

THE TOURISM CONVERSATION 2024



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Barcelona, Spain · December 2023

Anti-tourism graffiti writing sprayed on house entrance in Barcelona



2024 was the year that the tourism conversation changed for many people.



Lisbon, Portugal · June 2024

Tourist overcrowding in Rua Augusta, Lisbon city centre

The concept of ‘overtourism’ burst through into the consciousness of many for the first time, marked by protests, in particular in Southern European destinations including Barcelona, the Canary Islands, and the Balearic Islands, plus well-publicised concerns in Japan and cities such as Venice.

GSIQ Tourism Insights takes a regular look at the global online conversation, analysing mainstream and social media in all major countries and languages, to see which tourism issues are growing, which are starting to cut through and which are on the wane. Looking back over summer in the northern hemisphere it is clear that mass tourism and overtourism has become the topic du jour.

In August 2023, protests were seen in the Austrian town of Hallstatt but it took until the following year for protests to start to grow in other countries, pricking the consciousness in particular of northern Europeans who flock to the sunnier parts of Europe each year. Ire has been focused on short-term lets but overcrowding in resorts caused by cruise ships, stag party misbehaviour, and the desire for the perfect Instagram photo, have also caused issues.

These concerns bundle themselves into the larger concept of sustainable tourism, bringing into the light for the first time for many people, some negative social and economic impacts, as opposed to the more environmental side of the discussion.

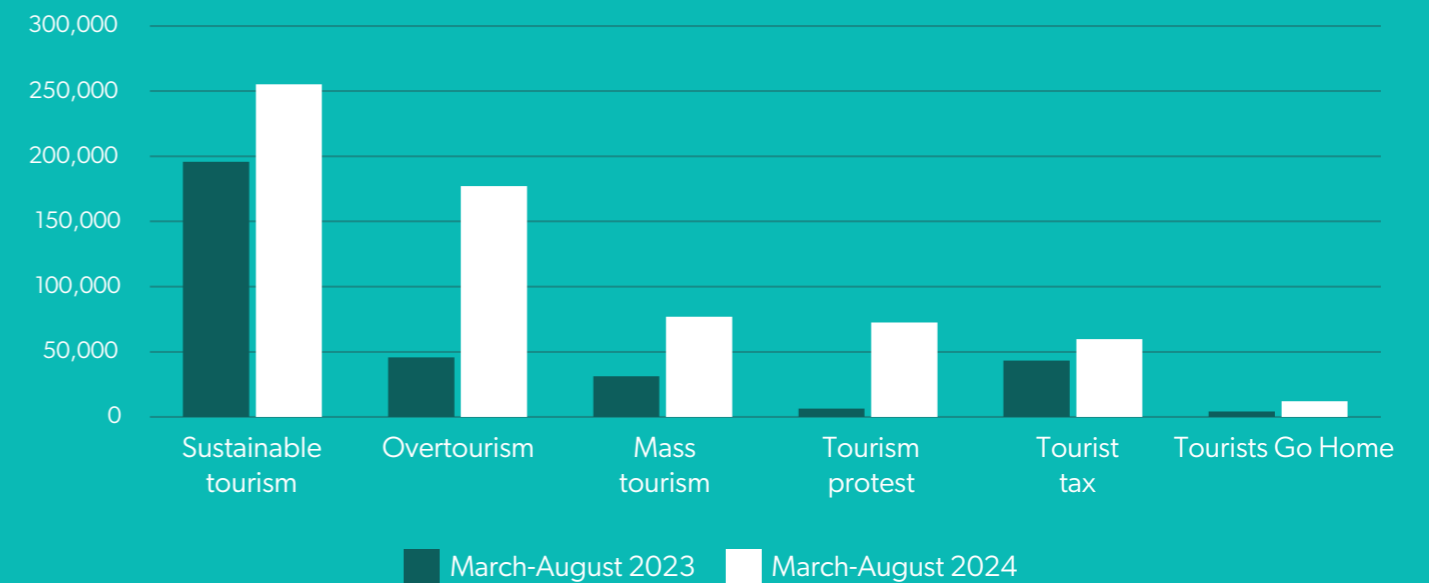
This report examines how the concept of overtourism, associated protests, and other key themes in the sector have broken through in online media and social discussion, with the aim of helping the industry keep in touch with developments in public engagement and sector conversations.



