

*A joint impact paper from Arival and Destination Wayfinder.*

# Beyond Capacity: Managing Demand at Europe's Top Attractions

What is driving the travel industry's biggest challenge in European destinations – and what to do about it.

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***The world will play host to nearly 1.5 billion international tourists in 2025, according to [UN Tourism](#), but there is only one Colosseum, one Acropolis, one Mona Lisa.***

Dubbed “overtourism,” this issue of rising visitor volumes has become one of the most pressing challenges facing the global travel industry. In Europe, the issue is regularly in the news, from protests in Spain to a growing array of visitor fees and regulations in top destinations across the Continent.

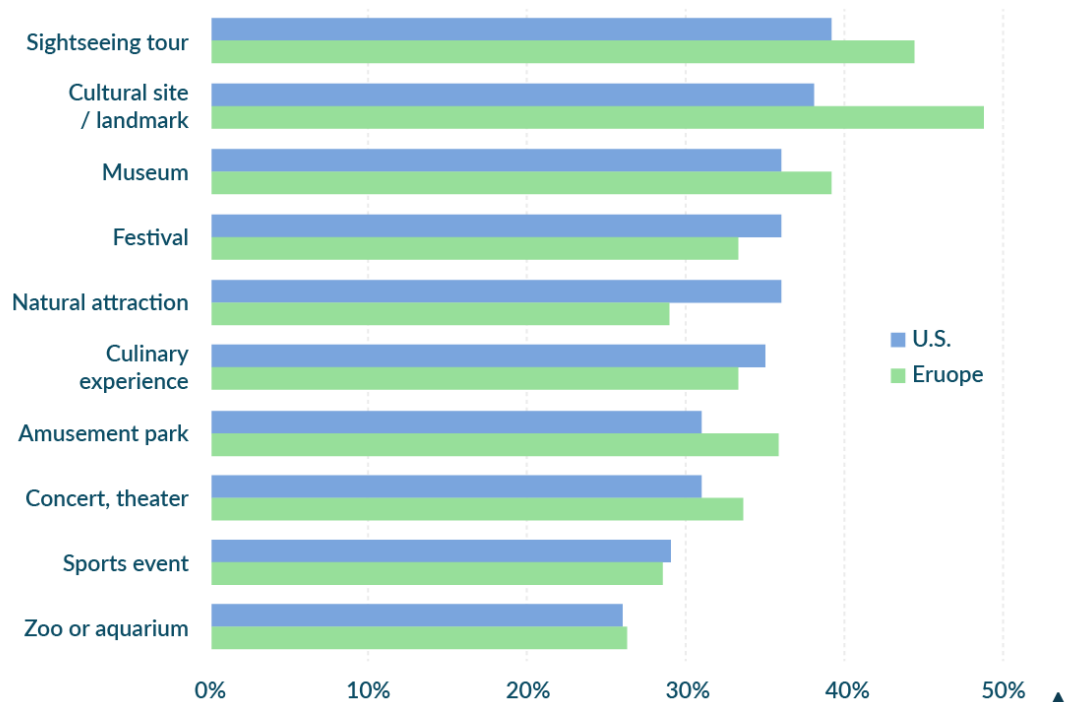
The challenge may be no more acute than in the travel experiences sector, which includes day tours, activities and especially visitor attractions. The “must-see” cultural monuments and institutions in Europe’s top cities – and the many tour operators seeking to bring their customers there – are on the front lines of the overtourism challenge every day.

# Attractions: *The Heart of Tourism*

Visitor attractions – which include cultural and historical landmarks and monuments, museums, amusement parks, zoos, aquariums, natural attractions, observation decks and other ticketed points of interest – have always been amongst the most sought-after travel experiences.

Four of the top five – and six of the top 10 – most-booked experiences by both U.S. and European travelers respectively are visitor attractions, according to Arival’s [2025 U.S. Experiences Traveler Outlook](#) and [2025 European Experiences Traveler Outlook](#) reports. The most popular experiences are sightseeing tours, which we include in this analysis, because they take travelers to visit these must-see sites.

## The Top 10 Experiences of U.S., European Travelers



Sample: 2400 U.S. and European experiences travelers  
Source: Arival’s 2025 U.S. Experiences Traveler Outlook, 2025 European Experiences Traveler Outlook

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However, consumer surveying cannot capture all of the intricacies of traveler behavior, so we undertook an analysis of online guest review counts of tours, activities and attractions across Europe. In the spring of 2025 we analyzed all listings from Tripadvisor’s “Things to Do” category for Europe.

