



A Roadmap for Place-Based Tourism That Regenerates Local Value

From Global Templates
to Distinctive Places

 anteverti INSIGHTS

About this Insight

This insight starts from a clear premise: traditional tourism models focused on growth and visitor numbers are no longer sufficient to address current social, environmental, and cultural challenges. It proposes a shift towards a place-based approach, in which tourism is understood as part of a wider territorial system, shaping local economies, landscapes, identities, and everyday life. The aim is not only to analyse these dynamics, but to offer a practical framework to support this transition. It outlines principles, alternative indicators, governance approaches, and economic alignment strategies to help municipalities and local actors begin working differently. Rather than a purely theoretical model, it provides concrete tools to start this shift so that tourism becomes a lever for strengthening the territory.

This work is also the result of a broader process of reflection and practice. It distils previous work developed through consultancy projects, ongoing collaboration with local stakeholders, and a body of articles over time. As such, it brings together accumulated knowledge and field experience into a coherent approach that can be shared, tested, and further developed. As such, it represents a new effort in this field and, hopefully, an open window to further collaborations with those interested in what is proposed here,

More information about the authors can be found on page 32.

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Introduction:

Tourism: A Limitless Force?

This insight offers a framework to rethink tourism not only as an industry to optimise, but as a system for creating and regenerating value around places.

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ust another report highlighting the conflicts surrounding tourism? A new — though not entirely new — proposal to rethink its growth and its impact on places and lives? Or another well-intentioned attempt to reinvent tourism?

In a way, it is all of these — and none of them at the same time.

This report aims to contribute to a conversation that is already underway, shaped by a **growing global concern about the role tourism plays in an increasingly complex world.**

Tourism is no longer just an economic sector; it is a system under pressure to respond to challenges it was not designed to face. We do not aim to address the full range of issues across global, regional, or local contexts — nor to provide a definitive solution to such complexity.

Instead, this is an **attempt to return to more fundamental questions: why we travel, why places welcome visitors, and what it really means to inhabit a place — even temporarily — as a tourist.** From this perspective, we propose a framework of opportunities, principles, and actions that can help guide tourism in the years ahead.

This is our way of having the conversation we believe is needed. One that moves beyond the trends that continue to shape tourism today. Ideally, these pages resonate on a personal level: reminding us why we value travel, and why we care about the places we come from and those we visit.

This reflection may at times feel incomplete — even naïve — but it is intended as a starting point. A basis from which we, at Anteverti, want to work with others to explore new prospects for tourism.

This document offers a framework for building a new generation of local practices around tourism, aimed at both public policymakers and private actors. It builds on ideas introduced in our previous [‘Decalogue for Regenerative Urban Tourism’](#) (published on our website in October 2025), particularly Point 7: Protect Local Specificity — Your City’s Uniqueness:

“Tourism thrives on uniqueness. But unmanaged tourism can erode precisely what makes a place special. When artisan shops are replaced by souvenir chains, when traditional cafés give way to standardized franchises, or when residential blocks convert entirely to short-term rentals, a city risks becoming a generic backdrop.”

This reflection triggered an internal shift within our team. While the decalogue outlined a broader vision, **this report focuses more closely on one specific dimension: how tourism can become meaningful again through the lens of place.**

Further insights will continue to explore other dimensions in the coming months. We invite those interested to join the conversation. Together, it will be more meaningful — and more impactful.

The Authors, 2026



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1

The Context:

A Turning Point
for Tourism

TODAY, TOURISM IS SHAPING TERRITORIES, NOT JUST ECONOMIES.

Its growth generates both opportunities and tensions, and the balance between the two is becoming increasingly fragile.

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ourism is a living force, capable of flourishing and growing in almost any place on Earth. It is not merely about geographic movement in search of breathtaking landscapes, but about a movement that seeks enriching experiences, reveals fresh perspectives, and awakens new values.

Tourism is a vibrant force. It sparks curiosity about others, connects cultures, and invites us to experience the diverse ways in which people and nature inhabit the world.

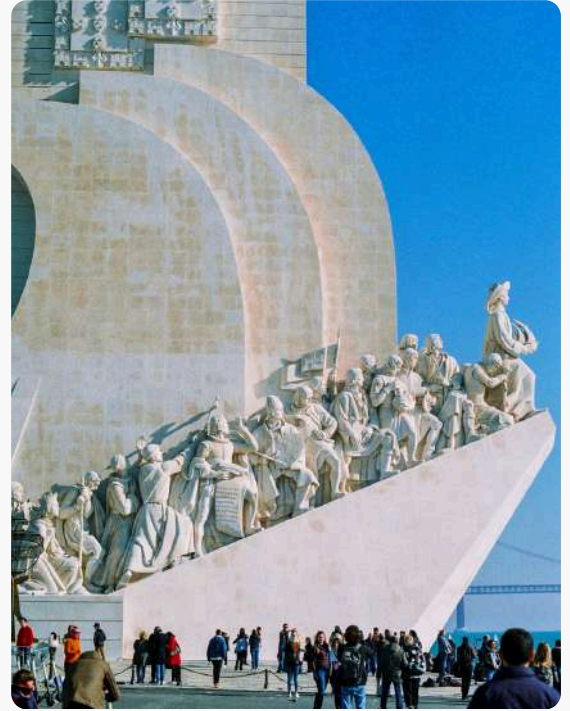
Tourism is both a global and a local force. It is a constant phenomenon, deeply intertwined with contemporary society's way of life. It relates to visitors, who travel from all over the world in search of new experiences, but also to residents, whose capabilities, perspectives, and ways of living are increasingly shaped by it.

More than ever, tourism is an expanding force. Over the past year alone, more than a billion international journeys have been made worldwide. Millions of people have left their homes to discover and enjoy another place,

another culture, another rhythm of life. And in the years ahead, this number is expected to continue to grow. Yet even these figures tell only part of the story, because they do not account for countless short-distance trips, day excursions, regional escapes, and everyday acts of discovery through which residents experience their own territories as visitors.

And yet tourism is also a profoundly contradictory force. On the one hand, it can be a powerful catalyst for economic opportunity, capable of attracting investment and activating local development. On the other, it can place increasing pressure on the very territories that sustain it — especially their landscapes, ecosystems, infrastructures, and everyday life. These contradictions also shape personal perceptions: people aspire to discover new landscapes, encounter unfamiliar experiences, or rediscover the places they inhabit through fresh eyes, while at the same time feeling uneasy or even overwhelmed by the presence of visitors in the places where their daily lives unfold.

Seen from an even broader perspective, these contradictions extend far beyond the territories we already know. Our planet presents an immense variety of landscapes and ways of inhabiting space, shaped by geography, climate, culture, and history. In principle, almost any accessible place has the potential to become part of the tourism orbit. **Historically, the expansion of travel has followed a simple logic: once a destination becomes imaginable, the means to reach it tend to become real.** Over time, tourism has consistently sought new frontiers, transforming what was once considered remote or extreme — deep-sea exploration, polar expeditions, even journeys beyond the atmosphere — into potential travel experiences. Today, this dynamic extends even further: **even the Moon, orbiting Earth at approximately 384,400 kilometres, has entered the narratives of the visitor economy.** Concepts that once belonged to literature and speculative science now appear in commercial strategies and promotional materials from companies exploring space tourism, circulating visions of orbital stays and lunar accommodations. The idea of a hotel on the Moon, however distant, has already become conceivable in the marketplace. **As tourism continues to expand its horizons, it becomes worth asking what this constant search for new destinations means in a world where environmental limits are increasingly visible.**



Tourism's global scale reveals something essential: it is not a peripheral economic activity, but a structural agent shaping cities, landscapes, behaviours, and economic opportunities. Tourism is not just an economic sector; it is also a territorial function. And if it is an ever-growing force, then strategy becomes essential. The question is no longer whether tourism will influence our territories, but how.

