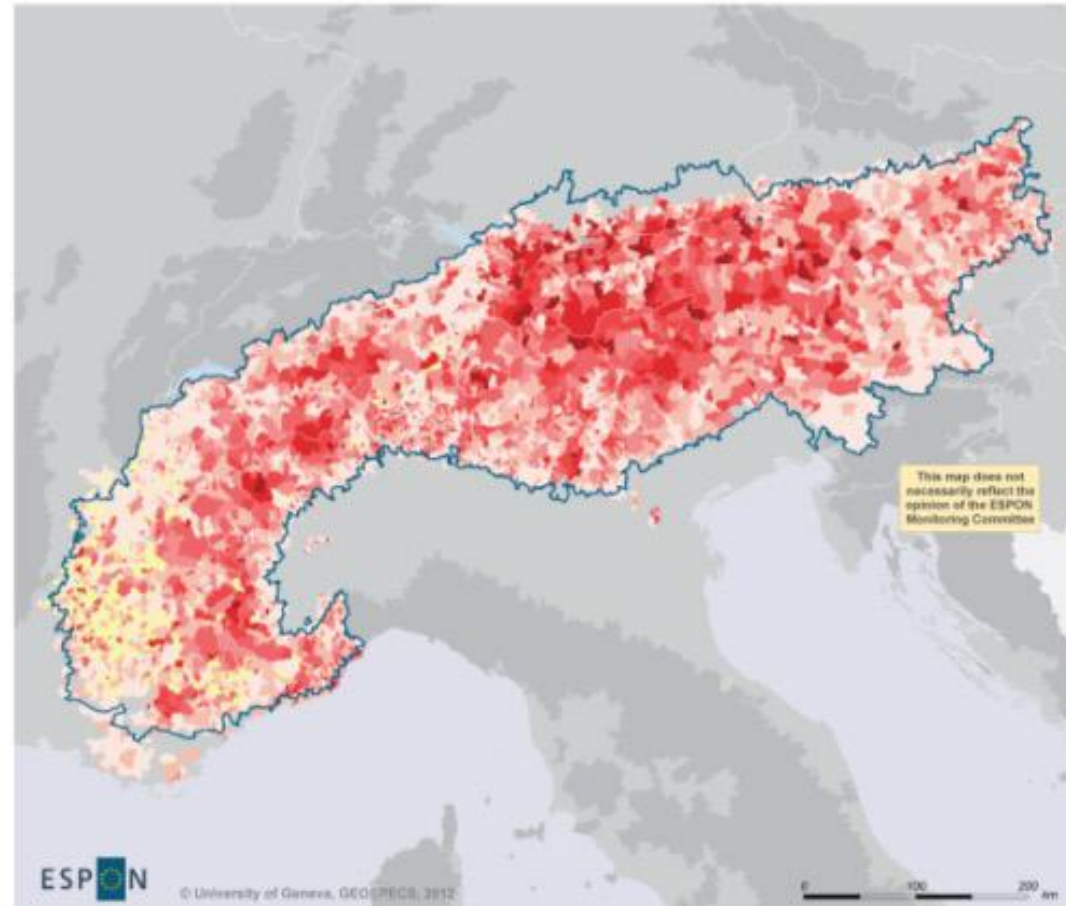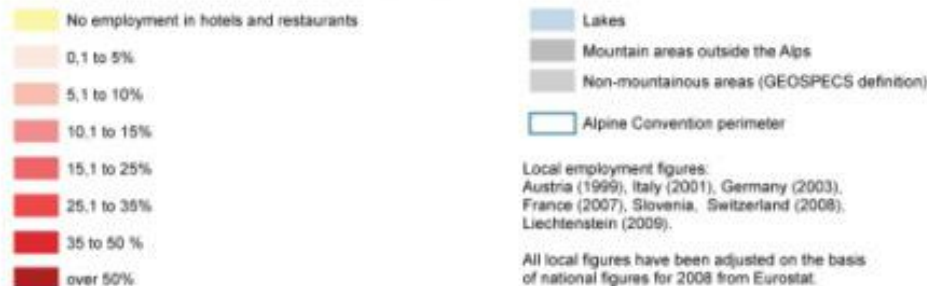
WORKING IN TOURISM

Proportion of employment in hotels and restaurants

Regional level: LAU2

Proportion of employment in hotels and restaurants

Proportion of gainfully occupied persons working in hotels and restaurants

No employment in hotels and restaurants	Lakes
0,1 to 5%	Mountain areas outside the Alps
5,1 to 10%	Non-mountainous areas (GEOSPECS definition)
10,1 to 15%	Alpine Convention perimeter
15,1 to 25%	
25,1 to 35%	
35 to 50 %	
over 50%	

Local employment figures:
Austria (1999), Italy (2001), Germany (2003),
France (2007), Slovenia, Switzerland (2008),
Liechtenstein (2009).

All local figures have been adjusted on the basis
of national figures for 2008 from Eurostat.

Employment in some municipalities is heavily dependent on tourism; with rates over 50% in the sector in a number of settlements spread across the Alps – but mainly in Austria and Germany – almost all at higher altitudes, i.e., ski resorts.

In contrast, there are significant parts of the Alps where employment in this sector is low: often below 10% or even 5%.

More significantly, the lack of employment in this sector in a considerable number of municipalities in the Southern French Alps is notable. These tend to have relatively high rates of employment in agriculture, and ageing and decreasing populations.