The major conversation trends

When comparing the six months of March to August 2024 with the same period in 2023, the word 'overtourism' (or tourist overcrowding) shows a huge increase in volume of mentions across online media. In fact the number of mentions is over three times higher than a year ago.

Figure 1: Total global online media mentions (mainstream and social)



Data is global, across all major languages and online media sources. Search words/phrases shown include minor variants for completeness.

Source: GSIQ Tourism Insights

Alongside increases in the discussion of overtourism, we find other related increases among less used associated phrases, including an elevenfold increase in mentions of 'tourism protest', plus an almost tripling of the phrase 'tourist go home'. Occurrences of the phrase 'mass tourism' have also jumped up two and half times year on year and can be found almost as frequently as 'tourism protest' over this recent six-month period.

Perhaps an area to watch going forward is the concept of a 'tourist tax' or charge, because while mentions have risen as the topic is increasingly discussed, they are only up by around a third, however in volume terms these mentions aren't far behind those of 'mass tourism' or 'tourism protest'. It may be that the conversation hasn't quite caught up with this particular solution to mass tourism.

The sentiment of these mentions of a tax/charge are judged to be more negative than positive by a factor of two to one. Also, the growth of mentions for a tax or charge matches the growth we see in mentions of "sustainable tourism" which is the largest single phrase in this area of discussion, despite growing more slowly than other related topics.

Overtourism (or overcrowding) gets most mentions in the US, with Japan coming next followed by Italy, and then the UK. Sustainable tourism also gets most mentions from the US, followed by the UK and India. The highest volumes for both terms come from the platform X.

Looking at the word cloud of words and phrases most seen with mentions of overtourism, we see a number of locations mentioned from the unspecific 'ancient capital' to Mount Fuji and Canary Islands, plus mentions of cruise ships and entry fee.

The UK is the country where 'tourism protest' was mentioned the most in 2024's survey period, with twice as many mentions as seen in the US which comes in second place, followed by India and Spain.

Our assumption is that the high volume of 'tourism protest' mentions from the UK in 2024 can be explained by British travellers' proximity to affected destinations like Spain, where large anti-tourism protests have directly impacted them. Extensive UK media coverage has amplified awareness, sparking discussions on social media.

Additionally, domestic concerns about tourism's effects in UK cities, such as Edinburgh, have fuelled conversations, with warnings of potential protests similar to those seen in Spain. Together, these factors have made 'tourism protest' a prominent topic among UK social media users.

