Supporting sustainability and resilience of EU tourism destinations

Deliverables 1.2 & 1.3

With the support of

Submitted by:
Intellera Consulting Spa ("Intellera") in consortium with Scholz & Friends ("S&F"), together with Center for Sustainable Tourism at Eberswalde University for Sustainable Development ("ZENAT"), AnySolution ("AS") and Baltic Media
to the European Commission, Directorate General for Internal Market, Industry, Entrepreneurship and SMEs (DG GROW)

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Purpose of the report

This document represents two project deliverables: D1.2 “Report on the implementation of the DMO survey” and D1.3 “Summary of DMO survey results and full set of survey data”. Accordingly, it is structured in two main chapters, each focusing on a single deliverable.

To complement the content of the two deliverables, the following materials are presented in the Annex:

I. Survey questionnaire
II. Full list of valid responses
III. Full list of DMOs
IV. Flash reports
V. Methodological notes

The document is complemented by an Appendix providing the datasets used for the analysis.

Key findings

The survey to Destination Management Organisations (DMO) was conducted from the beginning of March to the end of May 2024, collecting **222 replies** from all **27 EU Member States**[1] and one eligible country (**Montenegro**). Almost 90% of the respondents are from NUTS 3 or lower destinations, and the countries with the highest share of replies were **Croatia, Austria, and Italy**.

With regards to **destination types**, 32% of DMOs fall under the *Nature and Rural* category (72), followed by 26% of *Coastal* destinations, 17% of *Urban* destinations, 12% of *Mountain,* and 13% of *mixed* destinations.

Tourism in the destinations

- 33% of respondents (71) declared that the impact of tourism on the **local economy** of the destination is higher than 10% of the total GDP. For coastal and mountain destinations, almost 60% declared that tourism contributes to their local economy to a high extent. In most cases, destinations stated that tourism contributes to the local GDP and employment to the same extent.
- Almost half of respondents (45%) deem to be highly dependent on their three most significant **international source markets**.
- Most respondents declared to offer several attractions, suggesting a good **diversification** across the destinations sample. Urban and mountain destinations appear to be the most diversified, with respectively 76% and 78% of respondents reporting high diversification levels.
- **Seasonality** represents a major phenomenon across destinations: 81% of respondents declared a medium or high level of seasonality, with coastal and mountain destinations accounting for the highest incidence. These destination types also declared to have a **high variety of attractions**, suggesting that the diversification of reasons to visit them might not be enough to counter tourism concentration in relatively short periods of the year, as this is also related to the demand side (e.g. school holidays and office closures). Corrective measures should therefore go beyond increasing tourism attractions.

Destination Governance

- Nearly all respondents (87%) indicated that *Destination marketing and branding* is a **key role** of their DMO. Other key roles are related to *Tourism management and planning, Representing the destination's interests at national, local, or regional level*, and *Developing and delivering tourism initiatives and products*. *Visitor flow management* and *Risk and crisis management plans* were not considered among the key roles of DMOs, which leaves room for improvement.
- Accommodation providers are deemed the most important **stakeholders** for destinations (25%), with tourists representing the second most relevant stakeholders (15%), closely followed by local residents (14%).
- Almost 90% of DMOs reported the presence of **stakeholder engagement mechanisms**, declaring it key for ensuring effective governance and development processes in the tourism sector. Over 1 in 3 DMOs mentioned the presence of *structured stakeholder consultation mechanisms* (e.g. workshops and seminars for SMEs, social media and marketing campaigns, sustainable tourism plans and strategies, citizens and stakeholder meetings etc.). In small to medium-large destinations, DMOs present strong stakeholder engagement levels, unlike in larger destinations.
- Among the respondents, mountain and coastal DMOs reported the highest levels of **community participation** in tourism activities (e.g. entrepreneurship, business ownership, ecosystem governance etc.).

[1] One answer was also received from Montenegro.

- **Stakeholder interaction levels** often vary, with DMOs assuming diverse and heterogenous roles. High levels of structured collaboration are evident in areas such as marketing, planning, and representing stakeholder interests, outlining their significance within the tourism ecosystem. In contrast, areas like risk management, destination resilience enhancement, and visitor flow management show lower engagement, suggesting the need for greater integration into the DMO tourism strategy.

Challenges and opportunities

- In terms of **positive impacts of tourism**, half of them are reported in the economic sphere, 36% in the sociocultural one, and the rest (14%) in the environmental one.
- The **most common positive impacts** are *improved local economy*, *increased employment opportunities*, as well as a *bigger offer of entertainment and cultural events*.
- Almost two thirds (64%) of respondents affirmed that the **most negative impacts** are in the economic dimension, and one third (30%) in the environmental one. Negative impacts in the sociocultural sphere seem minimal (6%).
- The **most common negative impacts** of tourism are *increased cost of housing and living* (especially in very large destinations), *degradation and congestion*, *economic distress in low season*, as well as *precarious and irregular work*. *Increased cost of housing* (99) and *increased cost of living* (91) accounted for 27% of all responses received, with mountain destinations being the most exposed to these impacts.

Solutions

- 66% of the respondents affirmed that they have carried out some **measures to improve the destinations' sustainability and resilience**, with the vast majority of them (80 respondents) indicating that the measures were covering economic, environmental and sociocultural dimensions at the same time. This can be explained by the fact that the solutions adopted often have a broad impact on several aspects of the destination, as achieving sustainable development necessitates advancing in all three dimensions. Measures involving environmental aspects were the ones most often mentioned, representing 87% of the total measures implemented, followed by sociocultural aspects (81%) and economic aspects (65%).
- Almost one in three respondents (31%) who implemented measures declared that **EU or national funding schemes** were used, and in 41% of the cases DMOs counted on EU funding exclusively (ERDF[2] being one of the most used funding programmes). Unsurprisingly, adequate financial resources and funding were mentioned both as a key success factor and as a significant challenge.
- **Stakeholder engagement** has also been highlighted as the most relevant factor to successfully implement measures, yet at the same time also the most frequently mentioned challenge. This might suggest that while stakeholder involvement is crucial, achieving effective collaboration can be complicated for destinations, especially when considering small tourism locations.
- Other important **success factors** are a *sustainability and resilience mindset*, which also represents an important challenge for destinations, and the *availability of an adequate number of human resources*, which highlights the well-known need to address labour shortages and skills gaps in the tourism ecosystem.

[2] European Regional Development Fund

1. Report on the implementation of the survey

1.1 Objectives of the survey

The survey is the core of the project's first Work Package "Design and implementation of a survey for local and regional destination management organisations across the EU" and has the following three main aims:

- collect information about the sustainability and resilience of EU tourism destinations,
- collect key challenges, opportunities and best practices (in view of supporting Work Package 2 "Recognise key challenges and gather best practices for supporting sustainable and resilient tourism in destinations"),
- collect information to structure matchmaking and peer-learning activities foreseen in Work Package 3 "Establish a twinning mechanism for destinations with shared challenges".

More specifically, the survey was designed to:

- Get to know DMOs' characteristics linked to sustainability and resilience,
- Identify topics that are of shared interest among DMOs,
- Gather challenges, opportunities and best practices for sustainable and resilient tourism,
- Encourage DMOs to engage in project peer-learning activities and invite them to express their interest in peer learning and twinning initiatives,
- Identify experts who can apply to the TAIEX-EIR[3] Peer-2-Peer tool, allowing them to participate in expert missions, study visits and workshops,
- Provide clear and useful information to DMOs about the Transition Pathway for Tourism and related policies and initiatives.

1.2 Survey preparation

The preparation was organised around four phases: i) the survey drafting, ii) internal feedback and client validation, iii) pilot test, and iv) translation.

Regarding the **survey drafting**, according to the objectives described, the survey (provided in Annex I) was structured around five sections:

1. Introduction – to the project and the survey, providing a survey guide (including help desk contacts) and a set of key definitions.
2. General information – to collect contacts and information about tourism in the destination and its governance.
3. Challenges and opportunities – to collect information about positive and negative impacts of tourism, risks, and emerging tourism trends.
4. Solutions – to collect best practices.
5. Engagement in the project – to collect expression of interest in future project activities and expert names to be invited to register to TAIEX.

The questions were drafted in alignment with the "Analysis framework for key challenges and good practices for destinations" (Deliverable 2.1) and based on literature on the topic (

[3] Technical Assistance and Information Exchange instrument - Environmental Implementation Review

Box 1). The questionnaire was accompanied by a guide, providing a presentation of the Transition Pathway for Tourism, a description of the structure of the survey, Frequently Asked Questions (FAQ), and helpdesk contacts.

Box 1 - Main literature used

Butler, R. W. (2020). Overtourism in Rural Areas. In T. Gladkikh & T. Vo Thanh (Eds.), *Overtourism: Causes, Implications and Solutions* (pp. 27–43). Springer International Publishing. https://doi.org/10.1007/978-3-030-42458-9_3
EU Tourism Dashboard: EU Tourism Dashboard (europa.eu)
European Commission, European Innovation Council and SMEs Executive Agency, Strasdas, W., Lund-Durlacher, D., Wolf-Gorny, L., et al., Unbalanced tourism growth at destination level: root causes, impacts, existing solutions and good practices: final report, Publications Office of the European Union, 2022, https://data.europa.eu/doi/10.2826/782120
Lim, C., McAleer, M., 2005. Ecologically sustainable tourism management. Environ. Model Softw. 20, 1431–1438.
Martín-Martín, J. M., Guaita Martínez, J. M., & Salinas Fernández, J. A. (2018). An Analysis of the Factors behind the Citizen's Attitude of Rejection towards Tourism in a Context of Overtourism and Economic Dependence on this activity. Sustainability, 10(8), 2851. https://doi.org/10.3390/su10082851
Naumov, N., Green, D. (2016). Mass tourism. In: Jafari, J., Xiao, H. (eds) Encyclopedia of Tourism. Springer, Cham. https://doi.org/10.1007/978-3-319-01384-8_378
OECD (2021), "Managing tourism development for sustainable and inclusive recovery", *OECD Tourism Papers*, No. 2021/01, OECD Publishing, Paris, https://doi.org/10.1787/b062f603-en
OECD (2022), *OECD Tourism Trends and Policies 2022*, OECD Publishing, Paris, https://doi.org/10.1787/a8dd3019-en.
Peeters, P., Gössling, S., Klus, J., Milano, C., Novelli, M., Dijkmans, C., Eugelaar, E., Hartman, S., Helsinga, J., Isaac, R., Mitas, O., Moretti, S., Nawun, J., Papp, B., & Postma, A. (2018). *Research for TRAN Committee—Overtourism: Impact and possible policy responses*. European Union. http://bit.ly/2srgoyg
Postma, A., & Schmuecker, D. (2017). Understanding and overcoming negative impacts of tourism in city destinations: conceptual model and strategic framework. Journal of Tourism Futures, 3(2), 144–156. https://doi.org/10.1108/JTF-04-2017-0022
Postma, A., Papp, B., & Koens, K. (2018). Visitor pressure and events in an urban set: Understanding and managing visitor pressure in seven European urban tourism destinations (unpublished). Centre of Expertise Leisure, Tourism & Hospitality.
UNWTO, Centre of Expertise Leisure, Tourism & Hospitality, NHTV Breda University of Applied Sciences, & NHL Stenden University of Applied Sciences. (2018). 'Overtourism'? Understanding and managing urban tourism growth beyond perceptions. UNWTO. DOI: https://doi.org/10.18111/9789284420070
WTTC (2022). Enhancing Resilience to drive sustainability in destinations. WTTCxICF-Enhancing_Resilience-Sustainable_Destinations.pdf

Following approval by the European Commission (DG GROW) and beta testing by selected destinations from the consortium's network, the survey was uploaded on the EU Survey tool. It was then translated into all EU official languages (except for Gaelic and Maltese) and uploaded on EU Survey.

1.3 Survey implementation

1.3.1 Dissemination

The survey remained open from the **5th of March to the 31st of May 2024** (± 3 months)**.** Promotion and dissemination activities leveraged both in-person engagement and extensive digital outreach to maximise both survey participation and stakeholder engagement. In particular, the following dissemination activities were conducted:

- **DMO list enrichment:** before launching the survey, the project team updated the list of DMOs already presented in the technical proposal submitted in June 2023. Desk research was conducted to find new contacts, with destinations also being mapped based on their previous participation in other European projects focused on tourism, namely the Smart Tourism Destinations Pilot project, EDEN awards, DATES project, as well as other projects (i.e., Interreg and Horizon projects). This led to obtaining information details of approximatively 800 DMOs, which were consequently contacted and invited to complete the survey.

- **In-person engagement:** the project team and the Commission engaged directly with approximately 100 national, regional, and local destinations/DMOs during the ITB event held in Berlin (5-7th March 2024), distributing business cards with QR codes linking to the survey. Similarly, the project was promoted during the Transition Pathway for Tourism 2-Year Anniversary event (15th March, Brussels). This event allowed for networking with EU tourism associations, also serving as multipliers.
- **Project presentation webinar:** held on 18th April 2024, the webinar recorded 180 attendants from 21 different EU Member States and countries like Argentina, Iran, Montenegro, and Türkiye. The webinar presented the benefits of project participation and addressed any stakeholder question. All materials presented during the webinar, as well as its recording were uploaded on the project website[4].
- **Targeted email invitations:** survey invitations, follow-ups, and reminders were sent to contacts from previous projects and new contacts identified through desk research. Tailored emails were sent to known destinations, while general emails in the 22 EU languages were sent to others. In addition, multipliers (i.e., national ministries of tourism) received specific requests for disseminating the survey within their networks. Overall, 813 destinations and associations were initially reached, increasing to 890 by May, and 935 by the end of May.
- **Social media and newsletters:** the project team prepared posts for the Commission's (DG GROW) social media accounts. In particular, several LinkedIn posts were shared during the weeks before the survey launch and the webinar, with 100 unique visitors reached on April 18th. In addition, articles were published on tourism-specific newsletters and networks, including ITSO, Tourismusnetzwerk, Exzellenzinitiative Nachhaltige Reiseziele, ERRIN, and Leggo Newsletter.

1.3.2 Monitoring & support

1.3.2.1 Monitoring and control activities

Ensuring an adequate number of responses and guaranteeing a balanced geographical distribution of answers were the guiding principles for the survey monitoring activities. Specifically, monitoring and control activities consisted of:

- **Regular checks of answers received:** conducted twice per week, these checks aimed to ensure the validity of collected responses. Additionally, they allowed for verification of the survey's geographical coverage, prompting corrective measures when needed.
- **Corrective measures:** these actions had the objective of refining the project team's contact list to engage only relevant stakeholders. Measures included searching for new DMO contacts and sending out periodic reminders to complete the survey. In this regard, the Commission significantly contributed by directly contacting the national tourism offices of Spain, Portugal, Luxembourg, and Hungary, ensuring engagement from less-represented countries and outermost regions.

1.3.2.2 Helpdesk

To assist stakeholders interested in the survey, an ad hoc helpdesk was established. Throughout the survey's implementation period, the helpdesk was frequently contacted for more information about the survey and the project. The helpdesk's activities can be mainly categorised as follows:

- **Requests for clarifications regarding the project, its scope, the survey, and the involvement required:** a total of 22 inquiries were received before and immediately after the webinar held on April 18th, 2024. Most requests focused on obtaining the materials presented during the session and the event's recording. All inquiries were successfully taken care of.
- **Technical support for filling in the survey:** before launching the survey, the project team made sure the chosen platform (i.e., EU Survey) ensured correct display and functioning of the questionnaire. Nevertheless, 5 respondents experienced technical difficulties on their end. These difficulties were swiftly resolved with the help of the EU Survey IT support team.

[4] Sustainable EU Tourism – Shaping the Tourism of Tomorrow

1.4 KPIs

The table below provides the quality indicators and related key targets reached for the activities conducted to implement the survey.

Indicator	Element evaluated	Formula and basic data to be collected	Results achieved
Survey questions	Number of questions asked in the survey	Q1 = Number of questions asked in the survey	Q1 = 39
DMOs invited to respond to the survey	Number of DMOs invited to respond to the survey	Q2 = Number of DMOs invited to the survey	Q2 = 935
Survey response rate	Number of DMOs that answered the survey divided by the number of DMOs invited. The number is expressed in the form of a percentage	Q3 = (Number of survey responses / Number of DMOs invited to the survey) *100	Q3 = 24%
DMOs engaged in dissemination activities	Number of DMOs that took part in the webinar organised to disseminate the project	Q4 = Number of DMOs that took part in the webinar organised to disseminate the project	Q4 = 180

Table 1 - Survey implementation KPIs

2 Summary of survey results and full set of data

This section of the document highlights the survey results, presenting the main evidence stemming from the survey analysis. Firstly, details on the sample will be shared, indicating the total number of responses collected, as well as specifying other aspects regarding the involved destinations (i.e., destination type[5], country, number of residents). Then, the analysis will shed light on the role tourism plays in the destinations engaged in the survey, the governance model implemented at destination level, together with tourism-related challenges and opportunities. Lastly, this section of the document also aims to understand the solutions implemented by destinations for improving their sustainability and resilience in the field of tourism, as well as their interest in being involved in the project's future activities.

2.1 General information

The survey remained open from March to May 2024, recording **222 valid replies** from **all 27 EU Member States**, as well as Montenegro. This result was obtained following ad hoc data cleaning activities, including (i) removing duplicate responses, (ii) eliminating invalid replies, and (iii) considering only specific responses coming from national tourism authorities (i.e., Malta).

That said, the figure below provides more details on the distribution of responses by country (Q7), with most replies (**37**) coming from **Croatia**, followed by **Austria** (**21**), **Italy** (**20**), **Czechia** (**17**), and **Germany (16)**. In addition, 1 response was also collected from an extra-EU country, namely **Montenegro**, recorded under the *'Other'* category, as well as from **ZASNET**, a European grouping of territorial cooperation established between Spanish and Portuguese local authorities.

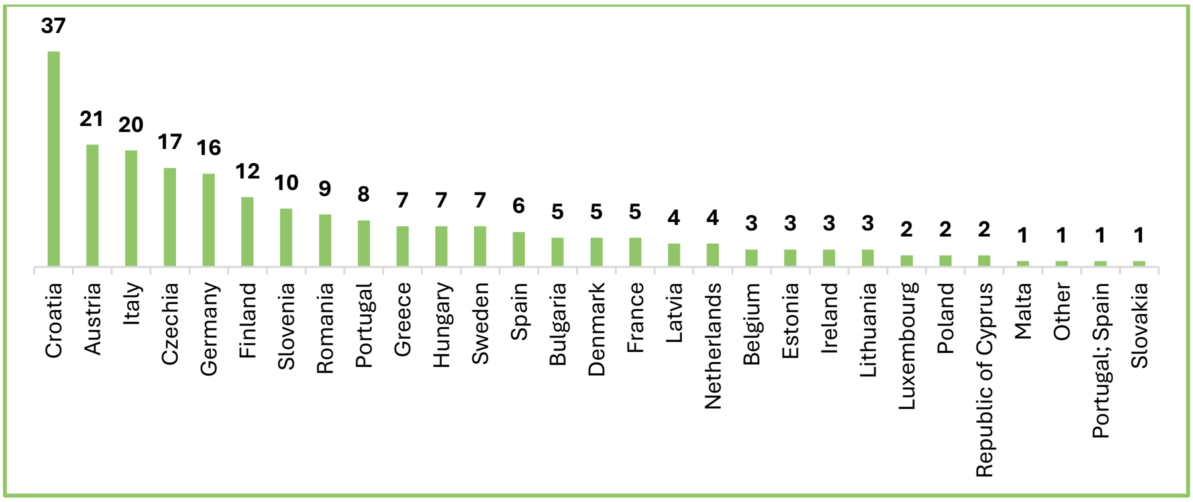

Figure 1 - Distribution of responses by country

Respondents were also assessed based on their type of tourism destination. In this regard, the analysis leveraged the definitions from the EU Tourism Dashboard, identifying **5** main destination **categories**[5]: *coastal*, *mixed*, *mountain*, *nature and rural*, and *urban*. An overview of the distribution of responses by destination type can be found in the figure below. Overall, most respondents belong to the '*Nature and Rural'* category (72), which accounts for 32% of the total.

This could be attributed to the increasing relevance of **rural tourism** in the European Union, which has significant potential for sustaining economic growth and promoting socio-cultural development at local level, also showing strong resilience to external disruptions caused by unexpected crises like the COVID-19

[5] All destination categories are available on the EU Tourism Dashboard website

pandemic[6]. This resulted from changing demand behaviour patterns, as tourists prefer destinations with outdoor activities and direct contact with nature to avoid overcrowded areas[7].

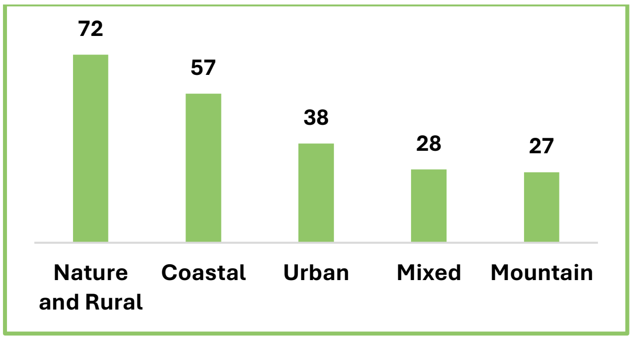

Figure 2 - Distribution of responses by destination type

Additionally, it was also possible to investigate how the **typologies** identified above are distributed among the different countries that answered the survey. Most coastal destinations come from Croatia, with a total of 22 destinations. Croatia also holds the highest number of destinations under the '*Nature and Rural*' category (11 destinations), followed by Czechia (10), Germany (7), Italy (5), and Austria (5).