### The European Data Sample

<p><b>Destinations</b> <i>Includes cities, towns, villages</i></p>	<p><b>32K</b></p>
<p><b>Operators*</b> <i>Includes tours, activity operators, visitor attractions</i></p>	<p><b>&gt;300K</b></p>
<p><b>Reviews</b> <i>Guest reviews of experience operators</i></p>	<p><b>&gt;56M</b></p>

\*This analysis excludes several Tripadvisor “Things to Do” business categories, such as restaurants, bars, and many local activities (e.g, bowling alleys) and points of interest (e.g. town halls, local parks, etc.) w are not bookable travel experiences.

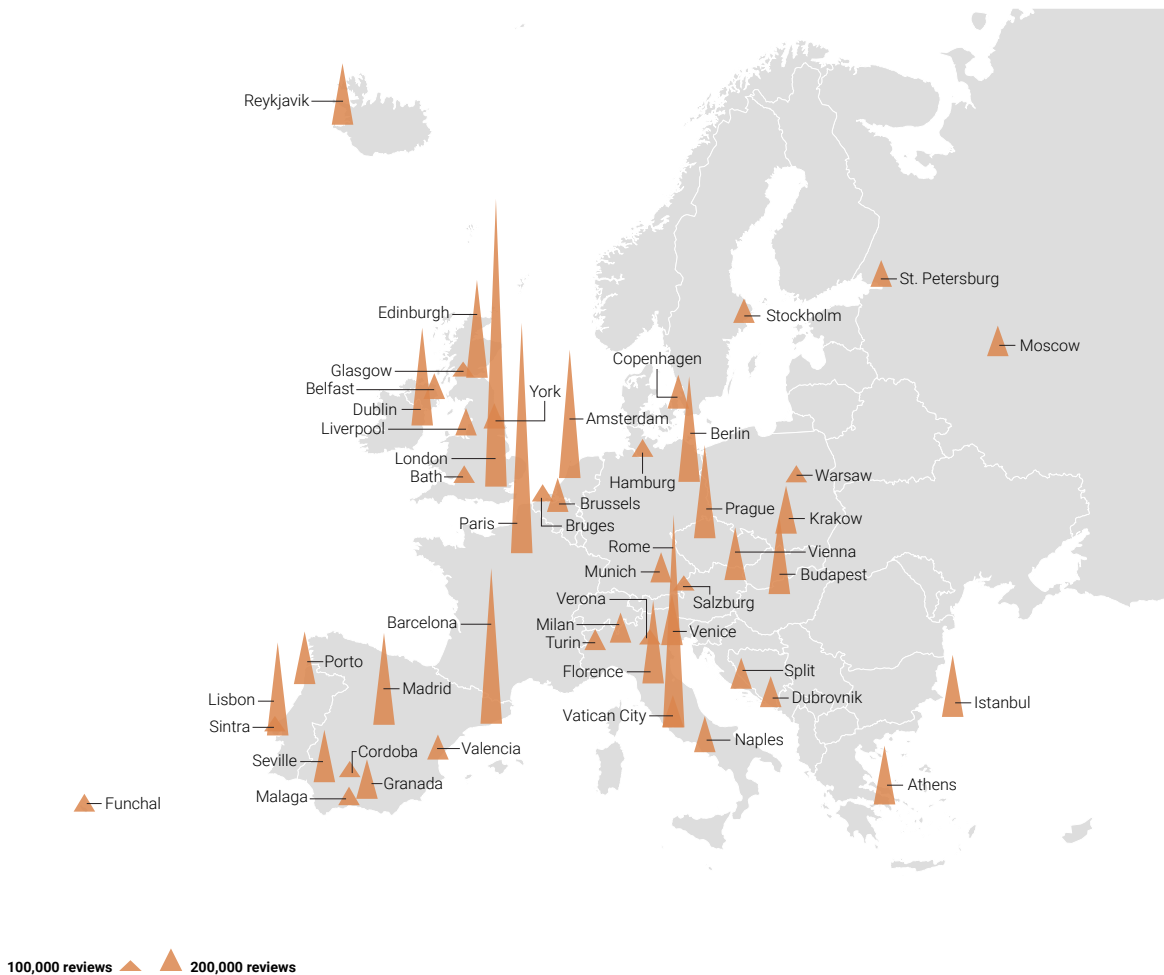
# Attractions: *The Epicenter of Overtourism*

Based on this analysis, two key trends emerge:

## 1. The Top 50 Markets Account for Nearly Half of All Reviews

Far too many people want to go to far too few places. Of the more than 32,000 cities, towns and villages across Europe, the top 50, or 0.16% of all possible destinations, account for 48% of all reviews.