It is no secret that many traditional destinations — as well as newer, emerging ones shaped by Instagram-led travel dynamics — are facing contradictions, conflicts, and even negative bottom lines from tourism. **The real challenge is not how to attract more visitors at any cost, but how to generate economic transformation without eroding resources, culture, and identity.** Because when identity is reduced to branding and heritage to spectacle, places may gain visibility, but they risk losing the only thing that can truly make them unique: their soul.

The future of tourism depends on the ability to safeguard a place's uniqueness and protect its identity and local resources, while transforming them into a strategic opportunity to thrive socially, environmentally, and economically. A strategic roadmap for tourism can strengthen economies, regenerate ecosystems, reinforce cultural vitality, and turn tourism into a truly sustainable force.

THE CHALLENGE IS NO LONGER GROWTH, BUT DIRECTION.

What matters now is not how much tourism expands, but how it transforms the places it reaches.

2

A New Paradigm:

When
Local Life
Thrives,
Tourism Thrives

A place that serves its residents well also serves visitors and tourists well. The reverse does not work. It is time to stop thinking in terms of places for tourism and places for residents. It is time to abandon the idea of a fragmented urban society, as if there were separate times and spaces for each kind of person. Landscapes are not backdrops on display, and a place's identity is not a static brand.

In recent years, many cities have made the mistake of over-exploiting — or allowing the over-exploitation of — their identity as a strategy to attract even more visitors. Spotlighting certain attractions, sites, or districts makes them easily absorbed by the market as “touristic potential”, selling them as the “typical” features of a place. At some point, they become non-places. As stated in the article the Anteverti team wrote for CitiesToBe, our urban think lab, [‘Is the Contemporary City Doomed to Be a Non-Place?’](#). “The widespread proliferation of such spaces contributes to a loss of cultural specificity and a decline in the quality of social interaction. In other words, **homogenization often comes at the cost of creativity, imagination, and diversity.**”

Many destinations have combined recognizable elements of a given culture — especially those capable of sparking curiosity and interest — **and transformed their sites into destinations of desire**, turning a supposed identity into an empty, replicable brand. In some cases, local identity has been so exposed to tourism that residents barely recognize their own culture. In **Bali**, for example, rituals and ceremonies are often staged for tourists, while in **Kyoto**, temples and geisha districts have been shaped into touristic icons. In both places, global appeal has grown, **but local authenticity and belonging have been eroded.**

**THERE IS NO
TOURISM WITHOUT
LOCAL LIFE.**

**What makes a place
worth visiting is the
same thing that makes
it worth living in.**

On the other hand, some destinations are finally beginning to understand that urban authenticity and vitality are born above all from local use. It is when the city is truly lived by those who inhabit it that it remains alive, relevant, and genuinely attractive. In contrast to a purely extractive logic, true urban vitality depends on the everyday appropriation of place by residents, who give a city its soul and make it a destination worth visiting. **Tourist ghettos are spaces destined, eventually, for decay.** Cities that prioritize residents' wellbeing — especially in housing, mobility, and public space — create inclusive, safe, and welcoming environments where visitors are naturally part of the landscape, rather than strangers or invaders.

It is clear that **the main element consolidating the identity of an urban destination is its residents.** This is why the protection of housing and the continuity of local communities are so essential to the soul of a city. Although gentrification is no longer a new term, it remains highly relevant in any reflection on tourism. **Residents are what give life, meaning, and recognisability to a city;** their daily routines, celebrations, and rhythms are the heartbeat that transforms streets, squares, and heritage sites from inert scenery into lived destinations. When communities are displaced for tourism, identity is fragmented, and the city loses a fundamental part of its essence.

When residents live, celebrate, and enjoy their city openly, they transform spaces into living experiences. Their daily routines, small rituals, and moments of leisure form the foundation of a city's identity. Given the rise of urban tourism in recent years, it is increasingly clear that both residents and visitors seek the same authentic experiences — whether through leisure activities, cultural celebrations, or everyday moments that give a city meaning. **Being part of this natural and genuine atmosphere is what visitors look for, sometimes almost desperately.** People, in any circumstance, seek the feeling of a city that is alive and vibrant, rather than a museumified space or a simulacrum prepared exclusively for the foreign gaze.

In this sense, **recognising local values, respecting ways of living, and making every effort to protect residents' homes and access to leisure are fundamental steps toward sustainability and responsible tourism.**

This means that **tourism strategies must first serve the needs of the city and its citizens, enriching heritage and culture rather than simplifying, trivialising, or destroying them for ephemeral consumption.** Responsible tourism emerges when the local community takes ownership of its own history, turning quality of life into the strongest guarantee of an authentic, lasting, and high-quality tourism experience.

Understanding and defending local values is the first — and ultimate — step toward fostering sustainability and responsible tourism.



**MUCH OF THE VALUE
OF TOURISM LIES IN
WHAT CANNOT BE
REPLICATED.**

**What differentiates places is
not what they offer,
but what they are.**



Extended views by our guest expert

Eugenia Altamirano Tourism Innovation & Sustainability Consultant

Eugenia Altamirano is a researcher and consultant in sustainable tourism, specializing in territorial planning, rural development, and innovation. She holds a PhD in Tourism & Leisure and combines academic and professional experience in the field of tourism, with a focus on digitalization, creativity, and the transition toward more equitable and adaptive tourism models.



Anteverti: In your opinion, what will the relationship between leisure and tourism look like in the society of the future?

Eugenia Altamirano: I believe we are facing a paradigm shift in how people travel, similar to the early 2000s, when holidays moved away from sun-and-beach destinations toward emerging or “off-the-beaten-track” places, or became trips related to work and events.

Today, the boundary between work and leisure time is increasingly blurred, as is the physical place where these occur. As a result, travel and pseudo-nomadism as a lifestyle create opportunities for many places to become tourist destinations, but also to suffer the consequences — especially when tourism emerges spontaneously and at scale.

As for traditional tourism, travel will increasingly be shaped by communities built around hobbies and interests, consolidated through social media and experienced through immersive experiences. Communities of K-pop fans, influencer followers, keto practitioners, skincare enthusiasts, digital detox advocates, etc., create opportunities for niche tourism. With imagination from DMOs, these flows could be redirected toward less developed destinations.

In this context, the main challenge for tourism planning is that the influence of ‘official’ destination planners is increasingly limited in directing tourist interests and practices. Travelers are now experienced and autonomous. Apps and online communities provide inspiration and planning tools that don’t always align with official promotion. This creates friction between planning and reality, but also opens opportunities for authentic, ephemeral experiences linked to contemporary interests.

“Travelers are now experienced and autonomous, and inspire themselves through apps and online communities. The main challenge for tourism planning is that the influence of ‘official’ destination planners is increasingly limited in directing tourist interests and practices.”

Do you think there should be a limit to tourism activity? Where do we draw the line between what is desirable and what becomes unsustainable?

Whether due to environmental fragility or social sensitivity, I do believe that some places and communities should be protected and that visitor flows should be limited — if not entirely, then at least partially. There is no such thing as tourism without impact. Visitors inevitably leave a footprint. This can be mitigated, and actions can reduce negative effects, but only when clear rules exist and there is strong commitment—from policymakers through regulation, and from citizens who want to preserve their heritage and way of life.

Tourist taxes, increasingly common in European cities, aim to boost local benefits and “filter” visitors. Conceptually, they are positive if revenues strengthen belonging and improve residents’ quality of life. However, they can also become elitist and reinforce the idea of cities as theme parks (as in Venice).

The line of unsustainability should be defined by a destination’s carrying capacity — ensuring natural resources are not compromised and residents can maintain their lifestyles. Some places already apply strict limits, such as Machu Picchu or the Altamira caves, with restricted daily quotas. These are difficult decisions, as they may reduce income and visitors, but they are essential for long-term planning. Managing flows is also easier in clearly bounded spaces than in cities or regions.

