



**Socio-economic and cultural  
impact of tourism in the project area**

*Interreg Project “Regenerate: regeneration paths to go beyond sustainability”*

*Work Package 2: Monitoring the impacts of tourism policies*

*Task 2.2: Socio-economic and cultural impact of tourism in the project area*

***Deliverable: Report on the comparative analysis of the socio-economic and cultural impact of the four tourism destinations taking part in the project***

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*Index*

<b>1. Introduction</b>	<b>3</b>
1.1. Regenerative approaches to tourism for a prosperous future	3
1.2. The Interreg Regenerate project	3
<b>2. Objective of the analysis and context of WP2</b>	<b>4</b>
<b>3. Methodology</b>	<b>6</b>
3.1. Involvement of residents	6
3.2. Involvement of operators	7
3.3. Involvement of tourists	7
<b>4. Tourism contexts</b>	<b>8</b>
4.1. Arabba and Colle Santa Lucia	8
4.2. Alta Badia	8
4.3. Tarvisiano	8
4.4. Nassfeld-Pressegger See/ Lesachtal/ Weissensee (NLW)	9
<b>5. Evidence emerged from the territories</b>	<b>9</b>
5.1. Mobility	10
5.1.1. Common points between destinations	10
5.1.2. Diverging elements	11
5.2. Housing issue	12
5.2.1. Common points between destinations	12
5.2.2. Diverging elements	14
5.3. Sustainable career paths	14
5.3.1. Common points between destinations	14
5.3.2. Diverging elements	16
5.4. Local trade	16
5.4.1. Common points between destinations	16
5.4.2. Diverging elements	18
5.5. Interconnections between themes	18
<b>6. Towards a more regenerative tourism</b>	<b>19</b>
6.1. Mobility as a common good	20
6.2. The right to housing	21
6.3. A job that offers the possibility to "flourish"	22
6.4. The local supply chain as care for the territory	23
6.5. The levers of change	24

## 1. Introduction

### 1.1. Regenerative approaches to tourism for a prosperous future

Given the continuous challenges tourism faces, stakeholders must rethink their operating models. Regenerative approaches offer a future-oriented vision that goes beyond traditional sustainability, requiring a fundamental shift in mindset to put nature, communities, and places at the center of development. This approach views tourism as a complex system capable of creating multiple values and driving positive change. Key focus areas include:

5. **Nature as a stakeholder:** Nature is an active subject, not just a backdrop; it must be included in decision-making and supported in its regeneration.
6. **New ways of thinking:** encouraging creative, system-wide thinking that challenges the status quo and seeks local solutions to global problems.
7. **Places as dynamic ecosystems:** Destinations are first and foremost homes for communities; tourism must serve the well-being of these territories.
8. **Community-led development:** Communities become the protagonists of balanced and lasting tourism development, taking responsibility for territory care.

### 1.2. The Interreg Regenerate project

To achieve its objective, the Regenerate project aims to **raise awareness in the territories, activate the social fabric, and create a tourism offer** that responds to the needs of the community and the natural environment.

In addition to the main project **partners**, the Consorzio di Promozione Turistica del Tarvisiano, di Sella Nevea e di Passo Pramollo, NLW Tourismus Marketing GmbH, Cooperativa Turistica Alta Badia, and Etifor | Valuing Nature, there are others who participate intensely in the project, namely PromoTurismoFVG and Fondazione DMO Dolomiti Bellunesi. They all work together to **find a new balance between economy and nature, tourist flows, and sustainability for residents**.

The project focuses on:

- **Analysis and monitoring of the environmental, socio-economic, and cultural impacts** of the tourism policies implemented so far, with a specific reflection on the changes related to obtaining sustainability certification according to the GSTC standard.

- **Exchange of good practices**, planning of a **shared communication strategy**, and development of a "**sustainability toolkit**" for stakeholders. Within the project, the effects of tourism on the respective regions are analyzed. Cross-border cooperation allows for the exchange of good practices and promotes innovations that are environmentally respectful, economically sustainable, and community-centric.
- **A co-creation tourism laboratory for local young people**. Finally, the four destinations will try to go beyond sustainability and experiment with an innovative way of co-designing the tourism offer, with local communities, particularly young people, as the absolute protagonists.

The Interreg Regenerate project therefore offers project partners the opportunity to develop a forward-looking tourism concept that is ecologically and socially sustainable through the exchange of experiences and skills. The Interreg project is a step in the right direction to address the challenges of tourism in the Alpine regions, preserving the beauty and value of nature and culture for future generations..

## 2. Objective of the analysis and context of WP2

The Regenerate project includes a work package, or **Work Package** (WP2) **dedicated to monitoring the impacts of tourism policies** in the project destinations. WP2 includes two analyses for each territory: one dedicated to the **study of environmental impact** (*Task 2.1*) and one relating to the **social, economic, and cultural impact of tourism** (*Task 2.2*). The motivation for the creation of WP2 was the lack of detailed research and data on the impact of tourism in Alpine mountain destinations.

Task 2.2, in particular, is the core of this report. As mentioned, the objective was to measure the socio-economic and cultural impact of tourism in the four destinations involved. Through this action, the aim was to analyze the tourism phenomenon in detail in the project area, identifying the positive and negative aspects that have occurred in recent years, as well as the opportunities directly linked to the tourism supply chain that have not yet been explored. The analyses focused in particular on the **involvement of local communities**, as potential protagonists of the new tourism proposal for the area.