These countries have developed a wide array of natural and rural tourism services, recording the largest share of nights spent at tourist accommodations in rural areas, with most of them also having more beds in rural areas than in cities, towns or suburbs[8]. Austria and Italy have the highest number of respondents from mountain destinations, accounting for 14 and 9 respectively. Urban destinations are evenly distributed at country level, with Germany (7) and Romania (5) in the lead. Lastly, the 'mixed destinations' category (28 destinations overall) encompasses a variety of destination types, including national DMOs (e.g. France, visit Finland, visit Malta, Luxembourg Travel, etc.) as well as specific locations (i.e., cities, regions, counties). Therefore, this category represents destinations with diverse tourism capacities, combining features of urban, rural, mountainous, or protected areas.

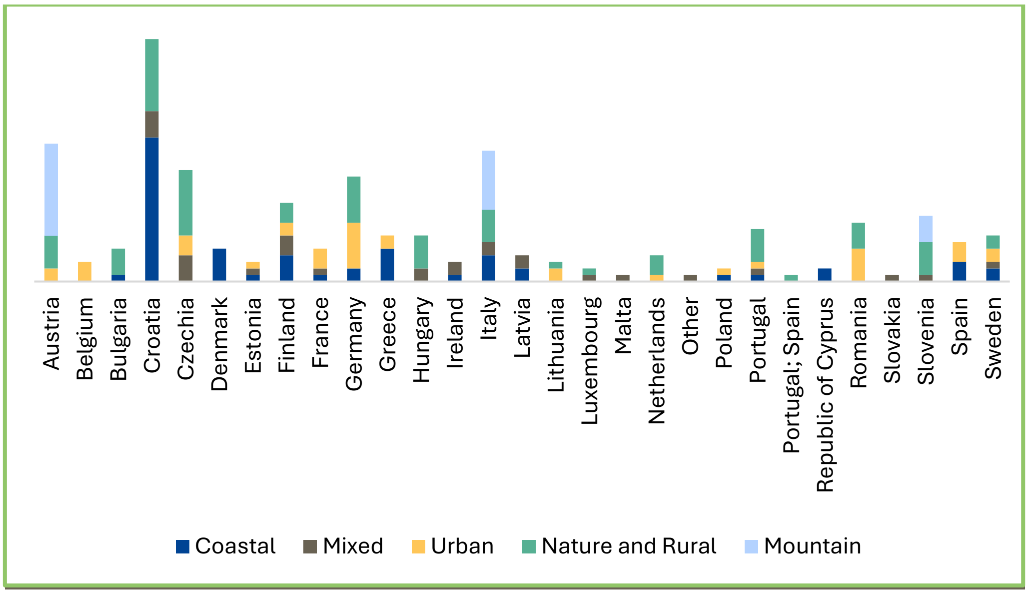

Figure 3 - Type of tourism destination per country based on survey responses

[6] European Committee of the Regions, & United Nations World Tourism Organization. (2024). Tourism and rural development. Publications Office of the European Union. https://doi.org/10.2863/099682

[7] Marques Santos, A., Madrid, C., Haegeman, K. and Rainoldi, A. (2020), Behavioural changes in tourism in times of Covid-19, Publications Office of the European Union, Luxembourg, ISBN 978-92-76-20401-5

[8] Šajn, N., & Finer, K. (2023). Rural tourism. European Parliamentary Research Service. PE 751.464.

To further validate the responses collected concerning this aspect, the survey representativeness has been monitored by verifying the destination type – as per the EU Dashboard - corresponding to the countries from which answers were collected. In this context, Croatia – the most represented country with 37 respondents – can be classified as a *Coastal* and *Nature and Rural* destination, which is reflected in the survey responses. Similarly, Austria is categorised prevalently as *Mountain*, with only a few areas falling under the *Nature and Rural* and *Urban* categories. As visible in the survey, most Austrian destinations belong to such categories. Italian destinations, instead, are equally distributed among the different categories, thus reflecting the heterogeneous morphology of Italy's territory. German destinations align with the country proposed classification – *Urban* and *Nature and Rural* -, with few destinations belonging to the northern part of the country, which undergoes the *Coastal* category. Overall, the survey results ensure fair representativeness levels.

In addition, this section of the survey aimed at determining the **respondents' size in terms of population** (Q8). The goal was to identify in-scope destinations, specifically NUTS 2 and NUTS 3 level destinations or lower, interested in the project's activities. More information on the different NUTS levels can be found below[9].

Figure 4 illustrates that 86% of the destinations which participated in the survey represent small towns and villages, as well as medium-sized communities, while large regions, countries, and large urban areas are less represented.

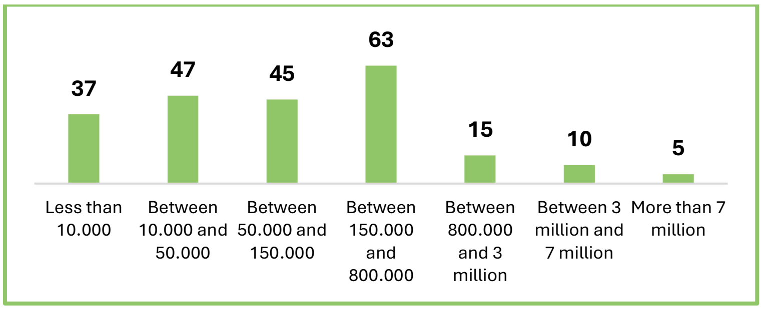

Figure 4 – Destinations' dimension

This evidence was then further complemented when assessing the destinations' estimated NUTS level, presented in the figure below.

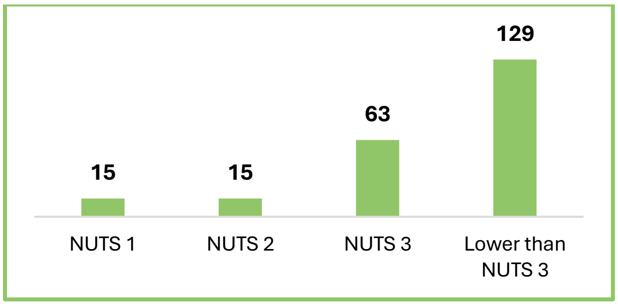

Figure 5 - Respondents' estimated NUTS level[10]

Overall, **58%** of all DMOs operate **below NUTS 3 level**, while **28%** correspond to **NUTS 3 level** destinations, which is in line with the main target group of the project. In contrast, only 15 DMOs each are found to be NUTS 1 and NUTS 2 levels.

[9] NUTS 1 level: major socio-economic regions. Population size between 3 million and 7 million.
NUTS 2 level: basic regions (for regional policies). Population size between 800.000 and 3 million.
NUTS 3 level: small regions (for specific diagnoses). Population size between 150.000 and 800.000.
Lower than NUTS 3 level: Population size < 150.000
Source: https://ec.europa.eu/eurostat/web/nuts

[10] These estimations might have possibly resulted in misclassifying one or more destinations

2.2 Tourism in the destination

A set of questions were asked to understand the destination's characteristics that may have an impact on its sustainability and resilience. All these characteristics define the "state" of a destination and its **sensitivity**, i.e. the extent to which the destination can react to the impacts of tourism or how adaptable the destination is to change. The following questions were asked:

- Question 9: "How much does tourism contribute to the economy of your destination?"
- Question 10: "Approximately, what % of your arrivals come from your 3 most significant international source markets for tourism (i.e. the tourists' country of origin)?"
- Question 11: "What does your destination offer in terms of types of attractions that may bring in tourism?"
- Question 15: "To understand your destination's sensitivity to changes, please rate the following features of your destination"

To analyse the destination features contributing to its sensitivity, the answers to the above-mentioned questions were divided into three macro areas:

- Quality of tourism in a destination,
- Vulnerability to changes,
- Resilience.

2.2.1 Quality of tourism offer

The **quality of tourism** is assessed through a set of variables that were rated "low", "medium", or "high" by respondents (Q15). The majority of respondents declared to provide a medium level of "Quality of utilities/facilities (e.g., public transport, parking, public water supply, waste management, etc.)", "Access to and travel within the destination (e.g., through public transport, low-cost airlines connections, etc…)", and "Accessibility of services and facilities (i.e., equal access to services and facilities for persons with disabilities)". Conversely, most destinations declared to provide a high "Level of conservation of natural features (e.g. natural landscape, protected areas, biodiversity…)"[11]. According to the data collected, "Access to and travel within the destination" is the feature that was most frequently rated as low, suggesting possible common mobility issues. "Accessibility of services and facilities" is the feature that was less frequently marked as "high", suggesting room for improvement in more than four fifths of the cases (184).

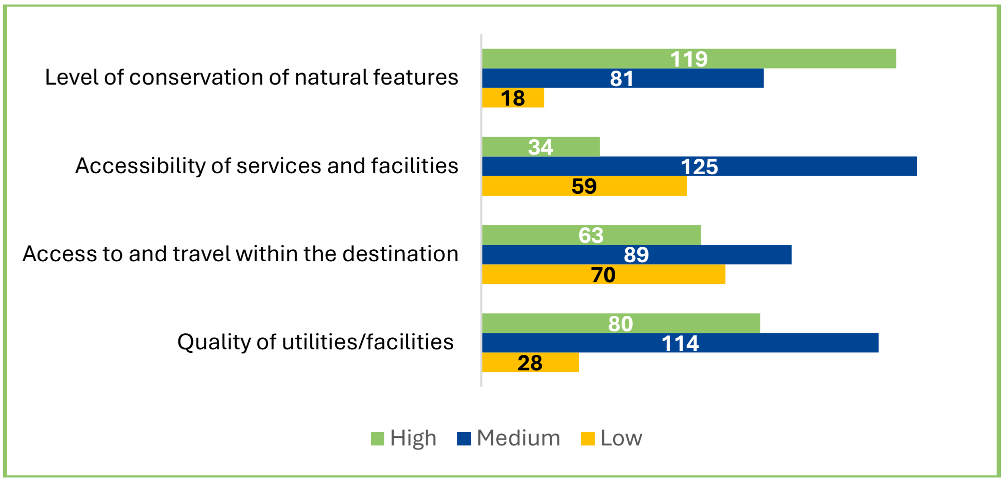

Figure 6 - Quality of tourism

[11] The answers collected for this "Accessibility of services and facilities" and "Level of conservation of natural features" are 218, as they were not asked in the pilot survey.

To understand whether these characteristics vary based on destination types, the distribution of rates was checked for each destination type. For all destination types, the distribution is similar to the one described in the figure above, with a few exceptions. In urban destinations, the quality of utilities/facilities was more often (21) rated as high rather than medium (10). The same is also observed for mountain destinations (15 mentioned a high level against 9 a medium level). Similarly, in cities, access to and travel within the destination is slightly more often (16) mentioned as high rather than medium (15). Conversely, in natural and rural destinations, this feature is more often mentioned as low (29), rather than medium (25) or high (18). Finally, in urban destinations, the conservation of natural features is more often rated as medium (21) rather than high (11). This might indicate that, concerning the survey respondents, urban and mountains DMOs focus on providing high-level infrastructures to enhance and support tourism-related economic activities. On the other hand, nature and rural DMOs may face difficulties in investing in infrastructure improvements, including those needed to travel to and within the destination.

Quality of tourism in a destination has also been assessed through a combination of the four variables described so far (quality of utilities/facilities, access to and travel within the destination, accessibility of services and facilities, and level of conservation of natural features)[12]. The results show overall a **balanced level of quality of the destinations sample**: on a scale of 1 to 3, half of the respondents' quality ranges from 1.75 to 2.50, suggesting a **frequent medium quality of the tourism offer.**

To analyse the quality by country, a similar analysis was performed with the averages of the destinations' quality for each country. Again, the results show a rather balanced country distribution of the sample[13], with the national average ranging between 2.00 and 2.31 in half of the cases[14].

2.2.2 Destinations' economic reliance on tourism

The **impact of the tourism industry on the local economy** and, from a mirror point of view, how much the local economy relies on tourism, were assessed though the question "How much does tourism contribute to the economy of your destination?" (Q9) both in terms of local GDP and employment. As shown in the figure below, both for local GDP and employment, all three levels of impact ("small", "medium", and "high") have similar frequencies, suggesting that, in the perception of the DMOs sample, tourism usually impacts GDP and employment to the same extent. Indeed, in only 15% (34) of the cases, local GDP and employment are differently affected by tourism, with the impact on local GDP being higher in 20 cases[15].

[12] The methodology used is explained in Annex V. Moreover, a correlation test between each component and the combination was performed to check whether each variable is properly represented within the combination.

[13] In terms of countries of the sample, 25% of the countries having the highest average quality include Luxembourg (2.63), the Republic of Cyprus (2.63), France (2.55), Belgium (2.50), Spain (2.40), Germany (2.36), and Portugal (2.34). At the same time, the countries with the lowest quality are Slovakia and Montenegro, both being outliers (1.5), Romania (1.75), Bulgaria (1.85), and Lithuania (1.92). For Slovakia, the quality value corresponds to the one of Kosice, the only Slovak destination that answered the survey. For Montenegro, the quality value corresponds to the national Montenegro destination management organisation, the only Montenegrin destination that answered the survey.

[14] This analysis was performed using two box plots, one for the quality combination and the other for the national average of quality combinations. See Annex V for the methodology.

[15] To better understand how local GDP and employment are similarly impacted by tourism, contingency tables were used. The frequencies observed at the table intersections further confirm that, in most destinations, tourism has a similar influence on both variables.

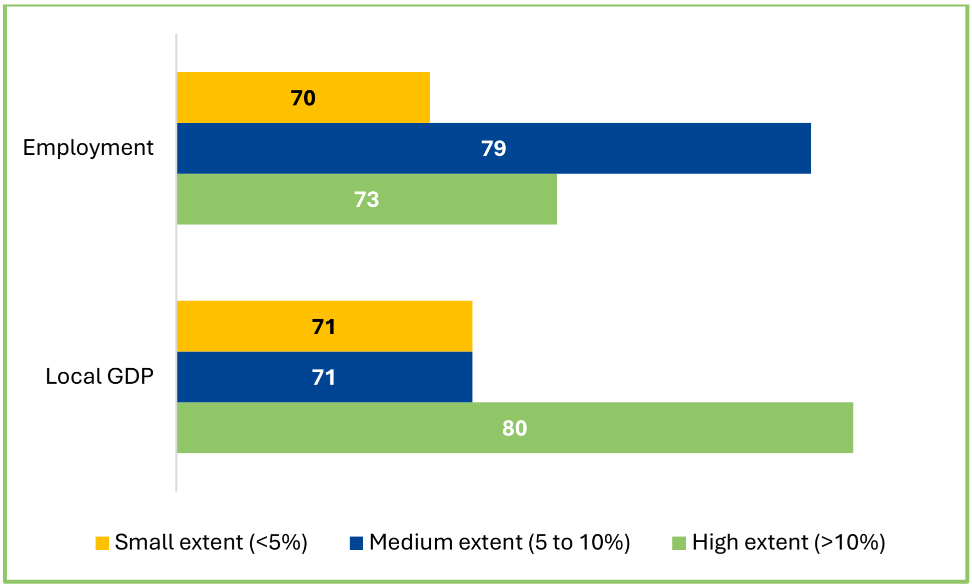

Figure 7 - Tourism contribution to destination economy

Since these analyses demonstrate a correlation between the extent of tourism impact on local GDP and employment, only local GDP will be used to assess how much a destination economy relies on tourism. The analysis of the distribution of GDP levels of contribution to the local economy shows a **balanced level of economic reliance of the destinations sample**. In 36% of the sample, the local GDP relies highly on tourism, in 32% to a medium extent, and in the remaining 32%to a small extent. Regarding the local economy reliance on tourism by country, a similar analysis was performed, with average values for each country. Again, the results show a rather balanced country distribution of the sample[16], with the national average ranging between 1.54 and 2.39 (1 low, 3 high) in half of the cases[17].

The following figure shows the percentage of the three levels of tourism contribution to local GDP by destination type. As expected, **the types of destinations whose economies rely the most on tourism are coastal and mountain**: almost 60% of respondents of both destination types declared that tourism contribute to their local economy to a high extent. Conversely, **urban and nature and rural destinations economies are less affected and rely on tourism to similar extents**. For both destination types, more than half of respondents declared their destinations' economy relies on tourism to a high or medium extent.

[16] See Annex V for the methodology. Slovakia, Luxembourg, and Portugal; Spain are the ones with the lowest level of economic reliance on tourism (1), while Republic of Cyprus, Malta, and Montenegro are the ones with the highest (3). Montenegro, Slovakia, and Portugal; Spain values correspond to the ones of the single country destination who answered the survey (see previous notes).

[17] This analysis was performed using two box plots, one for the economic reliance and the other for the national average of economic reliance.

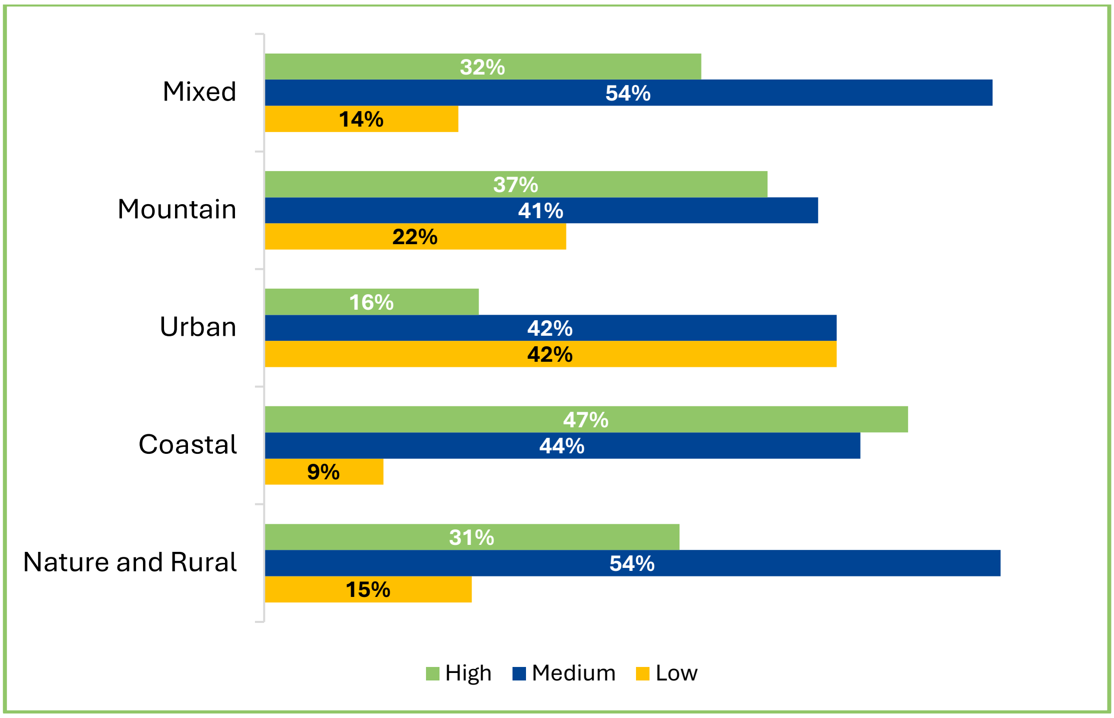

Figure 8 - Local GDP contribution by destination type

2.2.3 Destinations' vulnerability to change

As mentioned in the paragraph above, the impact of tourism on local GDP and employment contributes to determine a destination's sensitivity to change. In this paragraph, instead, the analysis focuses on those features determining a destination's vulnerability, based on the poor diversification of source markets, attractions, seasonality, and composition of the local economy[18]. Thus, the variables analysed in this paragraph are the answers to questions:

- Question 9: "How much does tourism contribute to the economy of your destination? Local GDP"
- Question 10: "Approximately, what % of your arrivals come from your 3 most significant international source markets for tourism (i.e. the tourists' country of origin)?"
- Question 11: "What does your destination offer in terms of types of attractions that may bring in tourism?"
- Question 15: "To understand your destination's sensitivity to changes, please **rate the following features of your destination: tourism seasonality"**

Question 10 provides an estimate of how much **tourism in the destination is diversified in terms of international source markets**. Thus, the higher the extent to which tourists come from a destination's top three international markets, the lower its diversification. Consequently, the lower the diversification, the higher its vulnerability. As shown in the figure below, most respondents declared to be highly dependent on their 3 most significant international source markets, suggesting a possible vulnerability issue.