Leaving aside the economic contribution, what is the most meaningful legacy that a visitor can leave in a place?

We live in times of war, polarization, climate urgency, hyperconnectivity, and productivity, alongside rising anxiety, depression, and loneliness. In this context, travel can foster connection, rest, disconnection, and recognition of different realities. More than ever, tourism’s role — for both travelers and hosts — should be to recognize ourselves in diversity.

Tourism brings not only economic growth, but also opportunities for understanding and building trust with what is foreign. However, assuming all travelers genuinely seek cultural understanding is an idealization, as is assuming that everything destinations present is “real” rather than performative.

Still, there is something inherently subversive about visiting others’ spaces — it creates a form of intimacy. For this to happen, we must move beyond all-inclusive models and include more people in the exchange. The challenge of tourism is to find alternative ways to connect cultures. In this sense, community- and interest-driven travel represents one of the most interesting evolutions of today’s tourism paradigm. The most valuable tourism is not about consumption, but about generating relationships.

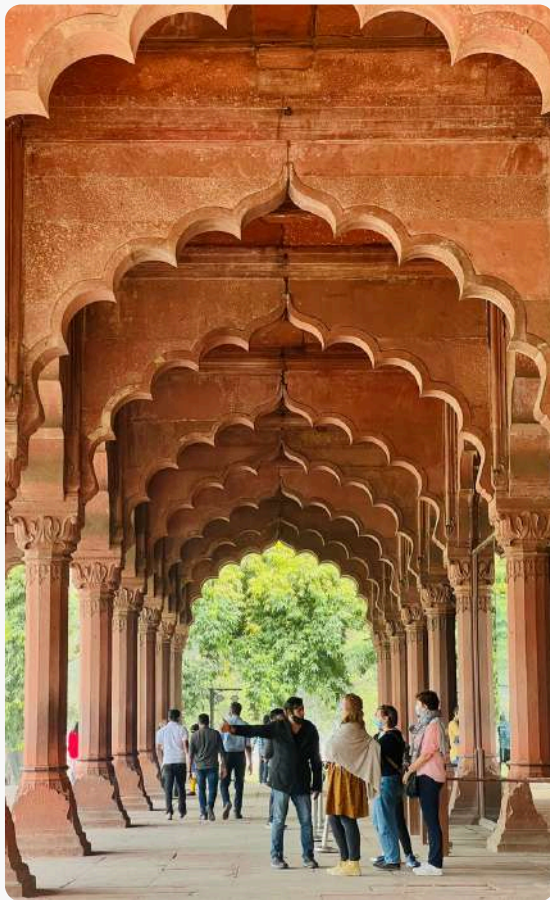
3

The Opportunity:

Place-Based Tourism as a Competitive Advantage

3.1

Genius Loci: The Everlasting Strength



Every place on Earth holds the potential to offer a singular experience, both for the people who call it home and for those who come to discover it. **One crucial step in making places genuinely interesting to tourists and visitors lies in recognising the constellation of elements — the “golden stones” — that shape their singularity.** Transforming this uniqueness into a strategic opportunity to generate wellbeing for residents while attracting conscious visitors is what has allowed many places to thrive.

This is something the dominant drivers of global tourism often fail to understand. The booming expansion of tourism, like any industrial activity, tends to rely on standardisation and homogenisation. **Even places that were once fundamentally singular have been turned into decontextualised destinations where uniqueness and ingenuity have evolved into soulless products.** Among other things, this may help explain part of the discontent and criticism surrounding the global tourism industry and its impact on specific streets, neighbourhoods, cities, and natural spaces around the world. The problem is not only massification, rising prices, or conflictive coexistence between residents and visitors; it is also **the frustration of seeing visitors encounter a fake version of the places residents love.** Visitors are often sold tourism products that could exist in many other places — products stripped of local soul, ways of doing, and everything that cannot be packaged.

Every city, region, or territory holds something remarkable in the authentic combination of its landscapes, architecture, and culture — the very elements that together shape its identity and soul. **This uniqueness lies in the relationship between architecture and natural landscapes, in the rhythms of daily life, in the ways people gather in public spaces, and in the interaction with cultural elements.**

**IDENTITY IS NOT
AN ASSET
TO EXPLOIT,
BUT A
CONDITION TO
SUSTAIN.**

When places lose their
internal coherence,
tourism may grow...
but meaning fades.

The singularity of destinations is anchored in the relationship built over time between communities, territory, and landscape. Every genuine place holds a **genius loci**: a unique combination that manifests itself in local crafts — artisanal practices, agriculture, fishing — and in collective rituals passed from generation to generation. It is expressed in the relationship with the environment; in celebrations marking the arrival of a new life or the farewell to someone who departs; in the food people prepare, the way they cook it, and the ritual of eating. It is revealed in the rhythm of walking, in the ways children and elders are woven into daily life, in the hours when places awaken and fall asleep, in their lights, music, and silences.

Place-based assets do not always appear in the photograph of a catalogue or leaflet; they live in the atmosphere of presence and authenticity. The same atmosphere emerges in scents, dances, rhythms, and musical instruments; in gestures exchanged with people known or unknown; in the tone of voices in public spaces; and in the colours and types of clothing people wear. It consolidates over time through memory, through stories passed from generation to generation, through the refinement of material production, and through the reaffirmation of experiences and intangible values.

Tourism unfolds in many forms — leisure travel, business trips, cultural journeys, heritage tourism, gastronomy, wellness, education, nature-based experiences. All of them engage different audiences and create distinct dynamics in places. But across all types, one shared truth remains: **places create value when their singular characteristics are consciously cared for, preserved, and regenerated.**

**TOURISM HAS
LEARNED HOW TO
GROW WITHOUT
LIMITS, DRIVEN BY
STANDARDIZATION
AND SCALE.**

But its future depends on recovering what cannot be scaled: the singularity of place.



Transforming singularities into opportunity means caring for every asset — natural and cultural alike — not as background scenery or bland identity, but as gateways to local knowledge, real resource regeneration, and the consolidation of genuine culture. In this sense, **places should first strengthen their local singularities, and only then seek external attraction.** This requires vision and empathy: mapping what exists, understanding constraints and possibilities across multiple dimensions, and defining priorities that generate long-term impact.

When original resources come first, **tourism becomes more than an economic sector: it becomes a strategic instrument for protecting, caring for, and fostering wellbeing, attracting more respectful visitors, and generating real value.**

3.2

Why the Time for Place-Based Tourism Is Now

Traditionally, the tourism industry has needed to create typologies, patterns, and sub-sectors in order to boost growth and respond to diverse needs and demands within a booming industry. **Classifying tourism into categories has been a way of organising an increasingly complex market and offering travellers proposals that appear more aligned with their interests.** In this sense, segmentation has become a business strategy that allows consumers to approach a structured offer of tourism services and products.

In a highly competitive global market, however, this logic also tends to generate standardisation. Competition usually rewards price-efficient and easily replicable products, favouring homogeneous and scalable offers. The industrialisation of tourism within the global economy has produced proposals for national and international markets, for cruises or long stays, for sustainable or responsible experiences, and so on. Categories have multiplied: cultural, sports, gastronomic, adventure, family, business, solo travel, and many others. The possibilities for segmenting a demand that continues to grow seem almost infinite. Yet this proliferation of typologies raises a fundamental question: **to what extent do these categories really respond to travellers' motivations?** Segmentation is often shaped more by the supply side — by the need to create easily sellable products — than by the real reasons people travel.

In this context, **the claim for authentic, place-based, or even hyperlocal tourism is not meant to become a new label in the catalogue of tourist typologies.** It is not about creating a new market category, but about recovering the meaning of travel and the conditions that make it significant for both visitors and the places that welcome them.