The partner Etifor was responsible for creating and sharing a **common methodology**, with all the information to be applied in each context but also sufficiently flexible to be adapted to different needs. Each project partner destination

was then responsible for applying (and adapting) the methodology in its territory, conducting the survey and data collection with internal staff or delegating to external professionals.

The objective of the socio-economic-cultural impact survey was the **collection of “primary” data through surveys aimed at 3 targets and relating to 4 themes linked to regenerative tourism.**

After initial brainstorming and discussion with partners, it was decided to focus on 4 topics, for which none of the four destinations currently collects information:

- **Housing issue:** perception of the phenomenon, price accessibility, comparison with the global trend, workers experiencing the problem, collection of possible solutions
- **Mobility services:** service coverage, mapping of needs, collection of possible solutions
- **Sustainable careers and new tourism professions:** professions of young people, perception of young people and employers, collection of possible solutions
- **Local trade and economic impacts in the area:** economic impacts of tourism in the destination, local supply chains, local products, collection of possible solutions

It was decided to proceed with data collection on **3 distinct targets: residents, tourism operators, tourists.** In some destinations, almost all residents work in the tourism sector, which is why for the second target, the focus will be on owners of tourism-related businesses.

The evidence collected by the individual destinations converged into **four detailed reports** which, for each destination, analyze the four key topics (housing, mobility, work, local supply chain) in light of the three mentioned targets. This report has the task of **bringing together the four reports from the individual destinations into a single document** which, by highlighting **common points and divergences** between the various destinations, arrives at providing considerations and food for thought for sustainable and regenerative territorial tourism.

### 3. Methodology

#### 3.1. Involvement of residents

For this survey, the resident population was involved in **focus groups**. A focus group is an “in-depth” interview with **a small group of people** (six to twelve) **who share common interests or characteristics and a common level of knowledge of the specific area**. An expert facilitator facilitates the discussion to obtain group opinions rather than individual responses; the final result is based on the opinion of the group as a whole. During the discussion, participants have the space to express themselves freely, while being encouraged to stay on topic. The format is flexible. The focus group lasts approximately 120 minutes. The session is normally recorded.

For the Regenerate focus groups, residents were **divided by age groups**: young people aged 18-25; young adults aged 26-40; adults aged 41-60; seniors aged 61+ years. The survey project foresaw a minimum of four focus groups (one per age group), lasting two hours each, with facilitated discussion of problems and listening to perceptions. A sample of 6-12 people per age group was required for each age group; if the number of people per age group was greater than 12, it was suggested to organize multiple parallel sessions.

The objectives of the focus group were:

- **Raise awareness** among residents on regenerative tourism issues (indirect objective)
- With respect to the 4 selected themes (housing issue, mobility services, sustainable careers and new professions, local trade), identify: **what works** in the destination; what are the **main problems**; what are the **potential solutions** proposed.

Participating residents did not necessarily have to work in the tourism sector, the important thing was that they resided in the destination and knew the territory. Each destination was free to choose the most suitable invitation method. The focus group structure was conceived as follows:

- A **plenary session**: welcome and introduction to the topic, explanation of the rules of the participatory process;

- **Group work based on age group** (if different age groups were brought together in the same event): check-in, first collection of what works and the problems;
- In-depth **discussion** of the problems;
- A second collection of **solutions**.

### 3.2. Involvement of operators

The recipients of the survey are all owners of economic activities related to tourism, divided into categories. The **Delphi method** was used for its design, foreseeing **two cycles of questionnaires via e-mail** with the same panel of interviewees. The Delphi method is a structured process for gathering knowledge and **reaching consensus** from a heterogeneous group of experts, through a series of anonymous questionnaires and continuous feedback from analysts, until the variability of responses is significantly reduced.

In the first round, both quantitative information and qualitative perceptions were collected; in the second, shorter round, the results of the first round had to be confirmed and ranked by importance, in order to converge on proposals for regenerative tourism.

The sample was made up of a panel of approximately 10-20 people, selected after a *stakeholder analysis*. To create the panel of stakeholders involved in the Delphi survey, it was first necessary to ask which were the main actors in the territory capable of providing useful information to guide the destination towards regenerative tourism.

Etifor identified some stakeholder categories and proposed a *name grid generator*. Partners were asked to draw up an initial list of all potential stakeholders in the area and subsequently evaluate them using two variables:

1. How sensitive is the stakeholder to the theme of sustainable and regenerative tourism?
2. How willing will the stakeholder be to collaborate during the two Delphi rounds?

By summing the scores for the two questions, the partners were able to identify the panel of stakeholders to involve: the top 3 from each category had to be contacted.

### 3.3. Involvement of tourists

The questions were conceived around the 4 topics mentioned above, mainly to be added to existing customer surveys. The survey was aimed at tourists staying in hotels and passing through information offices. This is a **non-probability voluntary response survey**; a QR code with a brief description had to be left on the information desks of hotels and information points. The survey was open during the tourist season, both summer and winter.