[18] This analysis was performed using two box plots, one for the economic reliance and the other for the national average of economic reliance. https://doi.org/10.1787/a8dd3019-en

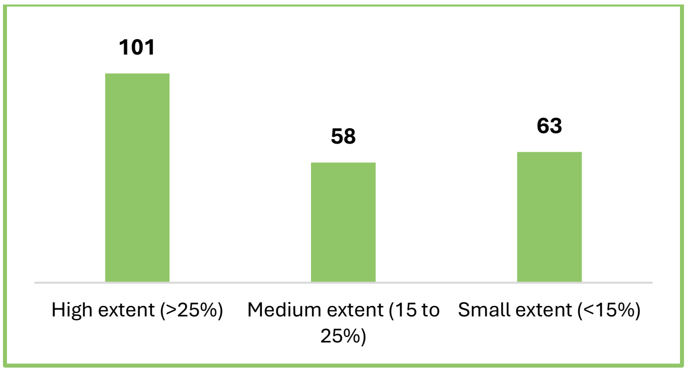

Figure 9 - % of arrivals coming from the destination's 3 most significant international source markets

This reflection can be further broken down taking into consideration destinations' typology and estimated NUTS level. Firstly, regarding the destination typology, the figure below shows how nature & rural, coastal, and mountain DMOs attract a larger portion of tourists from the top 3 international markets, thus presenting lower diversification levels which might result in high vulnerability levels to unexpected changes in terms of tourism demand from these markets. Conversely, urban and mixed destinations show a more evenly spread but lower dependence on international arrivals.

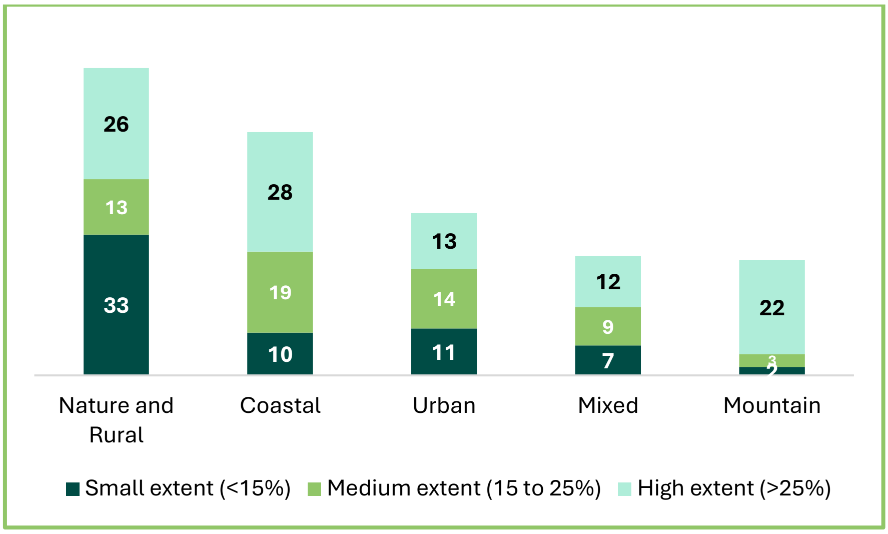

Figure 10 - Destination type and % of arrivals coming from the 3 most significant international source markets

Then, focusing on the NUTS level, the following figure demonstrates how smaller destinations, as NUTS 3 (30 preferences) or lower than NUTS 3 level (59 preferences) are highly dependent on their most relevant international markets, thus potentially exposed to vulnerabilities connected to demand shifts in such markets. On the contrary, NUTS 1 and NUTS 2 level DMOs result to be scarcely affected by this factor, with middle-low dependency levels.

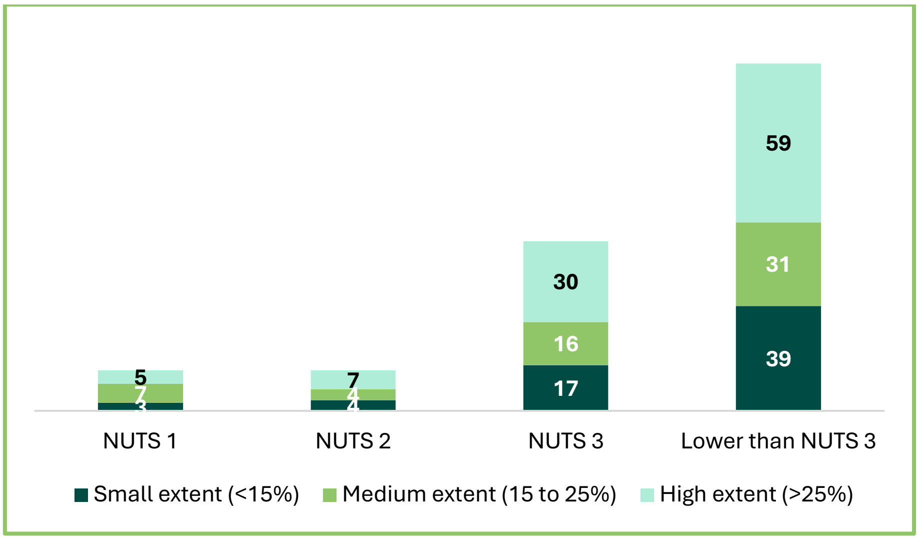

Figure 11 - Destination estimated NUTS level and % of arrivals coming from the 3 most significant international source markets

Similarly, Question 11 about **tourism attraction/reasons to visit** aims to provide an estimate of the diversification of the destination's tourism offer. Higher numbers of attractions (e.g. cultural heritage attractions, natural attractions, events, sports, shopping) not only attract more tourists, but also tourists with different interests, making the destination more diversified and less vulnerable to changes in demand. At the same time, providing a differentiated offer allows to compensate potential reduction of services due to changes in the destination's conditions (e.g. reduction of ski season due to climate change). The figure below shows that most respondents declared to offer several attractions, suggesting a good diversification across the destinations' sample. However, it should be noted that the answers are a self-assessment and thus could be subject to bias.

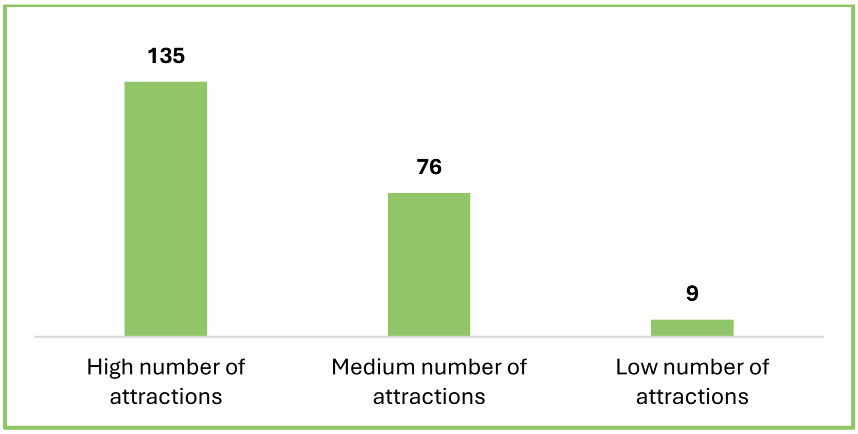

Figure 12 - Number of attractions/reasons to visit the destinations

The answers by destination type reflect the results of the overall sample: for each type of destination, most respondents declared to have a high number of attractions, followed by those declaring a medium number, and finally a low number. Finally, urban and mountain destinations are the ones representing the highest percentage of destinations offering many attractions, respectively 76% and 78% (Figure 15).

Figure 13 - Number of tourism attraction by destination type

Question 15 also asked respondents to rate the level of **seasonality** in their destination. The fact that in Europe tourism is concentrated in relatively short periods of time may cause problems such as income instability, precarious working conditions, and low investment attractivity. From a sociocultural point of view, high seasonality can drive to disruption of cultural traditions and lifestyles, in a context of overcrowding, pressure on infrastructures, and diminishing services quality. At the same time, from an environmental point of view, it could lead to deterioration of natural resources that may become permanent if not properly managed during off-season, in any case generating higher maintenance costs. The figure below shows that the level of seasonality is either medium or high in 81% of respondent destinations, suggesting a possible high vulnerability in most destinations. This finding is in line with Eurostat data, which highlights that in 2022, tourism demand of EU residents was concentrated in the third quarter, mainly in August followed by July, when respectively 12.9 % and 12.3 % of the entire year's trips were made and EU residents spent more than one in three nights away in these two months[19].

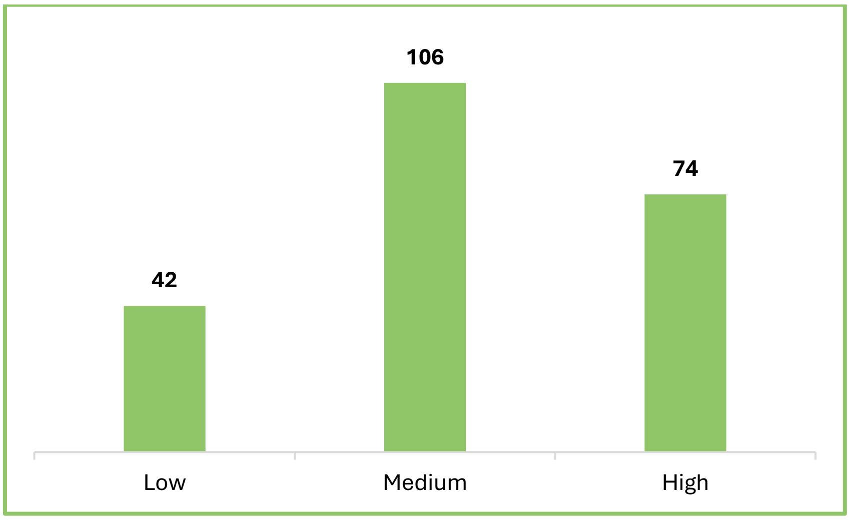

Figure 14 - Tourism seasonality

[19] Eurostat (2023), Seasonality in tourism demand. Available at: [Seasonality in tourism demand - Statistics Explained (europa.eu)]

The figure below shows how seasonality responses are distributed among the five destination types identified. Causes of seasonality can be natural such as the seasons and related climate conditions, or institutional such as public and school holidays[20]. **The destinations indicating the highest incidence of seasonality are coastal and mountain ones**. Indeed, tourism in these two types of destinations is linked to outdoor activities, which make tourism dependent on weather conditions. Interestingly, more than a quarter of mountain destinations experienced a low incidence of seasonality, suggesting the implementation of successful measures to mitigate seasonality. Conversely, **urban destinations are the ones suffering less from seasonality**: this is confirmed by the lowest share of high seasonality destinations and highest share of low seasonality.

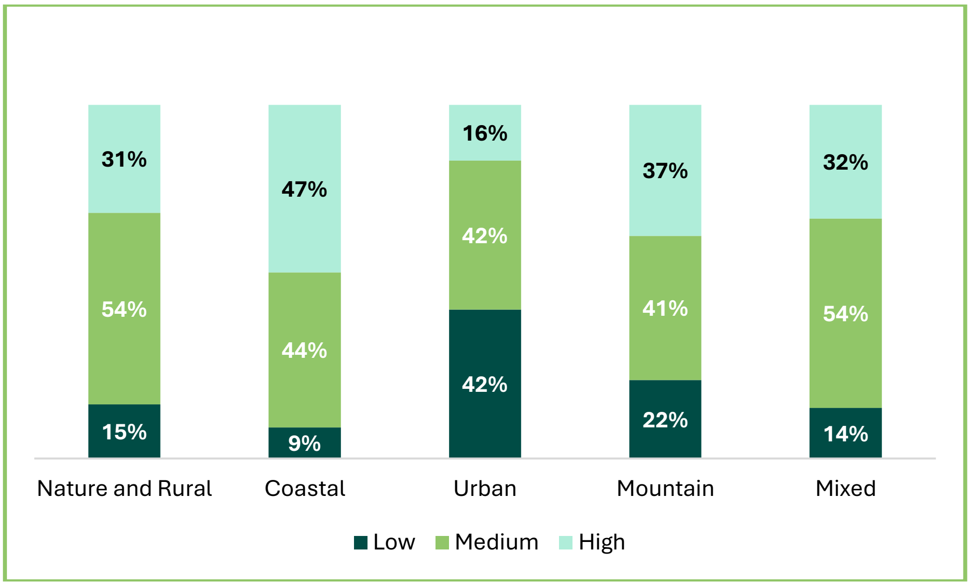

Figure 15 - Seasonality by type of destination

A common strategy to counter seasonality is to diversify the tourism offer and attract different types of tourists, ideally in different periods of the year.To understand how these two variables intersect with each other in the sample, the following heatmap was compiled. Darker colours of the intersections mark higher numbers of destinations. Making the hypothesis that a diversified offer would have reduced seasonality, we would have expected a colour intensification in the upper left corner (high variety – low seasonality) or in the bottom right corner (low variety – high seasonality). Conversely, the relatively high number of destinations (41) having a high variety of reasons to be visited and at the same time suffering from high seasonality may suggest that, in our sample, **a tourism diversification offer might not be enough to counter seasonality**.

The highest number (70) is made up of destinations with a high variety of attractions and a medium level of seasonality, suggesting a mild positive effect of tourism diversification offer on seasonality. A reasonable explanation is that, in this analysis, only the relation between seasonality and tourism offer was considered. Indeed, **seasonality is also strictly related to the demand side (e.g. school holidays and office closures) and corrective measures would need to go beyond increasing tourism attractions.**

[20] UNWTO, Tourism seasonality, [Tourism Seasonality | Tool and Resources (unwto.org)]

Figure 16 - Variety of attractions - seasonality heatmap

Starting from figure 17Figure 1, the same analysis was performed by destination type, to understand whether the distribution above is reflected across the five destination types or whether it is driven by one (or more) specific typology(ies). For each destination type, most respondents declared to have a high variety of tourism attractions and a medium level of seasonality, confirming a trend similar to the one of the whole sample (Figure 17). Many coastal and mountain destinations – the ones most frequently experiencing seasonality – declared to have both high seasonality and high variety of attractions, suggesting that the **diversification of reasons to visit them might not be enough to counter tourism concentration in relatively short periods of the year.** Conversely, many urban destinations declared to have a low seasonality and a high variety of attractions, suggesting that, in this case, the many reasons to visit countered seasonality.

The three variables described so far (international source market, tourism attractions, and seasonality) were also combined with the economic reliance on tourism (i.e. tourism contribution to local GDP), to explore the level of vulnerability of each destination[21]. Since the variety of tourism attractions seems not to be significantly correlated with the overall composition, a combination only including international source market, tourism attractions, seasonality, and tourism contribution to local GDP was used[22]. The results indicate a **balanced level of vulnerability** (the degree to which the destination is exposed to hazards and is sensitive and susceptible to them) across the sample. On a scale of 1 to 3, half of the respondents report a vulnerability score between 1.67 to 2.67, suggesting that **medium vulnerability** is common among **the destinations** surveyed. A similar analysis was conducted to assess vulnerability by country, using the average scores of the destinations. Again, the results show a rather balanced distribution by country[23], with the national average vulnerability ranging between 1.67 and 2.67 in half of the cases[24]**.**

[21] This combination – assuming values from 1 to 3 – was compiled giving the same weight to the four variables. The methodology used is explained in Annex V.
[22] The methodology used is explained in Annex V. Moreover, a correlation test between each component and the combination was performed to check whether each variable is properly represented within the combination.
[23] In terms of countries, 25% of the countries having the highest average vulnerability include (in decreasing order) Montenegro (3, outlier) and Republic of Cyprus (2.38), Greece (2.76), Portugal (2.42), Malta, Belgium (both 2.33), and Austria (2.29). At the same time, 25% of the countries with the lowest average vulnerability are (in increasing order) Slovakia, Portugal; Spain (both 1.33), Lithuania (1.67), Romania (1.74), Germany (1.75), the Netherlands (1.83), Luxembourg (1.83). Montenegro, Slovakia, and Portugal; Spain values correspond to the ones of the single destination that answered the survey (see previous notes).
[24] This analysis was performed using two box plots, one for the vulnerability and the other for the national average of vulnerability.

2.2.4 Destinations' resilience

Destination preparedness to respond to changes in conditions and demand are of course part of the factors contributing to a destination's sensitivity. "Resilience refers to the capacity to absorb disturbance, recover from disruption and adapt to changing conditions while retaining essentially the same function as prior to the shock. It goes beyond risk management and concerns the performance of the economic system once a threat has materialised."[25] That said, since the scope of the project is to lead European tourism destinations towards sustainable practices, it is necessary to investigate the relationship between sustainability and resilience itself. Although different, these concepts are strictly related to each other, since sustainability is often referred to as stability, addressing normative objectives, focusing on how economic development can affect social and ecological resources, and implementing "wise use" management strategies[26]. In practice, this means that resilience can be seen as a **destination's ability to handle and react to shocks**, while sustainability focuses on how that destination deploys its resources to achieve growth in a way that avoids long-term damage. In addition, resilient destinations can better cope with crises, and sustainable practices prevent overusing & misusing those resources which undermine resilience itself. In addition, it is possible to observe how sustainable tourism practices directly enhance resilience, and vice versa. In fact, sustainable tourism destinations have higher chances to recover from external shocks and maintain their long-term appeal. Similarly, integrating resilience-building solutions into sustainable development plans ensures that destinations not only overcome the challenges generated by external disturbances but remain successful in the long term. Consequently, by aligning sustainability goals with resilience strategies, destinations can enhance their economic, social, and environmental dimensions, increasing their ability to adapt and grow even after disruptions.

Leveraging this evidence, in this analysis, destinations' capacity to address changes and shocks are treated as factors determining a destination's resilience. These include "Effectiveness of destination governance", "Effectiveness of destination management"[27], "Ability to respond to changes in destination's conditions", and "Ability to respond to changes in tourism demand" (Q15). As shown by the figure below, respondents rated each of these characteristics on a "low", "medium", "high" scale. For all characteristics, the majority of respondents declared a medium level. The "**Ability to respond to changes in destination's conditions**" is the characteristic that was most frequently marked as "low" and that received the least number of "high" rates, suggesting **a common need for improvement across the sample**. Conversely, "Effectiveness of destination management" is the one that was the least frequently rated as "low" and most frequently rated as "high". This result may be interpreted as evidence of an overall good level of management across the sample. However, it should be considered that the survey was specifically submitted by the organisations responsible for the management and/or marketing of destinations (i.e. DMOs), and the responses could thus be subject to bias. Conversely, even though destination governance is also a DMO's prerogative, the number of destinations with a good level of governance is only slightly more than half of those with good management.

[25] OECD (2022), "Building resilience in the tourism ecosystem", in OECD Tourism Trends and Policies 2022, OECD Publishing, Paris, https://doi.org/10.1787/a8dd3019-en

[26] Lew, A. A., Ng, P. T., Ni, C. C., & Wu, T. C. (2016). Community sustainability and resilience: Similarities, differences and indicators. Tourism Geographies, 18(1), 18–27

[27] Hynes, W. et al. (2020), Bouncing forward: a resilience approach to dealing with COVID-19 and future systemic shocks, Springer.

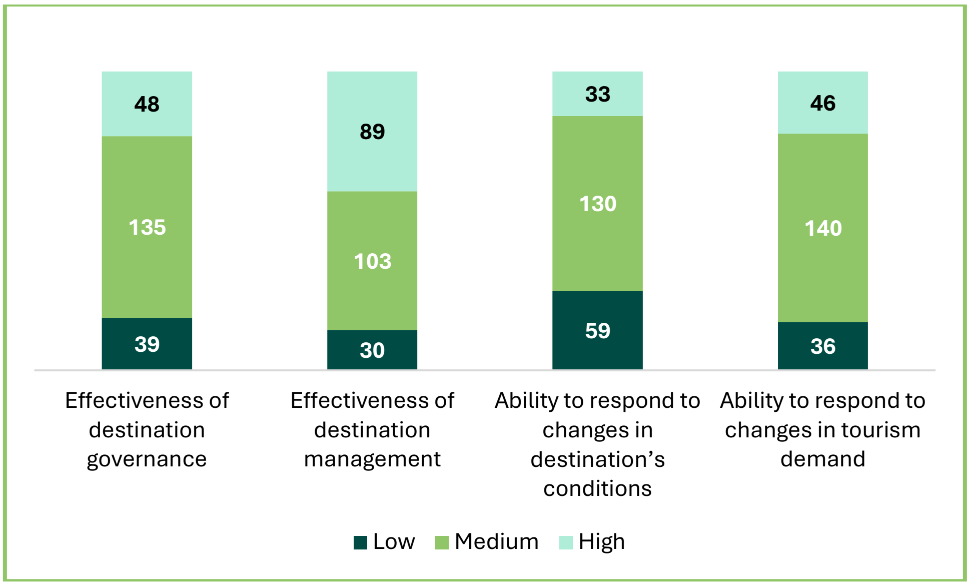

Figure 17 - Resilience factors

These four variables (effectiveness of destination governance, effectiveness of destination management, ability to respond to changes in destination's conditions, and ability to respond to changes in tourism demand) were combined to explore the overall level of resilience of each destination[28]. The results show a perfectly **balanced level of resilience of the sample**: on a scale of 1 to 3, half of the respondents' overall resilience ranges from 1.75 to 2.25, suggesting a **frequent medium vulnerability of the destinations** in the sample. The distribution is symmetric, meaning that the most vulnerable destinations and the least vulnerable ones assume values within intervals of the same width.