Over the past few years, the debate has begun to shift toward a more ambitious approach: **tourism as a strategy for regenerating the valuable assets that make places worth visiting — and worth investing in.** It is not only about reducing tourism's potential impacts, but about proposing that tourism should actively contribute to improving the original ecological, social, and cultural conditions of territories. Linked to a place-based vision, a regenerative approach treats places not as commodified products in a global market, but as living systems in which visitors are integrated into local dynamics, assets, and resources.

People travel for many reasons. Sometimes we look for a cultural experience; on other occasions the trip has a sporting, spiritual, or simply restful motivation. These motivations may lead us to travel thousands of kilometres or just a few kilometres from home. In some ways, what we consume is still a leisure product. Or perhaps, more than a product, what we consume is territory: physical territory and emotional territory. Sometimes for a few hours; sometimes for long stays.

The global tourism industry can prioritise certain experiences within this wide range of motivations. But that opens up a new question: **to what extent do those experiences reflect the reality of places, and to what extent do they respond to a market logic that tends to simplify and package territory in order to make it consumable?**

We can observe this pattern in certain tourism sectors.

3.3

Passion as a Driver of Place-Based Destinations

Cultural tourism: Identity and tradition as drivers of niche communities

Cultural tourism is not simply about visiting monuments, but about entering the narrative of a place. It is driven by the desire to learn, discover, and engage with the tangible and intangible expressions that shape a destination: from architecture, museums, and historic quarters to gastronomy, creative industries, and living traditions. Today, cultural tourism is one of the most powerful segments of global travel, accounting for an estimated 40% of international tourism flows when cultural motivation (primary or complementary) is considered (UNWTO). Moreover, surveys consistently show that over 70% of travelers value authentic local culture as a decisive factor when choosing where to go (Booking), confirming that identity has become a competitive asset in the global visitor economy.

The UNESCO report 'Culture-driven Sustainable Urban Tourism (2025)' acknowledges that "cities that leverage their cultural heritage, creative industries, and local traditions are better positioned to develop sustainable tourism models that create value for residents, visitors, and local economies," stressing the need for a new balance between those who come and those who stay. Culture as a driver of tourism development has been present in policymaking and private investment for decades, alongside the expansion of the welfare society. However, globalization has likely narrowed the potential for deeper experiences, and today culture-driven travel is increasingly affected by the tokenization, fetishization, and reduction of what is offered as "cultural experiences." The main source of dissatisfaction for both travelers and residents is, once again, that culture is presented as a scenario rather than a place — a representation rather than something real. Culture is often treated as a global, undifferentiated product for fast consumption and Instagrammable moments.

In many destinations, cultural tourism has gradually drifted toward standardized and spectacle-driven experiences that risk flattening the very identity they seek to display. Historic cities such as Dubrovnik illustrate how heritage can become a stage set rather than a living place. The Croatian city, whose medieval walls became globally recognizable after serving as a filming location for the TV series *Game of Thrones*, experienced a dramatic surge in visitors that concentrated tourism around a narrow set of iconic spaces and visual references. While this exposure generated international visibility and economic benefits, it also reinforced a tourism dynamic in which the cultural narrative of the place risks being reduced to a simplified global image.

At the same time, large-scale cultural events often illustrate the tension between global visibility and local meaning. The record-breaking concerts of Taylor Swift's Eras Tour, for instance, generated massive tourism flows and significant economic impact in cities around the world. Studies have shown increases in hotel revenue of up to 45% and total economic effects estimated at US\$4.6 billion in the United States alone (Fortune), with cities like London reporting around £300 million in local activity linked to the tour (Forbes).



Yet these experiences, while extraordinarily successful, tend to produce short-lived and homogeneous tourism dynamics that revolve around the event itself rather than the deeper cultural ecosystem of the host city. These examples are not inherently problematic, but **they highlight the limits of a tourism model centered on spectacle, scale, and immediacy rather than authentic engagement** with the cultural fabric of a place. This is where there is still room for the ingenuity of places.

Traditional cultural practices such as the tea ceremony, ikebana, or calligraphy in **Kyoto** (Japan) are good examples of how to build an attractive offer around what makes a place unique while balancing the carrying capacity of a territory. Though distinctive, they remain cultural experiences open to the world, even as they face the risks of overcrowding. Mexican regions such as **Puebla** or **Oaxaca** are also finding their own path by showcasing their gastronomy, attracting visitors who seek more than stereotypical or misleading representations, and instead look for a deeper sense of belonging to diverse culinary cultures. **Bayreuth** (Germany) is a key destination for opera lovers, while **Salzburg** (Austria) attracts classical music enthusiasts every summer. Cities such as **Cali** (Colombia), **Havana** (Cuba), **Buenos Aires** (Argentina), or **Kolkata** (India) continue to appeal to travelers who go beyond consuming global products and travel as fans, students, or practitioners of local cultural expressions—seeking the unique experience of being where something truly belongs. Choirs and vocal music also have their own circuit of cities, from **Tallinn** (Estonia) to **Llangollen** (Wales), creating strong communities around these traditions.

Many other examples can be found among passionate niche communities, from literature festivals to early music performances, experimental choreography, and spoken-word scenes. **Cultural expressions often find their place to flourish through festivals, expert gatherings, clusters of galleries, or local creative networks.** These attract both those searching for something unique and those who regularly engage with communities of shared interest, moving beyond superficial or standardized travel experiences.

Across all these domains, we find **strong identities and communities of enthusiasts shaping niche destinations.** Cultural tourism

**MANY OF THE
NEXT GREAT
CULTURAL
DESTINATIONS
WILL NOT ATTRACT
EVERYONE.**

**They will become the
global home for a
community of passion.**

is often understood through its most visible expressions — major museums, iconic monuments, world heritage sites, and large festivals—but these represent only a small part of what culture truly means. In many places, this traditional model has contributed to overcrowding, standardization, and increasingly similar experiences across cities. **As global travel continues to grow, relying solely on a limited set of well-known attractions is becoming both unsustainable and insufficient.**

In the coming decades, **cultural tourism will likely expand beyond this framework toward more specialized, participatory, and place-based experiences.** Around the world, passionate communities are devoted to practices such as ceramics, contemporary dance, design, comics, or craft techniques rooted in specific places. While these may seem minor compared to mass attractions, they often attract global networks of enthusiasts willing to travel long distances to learn, practice, or immerse themselves.

What makes these forms of cultural tourism particularly valuable is that they are inseparable from the identity of places. Ultimately, **the future of cultural tourism may lie less in replicating iconic attractions and more in rediscovering cultural specificity.** As travelers increasingly seek meaningful experiences and deeper engagement with local cultures, niche traditions, creative communities, and living practices will play a growing role. In this emerging landscape, **the most compelling destinations will not necessarily be those with the largest monuments, but those that succeed in revealing and sharing what is truly unique about their cultural life.**

Sports tourism: Practice as a catalyst for place attachment

On a global scale, sports tourism already represents between 10% and 12% of international tourism (UN Tourism), with growth rates higher than those of conventional tourism. According to recent estimates, the segment is growing at an annual rate of around 17%, driven by large events, international leagues, urban marathons, sports festivals, and hybrid experiences that combine culture, entertainment, and sport. It is not just about attracting visitors, but also about activating local economic sectors, extending the average length of stay, and reducing the seasonality of demand.

Cities are realising that sports infrastructure, public space, and event calendars are strategic resources, not merely equipment for local use. Stadiums, ports, urban circuits, beaches, parks, and streets become stages capable of generating their own narratives, projecting a city's identity, and attracting global audiences. **The value lies not only in the event itself, but in its ability to connect with local identity, activate communities, and leave lasting legacies** in economic, social, and urban terms.