## 4. Tourism contexts

### 4.1. Arabba and Colle Santa Lucia

Located in the heart of the Belluno Dolomites and part of the UNESCO site, this destination combines a strong rooting in Ladin culture with a high-level sporting vocation. With a limited resident population, the territory manages important tourist flows (almost 420,000 overnight stays in 2024), characterized by increasing internationalization. The offer is driven by the strategic position in the **Dolomiti Superski** circuit and on the **Sellaronda**: in winter the Arabba-Marmolada area attracts expert skiers thanks to direct technical connections, while in summer the Dolomite passes (Pordoi, Campolongo, Giau) become the hub for road cycling and MTB, hosting globally renowned events such as the Maratona dles Dolomites. Seasonality is markedly bimodal, with an accommodation offer that balances hotels and a widespread non-hotel sector, supporting both winter white weeks and active summer tourism.

### 4.2. Alta Badia

An excellent destination in the Autonomous Province of Bolzano, Alta Badia positions itself as a prestigious Alpine destination, capable of generating over 2.4 million annual overnight stays with a high average stay (4.9 nights). The territory, which includes key municipalities such as Corvara and Badia, makes the quality of services its strong point, offering a mix of accommodation ranging from family-run guesthouses to 5-star hotels. The destination's identity rests on two pillars: an extraordinary natural heritage (with two UNESCO natural parks, Puez-Odle and Fanes-Senes-Braies) and a strong **Ladin hospitality culture**, expressed in gourmet gastronomy and major sporting events. Strongly oriented towards sustainability, Alta Badia obtained **GSTC certification** in 2022, integrating environmental protection with

active tourism (skiing and cycling) which attracts a clientele that is over half international.

### 4.3. Tarvisiano

The Tarvisiano represents a cultural and geographical crossroads in the far north-east of Italy, offering a varied tourist experience that ranges from the Julian Alps to the Fusine lakes. With approximately 190,000 arrivals in 2024, the destination stands out for a heterogeneous and cross-border visitor profile. The offer is "four seasons": winter is dedicated to skiing (alpine and Nordic) and ski mountaineering, while summer enhances **cycle tourism** (thanks to international cycle paths), hiking and relaxation on the lakes, real "mountain beaches". A distinctive element is the cultural vibrancy, with events such as the **No Borders Music Festival** acting as strong attractors. Governance is supported by a synergistic network between local consortia and regional DMOs, which work to integrate a fabric of micro-businesses and outdoor services into an increasingly structured offer. The destination obtained the GSTC certification for being a sustainable tourism destination.

### 4.4. Nassfeld-Pressegger See/ Lesachtal/ Weissensee (NLW)

This region of Carinthia (Austria) is a mature and complex destination that brings together three distinct souls: the ski and lake area of Nassfeld-Pressegger See, the pristine valley of Lesachtal, and the Weissensee natural park. With approximately 2 million annual overnight stays, NLW offers an integrated tourism product ranging from **intensive sport** (skiing and water activities) to "**slow**" **tourism** (Slow Food Travel, Mountaineer Villages). The destination has placed sustainability at the center of its development strategy, obtaining the Austrian Ecolabel and participating in soft mobility and energy management projects (KEM). **Cross-border cooperation**, particularly with the neighboring Tarvisiano through Interreg projects, strengthens its positioning as a "World of Mountains and Lakes", aiming for a balance between large tourist volumes and the protection of the local lifestyle.

## 5. Evidence emerged from the territories

As already explained in chapter 2, this report, starting from the four reports prepared by the individual partner destinations, will highlight the points of convergence and points of divergence between the various opinions expressed. Chapter 5 is divided based on the four themes at the center of the analysis: mobility, housing issue, sustainable career paths, local trade. This evidence will be functional to the

expression, in chapter 6, of considerations and food for thought for a sustainable and regenerative territorial tourism.

## 5.1. Mobility

### 5.1.1. Common points between destinations

- **Predominant dependence on private cars**

A transversal evidence is the massive use of private cars by tourists to reach the destinations and for internal movements. For example, in Arabba-Colle the car is the predominant means for arrival (74.15%) and for internal movements of Italians (32.8%). In the Tarvisiano, 67.6% of tourists arrive by car and 64.0% use it for internal movements. In NLW, approximately 77% of tourists arrive by car, using it locally in 63% of cases too. In Alta Badia, 81% of tourists travel by private car.

- **Inefficiency and insufficiency of local public transport**

All stakeholder groups (tourists, operators, residents) complain about low frequency and coverage of local public transport.

- In Arabba-Colle, tourists express "clear dissatisfaction with the frequency" (approx. 63.2%) and "insufficient coverage" (approx. 63%). Operators highlight "public transport timetables incompatible with working shifts" and the "lack of public transport services".
- In the Tarvisiano, the evaluation of local public transport is "generally negative" for frequency and coverage. Residents of Tarvisio report "inefficiency of local public transport", while in Venzone local public transport is "inefficient outside school service".
- In NLW, the majority of tourists (51%) judge the frequency to be "rather rare or rare" and the coverage "patchy" (53%). Operators complain about "less flexible and widespread" mobility.
- In Alta Badia, however, satisfaction with local public transport is "moderately positive but not excellent", and residents complain about "limited timetables and coverage" and the "last mile problem" (i.e. the difficulty of reaching some final destinations with public transport). It should also be considered that the availability of local public transport is subject to seasonality.

- **Desire for enhanced local public transport and alternative solutions**

A strong convergence is the need to enhance local public transport with

improved frequencies and timetables, and/or to develop alternative mobility solutions. Where it does not reach, private transport enhancement solutions are proposed: not only taxis, but also the private tourist operator/entrepreneur (e.g. hotelier) who provides shuttles for their employees (it is interesting how this is suggested by Arabba-Colle, while others focus on public enhancement - lobbying the public remains the most strategic and feasible option). Multiple suggestions include shuttles, micro-public transport, car sharing, and the introduction of cards/concessions. Alta Badia also suggests considering cable cars as a mobility service.