WORK PLACE RELATION TO DEVELOPMENT

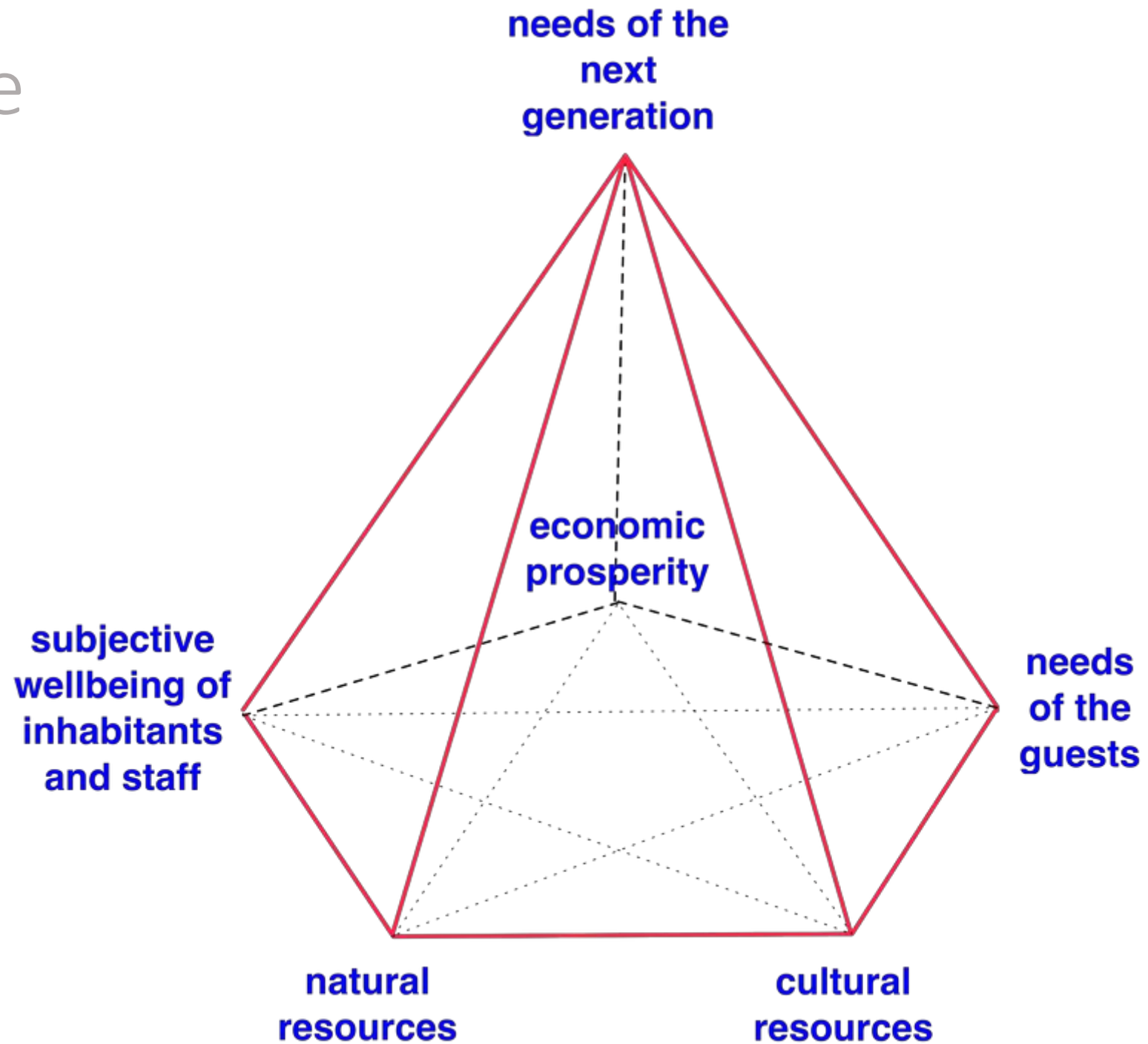| Community	Winter 2015/16	Summer 2016	Total Summer and Winter	Change in population 2006-2016
Sölden	2.041.603	483.230	2.524.833	-6,2%
Saalbach-Hinterglemm	1.567.091	707.148	2.274.239	-2,0%
Mittelberg	816.240	867.379	1.683.619	-2,0%
Schladming	973.308	662.146	1.635.454	stagniert
Zell am See	778.376	780.228	1.558.604	-1,4%
Mayrhofen	878.276	618.054	1.496.330	stagniert
Ischgl	1.342.874	126.318	1.469.192	-25,7%
Neustift im Stubaital	794.228	502.576	1.296.804	4,8%
Serfaus	761.393	439.317	1.200.710	-4,1%
Sankt Anton am Arlberg	1.005.690	181.887	1.187.577	-16,3%
Flachau	840.405	342.327	1.182.732	6,4%
Hermagor-Pressegger See	583.100	590.376	1.173.476	-4,3%
Bad Gastein	631.744	502.917	1.134.661	-16,4%
Bad Hofgastein	593.385	474.755	1.068.140	stagniert
Tux	662.821	343.130	1.005.951	stagniert
Lech	849.200	156.046	1.005.246	-19,5%
Kaprun	568.437	431.059	999.496	7,5%
Fiss	632.848	365.536	998.384	-2,7%
Obertauern	956.170			-2,3%
Wagrain	597.192	321.339	918.531	1,8%

WORK PLACE RELATION TO DEVELOPMENT

WINTER Tourism does NOT (necessarily) contribute to positive population development.

