Embedding tourism development: Links with regional plans and strategies
Embedding Tourism Development

Agenda

1. The province of South Tyrol
2. Our observatory STOST
3. Impact of STOST on regional plans and strategies
   • Regional tourism development program LTEK2030+
   • IDM Sustainability Program
4. Impact of regional plans and strategies on STOST
   • Climate plan South Tyrol
5. Conclusions
The province of South Tyrol (Italy)

Introduction

- South Tyrol is an autonomous province in the Italian Alps
- Official languages: German (69%), Italian (26%), Ladin (5%)
- Inhabitants: over 530,000
- Dolomites UNESCO World Heritage Site
- Tourism sector directly accounts for 11.4% of total GDP (2019)
- Main markets of origin: Germany (48.4%) & Italy (31.5%)

<table>
<thead>
<tr>
<th></th>
<th>2021</th>
<th>2022</th>
<th>Change (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arrivals</td>
<td>5.4 Million</td>
<td>7.9 Million</td>
<td>+47.8%</td>
</tr>
<tr>
<td>Overnight stays</td>
<td>23.8 Million</td>
<td>34.4 Million</td>
<td>+44.7%</td>
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Source: ASTAT
The province of South Tyrol (Italy)

Tourism intensity

Fonte: Ufficio nazionali di statistica per presenze turistiche. Eurostat 2016 per numeri di abitanti.
Confine amministrativi: Countries, 2014, European Commission; Eurostat/GISCO.

Autor: LANER P
Data: Febbraio 2019
The Sustainable Tourism Observatory of South Tyrol (STOST)

→ Founded in 2018

Governance:
• Based at the Center for Advanced Studies
• Local partners:
  • IDM South Tyrol (Destination Management Organization)
  • Provincial government
• International network: UNWTO – INSTO
• Diverse stakeholder working group

Main Objectives:
• Offer a theoretical contribution to the conceptualization and measurement of sustainable tourism
• Support local DMOs and the regional government in developing policies, strategies and management processes for sustainable tourism (e.g. evidence-based policy-making)
**LTEK 2030+**
The regional tourism development program

- Elaboration of **scientific basis** for the program
- **Project duration**: April 2021 – March 2022
- **Goal**: concrete indications for tourism policies oriented towards sustainable, landscape-friendly, and balanced development
- **Lebensraum** = Habitat: shared space between residents and tourists
  - Tourism closely interconnected with other sectors: mobility, agriculture, environment, local economy...
- Idea to **align tourism experience with local quality of life**
- Foster a **new tourism culture**
**LTEK 2030+**

Content & role of STOST

### Status quo

- **Space**
- **Nature**
- **Landscape**

### STOST indicators

- Benchmark analysis
- Approaches for a spatially compatible tourism development

### Tools for tourism governance

- Classification of municipalities by tourism exposure
- Municipality profiles
- Sensitivity index

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**Path of development**

**Policy recommendations**

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10 hypotheses on tourism in South Tyrol
LTEK 2030+
Tourism Exposure Index

Definition of data sources
• Overnight stays & bed capacities (considered)
• Employees (excluded, too correlated)

Definition of the "Tourism Exposure"
• Bed concentration
• Tourism intensity

Deviation from the mean(z-scores)
• Equal weighting of intensity and density

Standardization and weighting system

Classification (groups of municipalities)
• Quartiles or percentiles
• Absolute values (baseline year 2019)

Based on STOST report & ESPON report "Carrying capacity methodology for tourism"
LTEK 2030+

Policy recommendations

Municipality level

• Profiling of municipality by tourism exposure
• Additional survey on local tourism satisfaction
• Creation of a long-term vision
• Consolidation with land-use planning

Regional level

• Development of cross-sectional collaborations & synergies by different gov. departments
  • Policy recommendations by department
• Stronger regulations for hotel expansions and limitations to growth
IDM Sustainability Program

What is it?

• “...making our province to the most desirable sustainable region of Europe”

• Fostering sustainability in the tourism industry through:
  • Consulting for destinations and hotels
  • Sustainability Label South Tyrol, based on GSTC

Role of STOST:

• Scientific support of IDM

• Elaboration of a survey for local tourism satisfaction

https://www.idm-suedtirol.com/de/unsere-leistungen/nachhaltigkeit/nachhaltigkeitsprogramm
Climate plan South Tyrol 2040

- Strategic plan elaborated by the regional government in July 2023
- Goal: Climate neutrality until 2040
- Tourism as one out of 17 areas:
  - Mandatory energy audit for hotels, ski resorts, cable cars...
  - Increasing tourist use of public transport, concept for e-mobility
  - Fostering photovoltaic on hotel roofs
  - Sustainability certification for companies
- Linkages STOST & Climate plan:
  - Requested by stakeholders
  - Defining concrete goals, actions and indicators for achieving climate neutrality in tourism

Embedding Tourism Development

Conclusions

• Building up visibility
  • STOST as a think-thank for tourism in South Tyrol

• Strong connections between research institution, DMO & government
  • Direct involvement in regional tourism strategies and plans

• Constant integration of overarching strategies necessary
  • Points of intersection
Contact us!

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