Considering resilience by country, a similar analysis was performed with the averages of the destinations for each country. Again, the results show a rather balanced distribution by country and suggest a frequent medium resilience of the destinations by country[29], since the national average resilience value ranges between 1.91 and 2.21 in half of the cases[30].

The comparison between the results of the vulnerability and the resilience shows that most countries (i.e. Estonia, Portugal, Republic of Cyprus, and Slovenia) where destinations are on average more vulnerable are also among the ones where destinations are on average more resilient, suggesting a possible compensation effect. At the same time, some countries (i.e. France and Slovakia[31]) where destinations are on average less vulnerable are also among the ones where destinations are on average more resilient, suggesting a lower likelihood of being affected by changes in the destination and tourism demand.

[28] The methodology used is explained in Annex V. Moreover, a correlation test between each component and the combination was performed to check whether each variable is properly represented within the combination.

[29] In terms of countries, 25% of the countries with the highest resilience include the Republic of Cyprus (2.75, an outlier), Portugal (2.47), Belgium (2.42), France (2.35), Slovenia, Estonia, and Slovakia (2.25). At the same time, 25% of the countries having the lowest resilience include Romania (1.47), Denmark, Montenegro (1.75)[29], Lithuania (1.83), Finland (1.88) and Bulgaria (1.90). Values for Montenegro and Slovakia correspond to the ones of the single destinations that answered the survey (see previous notes).

[30] This analysis was performed using two box plots, one for the resilience and the other for the national average of the resilience. See Annex V for the methodology.

[31] It must be considered that this consideration about Slovakia is based only on the survey response of Kosice, the sole Slovak destination that answered the survey.

2.3 Destination governance

Collecting data on the governance models adopted by DMOs taking part in the survey was crucial for understanding the DMOs' role within the tourism ecosystem and their interactions with key stakeholders. To this end, according to the existing literature, DMOs shall fulfil a role that goes beyond marketing, effectively becoming strategic leaders to sustain destination development. Therefore, this role entails coordinating destination management activities within a cohesive strategy that enables the creation of an appealing environment for all stakeholders involved in the process (i.e., residents, tourists, local public entities, local firms, etc.)[32]. Indeed, **higher stakeholder engagement and consultation can lead to more resilient and sustainable tourism destinations**, as demonstrated by several collaboration experiences at EU and international level[33]. In this context, identifying and gradually involving visitors and local communities reinforces the bond between the actors operating in the tourism ecosystem, enhancing sustainability and resilience-related practices.

2.3.1 DMO key roles

The survey started by assessing the DMOs' key roles (Q12), presented in the figure below.

[32] World Tourism Organization (2007), A Practical Guide to Tourism Destination Management, UNWTO, Madrid, DOI: https://doi.org/10.18111/9789284412433

[33] Byrd, E.T. (2007), "Stakeholders in sustainable tourism development and their roles: applying stakeholder theory to sustainable tourism development", Tourism Review, Vol. 62 No. 2, pp. 6-13. https://doi.org/10.1108/16605370780000309

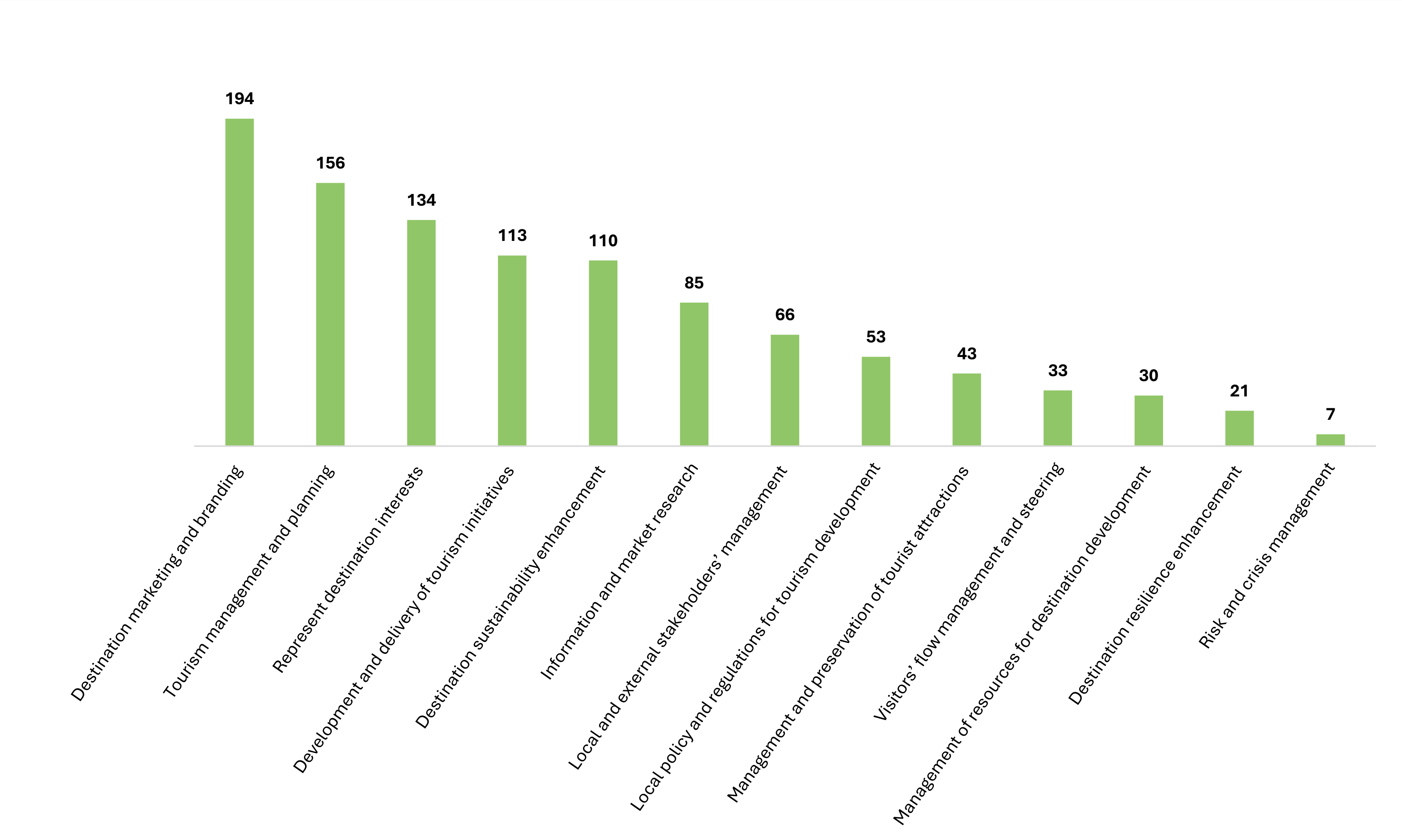

Figure 18 - Key roles within the DMO

As underpinned by the figure, **19% of the functions indicated by the destinations concern marketing activities**, including promoting the visibility of the destination's activities, as well as their digital presence. Other key roles covered by DMOs are related to tourism management and planning (15%), representing the destination's interests at national, local, or regional level (13%), and developing and delivering tourism initiatives and products (11%). Respondents also demonstrated surging interests in addressing the specific topics of economic, environmental, and social sustainability, as 11% of the functions undertaken by their DMOs are directly related to sustainable development of tourism.

Contrarily, **most destinations do not prioritise visitor flow management and steering**. This might be related to the dimension of destinations. In fact, as 58% of all respondent DMOs operate below NUTS 3 level, they might not have the resources necessary to develop this set of competencies.

The lowest value (7 respondents) has been recorded for risk and crisis management, despite the importance of crisis management plans to limit the negative effects of disruptive events (pandemic, war, financial crisis, natural disaster etc.), which can cause harm to both the local economy and the destination's image. In fact, risk assessment frameworks are essential for building resilience and preparedness, as well as for minimising disruptions and facilitating recovery. In addition, specific response mechanisms should include well-defined protocols, coordinated communication channels, and efficient resource allocation systems, enabling DMOs to swiftly reply to the challenges determined by potential crises.

Conversely, as mentioned above, most of the respondents reported putting low emphasis on developing risk and crisis management capacities. Indeed, the majority of DMOs and SMEs operating in the industry lack the financial capacity to build resilience and develop crisis preparedness strategies. They are often lacking the necessary expertise, capabilities, and resources to invest in digitalisation, sustainability, and resilience initiatives. Moreover, after experiencing crises, the investment capacity of tourism ecosystem stakeholders becomes even more constrained. Financial strain during crises restricts their ability to make necessary investments in the post-crisis period. This cycle places significant stress on stakeholders which are part of the tourism ecosystem, hindering their ability to enhance resilience, invest in long-term sustainability, and effectively respond to future crisis events [34].

To answer these challenges, the European Commission funded the Crisis Management and Governance in Tourism project, aimed at strengthening the EU tourism ecosystem resilience by improving its governance and mechanisms for resisting, managing, and mitigating future crises. Overall, 55 beneficiaries from 21 different countries received advisory to improve their resilience and crisis preparedness. The project's main outcomes include:

- **Best practices** to find more information on exemplary governance strategies and crisis preparedness and data deployment actions.
- **Policy recommendations** addressing the whole tourism ecosystem.
- **eLearning journey** through the EU Academy to enhance destinations' crisis preparedness management skills and expertise.

[34] Call for tenders EISMEA/2022/OP/0011, Crisis Management and Governance in Tourism, D1.5 Recommendations, September 2023

2.3.2 Destinations' most relevant stakeholders

In connection with the DMO's roles, the survey further explored the respondents' most relevant stakeholders (Q13), namely those actors which are most affected by tourism and/or the ones whose actions can influence tourism. A detailed overview regarding data collected can be found in the figure below.

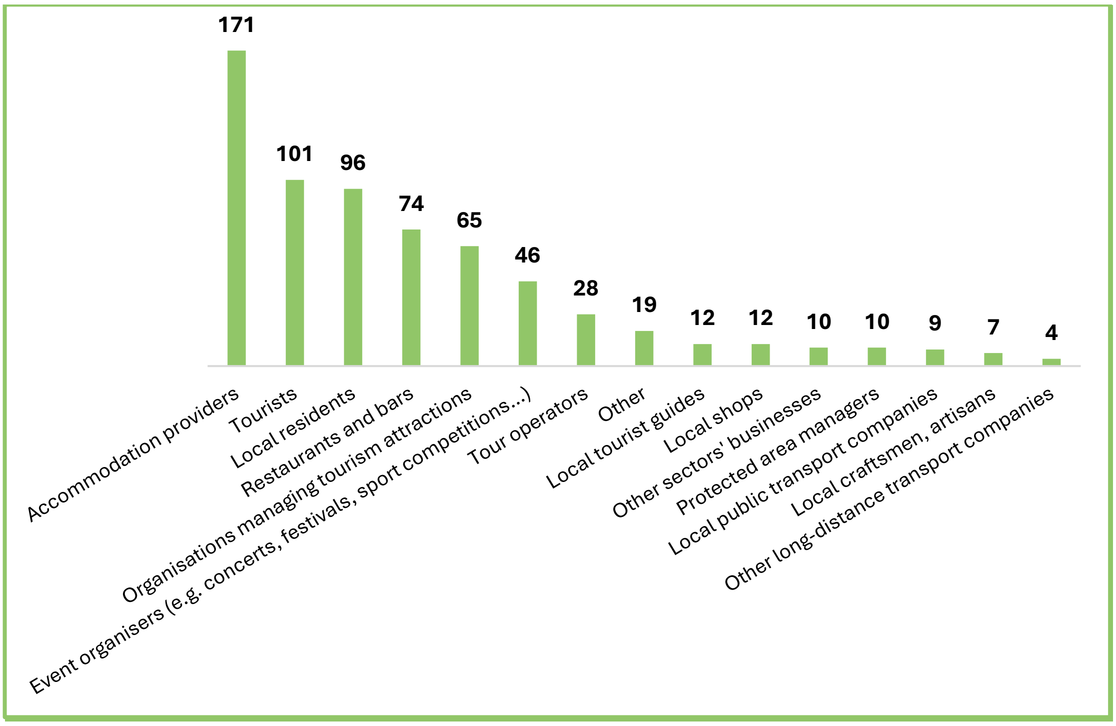

Figure 19 - Respondents' most relevant stakeholders

Overall, **accommodation providers are deemed the most important stakeholders** (171 responses), with destinations underscoring their critical relevance in providing lodging and other essential services to tourists, directly impacting the quality of visitor experience and satisfaction. **Tourists represent the second most relevant stakeholders** for destinations (101 responses), as they are the primary consumers driving the tourism industry. **Local residents** are highly valued as stakeholders (96 responses), as their involvement is pivotal for ensuring community support, while balancing the impact of tourism on local development. Lastly, the role of **local municipalities and administrations** is also worth mentioning. Classified under the 'Other' category, these stakeholders received 11 out of the 19 total responses in this category, highlighting their significance within the tourism ecosystem.

This evidence can also be combined with the size of the destinations involved, to understand the specific relevance of the stakeholder categories identified above for heterogeneous destinations. In particular, **accommodation providers** are significantly relevant for destinations with less than 800.000 inhabitants.

Such categories represent the project's main target population, thus further reinforcing the relevance accommodation providers hold for the destinations engaged in the survey.

These types of tourism destinations also prioritised the role of **tourists**, **local residents**, as well as **restaurants and bars**. The figure below presents a more comprehensive overview of the analysis in question.

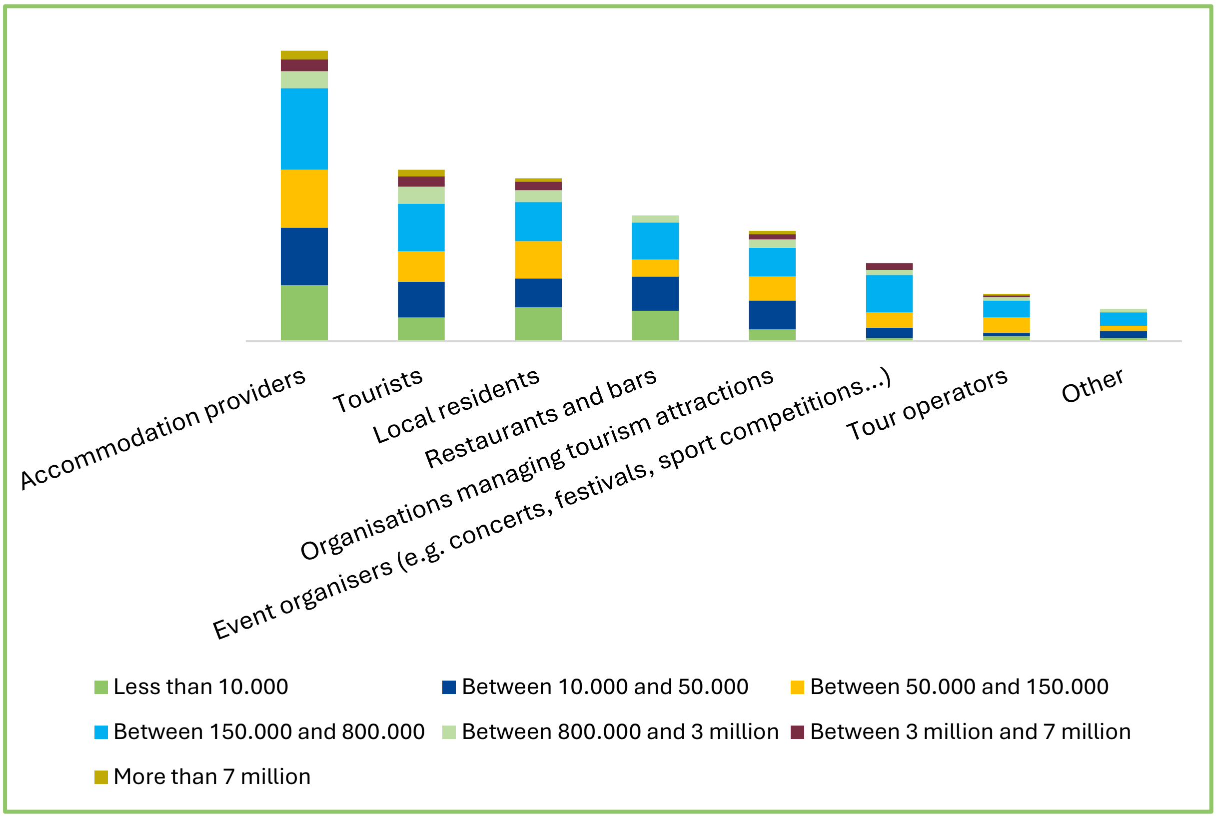

Figure 20 - Stakeholder relevance per destination size

In addition, these results show consistency across the different types of destinations, with **accommodation providers being especially relevant in nature & rural destinations** (58 responses), as well as coastal DMOs (43).

2.3.3 DMO relationship with key stakeholders

After having examined stakeholders' relevance, question 14 investigated their relationship with the DMO. Consequently, it is possible to observe how stakeholders have become increasingly central, with **stakeholder involvement being a key mechanism for ensuring effective governance and development processes in the tourism sector**. The graph below shows that almost 90% of DMOs reported the presence of stakeholder engagement mechanisms. At the same time, more than 1 in 3 DMOs mentioned the presence of structured stakeholder consultation mechanisms.

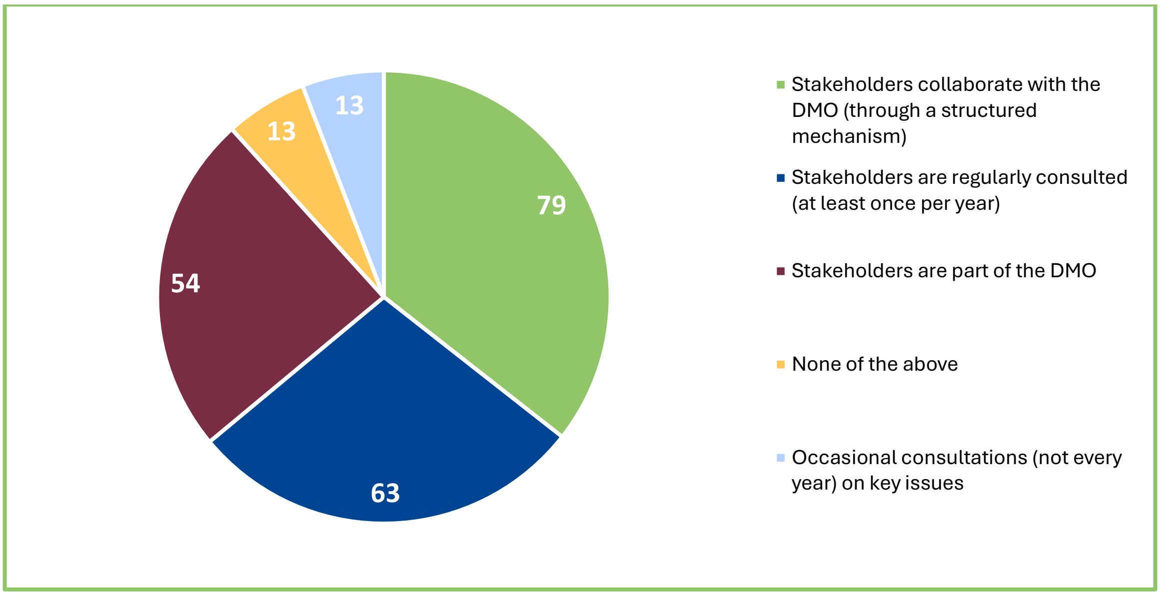

Figure 21 - DMO relationship with the destination's most relevant stakeholders

In addition, further analyses were undertaken to better understand the relationship between DMOs and stakeholders. This relationship has been studied in relation to several factors, including the DMOs key roles, the types of main stakeholders, the DMOs dimension, and the relevance of tourism for the local economy.

2.3.3.1 Key DMO roles and stakeholder involvement

Firstly, taking into consideration the key roles covered by the DMOs which answered the survey, **destination marketing and branding is the activity through which stakeholders are mostly involved in the tourism ecosystem.** In detail, this translates into the organisation of ad hoc events aimed at promoting the destination's sustainability practices, complemented by the development of mobile phone applications for engaging tourists and leading them to visit the destination and benefit from its services (accommodation, restaurants and bars, tourism attractions, etc.). Additionally, destinations carrying out such activities reported having set up a wide number of structured collaborations with relevant stakeholders, which have been integrated within the DMO or regularly involved in the DMOs' activities.

Tourism management and planning, as well as representing the destination's interests also entail high involvement levels, foreseeing regular consultations and structured collaboration with stakeholders. High stakeholder involvement can also be observed when DMOs pursue local and external stakeholder management functions and conduct information and market research, as stakeholders are either part of the DMO or engaged through regular consultations and structured collaborations. This underlines the need for destinations to connect with key players in tourism when managing sectorial dynamics, as demonstrated by several projects developed by the survey respondents involving politicians, city administrations, suppliers, the MICE[35] industry, etc. (i.e., urban mobility plans, development of key and sustainable infrastructures, certifications, use of data and innovative technologies for monitoring the achievement of sustainability-related goals, etc.).

Other significant roles that ensure close and structured collaboration with stakeholders are the development and delivery of tourism initiatives and products, together with destination sustainability enhancement.