In the context of tourism saturation and increasing competition among destinations, cities are beginning to rethink tourism not so much as a matter of volume, but of strategic value. In this shift, **sports and live events are becoming some of the most powerful assets for transforming urban economies, diversifying audiences, and strengthening city identity.**

Tourism linked to sport and major events has a key advantage over other tourism models: **it attracts specific and highly segmentable audiences**, with a greater propensity to spend and less dependence on traditional seasonality. International sporting events, urban competitions, and hybrid festivals generate concentrated peaks of demand, but also opportunities to build year-round agendas combining sport, culture, gastronomy, and innovation.



Rather than replicating major international successes, **the challenge for cities is to identify what kinds of events — and what scale — best fit their resources, economic fabric, and communities.** In this sense, original bold, or hybrid projects, somewhere between sport, culture, and spectacle, deserve attention not because of their size, but because of their capacity to redefine urban tourism.

Some sport-related destinations offer place-based examples of how to combine small or remote places with world-renowned brands, especially where there is a highly specialised activity, unique natural conditions, and an international community of practitioners. **Nazaré** (Portugal) and surfing, **Tarifa** (Spain) and windsurfing, **Mallorca** (Spain) and cycling, **Kalymnos** (Greece) and sport climbing, **Dahab** (Egypt) and freediving: these are all well-known examples of how the best in a field can also help shape the best place for that field. A destination does not need to attract all tourists — only the right ones for a particular niche. In each case, the destination did not simply benefit from natural conditions; it built a reputation through the alignment of local policy, entrepreneurial initiative, and the commitment of specialised communities that helped position the place on the global map of their discipline.

This logic also applies to major endurance events such as city marathons, which have become powerful niche tourism drivers. Races such as **Boston**, **Berlin**, or **Sydney** attract tens of thousands of runners and even larger numbers of accompanying visitors each year, turning sport participation into a travel motivation. **For these destinations, the goal is not to attract everyone, but to become the global meeting point for a specific community of passion.** In this sense, successful sports destinations do not compete for the largest number of tourists; they compete to become the most authentic and respected stage for a particular activity.

This trend not only works for high-performance sports performers, but also for a growing interest in wellness and health, both drivers or major shifts in consumption and expenditure patterns around the world. According to the Global Wellness Institute, **the global wellness economy reached \$6.3 trillion in 2023 and is projected to exceed \$8.5 trillion by 2027**, with wellness tourism alone expected to approach \$1.3 trillion globally. This growth shows how travel increasingly intersects with personal wellbeing, preventive health, and lifestyle transformation. **Rishikesh** (India) is known as the capital of yoga, **Baden-Baden** (Germany) is a traditional thermal spa and healing baths destination, or **Jeju Island** (South Korea) as a healing place enjoy a reputation for those willing to pay for the best experience. Again, a distinctive natural asset or singular opportunity is in the core business of travel destinations not seeking massive figures of visitors, but long-stay visitors eager to connect with local uniqueness.

There are many **practices, rituals, traditions, or forms of care rooted in local identity that can become powerful global draws with the support of strong storytelling and compelling narratives.** Increasingly, travellers are looking for experiences that go beyond leisure and consumption, seeking instead forms of personal transformation, self-development, or mental wellbeing. Learning experiences and immersive journeys are growing motivations for travel, and all of this forms part of the wider wellness economy — one of the major drivers of value change in the world today.

This is why meditation retreats, detox programmes, craft workshops, or pilgrimage walking routes are giving more destinations a place in the global movement of travellers, offering them a chance to enrich the world through their unique proposition of particularity.

WHAT WERE ONCE SPORTS FACILITIES ARE NOW STRATEGIC ASSETS:

sport practice, public space, and events are becoming key levers to redefine tourism, strengthen identity, and create lasting urban and community value.





Extended views by our guest expert

Yeon Sue Park Anthropologist Founder of Culture Matters

Anthropologist, Founder of Culture Matters. She has worked on over 10 national projects on sustainable tourism programs for the Korean government, bringing a citizen-centered perspective to policy design, and holds a master's degree in Applied Anthropology to cultural and social mutation in Université Lumière Lyon II, and bachelor's degrees in Cultural mediation.



Anteverti: From an anthropological perspective, why has traveling or being a tourist become almost a vital need in contemporary society?

Yeon Sue Park: To answer this question, what comes to mind is Appadurai's reading of modernity (1996). He describes modernity as a landscape shaped by flows and circulation — of capital, media, people, technology, and ideas.

Within this framework, tourism can be understood less as an expression of individual desire, and more as a natural consequence of this very structure of flows.

And among these flows, I believe media plays a particularly influential role. Through films, television, and now social media, distant places are constantly entering our everyday lives. These representations do more than inspire curiosity, they normalize the idea that places beyond our immediate environment are accessible, movable, and even temporarily "belonging" to us. In the age of social media, this dynamic has only intensified.

“What tends to leave the most lasting impression in travel is an unexpected human connection — what we might call rapport.”

What kinds of experiences or elements are most likely to leave a lasting impression in a visitor's memory?

What tends to leave the most lasting impression in travel, I believe, is an unexpected human connection — what we might call rapport.

I see this as closely related to anthropological fieldwork. One of the things that distinguishes anthropology from other social sciences is that the researcher's own emotions and presence are not a contamination to be eliminated, but an inevitable part of the process. In fieldwork, researchers do not remain distant observers; they enter into relationships with the people they study. Through this process, they build rapport, and it is within these relationships that the deeper narratives of a place - what we call culture - begin to emerge. Because of this process, the researcher's own identity inevitably shapes what they see and how they interpret it, which is why reflexivity becomes an important part of anthropological practice.

Travel works in a similar way. You can form a kind of rapport with a place itself. But when a person enters that equation — an unexpected conversation, a moment of genuine kindness, a brief but real human connection — the experience shifts from observation to relationship, and is far more likely to stay with you over time.

“I think that what we're really looking for through tourism is the everyday narratives of others, how other people live — even if only for a short time.”

In your opinion, does culture matter when we talk about leisure and tourism? Why?

Absolutely. This connects directly to everything we've discussed earlier.

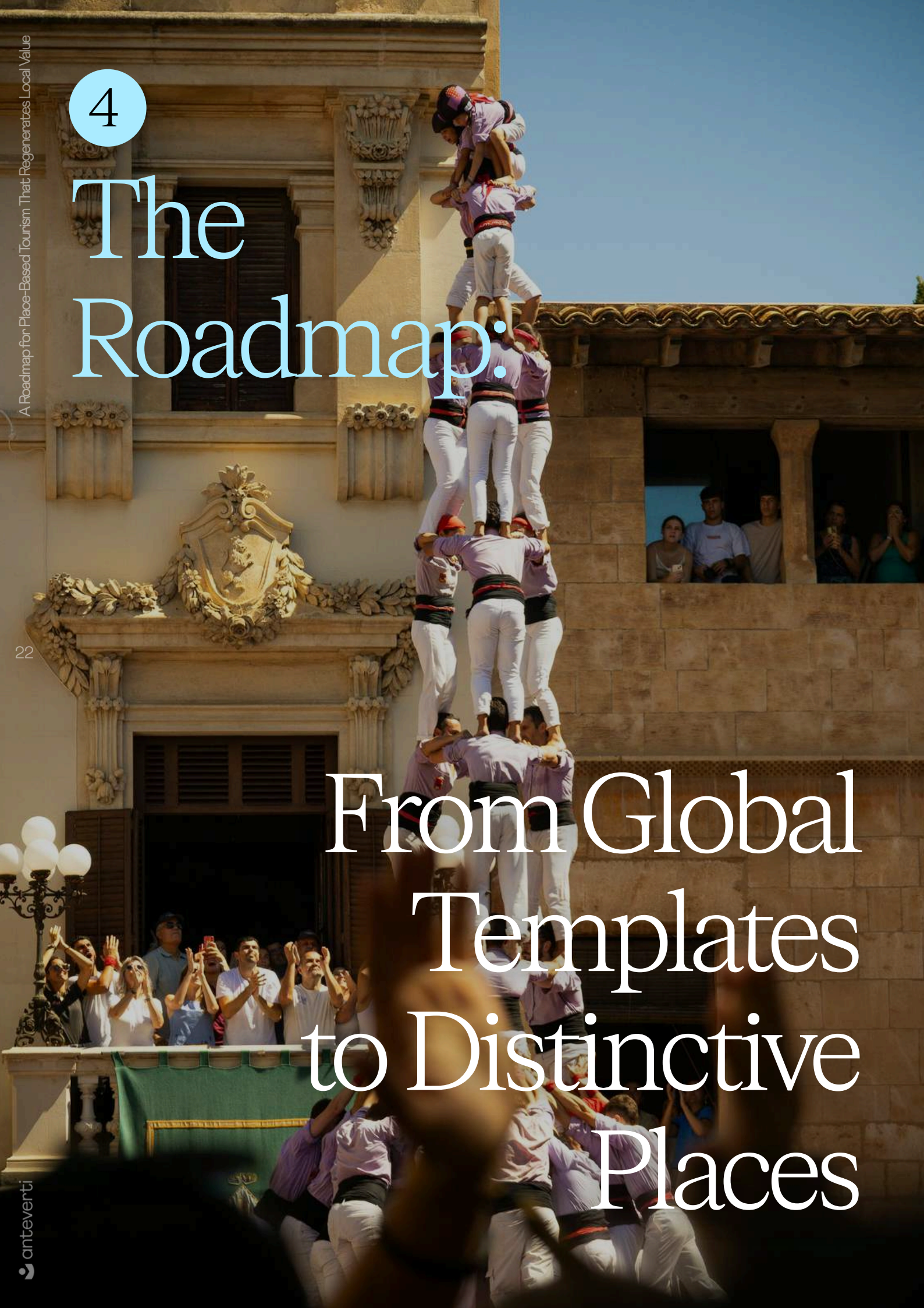
What circulates globally - whether capital, media or ideas — does not move on its own. It is carried by people, and people are beings who carry culture with them. In this sense, what is truly circulating is not just information or resources, but culture itself.