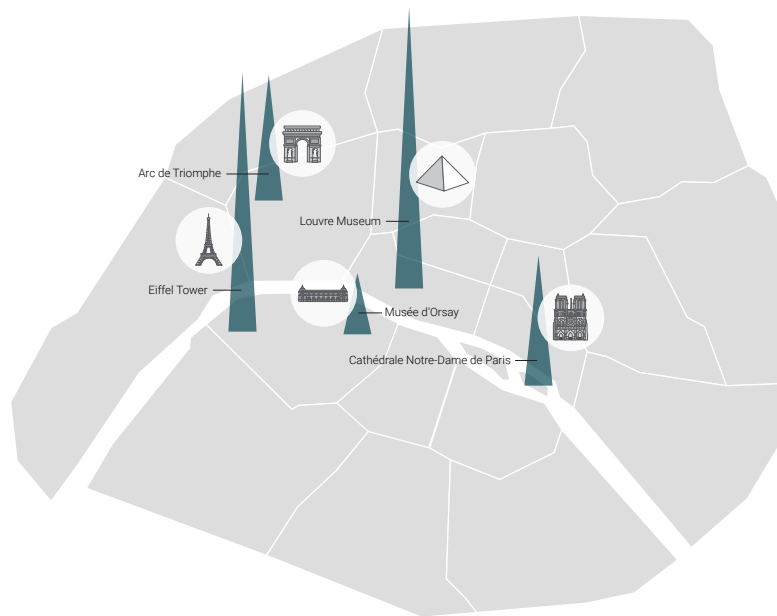
Europe's Top 50 Cities by Review Count



## 2. In Top Markets, the Top Five Attractions Account for Nearly Half of All Reviews

This concentration of demand is even more dramatic at Europe’s top destinations. The top five operators by review counts in Paris – Louvre, Eiffel Tower, Cathédrale Notre-Dame de Paris, Arc de Triomphe and Musée d’Orsay – out of more than 4,200 operator listings in the city, account for 44% of all Things to Do reviews. In other words, some 0.1% of all operators account for nearly half of all reviews.

### Paris’ Top 5 Attractions by Review Count

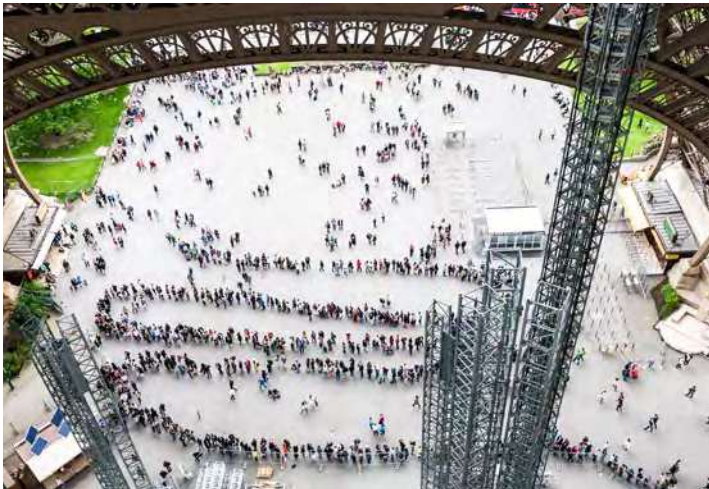


The following table illustrates the concentration of reviews in select top markets, highlighting the disproportionate demand to visit a handful of top attractions and experiences.

Select Top Markets	No. of Operators (000s)	Total Reviews (M)	Top 5 Operators Review Share
London	3.5	2.7	28%
Paris	4.2	2.2	44%
Rome	3.6	2.0	34%
Barcelona	2.5	1.5	43%
Amsterdam	1.9	1.2	41%
Athens	1.4	0.6	39%

# Impact on Tour Operators: *Ticket Access Challenges*

The remarkably lopsided demand for Europe’s top attractions has had growing negative effects on the travel experiences industry across several markets. One of the biggest challenges facing the tour operator sector is [getting access to tickets](#) at Europe’s top attractions.



Many attractions have limited supply and strict regulations for B2B ticket sales (tickets available for purchase and resale by tour operators and other resellers). This results in fierce competition when ticket supply becomes available, leaving many operators without a sufficient number of tickets for their customers, or with no tickets at all.