On the contrary, **enhancing resilience is not seen as a priority by most respondents**, as risk and crisis management functions are not adequately stressed, resulting in scarce and occasional stakeholder consultations. Similarly, managing, maintaining, and preserving tourist attractions, also by designing local policy and regulations, present moderate engagement, a pattern also followed by visitor flow management

[35] Meetings, Incentives, Conferences and Exhibitions

and steering. All these activities recorded the least engagement, suggesting they might be less central to the collaborative efforts with stakeholders.

To summarise, the survey demonstrates that DMOs can assume multiple roles with different levels of engagement from stakeholders. Key economic areas like marketing, planning, and representing interests show high levels of structured collaboration and regular consultations, highlighting their importance in the tourism ecosystem. On the other hand, areas like risk management, destination resilience enhancement, and visitor flow management show lower levels of engagement, which might require more attention to enhance their integration into the overall tourism strategy. The following figure provides a clear overview of the relationship between key DMO roles and stakeholder engagement.

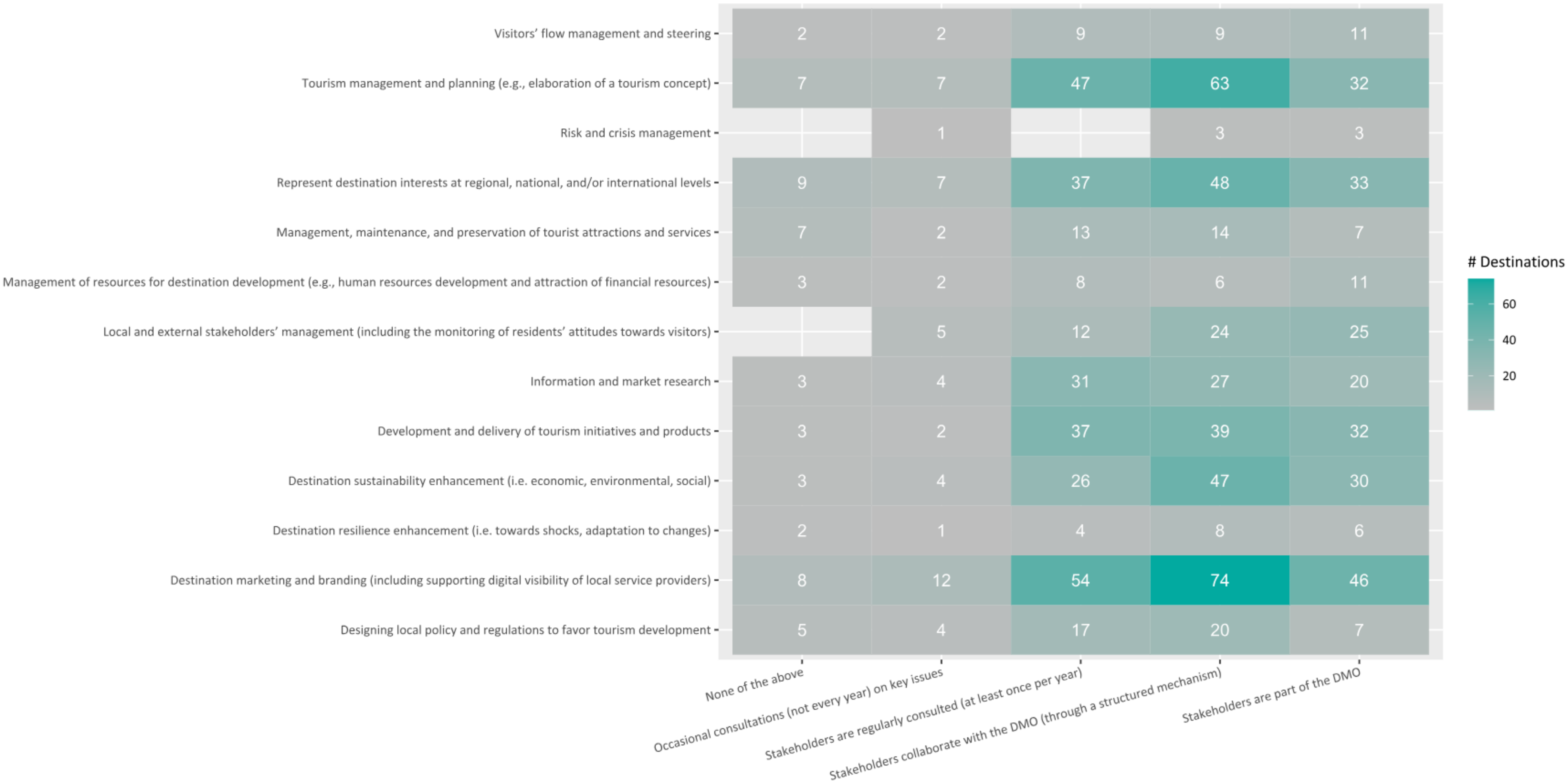

Figure 22 - Key DMO roles and stakeholder engagement

2.3.3.2 Type of stakeholder and stakeholder involvement

Regarding the types of main stakeholders, the analysis shows how **accommodation providers** are the most frequently involved stakeholders across the majority of destinations, being highly engaged through **regular consultations** and **structured collaboration** mechanisms. **Tourists, residents**, **event organisers**, **restaurants and bars**, and **local authorities/municipalities** – under the 'Other' category, as mentioned above - also present high engagement levels, with a considerable number of destinations also reporting structured collaboration. Conversely, **local shops** and **organisations managing tourism attractions**, are moderately engaged, with occasional consultations and few structured collaborations.

Protected area managers, **local craftsmen** and **artisans**, **tour operators**, **airlines** and **local transport companies**, together with **other sectors' businesses** and **other long-distance transport companies** present minimal interaction with the DMO.

Overall, considering this dimension, the dataset reports significant engagement between DMOs and its stakeholders, particularly those directly involved in tourism (**tourists**, **local residents**, and **accommodation providers**). Structured mechanisms and regular consultations are common forms of interaction, demonstrating a widespread collaborative approach when managing and promoting tourism destinations at EU level. Examples of these include public-private partnerships with national authorities and local tourism companies for preserving destinations' cultural heritage, consultation sessions with local stakeholders for establishing Sustainable Environmental Communities (SECs), among others. Despite that, some stakeholders, more specifically those indirectly related to tourism, present lower engagement levels, opening up possibilities for potential and improved collaborations. All evidence presented above is summarised in the figure below.

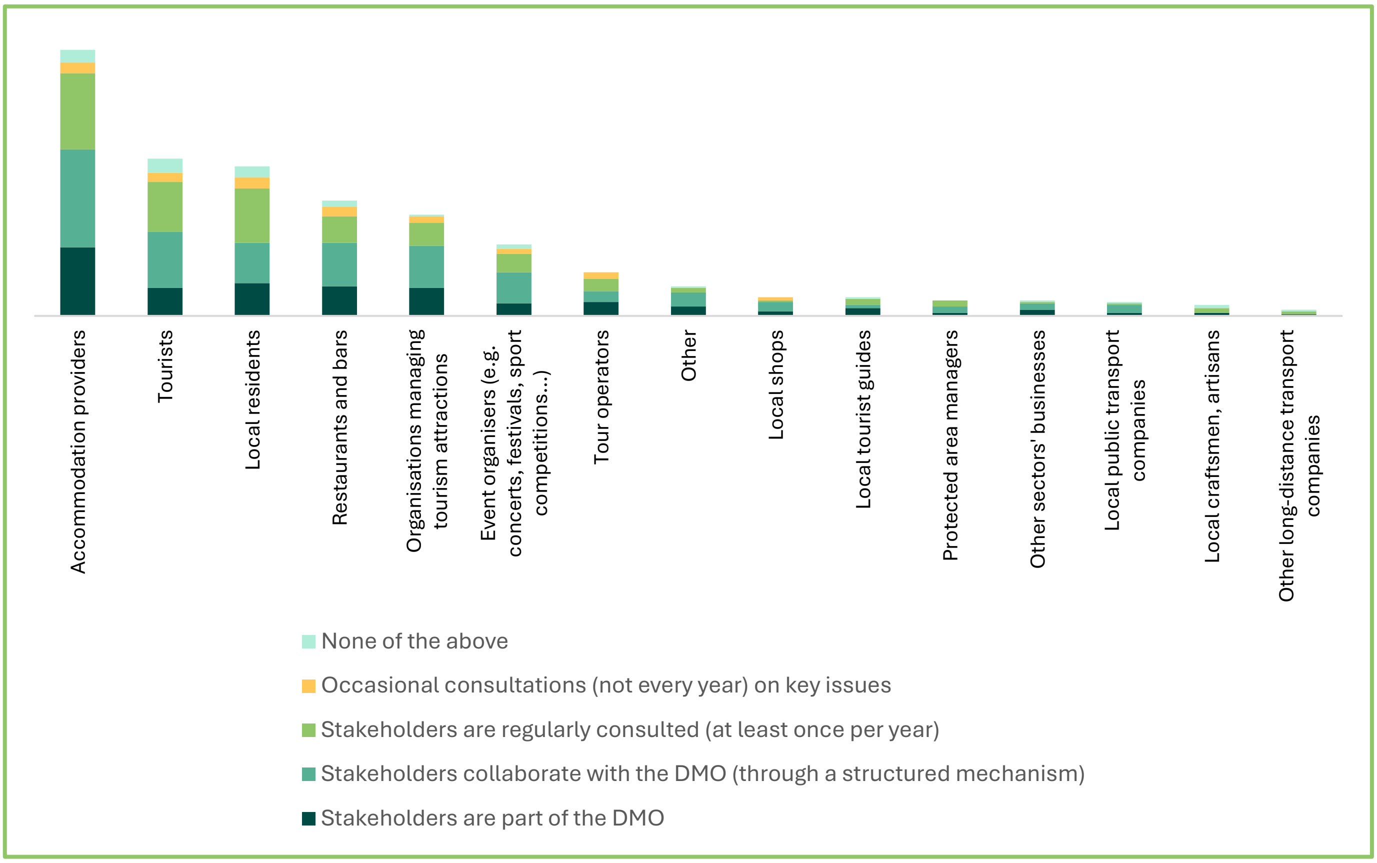

Figure 23 - Type of stakeholders and stakeholder involvement

2.3.3.3 Destination size and stakeholder involvement

Moving to the size of involved destinations, it was possible to observe the following trends:

- For most destinations, from small to large (i.e. less than 10.000, between 10.000 and 50.000, between 50.000 and 150.000, between 150.000 and 150.000, between 150.000 and 800.000), DMOs present high stakeholder engagement. Indeed, for each category, more than half of the respondents declared to either involve stakeholders as part of the DMO or to collaborate with them in a structured way.
- Conversely, in very large destinations (i.e. between 3 and 7 million and more than 7 million), stakeholders are less involved: in some cases, they are regularly consulted (at least once a year), occasionally consulted, or, in a few cases, they are not consulted.

The difference between the two approaches might be due to the complexity of managing stakeholders on large dimension scales or to the fact that DMOs of very large destinations might have roles for which stakeholder consultations are less relevant (e.g. in the case of national DMOs that may cover local DMOs coordination).

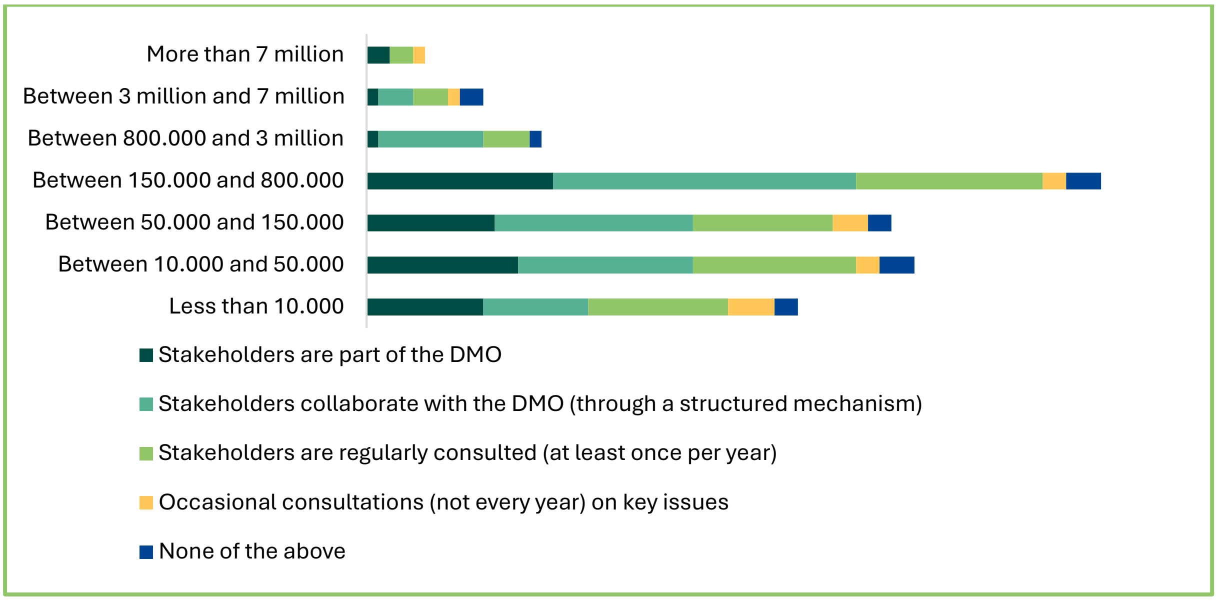

Figure 24 - Destination dimension and stakeholder engagement

2.3.3.4 Tourism economic relevance and stakeholder involvement

Stakeholder engagement has also been analysed in relation to the importance of tourism for the local economy, to see whether changes in the tourism contribution to local GDP are associated with higher likelihoods of observing each type of stakeholder engagement. Interestingly, there is a **positive correlation between the contribution of tourism to the local economy and the likelihood of a DMO having stakeholders as part of it**, as indicated in the table below.

For the type of analysis conducted, this relation can be explained in two ways: i) in destinations whose economy heavily relies on tourism, stakeholders have a prominent role in the local economy and their stakes are taken into consideration so much that they are directly part of the DMO[36], or ii) empowering sectorial stakeholders by making them part of the DMO as independent advisors drives to higher relevance of the sector in the overall local economy.

[36] In several cases the DMO is a private, non-profit association that is the result of a partnership between the public and private sectors (i.e. Visit Azores, etc.)

2.3.3.5 Stakeholder relationship and respondents' country of origin

Stakeholder involvement has been analysed taking into consideration the respondent's country. In this regard, the heatmap below details the results obtained for each of the different countries mapped within the sample, thus not relating to the overall population.

Croatia – the most represented country – has a notable number of DMOs which are characterised by a strong presence of stakeholders within their organisational structure. These DMOs frequently carry out structured collaborations, regularly consulting stakeholders through specific engagement and involvement mechanisms. In destinations like Split, this led to the development of cross-sectorial strategies and action plans encompassing the economic, environmental, and socio-cultural impacts of tourism in the city. These tools were implemented for developing practical instruments for achieving sustainable and resilient development (i.e., Tourism Carrying Capacity Assessment).

Germany also practices a broad spectrum of stakeholder engagement activities allowing them to be part of the DMO or directly involving them through structured collaborations. Examples of direct interaction with key stakeholders include organising topic-specific networking rounds for tourism stakeholders, as per the case of Bremen. In fact, the German destination set up network exchanges for representatives of the MICE sector, cultural heritage and culture, as well as sustainability. This measure positively contributed to connect stakeholders, share ideas and common goals, initiate joint projects, and provide business opportunities.

Similarly, **Italian DMOs** recorded high stakeholder engagement levels, as integrating stakeholders within DMOs is a practice adopted by the majority of respondents. In this context, the Sardinian destination of Carbonia allowed local entrepreneurs in the DMO's organisational structure for renovating the city's mines, repurposing and converting them into new infrastructures aimed at conducting research on and generating non-polluting clean energy.

In addition, other countries like **Austria** and **Czechia** are prominent in partnering up with local tourism stakeholders and organising regular consultations. Conversely, countries like **Portugal** and **Romania** have fewer destinations engaging in stakeholder practices, indicating potential areas for improvement.

More details concerning stakeholder involvement distributed across the respondents' country of origins can be found in the figure portrayed in the next page.

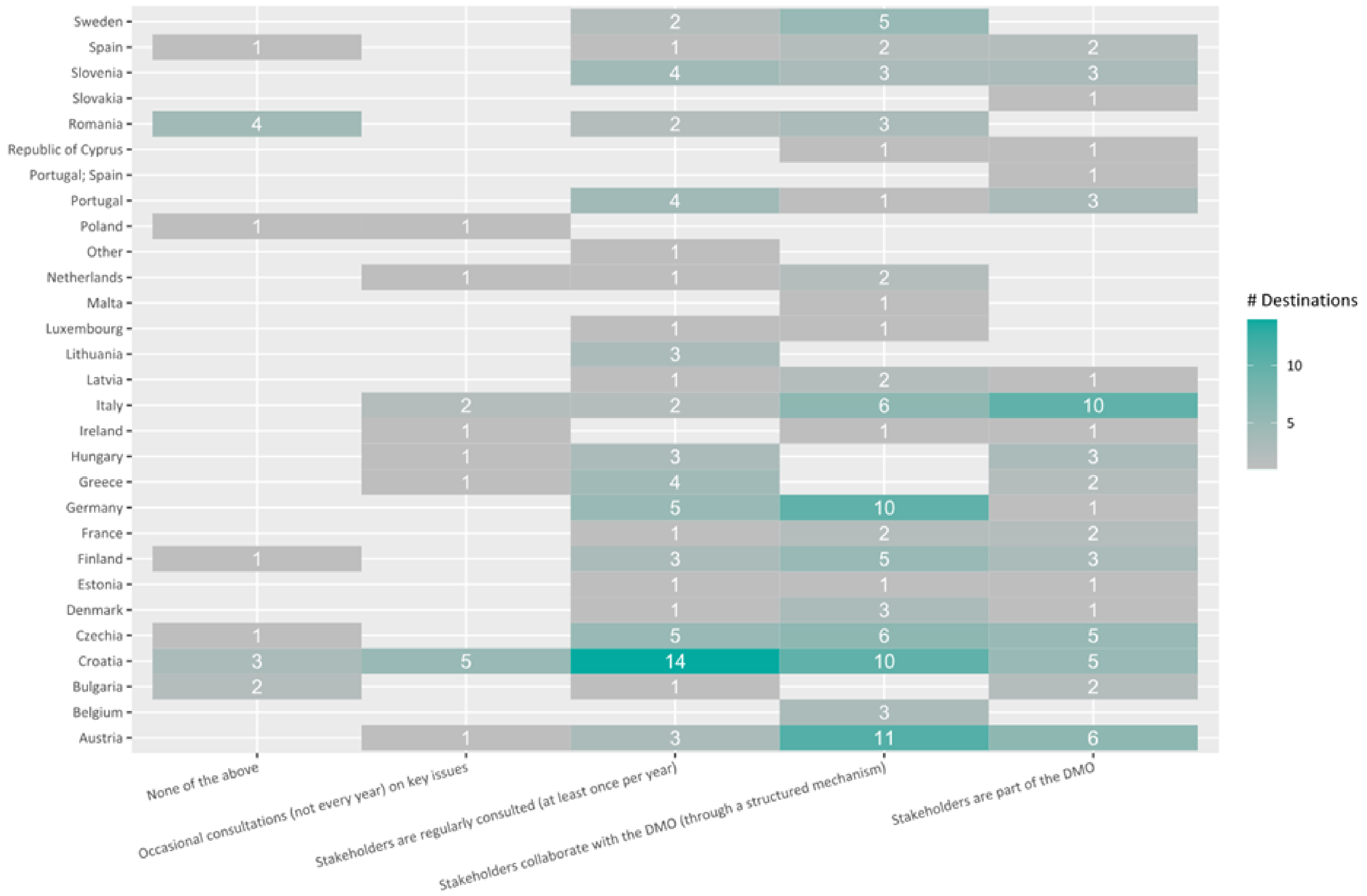

Figure 25 - Type of stakeholders and stakeholder involvement

2.3.3.6 Community participation in tourism activities

In addition to the analyses conducted based on question 14, question 15 allows to understand community participation in tourism activities (e.g. in terms of entrepreneurship, business ownership, ecosystem governance, etc…). In detail, the figure below shows that 56% of the DMOs involved in the survey recorded medium-levels of community participation in their tourism activities, with high-levels only accounting for 24% of total responses.