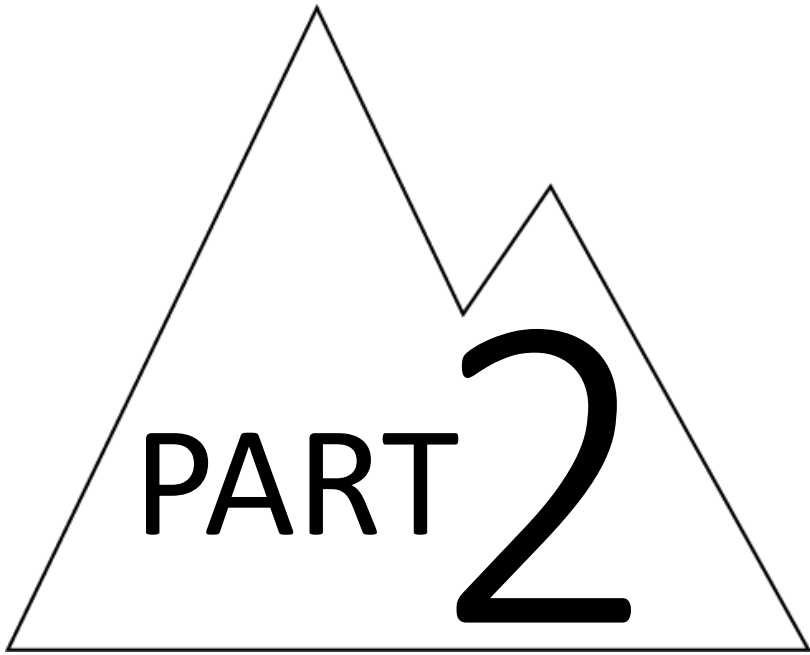| Community	Winter 2015/16	Summer 2016	Total Summer and Winter	Change in population 2006-2016
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Sustainable TOURISM

PART2

TRENDS AFTER COVID

Best August ever

Mountain inn Aescher-Wildkirchli, Appenzell (CH)

Best August ever

Catching-up
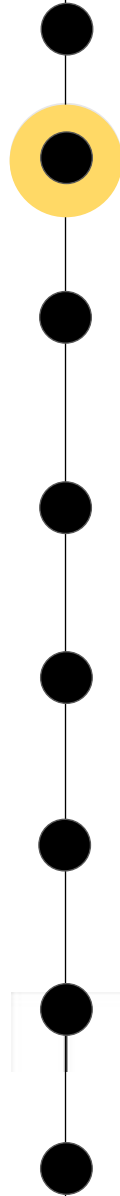
Tourists at Passo Pordoi, Summer 2020
(c) CNSAS

Best August ever

Catching-up

Uncertain Asian / Chinese market

Hallstatt, before 2020

Best August ever

Catching-up

Uncertain Asian /
Chinese market

Declining MICE /
city tourism

Example for an alpine MICE facility, Kitzbühel (AT)

Best August ever

Catching-up

The Asian /
Chinese market

Declining MICE /
city tourism

Cruises

© Der Standard: 2020: Cruise ships banned from Venice

Best August ever

Catching-up

Uncertain Asian / Chinese market

Declining MICE / city tourism

Cruises

Health / Nearness / Region / Safety

Best August ever

Catching-up

Uncertain Asian / Chinese market

Declining MICE / city tourism

Cruises

Health / Nearness / Region / Safety

Labor shortage

Best August ever

Catching-up

Uncertain Asian /
Chinese market

Declining MICE /
city tourism

Cruises

Health / Nearness
/ Region / Safety

Labor shortage

Uncertain: The
young generation

© Apuncto

Don't wait for the consumer's demand for more sustainability!
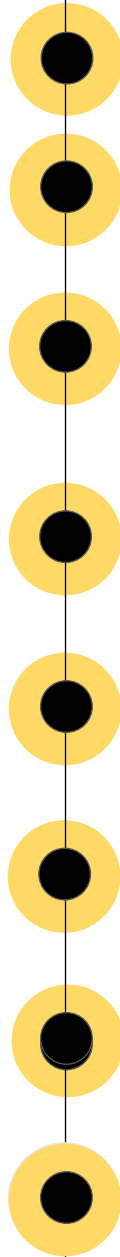
PART3

CURRENT POLICIES

Sustainability needs Transformation

The ecological dimension

The economic dimension

The cultural dimension

Sustainable Tourism Triangle
(© Baumgartner, 2019)

Sustainability needs Transformation

Sustainability needs Transformation

- A complete change in the appearance in the character of something or someone, especially so that the thing or person is improved.

  (Cambride Dictionary)

- Transformation is understood as a fundamental change. From a social perspective, the term is used to describe changes in political, economic or technological development. A transformation can be triggered by new technical and economic possibilities as well as significantly changed social needs. Every transformation is a long-term learning and search process that lasts several decades and is associated with many uncertainties. It is only completed when new system structures have become permanently established and stabilised.