- **Concerns about traffic and noise**

Residents and sometimes tourists express concern about excessive vehicular traffic and noise, especially in high season.

- In Arabba-Colle, tourists suggest "reducing excessive and noisy vehicular traffic" (particularly motorcycling on the passes), and residents over 40 complain about the "uncontrollable motorcycle traffic" in the summer months. Despite these observations, no solutions (severe or otherwise) emerge to act on the issue of traffic on the passes and/or inhabited centers as happens instead in Alta Badia.
- In Alta Badia, both tourists and residents perceive a "clear and widespread problem of excessive traffic" on the Dolomite passes and in inhabited centers. The high consensus recorded for traffic regulation measures by tourists is interesting ("Interest in traffic limitation" average 4.3 out of 5) – on the part of residents, the most "severe" pass management measures come from the young age groups 26-40 and 41-60: closures (even for time slots), introduction of paid tickets, contingents.
- In NLW, residents highlight the "greater traffic load during the tourist season", with "increased dust and noise pollution" at critical points.

- **Proposals for mobility cards**

The idea of cards or concessions for the use of public transport is widespread. Tourists in Arabba-Colle propose "cards and concessions". Residents of the Tarvisiano suggest a "free mobility card" extended also to residents. Residents in Alta Badia note the "disparity in costs" of the Guest Card which is free for tourists but paid for them, proposing extension or elimination for equity.

### 5.1.2. Diverging elements

- **Perception of traffic impact**

Although traffic is a problem, its perception varies in intensity. In NLW, tourists and residents agree that the general road situation is "rather relaxed", while in Alta Badia and Arabba it is perceived as "excessive".

- **Perception of the quality of local public transport**

In NLW, residents rate local public transport significantly better than tourists. This difference could derive from different expectations or from daily use that offers a more realistic perspective. Furthermore, residents recognize the fact that an improvement in public transport is also due to tourism, which also benefits the residents themselves.

- **Discrepancy between intention and behavior (Alta Badia)**

In Alta Badia, a "clear discrepancy between perception and actual behavior" emerges: despite tourists showing "broad consensus for sustainability measures related to mobility" and for the enhancement of local public transport, 81% of them travel by private car. The use of local public transport, like others, is also a cultural problem (dependence on private cars) as well as structural (lack of services).

- **Specificity of residents' complaints**

Residents often express more granular and daily-life related problems. In the Tarvisiano, "road maintenance", disorganization of connections with the railway station and isolation of hamlets are highlighted. In Alta Badia, there are complaints about "foreign drivers with poor knowledge of the territory or 'unreliable'" and "non-transparent payment practices".

- **Resignation vs. proactivity**

In Arabba-Colle, younger residents (under 40) show a "certain resignation" regarding mobility, not proactively addressing the problem.

## 5.2. Housing issue

### 5.2.1. Common points between destinations

- **High costs and scarcity of accommodation**

This is the most felt and unanimous challenge for residents and operators in all areas. Purchase and rental prices are judged "excessively high" and the availability of accommodation for residents and workers is "scarce".

- In Arabba-Colle, operators and residents are "unanimous in considering the cost of rent high". Residents complain about the "high value of

properties and the cost per square meter" and the "impossibility for locals to buy houses".

- In the Tarvisiano, residents of Tarvisio cite "Excessively high property prices (purchase and long-term rental)", and in Venzone "difficulty in finding rented housing" with "rising prices".
- In NLW, the availability of affordable accommodation for employees is "scarce". Residents mention the "price (property, rent, land)" as the main negative influence.
- In Alta Badia, the housing issue is "the main and most felt challenge for all resident age groups", with "total convergence on the excessive cost of housing" and the "scarcity of available apartments".

- **Negative impact of tourism and second homes**

The tourism supply chain, the conversion of properties into short-term rentals, and the proliferation of second homes are identified as the main causes of the housing problem.

- In Arabba-Colle, residents denounce the "sale of houses at too high prices (favoring outsiders)", "rentals only for tourists" and the "loss of identity due to second homes".
- In the Tarvisiano, there is talk of "new constructions oriented towards tourist rental", "increase in second homes" and how it is "economically more advantageous to allocate properties to Airbnb".
- In NLW, the "large number of second homes" is a significant negative influence.
- In Alta Badia, the "strong presence of second homes" and the "massive acquisition of apartments by large hotels for their employees" reduce the offer for residents.
- Solutions: recovery of vacant properties and accommodation for employees/locals

A broad convergence is found in the proposal to recover and mobilize vacant or degraded properties and to build specific accommodation for seasonal workers and residents.

- In Arabba-Colle, operators suggest "co-housing for workers" and possibilities for employers to "build accommodation for employees".

- In the Tarvisiano, the proposal is for "public and private building requalification for long-term housing", "public and subsidized residential building" and the expropriation of "unused military properties for controlled-price accommodation for seasonal workers".
- In NLW, the "construction of employee housing" and the "mobilization of vacant accommodation" are considered very effective solutions.
- In Alta Badia, a call is made for "coordinated political action" to "regulate the real estate market", the construction of "new public housing/condominiums" and the incentive of "housing cooperatives".