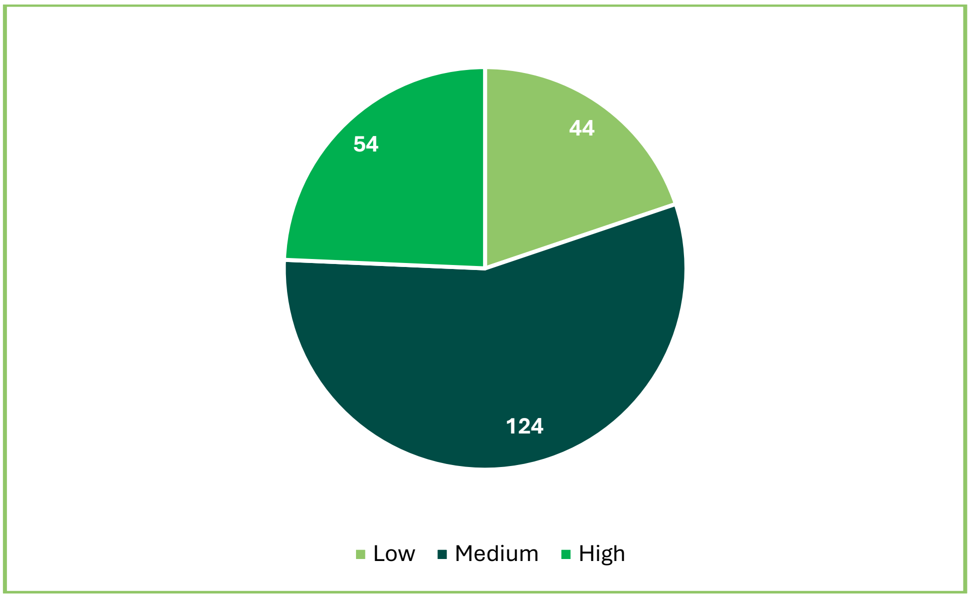

Figure 26 - Community participation in tourism activities

Such information can be combined with the DMO type, to further understand how it influences local residents and tourist behaviour in participating in tourism activities.

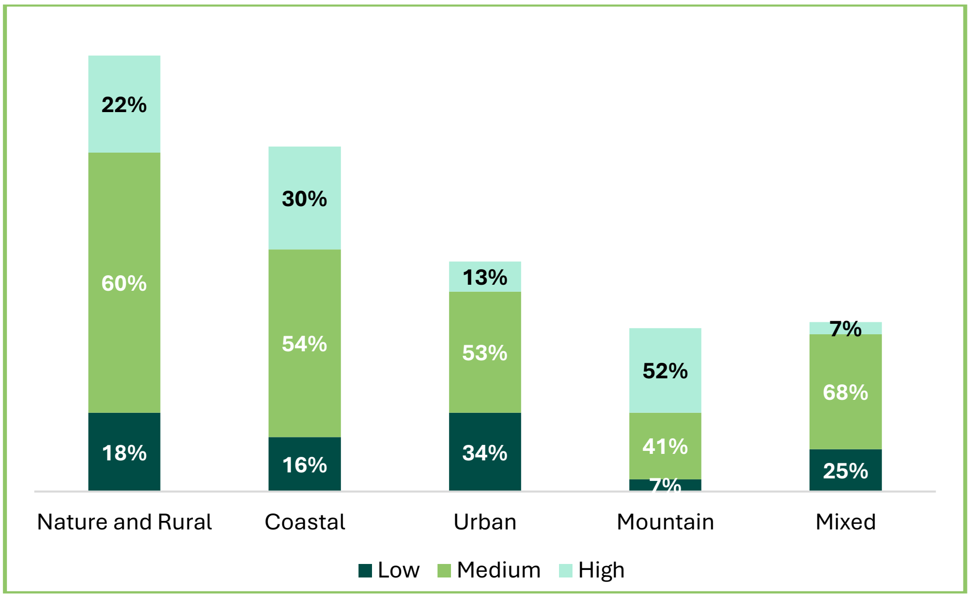

Figure 27 - Community engagement by DMO type

As pictured in the figure above, the following evidence can be summarised:

- **Mountain (52%)** and **coastal destinations (30%)** report more frequently high levels of community participation in tourism activities[37], considering their relevance over the number of responses received per DMO type. Conversely, urban and mixed DMOs are the ones with the lowest incidence of participation. This can be easily understood as mountain and coastal destinations are the ones most economically dependent on tourism and consequently stakeholders are more involved in tourism activities.
- In all destination types – except for mountains – respondents mostly declared a medium level participation to tourism activities in terms of entrepreneurship, business ownership, or ecosystem governance. This suggests that while community involvement is relatively stronger in natural settings, there is room for improvement in fostering higher levels of participation, especially in urban and mixed tourism destinations.

2.4 Challenges and opportunities

2.4.1 Tourism positive and negative impacts

For decades, the tourism industry has experienced sustained growth with multiple impacts on the economy, society, and environment. This growth brings **many benefits for regional and local development**, but also poses **challenges when it comes to managing it in a sustainable way**.

2.4.1.1 Positive impacts

To understand the benefits experienced by European destinations, respondents were asked to mention the 5 most positive impacts of tourism in their destinations, through a multiple-choice question. **Half of the positive impacts expressed concern the economic sphere**, 36% the sociocultural one, and the rest (14%) the environmental one[38]. Almost all destinations[39] experienced at least one tourism positive impact. In particular, the graph below shows that 30% of votes focus on two economic benefits, i.e. **improved local economy and increased employment opportunities.**

[37] Tourism activities include consultation sessions for defining the DMO's sustainable tourism strategy, the acquisition of sustainable or green tourism certifications, participation in tourism capacity assessments, participation in education initiatives on sustainable tourism, participation in workshops/webinars focusing on sustainability for SMEs, participation in ad hoc communication and marketing activities, participation in volunteering activities for making tourism sites more accessible.

[38] Economic impacts include Improved local economy, Increased employment opportunities, Higher quality and improved infrastructure and services, and Increased income and standard of living. Sociocultural impacts include Increased offer of entertainment and cultural events, Preservation of historic buildings, Social and cultural exchange, Improved accessibility of services and facilities, Positive changes in values and customs, and Higher levels of education. Environmental impacts include Improvement of the area's appearance and Protection of natural environment. Percentages are calculated excluding the number of votes for "None" and "Other".

[39] Except from one Hungarian destination.

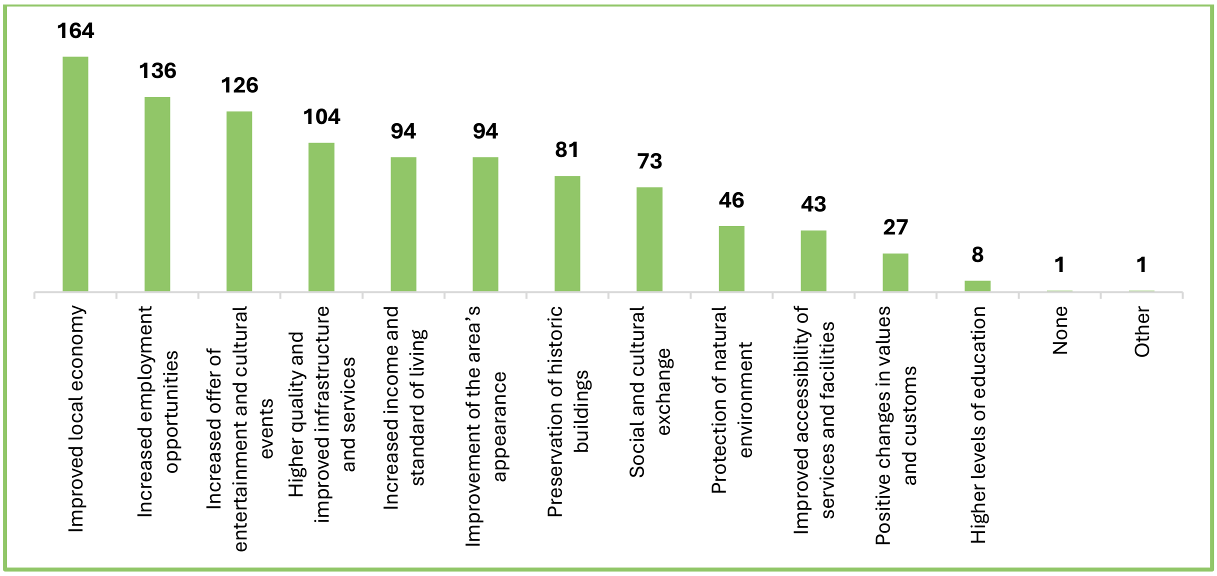

Figure 28 - Most positive impacts of tourism

A specific kind of destination may be more likely to experience positive impacts. The graph below shows the frequencies of the positive impacts by type of destination and the intensity of the colour represents how the numbers would have been distributed if the sample was weighted by destination type[40]. At a first glance, looking at the shades of colour by row, it can be noted that positive tourism impacts are somewhat homogeneously distributed by destination type. An exception is represented by "Higher quality and improved infrastructure and services" which, according to the weighted table, has higher incidence in mountain destinations. Conversely, "Increased income and standard of living" and "Preservation of historic buildings" have a lower incidence respectively in urban destinations and mountain destinations.

[40] Weighting the sample by destination type allows to control the possible bias due to an unbalanced number of responses collected by destinations of different destination types. See annex V for the methodology.

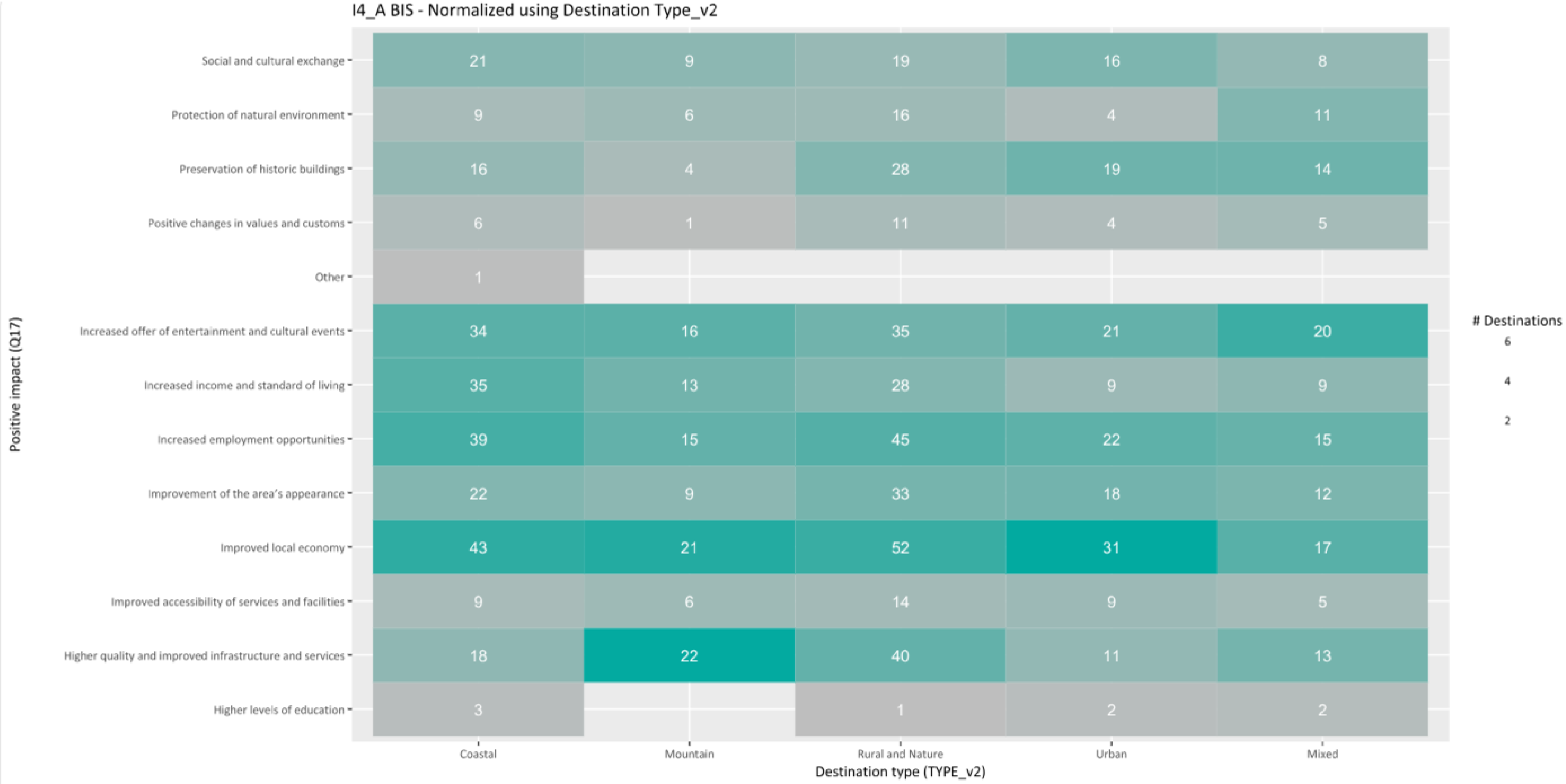

Figure 29 - Positive impact by DMO type

Similarly to the case of destination types, some positive impacts may occur with different frequencies in destinations of different dimensions. The graph below shows the frequency of the positive impacts by destination dimension (in terms of number of inhabitants) and the intensity of the colour represents how the numbers would have been distributed if the sample was weighted by dimension[41]. In this case, the differences in frequency distribution across dimensions are more noticeable. When frequencies are unevenly distributed, as shown in the weighted table, they tend to be higher in large destinations, particularly those with populations between 800.000 and 3 million, or over 7 million. For instance, the positive impact “Improved local economy” – which applies to all dimensions – is more concentrated in one of these larger destinations. The same pattern is seen with “Increased offer of entertainment and cultural events” and “Preservation of historic buildings”. Finally, “Increase employment opportunities” is more prominent in destinations with over 7 million, and those with populations between 50.000 and 150.000.

[41] Weighting the sample by destination type allows to control the possible bias due to an unbalanced number of responses collected by destinations of different destination types. See annex V for the methodology.

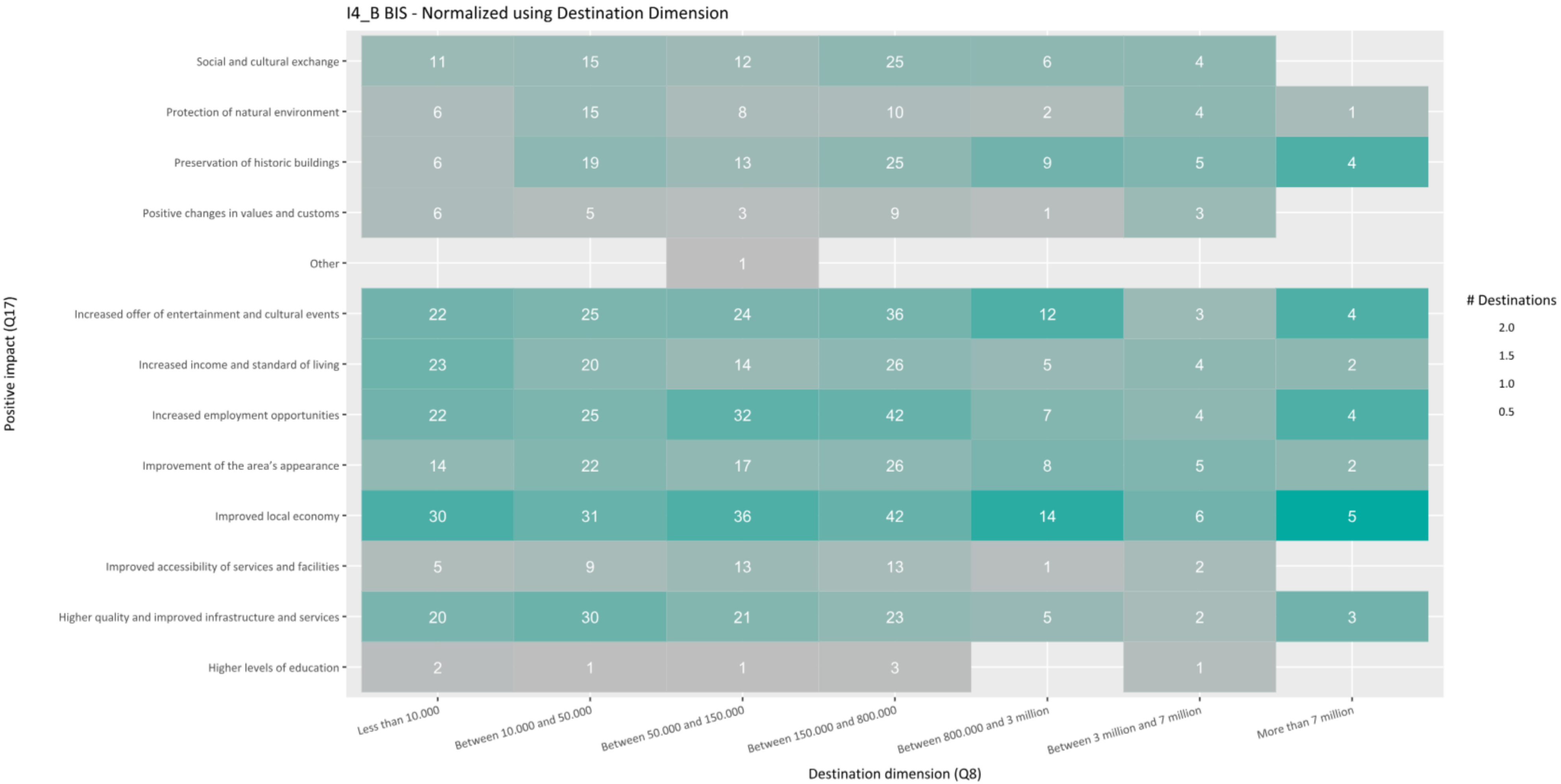

Figure 30 - Positive impacts by DMO dimension

To understand which are the destination characteristics (including GDP reliance on tourism) that influence being subject to positive impacts, a binomial regression (logistic regression) was used to assess the correlation between each positive impact and the variables analysed so far[42].

Concerning tourism's contribution to a destination's economy, local GDP is significantly positively correlated with "Increased income and standard of living" and "Improved local economy", but not with "Increased employment opportunities"[43]. Then, considering destination's vulnerability, tourism seasonality shows no significant correlation with any positive impact. A negative link between "Dependence on top 3 international source markets" and "Improvement of the area's appearance" is probably driven by another factor, which might be related to economic constraints or short-term profit prioritisation. In this context, destinations that rely on a few international source markets may prioritise catering their tourism offer to specific tourist demands rather than investing in long-term improvements of the area's appearance. Alternatively, heavy dependence on a few markets might lead to over-tourism, disrupting the destination's infrastructures as well as reducing the focus on improving the area's visual appearance. Factors like the "Ability to respond to changes in destination's conditions", "Effectiveness of destination governance", and "Effectiveness of destination management" are positively correlated with "Higher quality and improved infrastructure and services", though it is unclear which one drives this positive impact. Similarly, "Ability to respond to changes in tourism demand" and "Effectiveness of destination governance" are connected to the "Preservation of historic buildings", likely driven by the "Effectiveness of destination governance". Finally, the overall quality of tourism is not significantly associated with any positive impacts.

The following table reflects what has been observed above, and a short description of the symbols adopted can be found here below:

- **+*:** positive correlation that is statistically significant at a moderate level of confidence.
- **+**:** positive correlation that is statistically significant at a higher level of confidence.
- **-*:** negative correlation that is statistically significant at a moderate level of confidence.
- **+ NS:** positive correlation between the variables, but not statistically significant (NS).
- **- NS:** negative correlation between the variables, but not statistically significant (NS).

[42] See Annex V for the methodological notes

[43] Before performing this regression analysis, the relation between the economic positive impacts experienced and the destination economic reliance on tourism was explored through the observation of the frequency's distribution of the GDP reliance on tourism (the values of which were converted in either 1,2, or 3) of destinations mainly presenting positive economic impacts and those presenting either environmental or sociocultural impacts (through a box plot). Moreover, a hypothesis testing was used to check whether the means of the two groups were significantly different. The result confirms that the average of the GDP reliance on tourism of destinations experiencing positive economic impacts is statistically significantly different to the one of the other group, suggesting a relation between the two variables. See Annex V for the methodological notes.

-Positive impacts	Economic reliance	Tourism Seasonality	Dependence on top 3 international source markets	Ability to respond to changes in destination' s conditions	Ability to respond to changes in tourism demand	Effectiveness of destination governance	Effectiveness of destination management	Quality
Increased income and standard of living	+ **	+ NS	+ NS	- NS	- NS	- NS	+ NS	- NS
Higher quality and improved infrastructure and services	+ NS	- NS	+ NS	+ *	- NS	+ **	+ **	+ NS
Improvement of the area's appearance	- NS	- NS	- *	- NS	- NS	+ NS	- NS	+ NS
Social and cultural exchange	- NS	+ NS	+ NS	- NS	+ NS	- NS	+ NS	- NS
Increased offer of entertainment and cultural events	+ NS	- NS	+ NS	+ NS	- NS	+ NS	- NS	+ NS
Increased employment opportunities	+ NS	- NS	+ NS	+ NS	- NS	- NS	- NS	- NS
Protection of natural environment	- NS	- NS	- NS	+ NS	+ NS	+ NS	- NS	+ NS
Improved accessibility of services and facilities	+ NS	+ NS	- NS	- NS	+ NS	- NS	+ NS	- NS
Improved local economy	+ *	- NS	+ NS	+ NS	+ NS	+ NS	+ NS	+ NS
Preservation of historic buildings	- NS	+ NS	- NS	+ NS	+ *	+ *	+ NS	+ NS
Positive changes in values and customs	+ NS	+ NS	+ NS	- NS	- NS	+ NS	- NS	- NS
Higher levels of education	+ NS	+ NS	- NS	- NS	- NS	+ NS	- NS	- NS
Other	- NS	- NS	+ NS	+ NS	- NS	- NS	- NS	- NS

Table 2 - Correlation between the positive impacts and related variables

Different stakeholders might be affected by different types of impacts. Therefore, a heatmap of contingencies was created to display the frequencies of destinations reporting each impact-stakeholder combination, helping to assess the impacts experienced by the different stakeholder types.