  (difu, 2017)

Sustainability needs Transformation

- **Transformation orientation**
  - Sustainability aspects covered
  - Resilience focus
  - Critical self-reflection
  - General transformation orientation
  - Innovation in instruments / methods

- **Looking beyond the own system**
  - Stakeholder involvement
  - Overall societal benefit

- **Big challenges**
  - Climate change (mitigation & adaptation)
  - Economic pressure versus good working condition
  - Growth versus capacity limits

- **Implementation power**
  - Concreteness of the program
  - Legal framework versus voluntariness
  - Political backing
  - Probability of long-term implementation

Results of a current CIPRA project

Reset Alpine Tourism

IMPACT OF THE COVID-19 PANDEMIC ON ALPINE TOURISM

ECONOMIC STRATEGIES FOR POST-CORONA ALPINE TOURISM

23.09.2021
Kristina Bogner,
Wolfgang Pfefferkorn

Smaller and nature-oriented areas, rural areas and areas with a focus on summer tourism and smaller tourist units (e.g. apartments) were significantly less affected than mono-structured tourism areas, large hotel complexes and tourist hot spots.

Increased demand for secondary residences and vacation homes was leading significantly risen prices for land and real estate in rural areas. This represents a major challenge for low-income groups and young families in particular.

Exciting innovations at the interface of tourism and regional development at the local and small-regional level, particularly in the area with food processing and services of general interest could be observed. Through cooperation between different sectors, efforts have been made to improve small-scale resilience.

Impulses for change towards sustainable and resilient tourism did not come from the tourism sector itself, but from external think tanks, experts and from bottom-up initiatives.

The priority of policy measures was and still is (may 21) on acute loss prevention. Given the severity of the crisis, the focus of measures is on the present and not yet on transforming and diversifying the tourism sector to withstand future crises in a medium- and long-term perspective. Aspects such as environmental impact, climate friendliness or sustainability are almost completely ignored.

Swisstainable (CH)

From "hidden champion" to sustainability leader:
In Switzerland, real sustainability has been practised for years. Switzerland is always at the top of renowned rankings - yet many people don't know it. The new sustainability strategy of Switzerland Tourism (ST) and the tourism industry aims to change this.

Swisstainable (© Schweiz Tourismus, 2021; translated by C. Baumgartner)

Schweiz.

Swisstainable

Vom «Hidden Champion» zum Nachhaltigkeits-Leader:
In der Schweiz wird echte Nachhaltigkeit bereits seit Jahren gelebt. Bei renommierten Rankings ist die Schweiz stets ganz vorne mit dabei – dennoch wissen es viele nicht. Die neue Nachhaltigkeitsstrategie von Schweiz Tourismus (ST) und der Tourismusbranche soll dies ändern.

Strategie
Wir sind im Zeitalter der Nachhaltigkeit und keine Destination steht wie die Schweiz für diesen umsichtigen, ressourcen- und umweltschonenden Zeitgeist. Seit jeher achten wir darauf, die Bedürfnisse von Gästen, lokaler Bevölkerung und Umwelt in ein harmonisches Verhältnis zu bringen.

Mehr erfahren →

Kampagne
Mit der Swisstainable-Kommunikationsoffensive schafft Schweiz Tourismus (ST) Aufmerksamkeit für eine langfristig ausgelegte Nachhaltigkeitsstrategie. Gemeinsam mit der Branche sorgen wir für ein vollumfassend nachhaltiges Reiseerlebnis.

Mehr erfahren →

Programm
Das Nachhaltigkeitsprogramm Swisstainable steht allen Betrieben und Organisationen des Schweizer Tourismus offen.

Mehr erfahren →

Kooperationspartner
Mit folgenden Partnern arbeitet Schweiz Tourismus (ST) an einer nachhaltigen Entwicklung des Reiselandes Schweiz.

Mehr erfahren →

Toolbox & FAQs
Hier finden Sie die wichtigsten Links, Dokumente sowie Fragen und Antworten zum Nachhaltigkeitsprogramm.

Mehr erfahren →

Experience Shop
Nachhaltige Erlebnisse sind gesucht: Geben Sie Ihre Erlebnisse ein und werden Sie Teil des Pilotprojektes.

Mehr erfahren ↗

Swisstainable (CH)
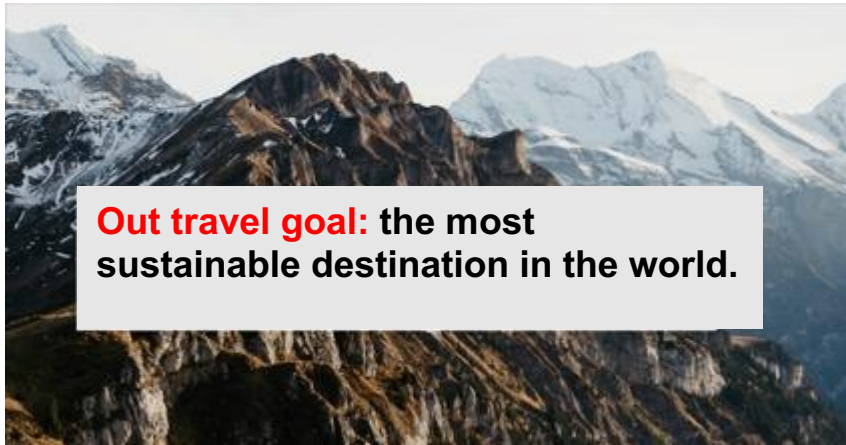## - The Strategy

Strategie

Wir sind im Zeitalter der Nachhaltigkeit und keine Destination steht wie die Schweiz für diesen umsichtigen, ressourcen- und umweltschonenden Zeitgeist. Seit jener achten wir darauf, die Bedürfnisse von Gästen, lokaler Bevölkerung und Umwelt in ein harmonisches Verhältnis zu bringen.