### 5.2.2. Diverging elements

- **More radical solutions**

Residents under 40 in Livinallongo propose more radical solutions such as "restricting the sale of houses only to residents" and "requiring 10 years of residency" for purchase.

- **Focus on speculation and foreign investors**

Residents in all destinations complain about real estate speculation, but in NLW and Tarvisiano there is greater emphasis on the purchase of properties by foreign investors as a driver of price increases.

- **"First-class tourist" vs. "Second-class citizen"**

In the Tarvisiano, residents explicitly express the risk of creating an "imbalance between the need for hospitality and the need for residency", feeling like "second-class citizens" compared to tourists.

- **Competition with university students**

In Venzone (Tarvisiano), the competition for housing resources is also linked to "university students", creating additional tensions.

- **Fiscal/regulatory measures**

Residents of the Tarvisiano suggest "increasing the TARI (waste tax) for second homes" and introducing "restrictions on intended use". In Alta Badia, there is talk of "higher taxes on real estate speculation".

## 5.3. Sustainable career paths

### 5.3.1. Common points between destinations

- **Negative image and low attractiveness of the tourism sector**

A recurring theme is the perception that working in tourism is unattractive, especially for young people.

- In Arabba-Colle, operators report the "area as unattractive for living and working" and the "difficulty in guaranteeing adequate wages". Young residents complain about "little time to enjoy the territory", "inadequate wages", "impossibility of reconciling private life and work" and a mentality that leads to "squeezing tourists like lemons".
- In NLW, working in tourism is seen as "less attractive" due to "low earning potential", "strong dependence on seasonality" and "poor development opportunities". The "bad image" of tourism in the labor market is emphasized.
- In Alta Badia, residents complain about "heavy working hours and loads, stress and burnout" and the "disinterest of local young people in working in their own territory".

- **Seasonality of professions**

The seasonal nature of tourism work is a recognized problem that contributes to job instability. In Arabba-Colle, operators highlight the "difficulty in de-seasonalizing work". In the Tarvisiano, there is talk of "seasonality of professions". In NLW, operators cite the "strong dependence on seasonality". In Alta Badia, residents propose the "extension of the tourist season to guarantee longer contracts".

- **Shortage of qualified personnel**

The difficulty in finding and retaining qualified workers is another constant. In Arabba-Colle, operators have "difficulty finding personnel (qualified and not)". In the Tarvisiano, there is a "shortage of job opportunities" and a "shortage of personnel". In NLW, the "bad image" of the sector leads to a "severe shortage of qualified workers". In Alta Badia, the "shortage of qualified personnel" is a common concern.

- **Need to improve working conditions and accommodation for workers**

Proposed solutions include creating annual or de-seasonalized contracts, respecting working hours, offering staff accommodation, and improving training.

- In Arabba-Colle, operators propose "annual or de-seasonalized employment contracts" and "respect for working hours and holidays". Residents suggest "more shifts and controls on working hours".
- In the Tarvisiano, they promote "training initiatives with schools", "career guidance paths", "support for artisan cooperatives" and "business culture training courses".
- In NLW, "improvements in continuous training and career opportunities" and "creation of annual employment opportunities" and "investment in training and 'green jobs'" are suggested.
- In Alta Badia, solutions include the "improvement of working conditions" (e.g. 5-day week), "investments in new staff accommodation" and "economic diversification".

### 5.3.2. Diverging elements

- **Discrepancy between image and actual perception**

A significant divergence emerges in NLW, where operators complain about a "bad image" of the tourism sector that discourages young people, but the majority of residents (66%) and a significant portion of tourists (50%) rate working conditions as "quite good" or "very good". In Arabba-Colle, tourists have a "strong positive perception of local hospitality" (82.9%), which contrasts with the perception of "exploitation" of workers by residents.

- **Internal perception of wages (Alta Badia)**

In Alta Badia, there are divergences in the perception of wages between different age groups of residents: young people (18-25) find them "fairly equitable" but insufficient, while more mature groups (26-40, 61+) talk about "good incomes and wages".

- **External influences on the labor market**

In Alta Badia, "distorted perceptions spread by social media" are mentioned as a factor contributing to the disinterest of young people.

- **Role of training**

In the Tarvisiano (Venzone), it is highlighted that the training offered "does not meet market needs".

## 5.4. Local trade

### 5.4.1. Common points between destinations

- **Value and desire for local/regional products**

There is a broad convergence among all groups on the quality, importance, and desired availability of local and regional products.

- In Arabba-Colle, tourists are "satisfied or very satisfied with the availability of local artisan products in shops and the possibility of consuming local products in restaurants". Residents recognize the "valorization of local identity and culture".
- In the Tarvisiano, most tourists (63.2%) are "in favor of finding local products on menus" and 56.6% would like to "buy them in local shops". Residents state that tourism "attaches importance to regional products".
- In NLW, tourists are "satisfied with the availability of regional products" in shops (79%) and restaurants (90%). Residents believe that tourism attaches "importance to regional products, with a high demand for regionality".
- In Alta Badia, guests give a high rating (4.1 out of 5) to the "possibility of buying local products" and the behavior of "buying local products" daily is frequent (3.6 out of 5). Residents recognize the "high quality of local products".

- **Difficulties in the supply chain, network, and promotion**

Operators and residents identify problems related to sourcing, logistics, lack of networks between producers, and visibility of local products.