As shown in the figure below, not surprisingly, the stakeholders most affected by tourism positive impacts are accommodation providers, local residents, organisations managing tourism attractions, tourists, as well as restaurants and bars, even if the association is less intense than in the case of negative impacts (see further below). Some of the "hotter" topics for these five categories of stakeholders entail how to manage and fully exploit improved local economy, increased employment opportunities, and increased offer of entertainment and cultural events. For the destinations mentioning these five stakeholder groups as the most important ones, the most common impacts pertain to the economic sphere.

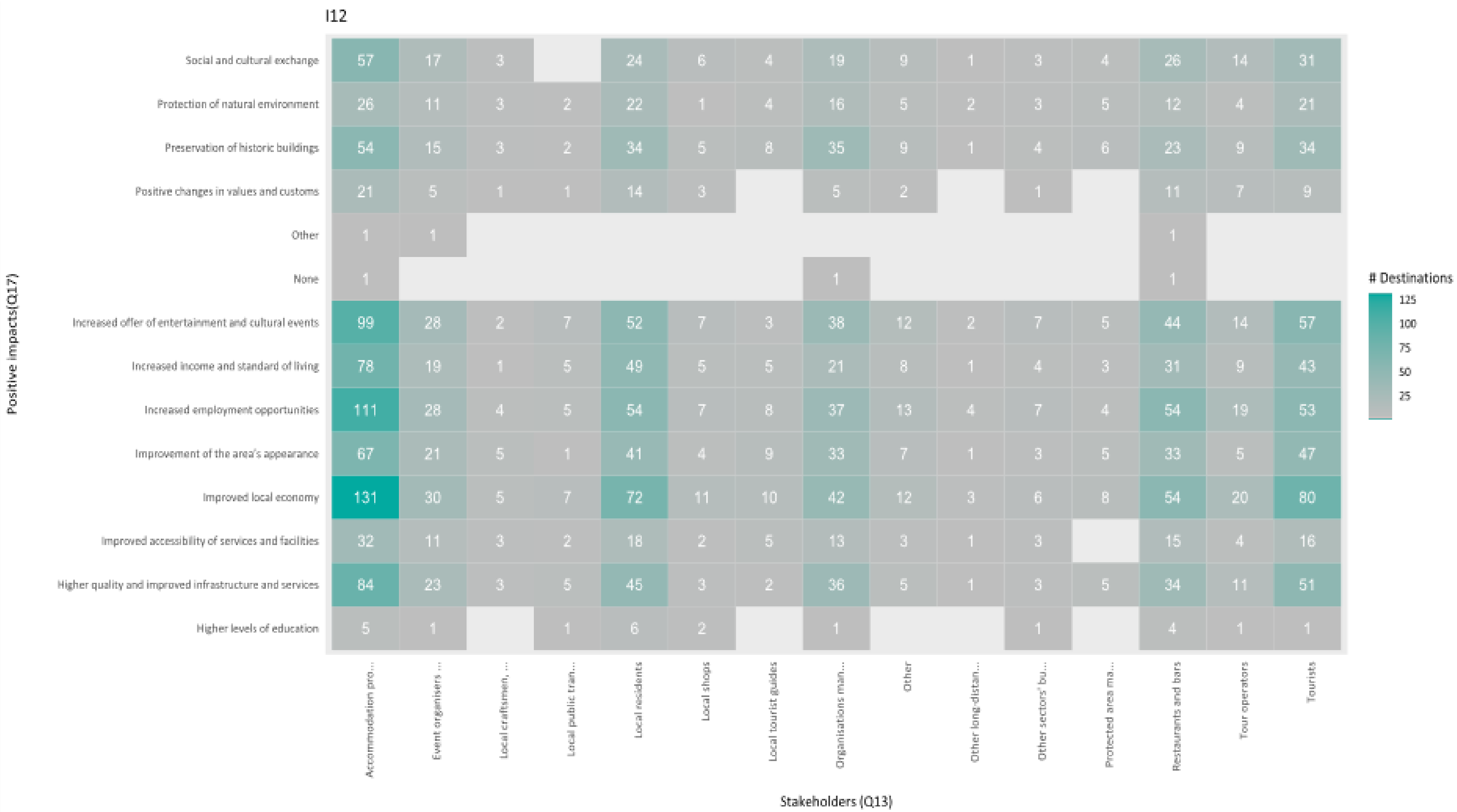

Figure 31 - Positive impact by stakeholder type

2.4.1.2 Negative impacts

When tourism, at certain times and in certain locations, exceeds physical, ecological, social, economic, psychological, and/or political capacity thresholds, it may bring negative impacts (this situation is usually referred to as "overtourism")[44].

Respondents were asked to mention the 5 most negative impacts of tourism in their destinations, through a multiple-choice question. **Most negative impacts expressed - almost two thirds (64%) – pertain to the economic sphere**, almost one third (30%) to the environmental one, and the rest (6%) to the sociocultural one[45].

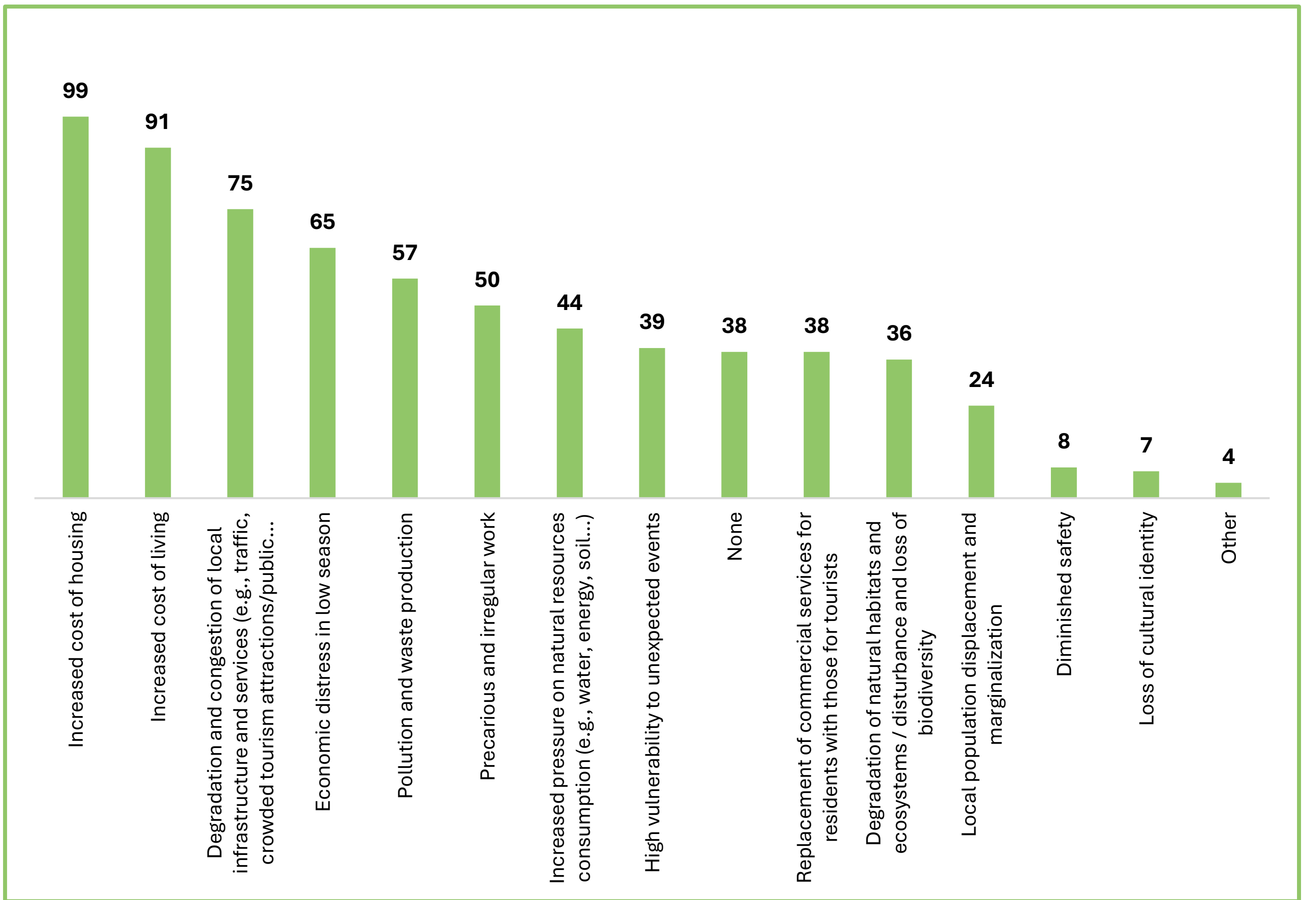

Figure 32 - Tourism negative impacts

27% of all responses point to increased costs of housing (99) and living (91). This result is most likely due to destinations experiencing inflation of house prices due to the surge of short-term rentals, made easily accessible by online platforms. This result confirms the findings of recent literature, which shows that rental and housing prices have increased with the increase of Airbnb listings[46] and decreased with the introduction of restrictive measures on short-term rentals[47]. Moreover, **"Degradation and congestion of local infrastructure and services** (e.g., traffic, crowded tourism attractions/public spaces…) and "**Economic**

[44] Peeters, P., Gössling, S., Klus, J., Milano, C., Novelli, M., Dijkmans, C., Eugelaar, E., Hartman, S., Helsinga, J., Isaac, R., Mitas, O., Moretti, S., Nawun, J., Papp, B., & Postma, A. (2018). *Research for TRAN Committee—Overtourism: Impact and possible policy responses*. European Union. http://bit.ly/2srgoyg

[45] Percentages are calculated excluding the number of votes for "None" and "Other".

[46] Miquel-Àngel Garcia-López, Jordi Jofre-Monseny, Rodrigo Martínez-Mazza, Mariona Segú, Do short-term rental platforms affect housing markets? Evidence from Airbnb in Barcelona, Journal of Urban Economics, Volume 119, 2020, 103278, ISSN 0094-1190, https://doi.org/10.1016/j.jue.2020.103278.

[47] Hans R.A. Koster, Jos van Ommeren, Nicolas Volkhausen, Short-term rentals and the housing market: Quasi-experimental evidence from Airbnb in Los Angeles, Journal of Urban Economics, Volume 124,2021,103356, ISSN 0094-1190, https://doi.org/10.1016/j.jue.2021.103356.

distress in low season" have rather similar number of responses (respectively 11% and 9% of the total). This result may be justified by the fact that destinations experiencing seasonality usually suffer from both these effects.

A specific kind of destination may be more subject to specific challenges. The graph below shows the frequencies of the negative impacts by type of destination and the intensity of the colour represents how the numbers would have been distributed if the sample was weighted by destination type[48]. The heatmap shows that **mountain destinations are the most exposed to inflation problems** (i.e. increased cost of housing and increased cost of living), **and suffering the most from tourism pressure**, both from an environmental (i.e. "Increased pressure on natural resources consumption", "Degradation of natural habitats and ecosystems / disturbance and loss of biodiversity", and "Pollution and waste production") and infrastructural perspective (i.e. "Degradation and congestion of local infrastructure and services"). **Coastal destinations – in addition to experiencing inflation – seem to be the ones suffering the most from problems directly linked to seasonality**, such as "Precarious and irregular work" probably linked to seasonal tourism jobs and "Economic distress in low season" (together with rural and nature destinations). Finally, **urban destinations are the ones experiencing the most the "touristification" of commercial services.**

[48] Weighting the sample by destination type allows to control the possible bias due to an unbalanced number of responses collected by destinations of different destination types. See annex V for the methodology.

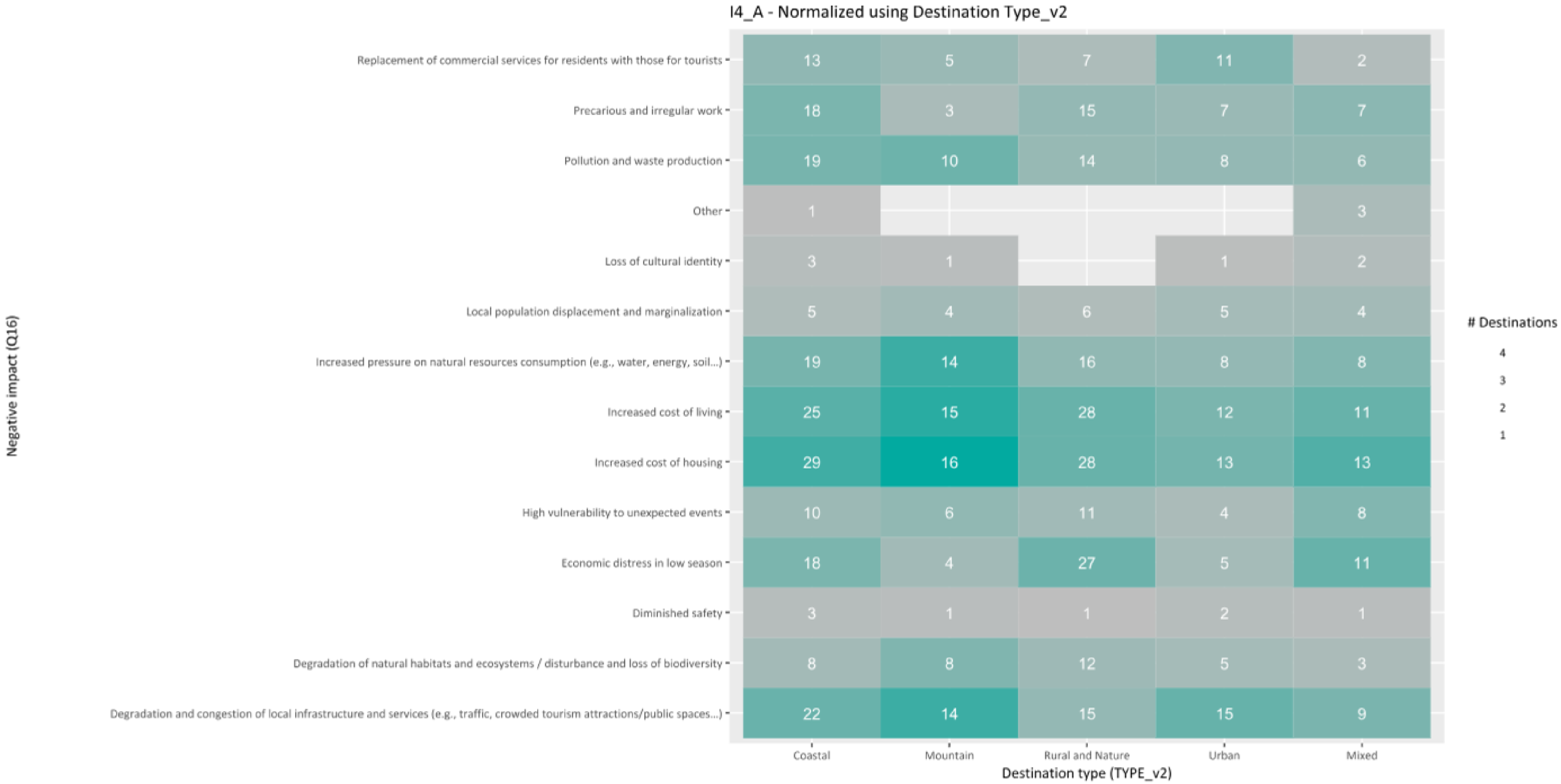

Figure 33 - Negative impacts by DMO type

Similarly to the case of destination types, some negative impacts may occur with different frequencies in destinations of different dimensions. The graph below shows the frequency of negative impacts by destination dimension (in terms of number of inhabitants) and the intensity of the colour represents how the numbers would have been distributed if the sample was weighted by dimension[49]. Inflation of prices are common to all destination dimensions. However, it appears that **very large destinations (more than 7 million inhabitants) are the most affected by increased cost of housing**. They also seem to be the most affected by "Increased pressure on natural resources consumption". Finally, medium-large destinations (800.000 to 3 million inhabitants) are the ones most affected by "Degradation and congestion of local infrastructure", according to the weighted table.

[49] Weighting the sample by destination type allows to control the possible bias due to an unbalanced number of responses collected by destinations of different destination types. See annex V for the methodology.

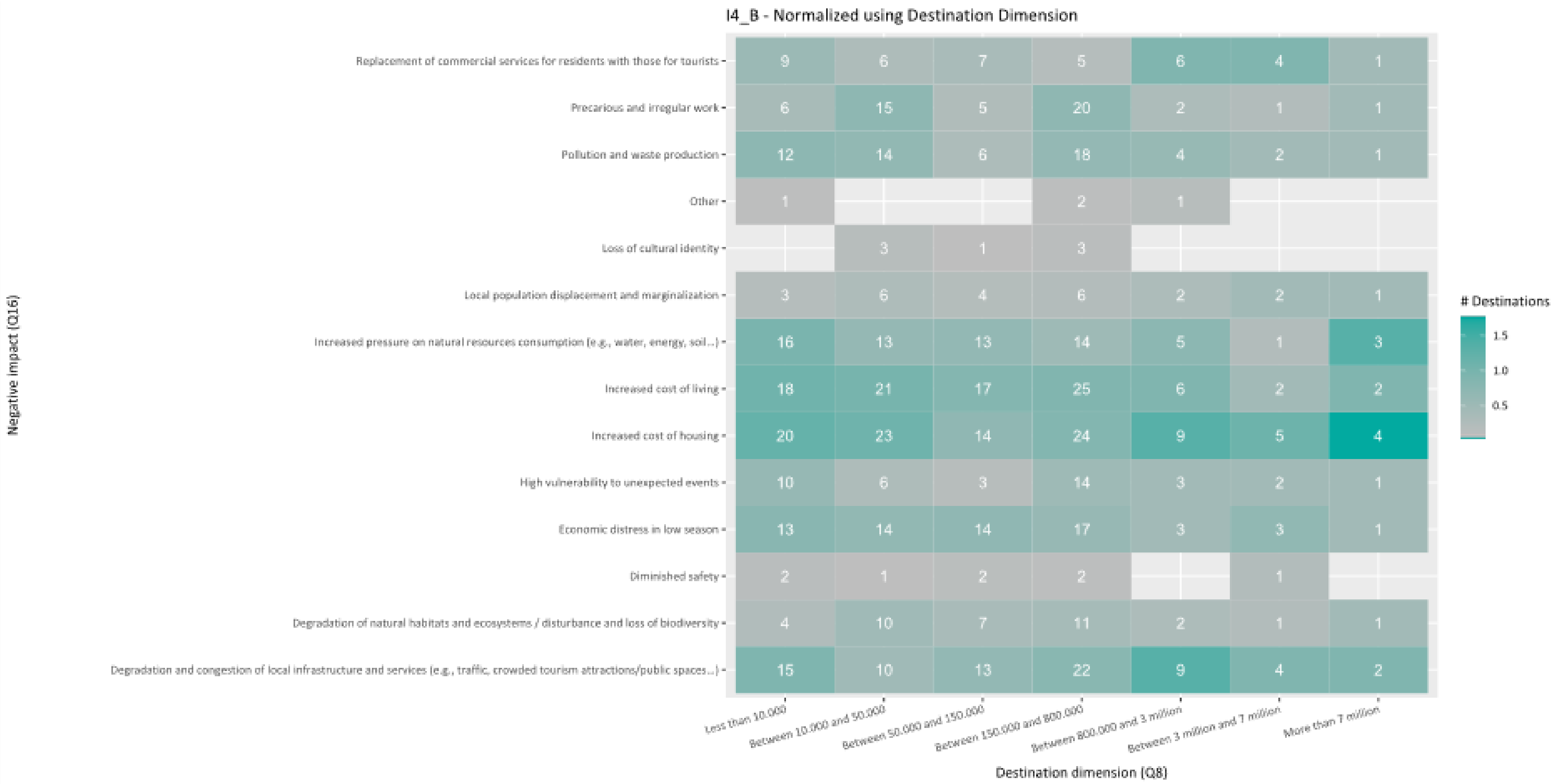

Figure 34 - Negative impacts by DMO dimension

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To understand which are the destination characteristics (including economic reliance on tourism) that influence the likelihood of being subject to negative impacts, a binomial regression (logistic regression) was used to assess the correlation between each negative impact and the variables analysed so far[50]. Starting from the destination economic reliance on tourism, this analysis confirms the previous ones. The local GDP reliance on tourism is significantly positively correlated with "Increased cost of housing", "Increased cost of living", "Replacement of commercial services for residents with those for tourists", and "Degradation and congestion of local infrastructure and services"[51]. Additionally, economic reliance on tourism does not present significant correlation with negative impacts on employment ("Precarious and irregular work"), just as it did not with the positive impact of "Increased employment opportunities". This further reinforces the fact that, as mentioned above, there is no correlation between economic reliance on tourism and employment, given that it does not have any significant influence over positive and negative impacts in this sector.