Mehr erfahren →

Out travel goal: the most sustainable destination in the world.

Switzerland is number 1 in the Travel & Tourism Competitiveness Report in the area of "Environmental Sustainability" and is thus a global leader.**

Our country also leads many other sustainability rankings. But what studies clearly show has not yet fully caught on with guests. They rarely associate Switzerland with sustainability. This is shown, for example, by a study we conducted in the Benelux market: Only 15 % see a connection between Switzerland and sustainability.

We want to change that.

Swisstainable (© Schweiz Tourismus, 2021; translated by C. Baumgartner)

Swisstainable (CH)
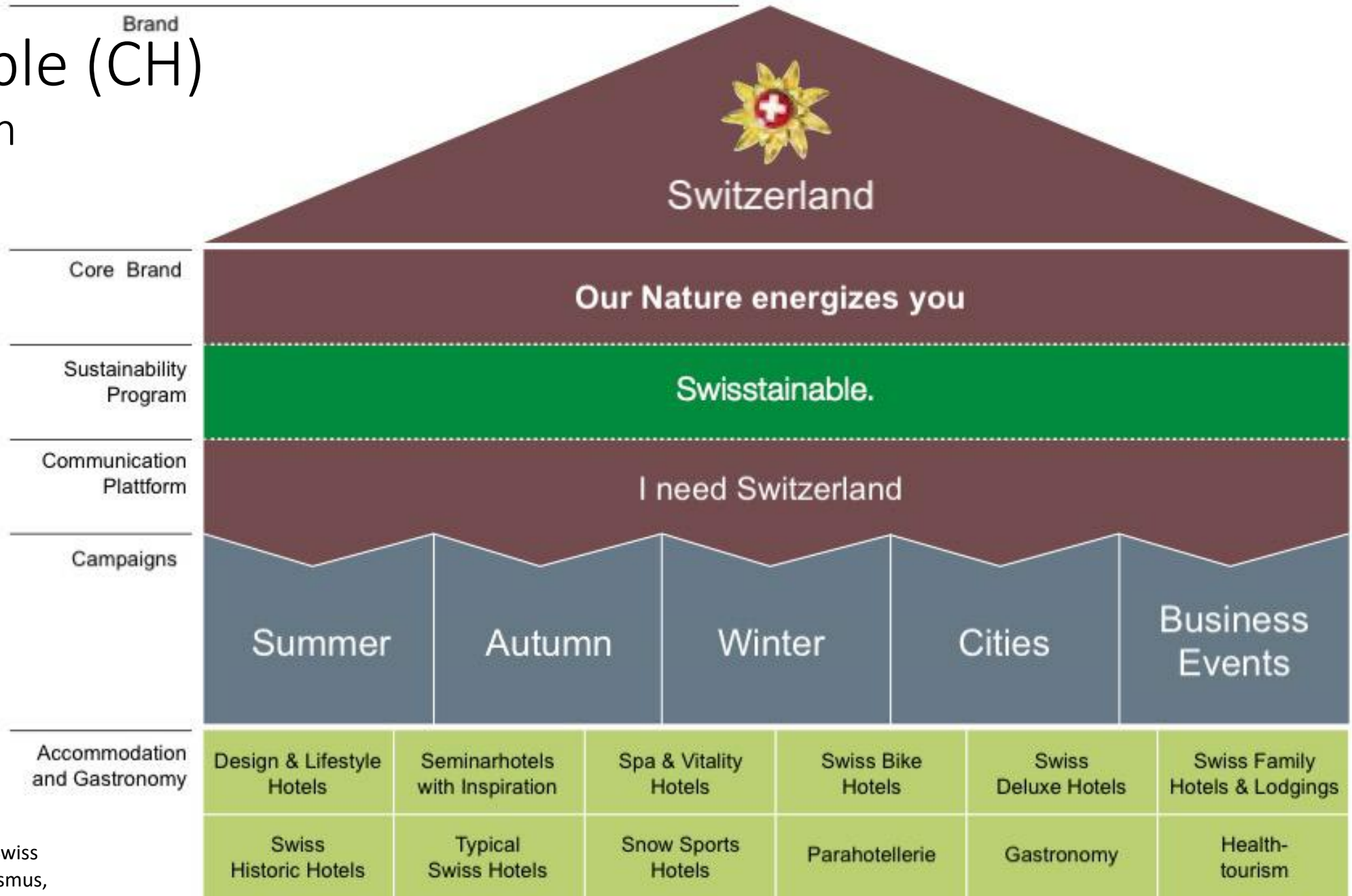## - The Campaign

Kampagne

Mit der Swisstainable-Kommunikationsoffensive schafft Schweiz Tourismus (ST) Aufmerksamkeit für eine langfristig ausgelegte Nachhaltigkeitsstrategie. Gemeinsam mit der Branche sorgen wir für ein vollumfassend nachhaltiges Reiseerlebnis.

Mehr erfahren →

Integration of Swisstainable into the Swiss marketing structure (© Schweiz Tourismus, 2021; translated by C. Baumgartner)

Brand

Switzerland

Core Brand — Our Nature energizes you

Sustainability Program — Swisstainable.