Figure 2: Overtourism word cloud

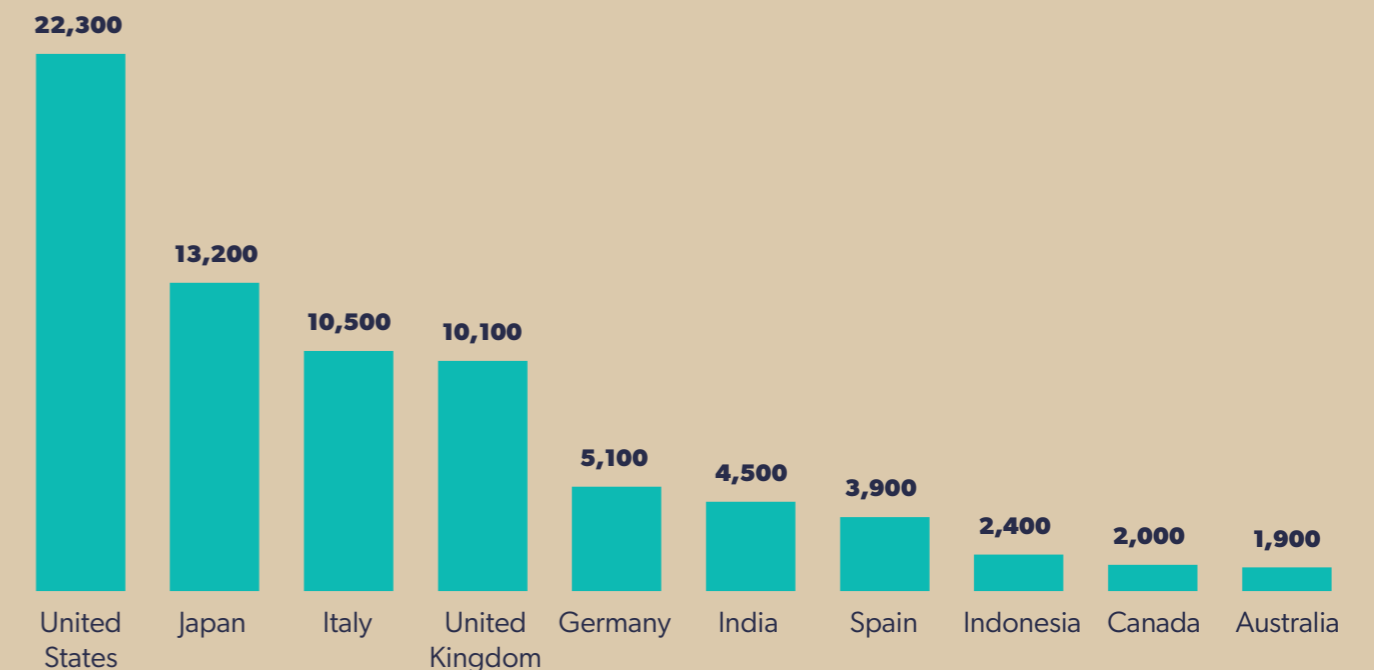


Source: GSIQ Tourism Insights

Paris, France · June 2022
The Louvre Museum



Figure 3: Overtourism mentions by country



Source: GSIQ Tourism Insights

Declines at the top

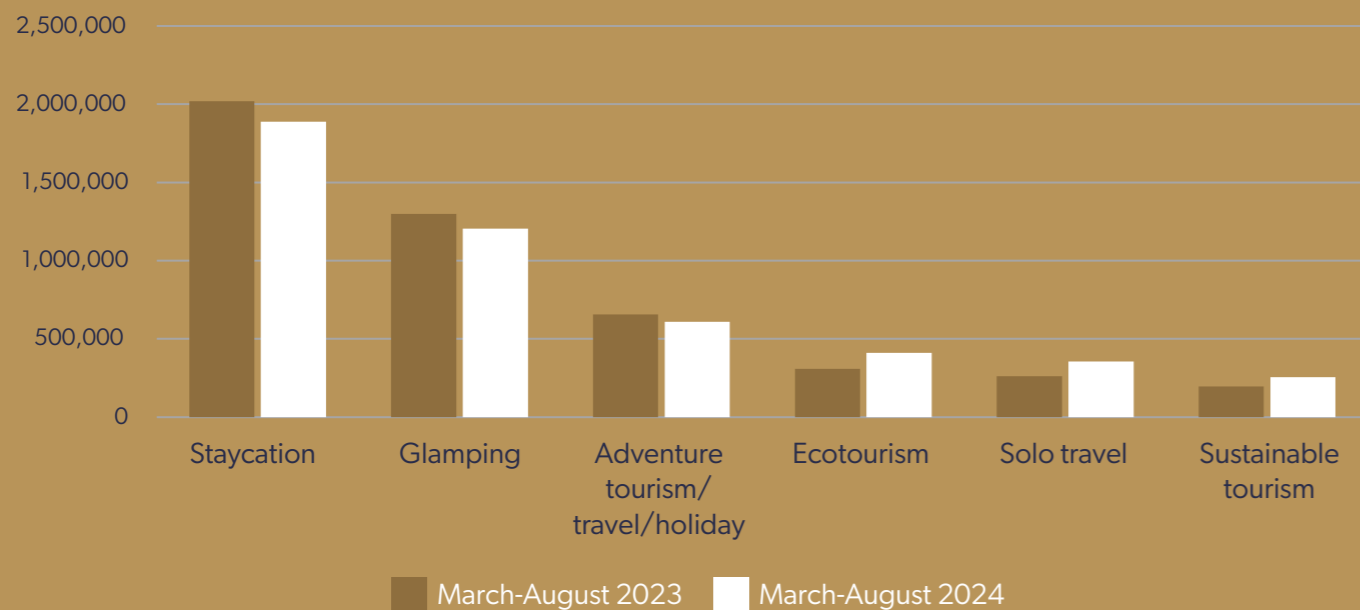
Looking now towards specific tourism types, we find that “staycation”, “glamping” and “adventure” tourism remain the top three year on year, with far more mentions than the more controversial areas of overtourism and sustainable tourism. However, mentions of all these three largest topics are declining, with drops of 7% year on year.