- In Arabba-Colle, operators cite "limited fruit and vegetable products", "scarcity of short supply chain producers" and "difficulty in finding different local products". Residents complain about the "local supply chain being poorly diversified" and the "lack of incentives for young artisans".
- In the Tarvisiano, operators encounter difficulties in "maintaining constant quality and quantity", "lack of knowledge of regional producers" and "logistics". Residents report "difficulties in creating networks between economic operators", "poorly diversified commercial offer" and "lack of collaboration between traders".

- In NLW, the main difficulties are "maintaining constant quality and quantity", the "lack of knowledge of regional producers" and "logistics".
- In Alta Badia, residents complain that the "demand for local products often exceeds supply", the "poor visibility of local producers" and the "lack of innovation in agriculture".
- **Proposed solutions: support, platforms, and marketing**  
Common solutions include investing in local production chains, creating centralized platforms, and awareness and marketing campaigns.
  - In Arabba-Colle, operators propose "investing part of the tourism profits in local production chains" and "incentive mechanisms". Residents suggest the "valorization of typical products and craftsmanship", "continuous training" and "economic aid for young people".
  - In NLW, the "creation of a regional/wholesale platform" and an "image campaign ('Buy regional')" are suggested. Residents propose to "strengthen regional producers", "further develop agricultural production" and "improve commercialization".
  - In Alta Badia, solutions include "increasing the circular economy", "diversification of agricultural production", "support for producers", "creation of dedicated artisan areas" and "greater awareness".

#### 5.4.2. Diverging elements

- **High prices for residents**  
Residents, unlike tourists, highlight that tourism can be a factor in increasing local trade prices, reducing accessibility for the population. In Arabba-Colle, residents under 40 complain about the "difficulty of making ends meet by relying only on 'km0'". In the Tarvisiano, residents highlight "tourist prices" and "tourist hours" which "penalize residents". In NLW, residents perceive tourism as a "factor in increasing prices (especially in catering), reducing accessibility for locals". In Alta Badia, residents identify the "high cost of local products" as a problem that limits their competitiveness.
- **Demand exceeding supply and innovation**  
Alta Badia residents specifically note that the "demand for local products often exceeds supply" and report structural problems such as "poor visibility of producers" and "lack of innovation in agriculture" (e.g. excessive focus on milk).
- **Local specificities in trade**  
In Tarvisiano, a "counter-trend" is observed in Venzone compared to Tarvisio,

with "greater availability of typical local products" and "development of synergies and collaboration chains". In Tarvisio, a "more commercial than tourist vocation" is noted.

## 5.5. Interconnections between themes

The analyses of the four territories reveal a complex picture with recurring themes. The most evident aspect is the clear **dichotomy between the external perception (of tourists) and the internal reality (of residents)**.

- Tourists tend to have a generally positive or less problematic view of many aspects, appreciating the hospitality, the beauty of the territory, the quality of accommodation, and the availability of local products.
- Residents, on the other hand, are more sensitive to the negative impacts on the quality of life (noise, traffic, housing costs, local prices) and on the community's identity (second homes, depopulation, loss of services).

**The four themes are strongly interconnected:**

- The lack of adequate public transport services (mobility) can discourage seasonal workers (sustainable careers) and increase dependence on cars, contributing to traffic and noise.
- The high cost of rents and the scarcity of accommodation (housing issue) directly impact the ability to attract and retain qualified personnel in the tourism sector (sustainable careers), worsening the labor shortage. For example, the housing issue is unanimously the "main challenge" and the "major divergence" between residents and tourists in Alta Badia (it is an issue that affects social balances in the destination).
- The limited availability of local products (local trade) and difficulties in the supply chain are reflected in the lower offer of authentic experiences for tourists, even though the latter are inclined to purchase them. At the same time, "tourist prices" in local trade penalize residents, creating an "imbalance between the need for hospitality and the need for residency".

In summary, the analysis highlights how tourism success, while bringing benefits, puts significant pressure on the quality of life of residents. The divergences suggest that to promote a regenerative tourism that places "nature, communities and places at the center of development", it is crucial to address these dissimilar perceptions and integrate the different needs in a more equitable and participatory way, transforming

challenges into opportunities through a holistic and collaborative approach.

## 6. Towards a more regenerative tourism

The evidence shows four destinations in a phase of **awareness**. They are aware that the current model, while generating wealth, shows signs of saturation (traffic, housing crisis) that threaten future resilience. Taking the regenerative path means using these analyses to **flip the decision-making pyramid**:

1. Not asking "how do we bring in more tourists?", but "how can tourism pay for public transport for residents?"
2. Not asking "where do we build new hotels?", but "how do we use existing building stock to encourage young people to stay?"
3. Seeing the local community not as "workforce" or "extra," but as the true internal customer to be satisfied first.

Currently, these destinations function as **high-performance machines**, which, however, consume their own gears (territory and people) to produce speed (tourism). The regenerative approach suggested by the data invites them to transform into **living organisms or gardens: where "cultivation" (tourism) does not impoverish the soil, but contributes to fertilizing it**, ensuring that the following year's harvest (economic and social well-being) is even richer and the soil (environment and community) healthier.

Following are some reflections on the four key themes of this report, keeping in mind that the topics addressed are complex and deserve equally complex future analyses to fully understand them.