It has also led to allegations of illegal or unethical behavior. In one example, Italy’s antitrust authority, ACGM, [levied fines totaling €20 million](#) against seven ticketing agencies, online travel agencies and tour operators for “ticket hoarding practices” earlier this year. City Wonders and GetYourGuide, two of the companies fined, refuted the allegations and stated their intent to appeal.

Amsterdam’s Van Gogh Museum [stopped working with tour operators](#) in 2024 to reduce its visitor numbers. Several operators acknowledged confidentially to Arival that the move has negatively affected their operations in the city.

# Intentions vs. Actions: *Travelers Won't Help*

The rising media coverage of overtourism does not appear to be denting the crowds at Europe's top spots.

***Even though travelers are increasingly aware of crowding and favor more sustainable travel practices, there is a disconnect between what they say is important to them and what they actually do – and why.***

In Arival's 2025 reports on the U.S. and European experiences traveler, a significant majority – more than seven in 10 – say it is “very important to go off the beaten path” when they travel. Approximately two in three travelers say sustainability and their impact on the environment as travelers is also very important. A slightly smaller percentage, or a little over half, say they would be willing to pay higher prices for a more sustainable tour or experience that had lower impact on the local community.

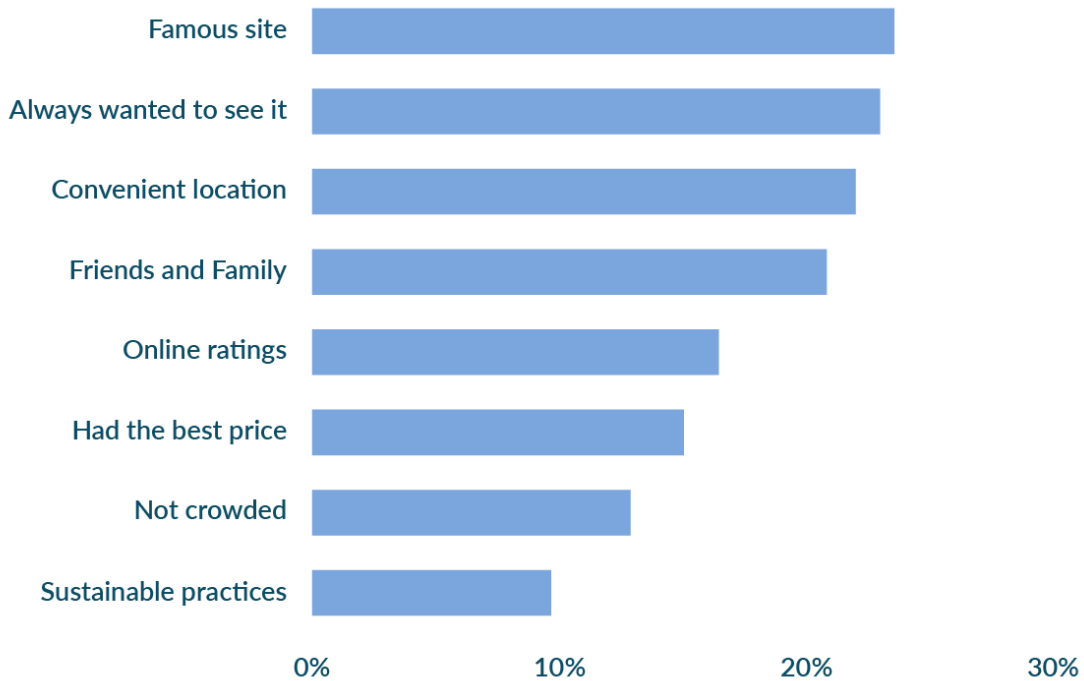


However, when we ask those same travelers “why did you visit this specific attraction,” crowding and sustainability are the least of their priorities. For most travelers, they visited that attraction because it was famous in the destination and they “had always wanted to visit it.” The third most popular reason: the attraction was conveniently located. These decisions are being amplified by social media and booking platforms incentivized to highlight, promote and sell the most “popular” and in-demand attractions.



The following graph illustrates the reasons travelers choose to visit a specific attraction, reinforcing the gap in traveler intent and behavior.

### Reasons for Visiting a Specific Attraction



Sample: 2400 U.S. and European experiences travelers  
 Source: Arival's 2025 U.S. Experiences Traveler Outlook, 2025 European Experiences Traveler Outlook

# The Future of Travel's Top Spots

Overtourism may be reaching an inflection point, and many leading attractions and the travel experiences sector seem ill-prepared. Too many attractions, even large, leading attractions, do not have modern ticketing technology or the means to automate connectivity with resellers, according to Arival & GetYourGuide's partner report [Inside Enterprise Attractions](#).