We often say we travel to discover another culture. But what does that actually mean? I think what we're really looking for is the everyday narratives of others - what they eat for breakfast, how people interact, how they respond to climate, how the architecture reflects their environments. These seemingly ordinary elements, when experienced together, form what we recognize as culture. Tourism, then, is not just about visiting a place, but about experiencing how other people live, even if only for a short time.

4

The Roadmap:

From Global Templates to Distinctive Places



The future competitiveness of tourism will depend less on scale and more on distinctiveness. In a world full of interchangeable offers, the places that will stand out are those able to be unmistakably themselves. What differentiates a city or a territory is not only its attractions, but the coherence between its landscapes, communities, traditions, and everyday life. Being local is no longer a limitation; it is an advantage. And in the coming years, the capacity to reveal and protect that advantage will become a defining strategic asset.

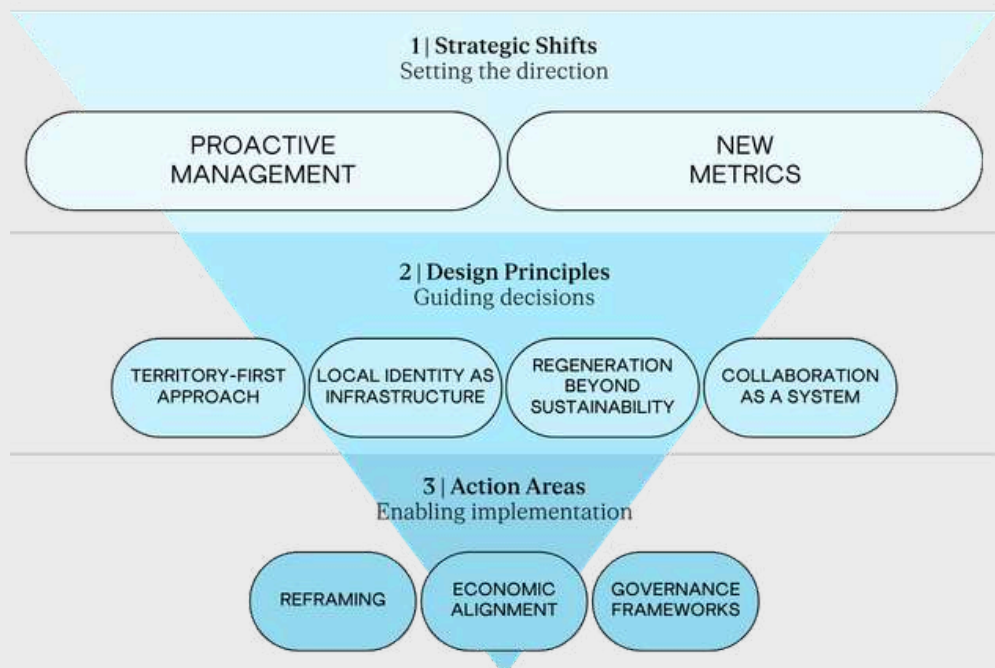
How can destinations move in that direction? What should they prioritise, and where should they start? **The transformation of tourism towards a place-based model — where local value is created and regenerated — cannot rely on isolated actions or fragmented strategies.** It requires a coherent framework that connects long-term vision with concrete decision-making, and that sets a clear path through specific actions.

The roadmap we propose for destinations aiming to embrace a **place-based tourism model is structured across three interconnected levels.** It is intended to offer a framework for building a new generation of local practices around tourism, useful for both public policymakers and private actors. **Adaptable to different contexts and levels of maturity,** it should be read as a guiding structure that includes:

- **Two strategic shifts** for the coming years, defining the overarching direction for places and destinations
- **Four design principles,** guiding the development of strategies and actions aligned with a place-based approach
- **Three action areas,** translating this vision into implementation and illustrating where destinations can begin

Together, these elements provide a way to move from abstract ambition to tangible change, aligning tourism development with the realities, capacities, and identity of each territory.

A Roadmap for Place-Based Tourism That Regenerates Local Value



4.1

Strategic Shifts Towards 2030

From reactive to proactive management

For many years, **tourism growth was largely treated as a market-driven phenomenon that cities simply had to accommodate.** Yet the rapid expansion of global travel has revealed the limits of this laissez-faire approach, particularly in destinations facing overcrowding, infrastructure pressure, and growing social tensions.

Leading cities and territories are now adopting more proactive destination strategies that allow them to shape tourism rather than simply react to it. This includes managing visitor flows through digital tools, economic incentives, and carrying-capacity management; regulating tourism activities in specific urban areas; and aligning tourism policies with broader goals such as mobility, housing, and environmental sustainability. **Tourism is no longer only about promotion. It is about the strategic management of territorial resources.**

The pressure generated by tourism growth illustrates why this shift is necessary. Tourism is one of the world's fastest-growing sectors, and in countries like Spain it represents a central pillar of the national economy — while also increasing pressure on infrastructure and public services.

The traditional model has been based on a simple dynamic: visitors arrive at a destination, consume experiences and services, and then leave. But **tourism now requires a more sophisticated relationship between visitors and destinations.** Travellers can increasingly be understood not only as consumers, but also as temporary participants in the life of a territory.

This new perspective encourages forms of tourism that connect visitors more deeply with local culture, communities, and environmental challenges. Programmes that involve visitors in cultural preservation, environmental restoration, or community-based experiences show how tourism can evolve toward more meaningful engagement.

The goal is to **transform the role of visitors from passive consumers into actors who contribute positively** to the places they visit.

One of the most sensitive and unavoidable debates around tourism today concerns its impact on **housing**. In many cities, the rapid expansion of short-term rentals and tourism-related real estate investment has intensified pressure on affordable housing and residential availability. The tension between tourism growth and the right to housing has become a central issue in urban policy debates.