In contrast the next three largest topics of ecotourism (+34%), solo travel (+36%), and sustainable travel (+30%) (see Figure 1) all show strong increases.

The three top mentioned topics (staycation, glamping and adventure tourism) all gain most mentions from Instagram, as well as scoring well on Pinterest, which is in contrast to more news relevant topics (e.g., mass tourism or protests) which get most mentions on X.



Figure 4: Tourism top mentions



Source: GS IQ Tourism Insights

Destinations and travel brands could leverage this information to inform their social media strategies, focusing on inspirational content depicting the best of authentic local experiences for staycations, highlighting glamping providers in their content, and giving the best tips on creating an adventurous visit.

We are also seeing an increase in mentions for many other more niche activities (or phrases) including community tourism (+35%), experiential/immersive tourism (+32%), and a big jump of 52% for ‘bucket list travel’. Smaller increases are also seen in ethical tourism (+25%), wellness tourism (+22%), personalised tourism (+22%), and regenerative tourism (+12%).

Other increases are noted in topics that only get a relatively small number of mentions including mindful tourism, resilient tourism and gastro tourism.



+36%
increase in mentions of
'solo travel'

SOLO TRAVEL

Solo travel has experienced significant growth in recent years, with a notable surge following the Covid-19 pandemic. Data from Booking.com indicates that pre-pandemic, only 14% of travellers were going solo, but by mid-2021, that number had almost doubled to 23%.

Additionally, Google trend data showed that solo travel had risen by a massive 760% during the same period. This suggests that the growth rate of solo travel has accelerated post-pandemic compared to pre-pandemic levels.