### 6.1. Mobility as a common good

The analyses highlight a structural criticality: the deep dependence on private cars. The data collected are unequivocal, with peaks of private vehicle use ranging from 67.6% in Tarvisio to 81% in Alta Badia, reaching 93.3% in Arabba for Italian tourists. From a traditional tourism perspective, this data is often interpreted as a purely logistical challenge; however, by adopting the lens of regenerative tourism, **mobility ceases to be mere "transport" and becomes a tool for ecosystem protection and social equity**. Traffic and noise pollution are not just inconveniences for the user, but represent direct damage to "Nature as a stakeholder," a vision that is the keystone of regenerative thought. If we were to question nature itself about this

impact, it would highlight the **insufficiency of current "spot solutions,"** such as temporary or partial closures, which treat the symptom without solving the cause of environmental degradation.

The transition from an extractive vision to a regenerative one requires the courage to make radical and, at times, unpopular choices. The regeneration of the Alpine environment cannot be limited to traffic management but must aim at its elimination in the most sensitive points, such as the Dolomite passes (with spatial and/or temporal limitations, or contingent access). This implies the political capacity to say "no" to events incompatible with the fragility of the territory, **prioritizing acts of care towards the ecosystem over immediate profit.** There is, however, a structural, as well as cultural, gap between the intention of sustainability and the actual behavior of visitors: for example, "car-free" communication campaigns, however creative, are ineffective if not supported by a solid infrastructure. Without a **concrete and competitive alternative to private means,** the discrepancy between the desire to preserve the mountain and the act of congesting it will remain unbridgeable. The discrepancy between intention and behavior is therefore also a structural issue, in addition to being cultural.

A fundamental pillar of regeneration also lies in resolving social conflicts related to services, exemplified by the management of **Guest Cards.** Currently, there is a rift between tourists and residents: the perception of an inequity where the visitor accesses some services for free (because they pay the tourist tax) while the resident is called to pay the price, while simultaneously suffering the inconveniences of overcrowding. A regenerative approach must instead **conceive Local Public Transport as a "shared asset."** For tourism to truly become a service for the territory, the benefit of mobility must be reversed: tourism should finance a transport system so efficient that it primarily serves the local community—students, the elderly, workers—and naturally, by reflection, the tourist.

Ultimately, regenerative mobility is realized when **public service is not just a commodity for the visitor, but a driver of vitality for the resident.** If the bus financed by the tourism industry allows a student to reach school or a cook to get to work easily, then tourism is actively regenerating the social fabric of the mountain. Destinations that are working on integrated cards and concessions for residents are moving in the right direction, but the real challenge remains the integration of these measures into a systemic strategy that reduces the "cost" paid by the local community, guaranteeing residents the right to dedicated services, reserved parking, and a quality of life that is not sacrificed on the altar of tourist accessibility.

## 6.2. The right to housing

The topic of housing today represents the main challenge and the point of maximum divergence in the destinations analyzed. It is necessary to address with intellectual honesty what can be defined as "the elephant in the room": although it is undeniable that the local economy benefits enormously from a healthy tourism sector, the data and perceptions collected confirm that the increase in short-term rentals—the so-called "Airbnb effect"—is exerting unsustainable pressure on property prices. A clear perceptual dichotomy is observed: while the tourist enjoys high-quality and aesthetically beautiful accommodation, the resident experiences depopulation and the progressive loss of essential services firsthand. From a regenerative perspective, **a destination cannot be considered successful if the growth of the tourism sector occurs at the expense of the social base that lives and cares for that territory**; on the contrary, tourism must activate "give-back" mechanisms, financing housing accessibility to prevent eroding its very foundations.

The critical evidence emerges transversally in all monitored areas, outlining a "red alert" that affects the stability of the territories. In Nassfeld, the need to protect the land from external investors is felt, while in Alta Badia, speculation makes it almost impossible for young people to remain in their municipality of origin. In Arabba, prices are clearly inflated by tourist demand, and in Tarvisio, the fear of depopulation becomes a concrete threat. These phenomena indicate that **the free market, alone, is not capable of guaranteeing local well-being**, transforming tourism into an extractive force that subtracts vital resources from the community instead of regenerating them. To reverse this trend, it is necessary for destinations to stop measuring their success exclusively through the number of beds offered and start to **monitor the availability of long-term housing** for workers and new generations.

The transition towards a regenerative model passes through concrete solutions that put the community at the center, **transforming the building stock from a speculative asset into a social good**. Proposals such as *co-housing*, the introduction of restrictions on second homes, or the recovery of vacant properties (consider the potential of former military barracks in Tarvisio) must not be interpreted as punitive measures against tourism, but rather as necessary interventions in favor of the community. A truly regenerative strategy uses the proceeds of the tourism industry to finance social housing and the recovery of vacant heritage. Only by guaranteeing the right to housing can we ensure that the mountain remains a living place and does not transform into a scenic shell devoid of residents, since **the regeneration of a territory always begins with the vitality of those who inhabit it daily**.

### 6.3. A job that offers the possibility to "flourish"

The theme of employment in the mountain tourism sector today requires a radical change of paradigm, moving from a purely economic vision to a systemic perspective that puts overall well-being at the center. The analyses highlight **an interconnection between the different territorial criticalities**: the staff shortage cannot be solved by acting exclusively on the salary lever if, in parallel, the lack of accessible accommodation and the inadequacy of local public transport are not addressed. Without a home or an efficient way to get around, the worker remains excluded from the territory, making it impossible to attract new talent. This vicious cycle suggests that the "extractive" model, metaphorically described by some interviewees as the effort to "squeeze tourists and workers like lemons," has reached its structural limit. Regeneration, in this context, means **restoring dignity to work**, transforming it from a mere means of subsistence into an opportunity for personal fulfillment. At various levels within the tourism supply chain, it would be necessary to **deeply question what "doing tourism" means for the destination itself**: for whom is it done, and for what purpose?