The introduction of timed entry, advanced booking requirements and connectivity with resellers can improve visitor management and the guest experience. Variable pricing could incentivize travelers to visit at less busy times with lower prices. A majority of large attractions are either implementing or have implemented some of these capabilities, according to [Inside Enterprise Attractions](#). Technology can certainly play a critical role. However, attractions must also communicate the advantages of planning and booking in advance – or even implement policies requiring it.

While some travelers may get more savvy – traveling during shoulder season, seeking less-crowded alternative destinations or taking advantage of options like after-hours VIP experiences at popular attractions – there will still be those who want their Coliseum tickets in the middle of July.

***Whether or not the customer is always right, one thing is clear: we cannot continue with business as usual. Whether through technology, greater collaboration between attractions and tour operators, or policy changes at the destination level, we need to keep finding ways to adapt – because the demand isn't going anywhere.***



# The Path Ahead:

## *Actions to Take Today*

The problem is clear. Europe's top cities and attractions are being supercharged and amplified by record travel volumes, social media-driven demand and online booking channels. We need coordinated, practical solutions to meet this moment. The path to address overcrowding and congestion must be a collaborative and holistic approach. Tour operators, tourism organizations or government agencies alone cannot solve the issue at hand. Rather, these stakeholders, and others, must work together to understand the underlying complexities of the issue and respond with multi-faceted solutions that achieve a healthier, more balanced tourism ecosystem for all. Below are key steps visitor attractions, tour operators and resellers, and destinations can start taking today to address the challenge of overcrowding.

### Practical Steps for Industry: Visitor Attractions & Tour Operators



#### **1** Prioritize Investment in Modern Ticketing & Visitor Management Technology

One of the biggest opportunities for attractions and tour operators to address overcrowding is technology. Too many attractions do not have the best technology and connectivity in place. The modernization of core systems – from ticketing to analytics to visitor flow management – is the foundation for enacting some of the key measures to address these challenges.



#### **2** Dynamic – and Equitable – Visitor Access Strategies

Not all attractions can implement dynamic pricing, especially public institutions with preservation, education or equity mandates. But demand must still be managed by implementing dynamic and equitable visitor access strategies such as:

- Explore variable pricing where feasible (e.g., off-peak incentives).
- Consider non-price-based measures such as timed entry, daily visitor caps or controlled group sizes.
- Evaluate queue-management systems such as advance booking lotteries, priority windows for local or educational groups, or member programs.

3

### Improve Reseller Connectivity & Access

Key to the implementation of new technology is automation for B2B ticket sales. Limited or manual B2B ticket distribution contributes to bottlenecks, black-market behavior and operator frustration – while undermining guest experience. Fair, transparent and consistent ticket access for verified resellers through APIs or other secure channels is critical.

4

### Tour Operators & Resellers Need to Be Part of the Solution

Attractions and platforms should set clear rules for ethical ticket access, but the reseller community needs to observe them. How attractions, operators and destination leaders manage this and police unethical actors will be a major challenge. Both operators and attractions should require transparency in booking practices, enforce fair use policies (e.g., no hoarding or fake inventory) and prioritize partnerships that add value through service, not just arbitrage.

## Practical Steps for Destinations: Destination Organizations & Government Agencies

These recommendations draw on insights from a range of resources, including Destination Wayfinder’s global framework for destination stewardship and the recently published “Managing Destination Overcrowding” from the WTTC (June 2025). See Additional Resources below for more.

1

### Take Action from a Foundation of Community-Based Tourism

Destination organizations must start with understanding community needs, aspirations and challenges to effectively manage crowding and congestion. Tourism, more than any other industry, relies on the welcome and support of local communities. Engage and empower residents by establishing participatory decision-making systems such as advisory groups or community boards to gather insights for strategic processes and gain ongoing support in a formal setting.



**Case Study:** Wonderful Copenhagen was a pioneer in prioritizing locals in the development and management of tourism in their community. In their 2017 strategy, Wonderful Copenhagen [championed “Localhood,”](#) preserving the authenticity of local neighbourhoods and empowering visitors to show up across Copenhagen, “like locals.” Copenhagen’s updated [2024-30 strategy, “All Inclusive”](#) builds on this focus, emphasizing tourism’s critical role in supporting the city’s “green transition,” fostering “enriching encounters” and creating “larger socio-economic value” for the community. [See more on Copenhagen’s Visitor Strategy here.](#)

2

## Collect Evidence for Your Destination

Causes of crowding and congestion are complex. Gather evidence and data — paired with insights and best practices from other destinations — to understand how visitors move and behave throughout your destination. To define the full scale and nature of your challenges, combine hard data such as visitor journey mapping with the sentiment of key stakeholders.