Communication Plattform — I need Switzerland

Campaigns

Summer	Autumn	Winter	Cities	Business Events

Accommodation and Gastronomy

Design & Lifestyle Hotels	Seminarhotels with Inspiration	Spa & Vitality Hotels	Swiss Bike Hotels	Swiss Deluxe Hotels	Swiss Family Hotels & Lodgings
Swiss Historic Hotels	Typical Swiss Hotels	Snow Sports Hotels	Parahotellerie	Gastronomy	Health-tourism

Swisstainable (CH)
- The Program

The sustainability programme Swisstainable is open to all businesses and organisations in Swiss tourism.

Guests interested in sustainable offers are often lost in the existing jungle of labels. Our goal with Swisstainable is therefore not to create a new certification, but more orientation for the guest. …

Level I committed	Commitment for Sustainabilty	Sustainabilty check	Sustainabilty measures	
Level II engaged	Commitment for Sustainabilty	Sustainabilty check	Sustainabilty measures	Sustainabilty proves Level II
Level III leading	Commitment for Sustainabilty	-	-	Sustainabilty proves Level III

Programm
Das Nachhaltigkeitsprogramm Swisstainable steht allen Betrieben und Organisationen des Schweizer Tourismus offen.

Mehr erfahren →

Level I - committed

Level I is aimed at companies that do not (yet) have any certifications or other proof of sustainability, but are committed to sustainable corporate management and would like to continuously develop their business in the direction of sustainability.

Level II – engaged

Level II also requires a commitment to sustainable corporate governance and ongoing development. In addition, certification or other proof in at least one sustainability area must be presented for this level.