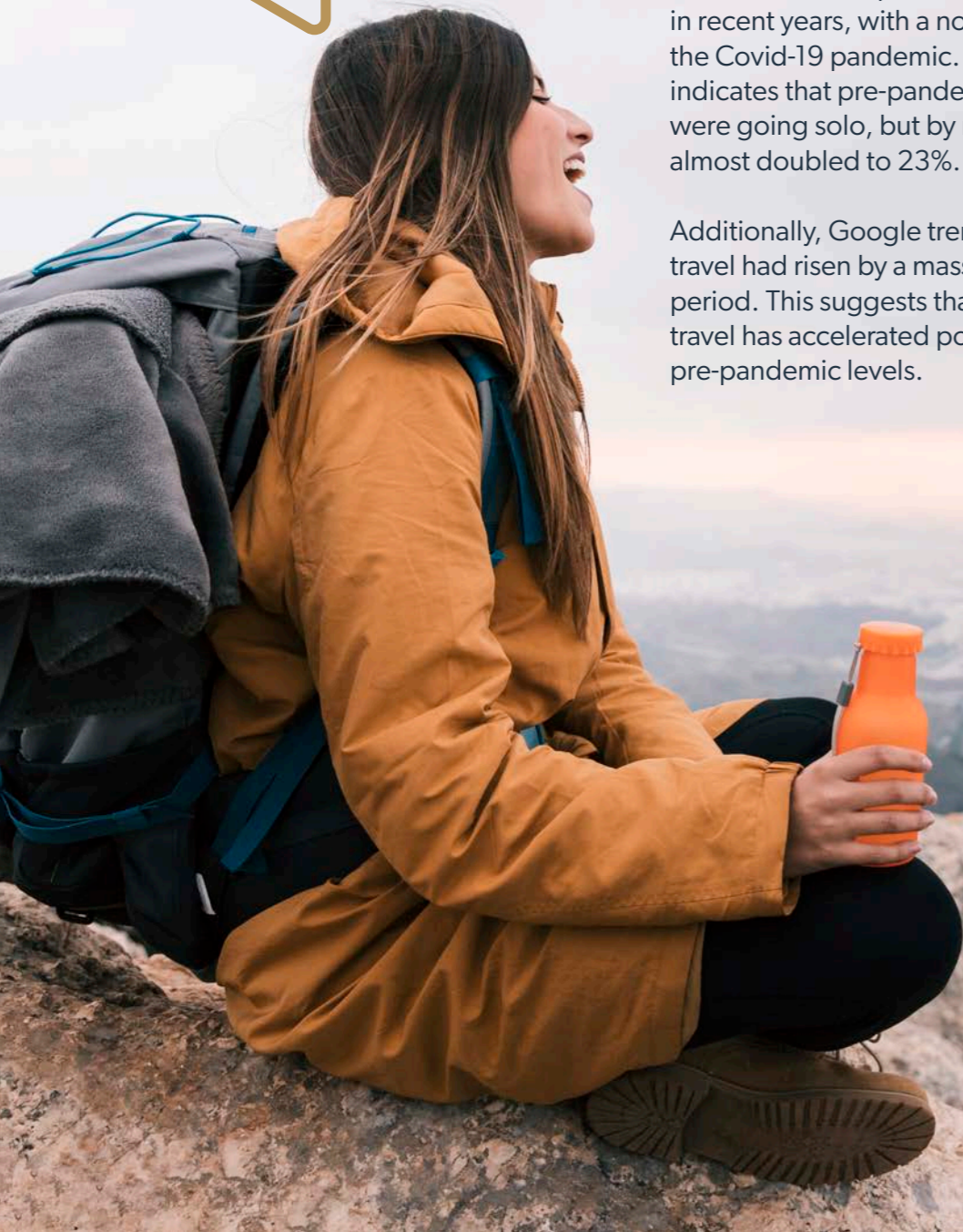
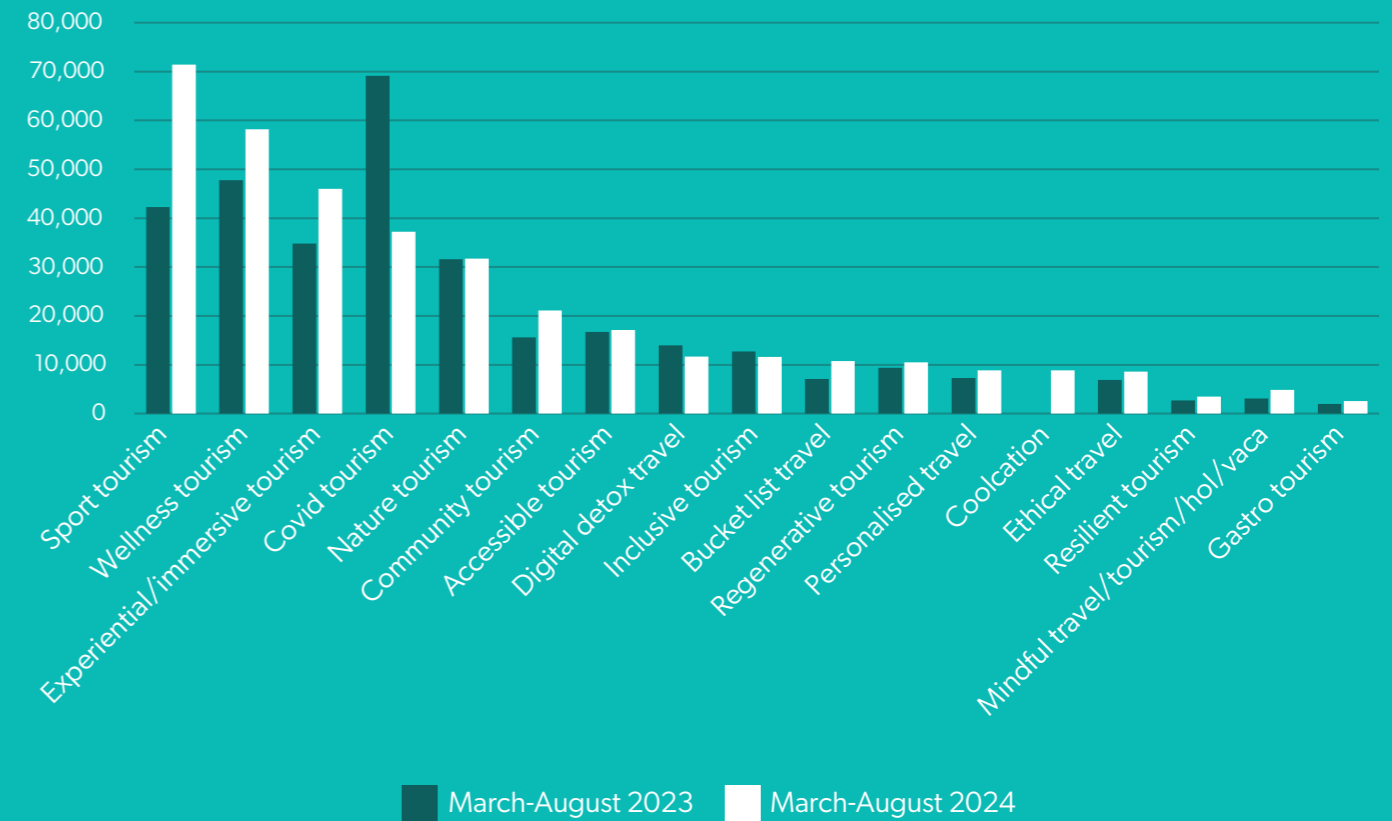