- Conduct formal resident sentiment research, representative across neighborhoods and community groups, to gain a sense of what the community feels.
- Map the visitor journey, from initial destination awareness to post-visitor experience, to identify key touchpoints, enhance and design unique visitor experiences, optimize marketing strategies and address potential challenges before they arise.
- Create a system to track and assess visitor flows by implementing strategies such as GPS and mobile tracking data, visitor surveys, and sensors at key locations to gather real-time data.

### 3

## Get Organized and Make a Plan

Solutions to crowding and congestion should be a private-public sector response. Destination organizations are ideally placed to coordinate collaboration between the tourism industry, community representatives and government officials. A practical response for managing both visitor demand and supply is critical to creating destination balance.

Action plans should be specific, measurable and action-oriented. Destinations must include strategies specific to developing and enhancing attractions and experiences such as:

- Develop individual management plans for sites of significance in collaboration with stakeholders, such as local authorities, tour operators, residents, historians and other groups with a vested interest.
- Co-create and promote secondary experiences that complement but redirect from overcrowded sites: neighborhood walks, lesser-known museums, local food trails, etc.
- Create programs and incentives that support the long tail of smaller experiences, tours and attractions. Get them online, connected, using booking systems and educated about travel distribution.
- Provide incentives to encourage resellers and operators to create and promote experiences beyond the superstar attractions.

### 4

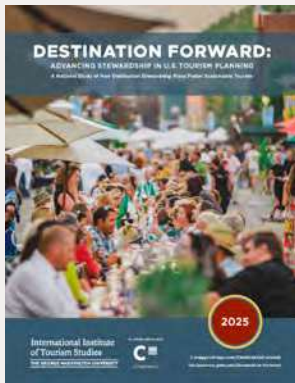
## Take Action with the Right Authority and Resources

The response to crowding and congestion must have a bias for action and be supported by the right authority and resources. This includes the support of key city, state or national officials; relevant government agencies; the destination organization; and partner tourism industry associations.

- Engage stakeholders in tourism-related policy frameworks and policy development, such as establishing and upholding capacity limits.
- Write a funding strategy to secure sufficient, sustainable and ideally, dedicated financial resources. Funding models should seek to reinvest tourism revenue in solutions that address challenges with growth and overtourism.

# Additional Resources

Here is a curated list of resources with additional insights and recommendations for managing these challenges.



[“Destination Forward - Advancing Stewardship in Tourism Planning”](#), George Washington University in collaboration with Coraggio Group, June 2025



[“Managing Destination Overcrowding: A Call to Action from the Travel & Tourism Private Sector”](#), World Travel & Tourism Council (WTTTC), June 2025



[“Funding Futures 2025 - Research and Insights on New and Enhanced Funding Options for Destination Organizations”](#), Civitas, Tourism Economics & Miles Partnership, April 2025



[“Navigating Your Stewardship Journey - Charting the Course for Destinations to Become Stewards of History, Nature & Culture”](#), Destination Wayfinder, Coraggio Group & Miles Partnership, March 2024



[“Time for DMOcracy: Global Best Practices in Community Engagement”](#), European and North American Editions, Group Nao & Miles Partnership, January 2023

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### ***About Arival***

Arival produces conferences, insights and community for tours, activities and attractions and is the global research authority for in-destination experiences. Arival research offers exclusive, primary quantitative and qualitative research to help tour, activity, and attraction industry professionals understand key market trends, identify new opportunities, set their strategies, track their competitors and understand their customers.

Learn more at [Arival.Travel](https://Arival.Travel).

### ***About Destination Wayfinder***

Destination Wayfinder is an industry-led initiative and destination management tool enabling destination organizations to measure, monitor and improve destination stewardship capability and outcomes. Through strategic investment in research, technology and collaboration with the Global Stewardship Innovation Lab—a network of thought leaders, researchers, and stewardship practitioners—Destination Wayfinder delivers a best-practice destination management framework designed to guide organizations toward sustainable and regenerative outcomes.

Learn more at [DestinationWayfinder.com](https://DestinationWayfinder.com).