The evidence collected in the four destinations outlines a picture of human capital suffering, where tourism work is often perceived as exhausting, precarious, and of low social status. In Arabba, in particular, the image of a "squeezed" workforce emerges strongly, victims of unsustainable rhythms and the lack of support services. A regenerative approach starts from the assumption that **it is not possible to offer high-quality hospitality if those who welcome do not live in a condition of well-being**. Therefore, measures such as the introduction of a five-day working week, flexible hours, and the provision of dignified accommodation for staff are not mere accessory benefits, but fundamental acts to regenerate the social and professional fabric of the mountain.

Finally, the regeneration of the Alpine labor market necessarily passes through the **diversification of skills and support for local project development**. Cases like those of Tarvisio and Alta Badia show how vital it is to **support youth entrepreneurship and the emergence of new professions**, from the digital to the creative sectors, that are not strictly confined to traditional hotel services. A destination can call itself regenerative only if it invests in the quality of life of its collaborators with the same commitment it reserves for guests. If local young people cannot foresee a solid and stimulating future within the sector, tourism fails in its role as a development engine, becoming a force that consumes the territory instead of nourishing it.

## 6.4. The local supply chain as care for the territory

In the context of regenerative tourism, the relationship between hospitality and local production must make a leap in quality, transforming **from a simple commercial transaction into a true strategic investment**. It is no longer just about "buying local," but about recognizing tourism's role as, for example, a "patron" of mountain (heroic) agriculture. In this perspective, part of the profits generated by the tourist flow is reinvested directly in local supply chains, **guaranteeing the survival of agricultural activities that are fundamental for the maintenance of the Alpine landscape**. Investing in the short supply chain is therefore not an act of charity, but a precise long-term product strategy: the critical evidence suggests that the scarcity of authentic products risks undermining the quality of the tourist experience, making the protection of agriculture an essential requirement for the destination's competitiveness.

The link between tourism and agriculture elevates nature to the role of an active stakeholder. Farmers are not mere producers of goods, but the true "gardeners" of the territory; every purchase of a local product translates into the direct financing of landscape care, preventing environmental degradation and the abandonment of the land. Despite the **high demand from visitors**, as demonstrated by the high degree of satisfaction detected in Alta Badia, **the supply still struggles to structure itself** due to logistical criticalities, high costs, and a certain discontinuity in supplies. To overcome these obstacles, it is necessary to move from a "Km0" narrative often stuck at the slogan stage to a structural and organized large-scale reality.

The challenge of regeneration therefore lies in the ability to "network," filling the void in the connective tissue that emerges in the analyses of Tarvisio and Arabba. A systemic approach requires the **creation of innovative logistical and organizational platforms** that simplify the meeting between hotel demand and the offer of small producers. Ultimately, the regenerative path implies the closing of the economic circle on the territory through incentive mechanisms for operators who actively support the local economy, **ensuring that the wealth produced by tourism translates into a renewed vitality for the entire mountain agro-food sector**.

## 6.5. The levers of change

The analyses conducted indicate that the four destinations are currently at a decisive crossroads. They possess the awareness and the economic and cultural resources necessary to evolve, but the transition to the operational phase requires the courage to abandon the old logic of "compensation," in which one seeks to balance services for the tourist with the disturbance caused to the resident, in favor of a regenerative and integrated logic. In this new paradigm, **tourism is no longer the ultimate goal**,

**but the means to build infrastructure and services designed primarily for the needs of those who inhabit the territory.** To trigger this transformation, one could act on three levers that transform criticalities into systemic opportunities.

The first lever lies in the **power of trust and the technique of so-called *nudging***, or "gentle push." Destinations like Alta Badia enjoy a very high rate of repeat visitors, a relational heritage that allows them to dare more in proposing virtuous behaviors. Instead of merely asking the tourist to give up their car, the regenerative strategy aims to make sustainability the default option (*sustainability by default*): by structuring the offer so that private transport becomes superfluous, the destination guides the guest towards ecological choices without perceiving them as a deprivation, but as the most natural and desirable form of enjoying the place.

In parallel, it is urgent to **close the gap between communication and operational reality**, a critical point where only a minority of subjects today perceive a real coherence between the "green" promise and concrete facts. The narrative must stop chasing new slogans and instead give tangible visibility to existing excellence. In this sense, local culture, such as the Ladin culture, must be elevated from simple tourist folklore to a true "instruction manual" for the management of common goods. **Learning from centuries-old traditions of territory care** means transforming culture into a regenerative act that instructs both the operator and the visitor on how to relate correctly to the mountain ecosystem.

Finally, the most powerful lever to guarantee long-term resilience consists in mending the social fracture, **placing residents at the center of measuring success**. The value of a destination can no longer be calculated exclusively through the *customer satisfaction* of the tourist, but must include the reduction of the gap between the happiness of the visitor and that of the resident. A system where the guest is satisfied while the local community is stressed by traffic and the cost of living is a system destined for collapse. The regenerative vision overturns this scheme: **investing in the well-being of those who live and work in the mountains becomes the necessary condition to offer, by reflection, an authentic and valuable experience to those who visit it as well.**