Figure 5: Mentions of other tourism phrases



Source: GSIQ Tourism Insights

The rise in solo travel can be attributed to several evolving social and lifestyle trends. Firstly, solo travel appeals to a growing demographic of independent travellers plus there are more singletons.

With increased remote work options, people now have more freedom to travel alone and at their own pace, often integrating travel with work.

Additionally, social media and digital nomad communities have normalised and promoted solo travel as an empowering experience, encouraging more people to explore it.

Lastly, the travel industry has increasingly tailored experiences, accommodations, and tours to cater to solo travellers, making it safer, more accessible, and attractive. These factors together have contributed to the rising popularity of solo travel and people sharing those experiences on social media.



SPORT TOURISM

It seems that the idea of sports tourism is starting to grow.

69%
increase in mentions of
'sports tourism'

There were almost as many mentions of 'sports tourism' as there were mentions of either 'wellness tourism' or 'tourist tax', but most important is the speed of growth.

Mentions of 'sports tourism' are up 69% year on year making it the second fastest growing phrase in the report outside the overtourism/protest space.

X dominates the topic, accounting for the vast majority of mentions, with Instagram, Facebook and YouTube coming next.

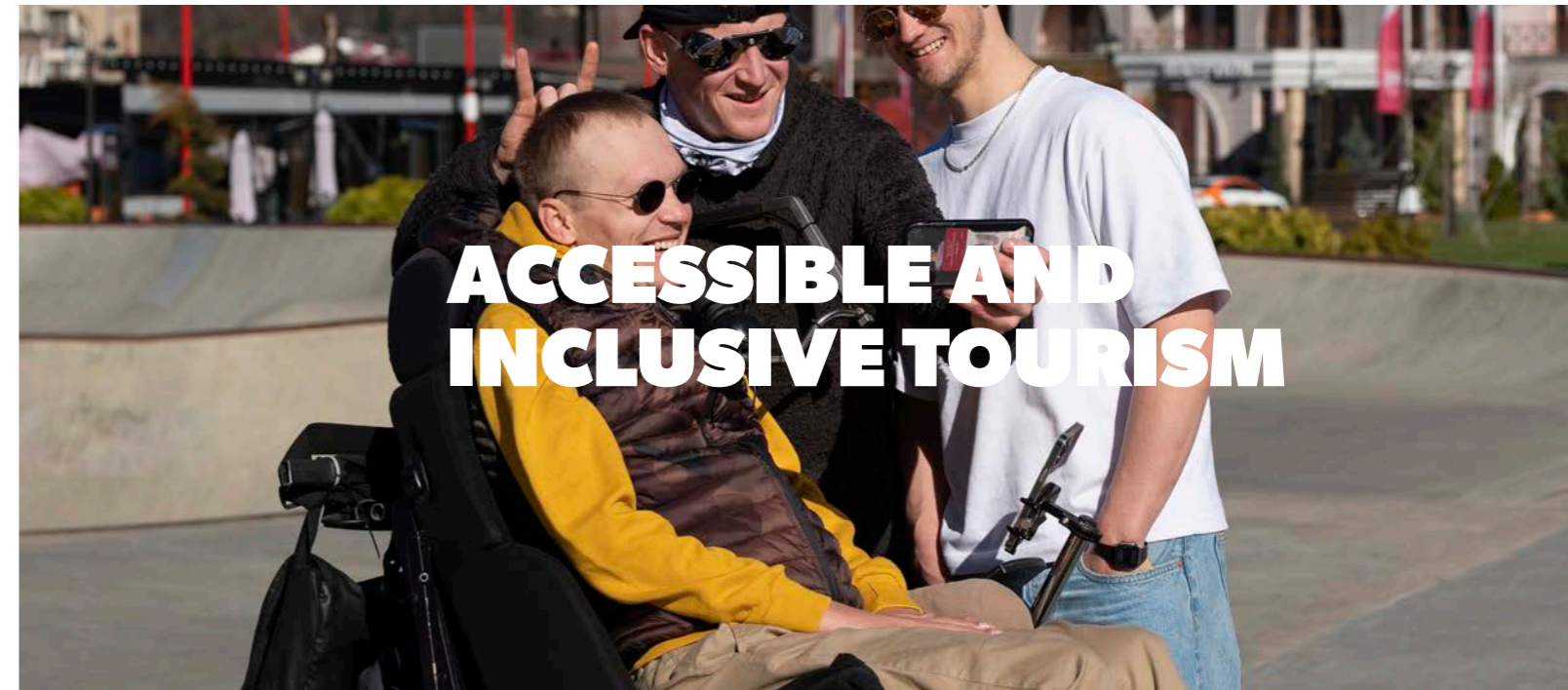


While still generating a fair number of mentions, the volume of mentions of Covid-19 in the context of tourism has dropped by almost half year on year.

This shows that even references to its impact, and also references to the industry bouncing back from the pandemic, are declining rapidly.

Tangentially related is the idea of a digital detox in relation to tourism, and here the data shows mentions are also declining, down 16% over the year.

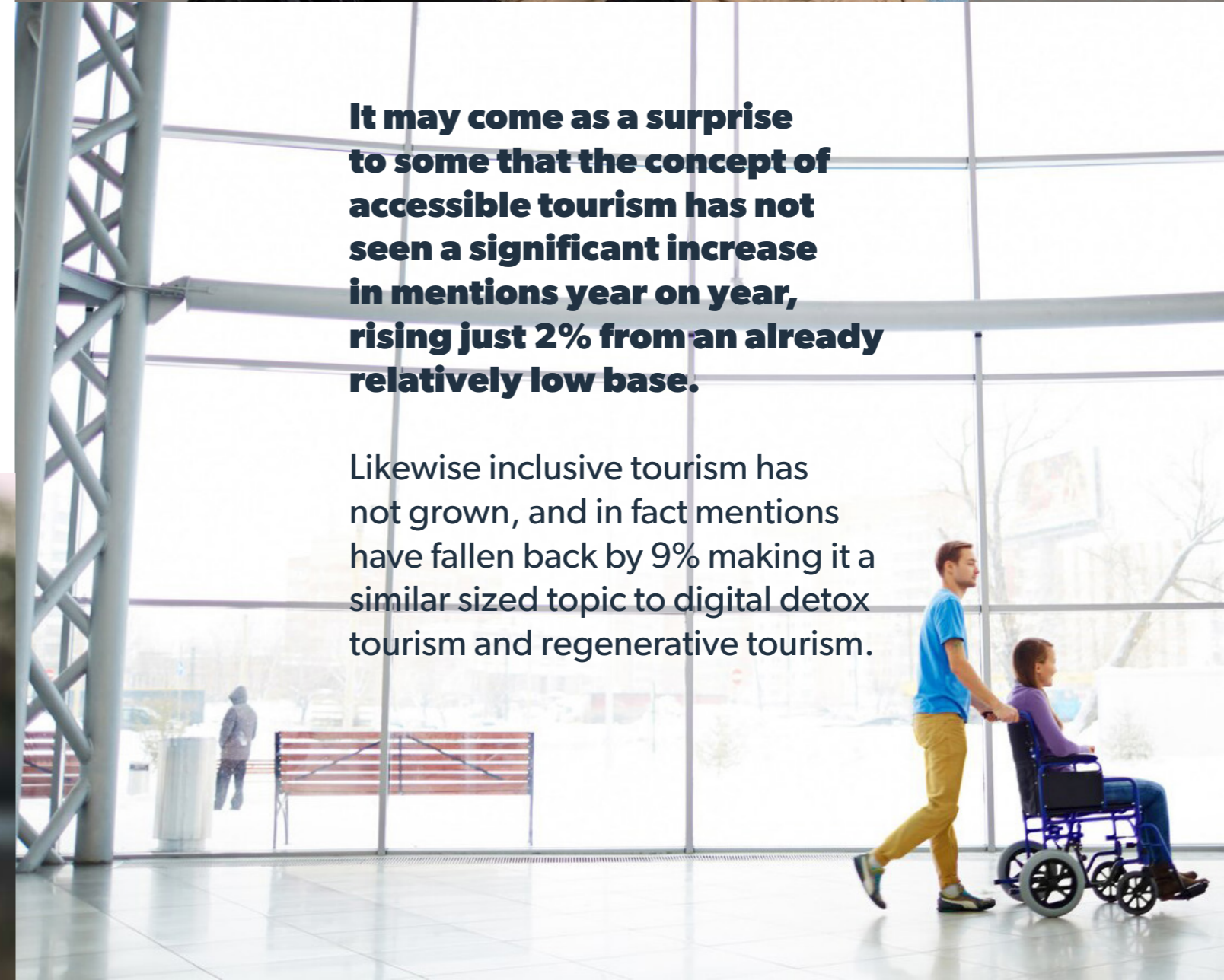
**COVID-19 AND
DIGITAL DETOXES
ARE ON THE
WAY OUT**