As a result, cities are increasingly adopting **stronger regulatory frameworks for tourism accommodation, including stricter licensing systems, caps on short-term rentals in saturated areas,** and improved monitoring mechanisms. The emerging consensus is clear: tourism cannot undermine residential life. Protecting access to housing is not only a social necessity, but also a long-term strategy for preserving the identity and liveability of destinations.

More than a basic requirement or strategic step, it is essential that local governments actively guide tourism development in line with the public interest. This means **moving beyond their traditional role as promoters or regulators and embracing a more proactive function as orchestrators of the territorial ecosystem:** coordinating stakeholders, facilitating partnerships among local and non-local actors, establishing clear frameworks for the use of space and material, immaterial, and natural resources, and ensuring that tourism contributes to the collective vision of the territory. Places suffering the negative effects of tourism may sometimes feel that these dynamics are unavoidable or driven by forces too large to manage. Yet **challenges can become opportunities when local authorities fully embrace their capacity to shape change.**

From volume to value: new metrics

The next decade will redefine how cities measure tourism success. For decades, destination performance has been assessed through traditional indicators such as arrivals, overnight stays, and total visitor expenditure. While these metrics remain relevant, they no longer capture the full impact of tourism on cities. **Destinations need to explore new indicators aligned with regenerative tourism models — metrics capable of measuring tourism’s real contribution to local ecosystems.** “More is better” is no longer a meaningful long-term strategy. What gets measured is what gets managed, and those involved in the tourism value chain will increasingly need to adopt metrics suited to a more complex tourism bottom line.

These new metrics seek to understand how tourism affects environmental sustainability, the distribution of economic benefits across neighbourhoods, the quality of employment generated, and residents’ perceptions of tourism activity. Measuring tourism through impact rather than volume allows cities to evaluate whether the sector is strengthening the urban fabric or putting it under pressure. In this sense, tourism policy is gradually moving closer to broader urban governance frameworks, in which economic activity must also generate social and environmental value.

By shifting the focus from sheer visitor numbers to the value created through social cohesion, civic engagement, and territorial regeneration, tourism can become a catalyst for sustainable development, breathing life into communities and strengthening the resilience of landscapes. This includes not only visitors from elsewhere, but also residents who experience their own cities and territories as spaces for leisure, pleasure, and meaningful engagement. To support this shift, **territories need to map their natural, cultural, and social assets, refine resources, and build effective tourism governance.** By identifying challenges and opportunities across economic, social, environmental, cultural, and territorial dimensions — and prioritising actions according to impact, feasibility, and local relevance — cities can foster a sustainable, resilient, and regenerative tourism model that benefits both communities and the environment.



Defining new indicator systems should focus on the evolution of values and principles such as the strength of the territorial system, the strength of local identity, regeneration, spatial balance, and governance, among others. Eventually, even a synthetic index could be useful to express territory-tourism compatibility: a composite measure of social balance, environmental regeneration, local governance, and economic autonomy.

Some possible indicators include:

- Ratio of local suppliers in the tourism value chain
- Territorial distribution of tourism activity
- Diversity of territorial narratives
- Number of tourism initiatives linked to territorial maintenance
- Visitor/resident ratio by neighbourhood or municipality
- Economic value retained locally

This is only a short illustration of less conventional indicators that could be used in tourism strategies and policies. **A more detailed indicator system should always be tailored to each context and objective.** Data will not always be readily available, and proxies will sometimes need to be used — especially when the aim is to measure qualitative values or long-term processes. **A new culture of tourism indicators is emerging,** and it will require innovative approaches to both data collection and evaluation.

4.2

Design Principles to Build Distinctive Places



DESIGN PRINCIPLE #1

Territory-first approach

When a place decides to design tourism policies and experiences, it should begin from a fundamental premise: the aim of tourism should not be to maximise visitor flows, but to improve the overall quality and condition of the territory. This means understanding tourism according to its contribution to social wellbeing, environmental quality, and cultural vitality, rather than solely by its capacity to generate arrivals or revenue. Easy to say, perhaps — but this implies a completely different understanding of tourism from the one practised by many cities and destinations around the world. In practice, it means **designing experiences aligned with the culture, rhythms, needs, and capacities of local systems and resources: distributing flows across space and time, supporting diversified local economies, and reinforcing the everyday use of places by residents.**



The key shift is that the starting point is not the creation of an attractive product, but **the strengthening of territorial value: landscape management, cultural continuity, local economy, ecological awareness, and social infrastructure.** Tourism should become the interface through which these systems gain visibility, resources, and long-term resilience.



DESIGN PRINCIPLE #2

Local identity as soft infrastructure

Local identity — the set of knowledge, practices, cultural landscapes, languages, memories, and ways of life that characterise a place — should be treated as an immaterial but strategic form of infrastructure. Like physical infrastructure, this layer requires awareness, care, and investment. From this perspective, both public policy and tourism initiatives should aim to activate and reinforce these deeper layers of the territory, rather than reduce them to decorative elements or simplified narratives for visitors. Designing experiences from identity means working with cultural actors, local producers, communities, and living places so that tourism helps reveal, sustain, and evolve real cultural practices instead of replacing them with standardised representations.



The key shift here is to **acknowledge that tourism should no longer be designed around what is attractive to outsiders, but around what strengthens the internal coherence, knowledge, and practices that make a place unique in the first place.**



DESIGN PRINCIPLE #3

Regeneration beyond sustainability

Moving beyond the sustainability paradigm means **going further than simply reducing negative impacts**. It means adopting an active approach to territorial regeneration. Tourism should be conceived as **a force capable of repairing, strengthening, or reactivating social, economic, and ecological systems that have been weakened**. In practical terms, this can translate into experiences that contribute to landscape restoration, the continuity of traditional agricultural practices, the recovery of heritage spaces, or the strengthening of community networks. From a public policy perspective, it involves directing incentives, regulations, and planning frameworks toward initiatives that generate tangible benefits for the territory across economic, social, environmental, and cultural dimensions. The visitor thus shifts from being a passive consumer of experiences to becoming, directly or indirectly, a participant in the care and improvement of the place they visit.



The key shift is **from managing tourism's impacts to actively directing tourism toward territorial improvement**. In practical policy terms, this means that tourism strategies no longer focus primarily on reducing damage through limits, regulations, or efficiency measures, but on channelling tourism demand, investment, and experiences toward restoring landscapes, strengthening local economies, and sustaining cultural practices. Tourism becomes a policy instrument for territorial improvement, not just an activity to regulate.



DESIGN PRINCIPLE #4

Collaboration as a guiding principle

Collaboration is a fundamental principle in tourism. **Transitioning toward a sustainable, resilient, and regenerative tourism model depends not only on local assets, but also on the capacity of territories to coordinate effectively with all stakeholders** — local, external, and place-related. Private-sector actors, local producers, cultural institutions, and many others bear significant responsibility for the impacts their activities have on territorial change and attractiveness. All tourism-driving institutions, public and especially private, have an inherent obligation to recognise the effects of their actions on tourism. Acknowledging both those impacts and their potential to improve experiences for residents and visitors is essential.

Those who benefit from tourism also have a duty to **collaborate actively with society and government in order to develop innovative solutions, methods, and initiatives aimed at minimising negative impacts and maximising territorial assets**, especially for local populations. Success depends not only on

local assets, but on the capacity to coordinate stakeholders, align surrounding territories, distribute visitors strategically, enhance overall attractiveness and value, and deploy innovative tools to manage tourism flows, demand, and resources effectively.

The key shift lies in **adopting a shared-responsibility approach and translating it into structured action plans**. This requires building a comprehensive matrix of the assets, resources, and values of nearby territories, neighbourhoods, and localities. It calls for collaborative work to identify environmentally and socially vulnerable points, map high-value resources, and use data-driven tools to manage visitor flows, redistribute demand, and optimise communication in a strategic way.