Level III – leading

Level III is designed for companies that already have comprehensive, recognized sustainability certification. Consideration is given to certifications that cover all dimensions of sustainability and are regularly externally audited.
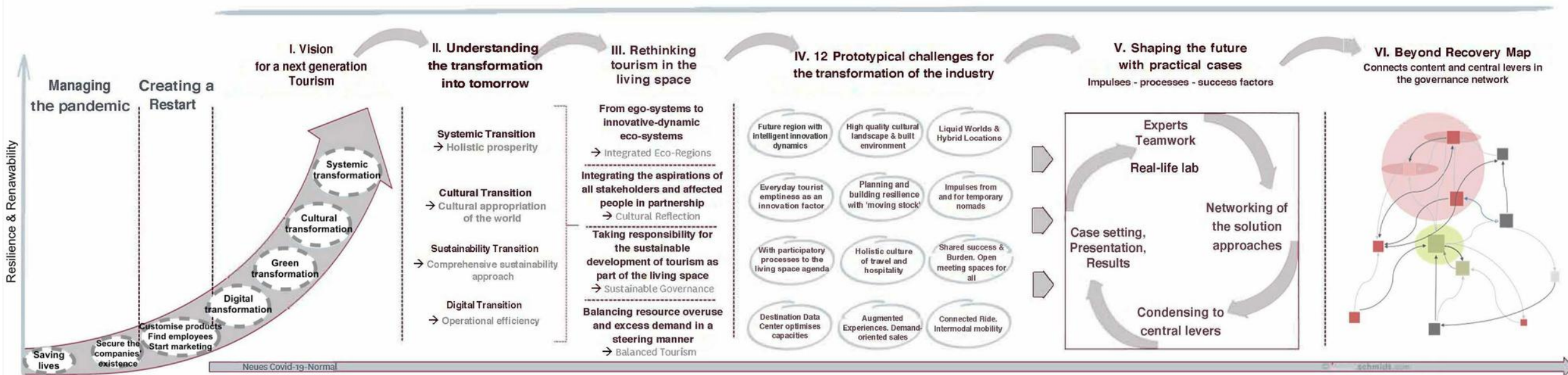
Swisstainable (© Schweiz Tourismus, 2021; translated by C. Baumgartner)
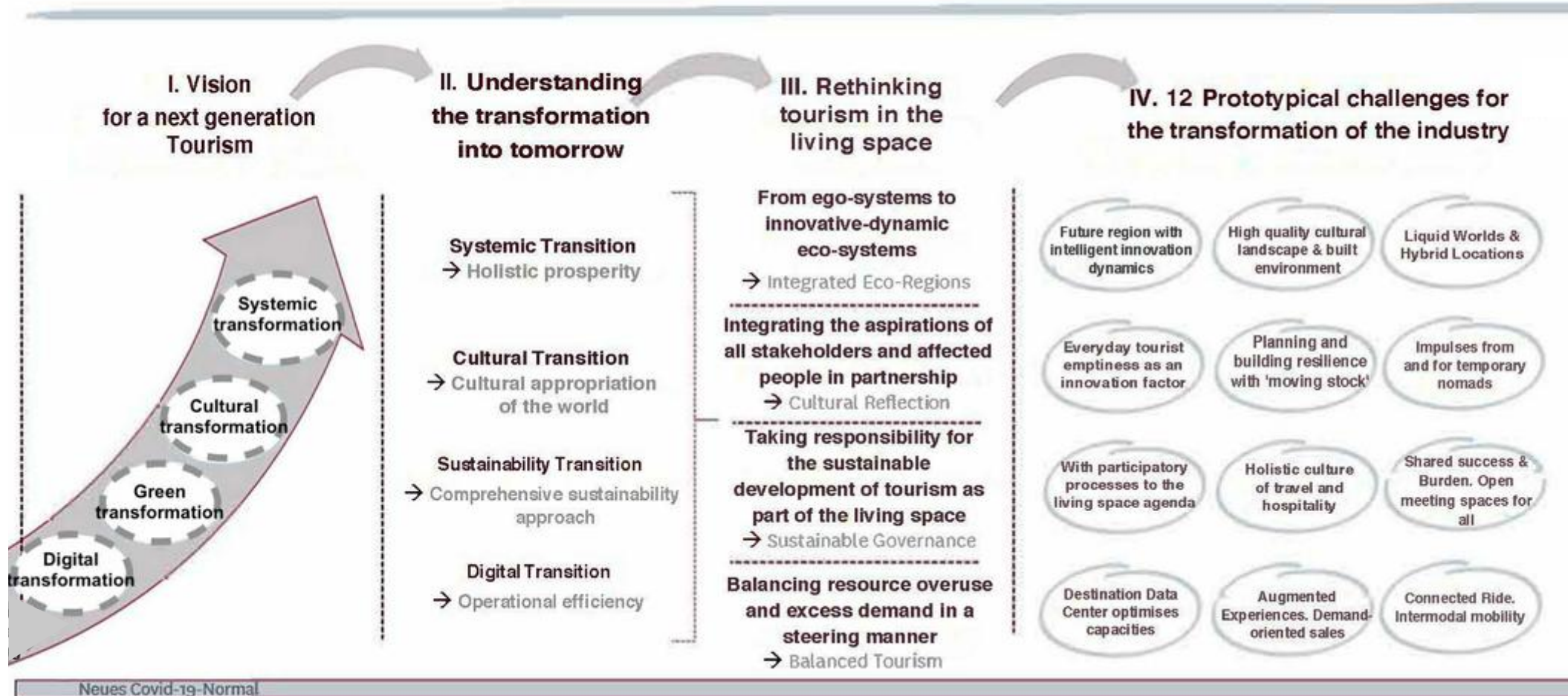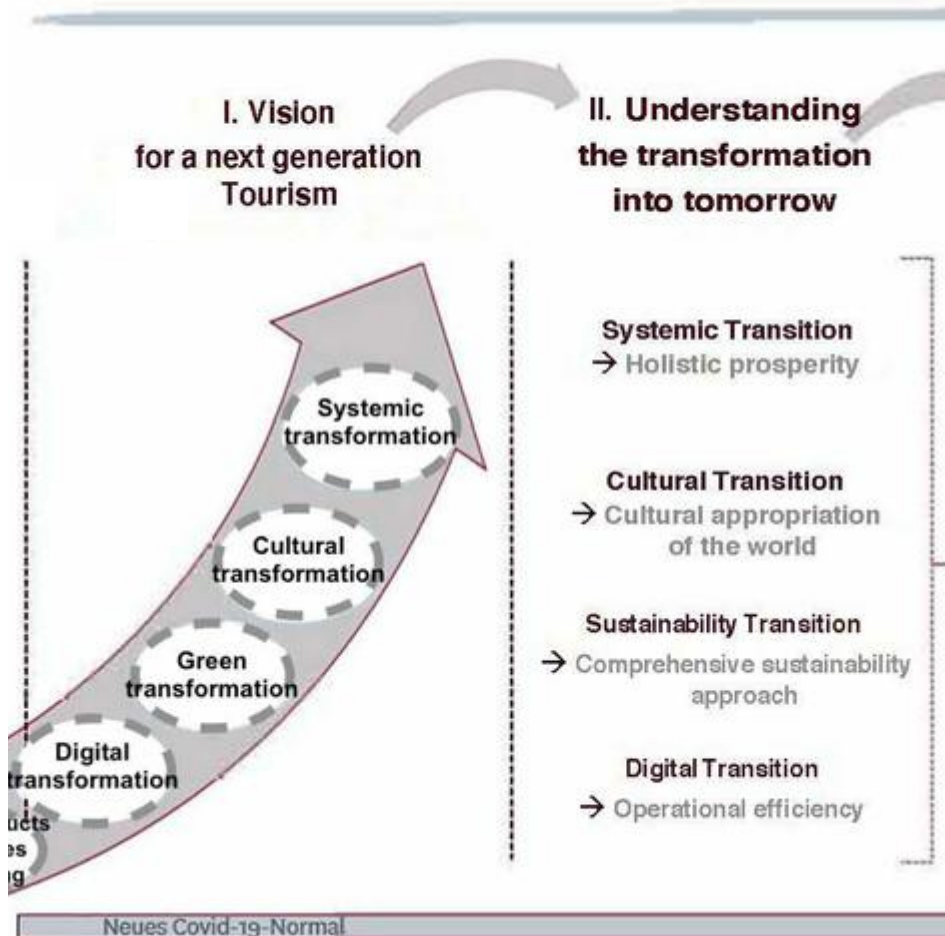
future tourism. beyond recovery (AT)

Process of 'Forum Future Tourism - Beyond Recovery' (© Schmidt, 2021a ; translated by C. Baumgartner)

future tourism. beyond recovery (AT)

future tourism. beyond recovery (AT)

Who we were

Prisoners in the efficiency game, driven by optimisation, standardisation and making the world available. Producers of holiday products ironed flat to the point of rigidity, devoid of surprise - the opposite of liveliness and resonance experience. Resource-demanding, stuck in their old ways of thinking. Because "it has always worked that way".