**ACCESSIBLE AND
INCLUSIVE TOURISM**

It may come as a surprise to some that the concept of accessible tourism has not seen a significant increase in mentions year on year, rising just 2% from an already relatively low base.

Likewise inclusive tourism has not grown, and in fact mentions have fallen back by 9% making it a similar sized topic to digital detox tourism and regenerative tourism.



COOLCATION

With no mentions last year, 'coolcation' is our fastest growing phrase in this report.

9k+
mentions of
'coolcationing'

We are starting to see many mentions of 'coolcation' or 'coolcationing' as tourists start looking for lower temperature holiday alternatives to sunny summer hotspots.

The phrase has highest use on Instagram, followed by X and Facebook but seems to be relatively limited to travel journalists and nature writers. It has highest use in Germany and the US, followed by the UK.

It may be that more of the wider public are now talking about taking holidays that avoid high temperatures but the phrase 'coolcation' itself has yet to widely catch on, though its use is as high as the phrase 'ethical travel'.

It will be very interesting to see how the phrase tracks and whether it does become a more widely used term, and also we will need to better understand who the concept appeals to and whether it starts to become seen as an antidote to overtourism.

Destinations with cooler climates and scenic, uncrowded landscapes stand to gain from the "coolcation" trend.

Nordic and Baltic countries like Sweden, Denmark, and Lithuania, along with Scotland, Ireland, and Canada's coastal and mountainous regions, offer ideal summer alternatives. New Zealand's South Island and Alpine areas in Switzerland and Austria also attract travellers seeking outdoor adventure with cooler weather.

Positioning these regions as attractive, lower-temperature options for tourists seeking respite from heat and over-tourism could resonate well with future travellers.

CONCLUSION

Concerns about mass tourism have clearly grown rapidly year on year, and while this isn't coming across so much in relation to environmental sustainability it is instead being felt in the sustainability of the activity itself due to human pushback.

The rise in talk about overtourism which has led to protests and much coverage in the media, means destinations will need to think hard, not simply about solutions, but how to get ahead of any potential negative stories before they break.

Bringing in measures to temper disquiet, whether from unhappy residents or tourists, will be critical to maintaining a positive image.

Tokyo, Japan · June 2024
Asakusa district, one of Tokyo's leading tourist spots



METHODOLOGY

Data is collected from all major online sources including news sites, social media, forums, blogs, reviews and messenger services, covering text, video and audio.

Data Source: solotravelerworld.com/about/solo-travel-statistics-data/

Collection is completed globally across all major languages.

Aggregated data is then checked by an analyst against a sample of actual mentions.

While minor improvements in data collection have occurred year on year, due to the addition of some additional small content providers, the general trends reported in the report are reliable.



ABOUT US



GSIQ Tourism Insights is a specialised division of GSIQ, dedicated to delivering cutting-edge research and intelligence for the global tourism, travel and leisure industry.

From mass to luxury, our expertise lies in uncovering the critical insights that help DMOs, OTAs and tourism leaders drive sustainable growth, optimise visitor experiences, and enhance communication effectiveness.

MEET THE FOUNDERS

With their combined expertise, Eva and Oliver are leading a talented and connected team of senior researchers based around the world. Each project is run by director-level staff only.



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GSIQ is a global research and insights agency specialising in intelligence analysis for the international sports, sponsorship, and tourism industries.

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