4.3

From Principles to Action: Where to Start

These principles can inform policymaking and take the form of actionable initiatives and projects, among others:

Reframing: Changing mindsets and goals

Reframing means **opening a new narrative and strategic stage in how tourism is understood and managed**. It does not mean starting from scratch or disregarding what already exists, since many local actors, initiatives, and projects are — and will remain — essential; they may simply require a different perspective in order to be fully understood and effectively communicated. **Reframing is about sending clear political and institutional signals that a different mindset is emerging**

— one capable of creating momentum and bringing stakeholders together around a shared direction. In practice, this can be supported by tools and strategies that decode real territorial identity, map capacities, conduct tourism pressure and carrying-capacity assessments, or create a local stakeholder platform that brings together community actors, businesses, and institutions to shape the future of tourism collectively.

Economic alignment: Local value retention

Economic alignment means **organising the tourism economy so that it supports local systems instead of functioning as a separate sector**. This includes implementing local value-chain programmes that encourage partnerships between tourism businesses

and other local economic actors, so that a larger share of visitor spending remains and circulates within the territory. At the same time, public authorities need to define clear incentives, regulations, and management tools that guide how tourism develops.

Governance frameworks: From sector management to system governance

A governance framework, in this model, means **treating tourism as part of the wider territorial system rather than as a separate sector**. In practice, this requires connecting tourism with other local policy areas such as urban planning, culture, environmental management, mobility, and local economic development, so that tourism decisions support broader territorial goals. It also

means setting up clear **indicator systems that help municipalities track how tourism affects the territory over time**. Finally, governance depends on **strong partnerships** between public institutions, local businesses, cultural actors, community organisations, and environmental groups — creating the collaboration needed to guide tourism in line with territorial priorities.

5

Take Action:

What
This Insight
Means
for You

Tourism today is no longer about how many visitors a city can attract, but about the value those visitors create for the place and its people.

P

laces will succeed if they think less about how much, and more about for whom and why. Places will succeed if they understand that what we usually call tourism is a function in which foreigners and visitors are part of a fluid dynamic of people living their lives in a specific place — moving, travelling, spending time in leisure and cultural activities, enjoying life in multiple ways. **Tourism today is no longer about how many visitors a city can attract, but about the value those visitors create for the place and its people.** And that value does not come from imitation; it comes from identity.

Cities and territories that will succeed in the long term are those that understand that their culture, heritage, creativity, and communities are their greatest assets. When tourism grows from these roots, it does more than generate economic activity: it strengthens local identity, supports communities, and creates experiences that cannot be replicated anywhere else. **In a world where many destinations compete for attention, authenticity becomes the most powerful form of competitiveness.** The future of tourism therefore belongs to the places that invest not only in attracting visitors, but in revealing and celebrating what makes them unique



In this insight, we invite readers to rethink how tourism can reinforce territories, destinations, places, venues, landmarks, and sites — exploring its potential as a territorial policy and as a tool to strengthen identity and uniqueness, so that tourism can rebuild a sense of social legitimacy.

This report is an invitation to public authorities, decision-makers, private actors, investors, and entrepreneurs to embrace a new paradigm — one that will require strategic thinking, creative policymaking, and leadership capable of acting at the local level.

About the Authors



About the Authors



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About Anteverti

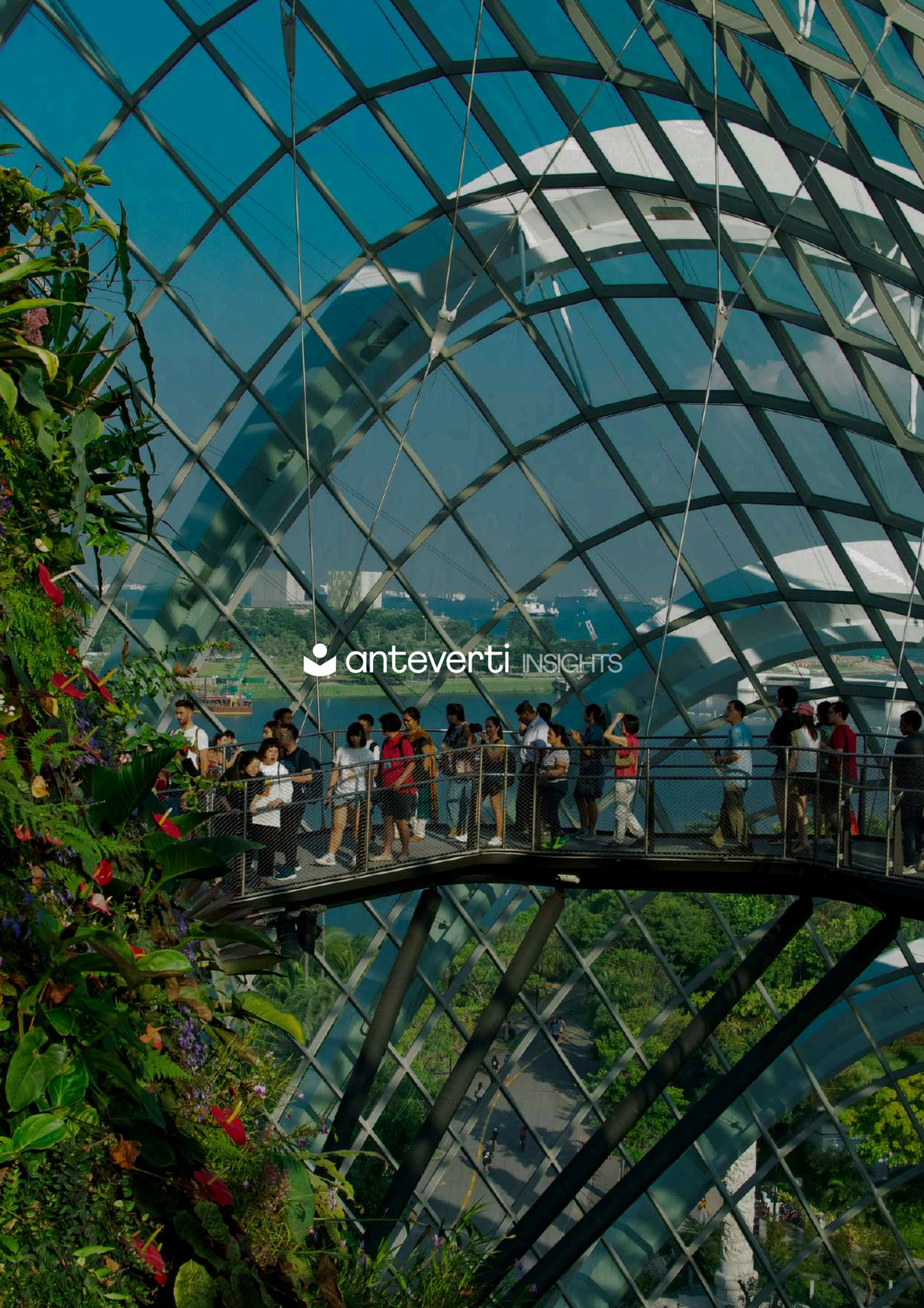


Based in Barcelona, Anteverti helps cities, governments, and companies transform innovation, sustainability, and creativity into tangible impact and future opportunities.

Since 2011, it has operated in 24 countries across five continents, collaborating with organizations such as the United Nations, the World Bank, the Government of Argentina, and FC Barcelona. It has supported cities like Seoul, Barcelona, Santiago de Chile, Marrakech, and Madrid in finding innovative urban solutions.

Anteverti curates the Smart City Expo World Congress, a global reference event organized by Fira de Barcelona. Its multidisciplinary team combines expertise in urban innovation, sustainability, economic development, and international projection, offering strategic vision, operational support, and transformative ideas.

Believing that innovation arises from asking the right questions and connecting with the environment, in 2025 it launched its Knowledge area to generate insights and analysis in collaboration with key stakeholders. Since 2016, it also operates Citiestobe, a laboratory of ideas on cities and innovation.



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