Who we are

It is a new awareness that is sweeping through tourism in Austria after the pause. A willingness to leave the well-trodden paths of one-sided efficiency and optimisation striving and to explore unknown terrain: enthusiastic, eager to innovate, willing to take risks.

Both travellers and hosts alike are aware that they are equally connected to the habitat that surrounds them, temporarily or permanently, and that they can only shape and experience it collectively. This awareness is underpinned by a responsible and appreciative attitude towards society and the environment: those who have helped to create what they find do not destroy it.

future tourism. beyond recovery (AT)

III. Rethinking tourism in the living space

From ego-systems to innovative-dynamic eco-systems
→ Integrated Eco-Regions

Integrating the aspirations of all stakeholders and affected people in partnership
→ Cultural Reflection

Taking responsibility for the sustainable development of tourism as part of the living space
→ Sustainable Governance

Balancing resource overuse and excess demand in a steering manner
→ Balanced Tourism

Integrated Eco-Region

A dynamic economic region increases the attractiveness of the tourism region through intelligent innovation management.

Cultural Reflection

A reflective appreciative attitude integrates the aspirations of all those involved and affected and thus enables a qualitative development of the living space.

Sustainable Governance

With civil society steering systems and governance processes, people take responsibility for the sustainable habitat design of their enterprises.

Balanced Tourism

The data-based load balance avoids over-demand and under-utilisation, ensures value-added high-frequency business and promotes intermodal mobility offers in the region.

Comparison of the transformation power I

Transformation Criteria	'Future Tourism - Beyond Recovery'	Swisstainable
Sustainability aspects covered	Comprehensive coverage of all aspects	Strong focus on ecological aspects
Resilience focus	High	Not explicitly
Critical self-reflection	High	Low
General transformation orientation	Very high	Medium; strong focus (currently) on communication
Innovation in instruments / methods	Tourism is re-thought as a living space agenda	Largely bundling existing measures / instruments
Stakeholder involvement	Broad approach, including non-touristic stakeholders, but focus on individual personalities	Focus on tourism stakeholder, widely spread
Overall societal benefit	Societal benefit as core value	Societal benefit as side effect

Transformation orientation

Looking beyond the own system

Comparison of the transformation power II

Transformation Criteria	'Future Tourism - Beyond Recovery'	Swisstainable
Climate change (mitigation & adaptation)	Climate change integrated into (all) transformation spaces	If integrated in the promoted sustainability labels or good practices.
Economic pressure versus good working condition	Taken into account; High value of good working conditions	Not significantly integrated into target and/or measures
Growth versus capacity limits	Taken into account; aiming at concrete limits of growth	Not significantly integrated into target and/or measures
Concreteness of the program	Low; so far only a theoretical approach	Concrete offers for committed companies and organisations
Legal framework versus voluntariness	Not concretely formulated, but mix of voluntary and sovereign measures and framework conditions intended	Exclusively volunteer measures
Political backing	Low at the highest political level, not (yet) arrived at the level of the federal states	Currently high, funding commitments for further steps (e.g. ST competence centre)
Probability of long-term implementation	Questionable, due to lack of political will	High

Big challenges

Implementation power

Political Conclusion

Swisstainable is too much oriented to the environment and communication and built on existing instruments; but can build on political will.

Future Tourism beyond recovery is more comprehensive and transformation-oriented; but has no lasting political support.

Both have the potential to make tourism more environmentally friendly / sustainable - but neither leads to a real (and necessary) transformation of tourism.

We still have a lack of political & industry commitment to real transformation processes for more sustainability. This lacks behind the consumer's interests.

Tourism is not yet serving as instrument to contribute to the SDG implementation – as requested by UN / UNWTO.

PART4

CONCLUSIONS & NECESSITIES

FROM MODELS TO NORMALITY

NO MORE SUSTAINABILITY-CONFERENCES …

As long as it is necessary to present good practices and best practices … we have not reached our goal.

POLITICAL STRATEGIES

SDGs ALONE IS NOT ENOUGH

Sustainability from lip service to clear strategy content: what, who, how, until when, …

SUSTAINABILITY NEEDS STEERING

CARROT AND STICK

Sustainability is a normative concept and requires government intervention:
Incentive systems as well as legal framework conditions.

MOTIVATING WORKING ATMOSPHERE

NEW CULTURE OF WORK

Sustainable tourism needs young people from the destinations.
Tourism businesses must become attractive employers (again).

LIVING SPACE AGENCIES

FOCUS ON THE POPULATION

New tasks for DMO and tourism office to avoid parallelism.
Tourism is embedded in an overarching regional development.

NEW PARTICIPATION AND GOVERNANCE MODELS

SUSTAINABLE GOVERNANCE

Problems can never be solved with the same way of thinking that created them. (A. Einstein)

RIGHT COMMUNICATION

‚SUSTAINABILITY' IS NOT GOOD FOR MARKETING

Addressing target groups with the right values and words.

Fachhochschule Graubünden
University of Applied Sciences

CIPRA
LIVING IN
THE ALPS

Thank you very much
for your attention!

Christian
Baumgartner

christian.baumgartner
@fhgr.ch

response & ability
working for ○ tourism
○ development
○ sustainability

© Andreas Muhar