For what concerns factors determining a destinations' vulnerability, tourism seasonality is strongly positively correlated with "Economic distress in low season". "Dependence on top 3 international source markets", instead, is significantly negatively correlated with "Economic distress in low season". This means that as reliance on these top markets increases, the likelihood of experiencing economic distress during the low season decreases. That said, this relation is not easily understandable and is probably due to other variables like changing tourist behaviour patterns, destination diversification strategies, economic buffering (peak income from the top 3 international markets which provides economic stability during the low season), or government/industry support. "Dependence on top 3 international source markets" is also correlated with "Degradation and congestion of local infrastructure and services". This may be because dependence on these markets is linked to the destination's high local GDP reliance on tourism, which is itself associated with correlated with such negative impact. Consequently, as destinations become more reliant on tourism for its economy, it is more likely to experience infrastructure degradation, and this reliance gets amplified when most tourists come from few (3) international markets. Then, focusing on destinations' resilience, "Ability to respond to changes in destination's conditions" is positively correlated with "Precarious and irregular work" and "Ability to respond to changes in tourism demand" is positively correlated with "Increased cost of housing". This might be due to other factors positively influencing the explanatory variables and the negative impacts.

Negative impact	Economic reliance	Tourism Seasonality	Dependence on top 3 international source markets	Ability to respond to changes in destination's conditions	Ability to respond to changes in tourism	Effectiveness of destination governance	Effectiveness of destination management	Quality
Increased cost of living	+ **	+ NS	+ NS	+ NS	+ NS	+ NS	+ NS	- NS
Precarious and irregular work	+ NS	+ NS	+ NS	+ *	+ NS	+ NS	- NS	- NS
Replacement of commercial services for residents with those for tourists	+ **	+ NS	+ NS	- NS	+ NS	- NS	+ NS	- NS

[50] See Annex V for the methodological notes

[51] Before performing this regression analysis, the relation between economic negative impacts and the destination economic reliance on tourism was explored through the observation of the frequency's distribution of the tourism contribution to local GDP (the values of which were converted in either 1,2, or 3) of destinations presenting negative economic impacts, of those presenting either environmental or sociocultural impacts, and those not experiencing any (through a box plot). Moreover, a hypothesis testing was used to check whether the means of the three groups were significantly different. The result confirms that the average of the reliance index of destinations experiencing negative economic impacts is significantly different from the ones of the other two groups, meaning that there is a relation between the two variables. See Annex V for the methodological notes.

Negative impact	Economic reliance	Tourism Seasonality	Dependence on top 3 international source markets	Ability to respond to changes in destination's conditions	Ability to respond to changes in tourism	Effectiveness of destination governance	Effectiveness of destination management	Quality
Economic distress in low season	- NS	+ ***	- ***	+ NS	+ NS	+ NS	- NS	- NS
Increased cost of housing	+ ***	+ NS	+ NS	- NS	+ *	+ NS	+ NS	- NS
High vulnerability to unexpected events	- NS	+ NS	+ NS	- NS	- NS	+ NS	- NS	- NS
Local population displacement and marginalization	+ NS	+ NS	- NS	- NS	- NS	- NS	- NS	- NS
Pollution and waste production	+ NS	- NS	+ NS	- NS	- NS	- NS	+ NS	+ NS
Degradation and congestion of local infrastructure and services (e.g., traffic, crowded tourism attractions/public spaces...)	+ **	- NS	+ **	- NS	+ NS	- NS	+ NS	- NS
Degradation of natural habitats and ecosystems / disturbance and loss of biodiversity	+ NS	+ NS	+ NS	+ NS	- NS	- NS	- NS	- NS
Diminished safety	+ NS	- NS	+ NS	- NS	+ NS	- NS	- NS	- NS
Other	- NS	+ NS	+ NS	- NS	- NS	+ NS	+ NS	- NS
Loss of cultural identity	+ NS	+ NS	- NS	- NS	- NS	- NS	- NS	- NS

Table 3 – Negative impacts and related variables

Furthermore, to assess which are the impacts experienced by different types of stakeholders, a heatmap with contingencies was created to show the frequency of destinations indicating each combination of impact-stakeholder.

As shown in the figure below, not surprisingly, the **stakeholders most affected by tourism negative impacts are accommodation providers, local residents, organisations managing tourism attractions, tourists, and restaurants and bars**. For instance, as could be expected, the most relevant challenges for destinations whose main stakeholders include accommodation providers, local residents, tourists and bars and restaurants are the increased costs of housing and living. Similarly, degradation and congestion of local infrastructure and services are a common problem for destinations with the same important stakeholders.

Figure 35 - Negative impacts by stakeholder type

2.4.2 Risks and emerging trends or developments

In recent years, the tourism industry has faced several damages due to a wide range of natural and human-made disasters, highlighting its vulnerability to such risks and crises. These risks can emerge from natural events, political instability, global pandemics, economic disruptions, as well as climate change, each having the potential to displace tourists and, consequently, cause severe economic and financial losses. The interconnectedness of tourism further exacerbates the impact generated by these risks, as crises in one part of the world can echo across the entire sector, in a butterfly effect which highlight the need for robust and well-developed risk management strategies[52]. The complexities of these threats demand an omni-comprehensive approach for considering all possible risk types, and understanding which ones are deemed the most difficult to overcome for EU tourism destinations. Therefore, this section of the survey explores the various risks faced by respondents, which were asked were asked to choose the three risks to which their destination is exposed the most among the following categories:

- Natural and environmental disasters (e.g. fires, floods, landslides, severe rains or windstorms, earthquakes, volcanic eruptions…)
- Health related risks (e.g. epidemics, food poisoning, humanitarian crises…)
- Human-made risks (e.g. war, terrorist attacks, social unrest, water and air pollution…)
- Financial risks (e.g. economic crises, fiscal crises, exchange rate collapses…)
- Technological risks (e.g. transportation accidents, cyberattacks, hazardous material accidents…)

As portrayed in the figure below, **almost one third (30%) of the responses** expressed that **financial risks** are the **most common** among destinations. This underlines the pivotal need for economic stability, as well as adequate funding opportunities (at national and supranational level), for conducting tourism activities and embedding sustainable practices. Similarly, **natural and environmental disaster** were indicated as the second most relevant risk source, which might be due to the fact that most respondents belong to the *nature and rural* categorisation. In fact, these types of destinations mostly build their tourism offer on natural assets and attractions, whose preservation is fundamental and natural and/or environmental disasters would deteriorate the destinations' environmental and economic dimensions, endangering its overall stability. Conversely, most destinations do not believe that technology poses high risks to their ecosystem, even though this specific category cannot be ignored as the role of innovative tools shall become more relevant for the tourism sector in the upcoming years.

[52] Li-Wei Liu, Pahrudin Pahrudin, Cheng-Yu Tsai, Lee Hao,Disaster, risk and crises in tourism and hospitality field: A pathway toward tourism and hospitality management framework for resilience and recovery process, Natural Hazards Research, 2024, ISSN 2666-5921, https://doi.org/10.1016/j.nhres.2024.06.001.

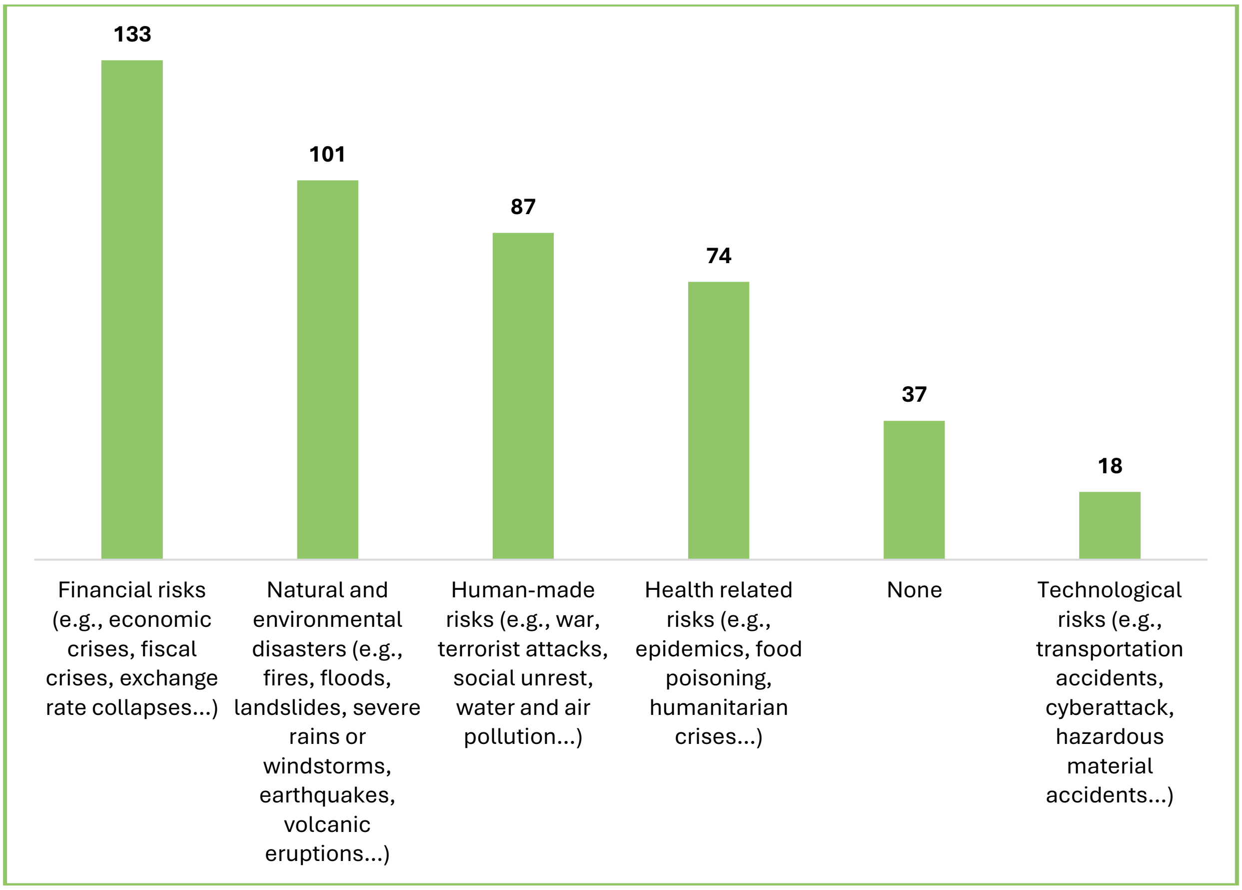


Figure 36 - Main risks to which destinations are exposed

The same analysis was also performed per destination type, to see whether specific risks are associated with specific types of destinations. 60% of destinations mentioning being exposed to technological risks are coastal, while 41% of those declaring not being exposed to any are natural and rural. Moreover, almost 60% of destinations subject to human-made risks are either coastal (30%) or urban (29%). Finally, financial risks and health-related risks appear to be more evenly distributed across the five destination types, as demonstrated in the figure below.

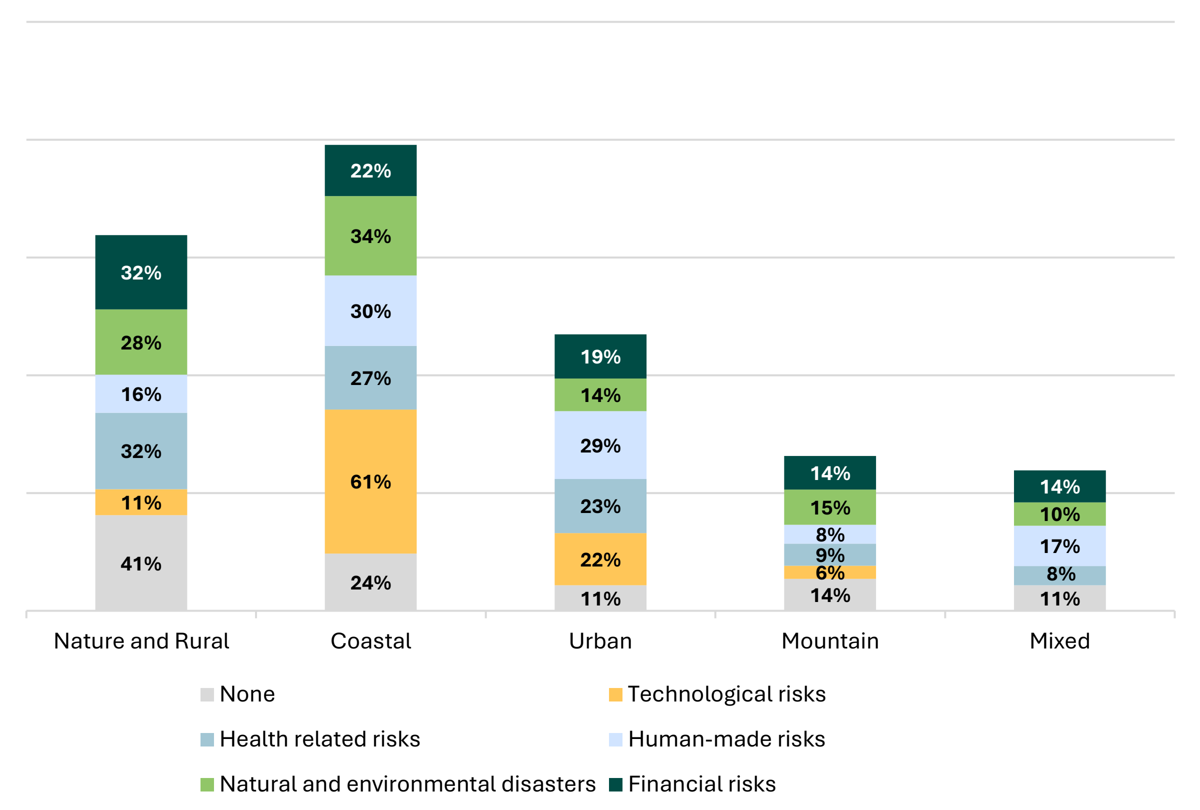


Figure 37 - Main risks by destination type

Respondents were also asked to indicate current or emerging trends or developments (general and tourism-specific) that have a significant influence on the sustainable and resilient development of their destinations. These trends comprise:

- Sharing economy and peer-to-peer platforms (e.g., Airbnb, Uber)
- Use of social media
- Rise of new competitors
- Changing consumer preferences
- Slower economic growth
- Growth-focused mindset of the tourism sector
- Advanced technologies, e.g. artificial intelligence (AI), virtual reality (VR), and the Internet of Things (IoT)
- Bad working conditions in the tourism sector

Almost **20%** of votes expressed "**changing consumer preferences**" as one of the most relevant trends, indicating the shift of consumer behaviours and preferences as crucial when choosing tourism destinations. This is also related to the consequences of the recent Covid-19 pandemics, after which travellers are more likely to adopt sustainable practices when interacting with local communities and immersing in local life, as well as learning about local traditions and trades, buying local products, and choosing locally owned restaurants while in the destination[53].

In addition, the use of social media has been given primary relevance by respondents, as it represents a convenient and effective way to promote the destination's attractions and appeal, generating high levels of stakeholder engagement. In this context, through social media, destinations also have the possibility to reach a more international audience, thus opening up new opportunities to diversify their tourism offer and reduce their dependence on a few markets only.

[53] Source: https://etc-corporate.org/uploads/2022/01/Impact-of-COVID-19-on-Sustainable-Tourism-Attitudes.pdf

Then, many destinations indicate that having a growth-focused mindset allows for expansion and profitability, which can sometimes conflict with sustainability goals. The rise of the sharing economy and peer-to-peer platforms (**88 selections**), like Airbnb and Uber, instead, shows how these platforms are disrupting traditional tourism and influencing tourism conventional dynamics. In fact, these platforms are often responsible for gentrification and touristification of accommodation services.

Advanced technologies like artificial intelligence (AI) and virtual reality (VR), are progressively being adopted to enhance customer experiences, optimise operations, and address sustainability challenges. Conversely, slower economic growth poses significant challenges to the sector, severely impacting investments in sustainable practices, together with bad working conditions. Lastly, the rise of new competitors might introduce further disruption in the market, potentially driving innovation but also adding pressure on existing businesses. This may result in the adoption of predatory practices, aimed at lowering costs and maximising profits related to tourism services, worsening all aspects of the destination related to sustainability and resilience.

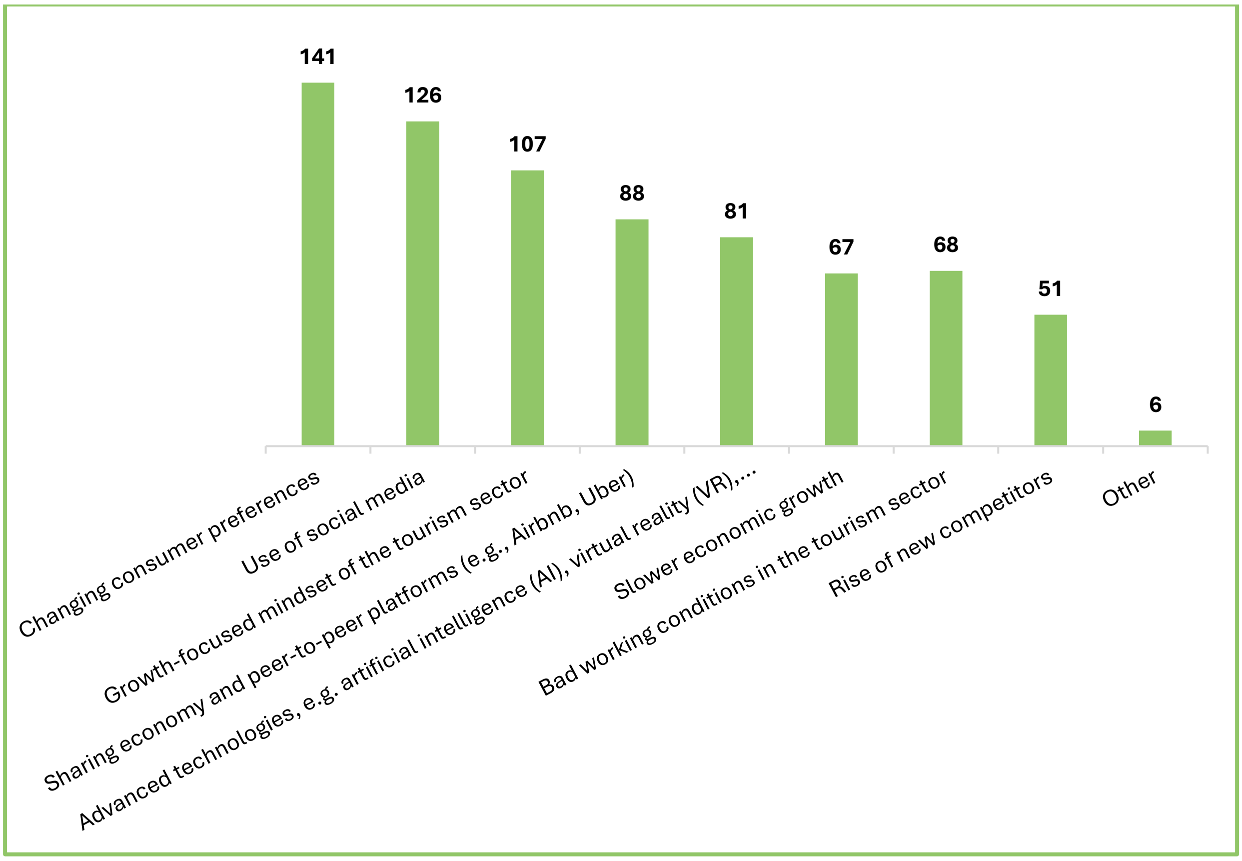


Figure 38 - Current or emerging trends or developments that influence the destination's sustainable and resilient development

2.5 Solutions

Having observed the challenges and opportunities faced by DMOs in the previous section, a set of questions were asked to understand the solutions planned or implemented at destination level. These solutions were mapped around three different aspects: the economic dimension, the environmental dimension, and the sociocultural dimension. Further questions aimed to investigate the mechanisms adopted for funding these solutions, as well as to gather information on the challenges and/or major difficulties encountered when planning or implementing the solution itself.

2.5.1 Measures to improve the destination's sustainability and resilience

Respondents were asked if they had already implemented any measures to improve their destination's tourism sustainability and resilience (Q20&Q21). The primary objective of these questions was to identify replicable best practices that could be successfully implemented in other destinations.

66% of the respondents affirmed that they have carried out some measures, with the vast majority of them (80 respondents) indicating that the measures were covering the economic, environmental and sociocultural dimensions at the same time. This is because the solutions adopted typically have a broad impact, addressing various aspects of the destinations to varying extents. Indeed, achieving sustainable development requires progress across the three different dimensions mentioned above.

That said, measures involving environmental aspects were the ones more often mentioned, covering 87% of the total of the measures implemented, followed by sociocultural aspects (81%) and economic aspects (65%). Similarly, if the measure implemented addresses only one aspect (22% of cases), it mainly addresses **environmental matters** (12%), followed by **sociocultural** (7%) and lastly **economical aspects** (3% of the measures). Additionally, although the negative impacts mentioned in the previous paragraphs mainly stem from economic issues, only a few measures directly address economic aspects. This might be related to the fact that solutions tackling sustainability-related themes are often set out for achieving specific political objectives when adopted at DMO level, a phenomenon which determines positive spillovers on the DMOs' economy, as well as on their sociocultural and environmental context.

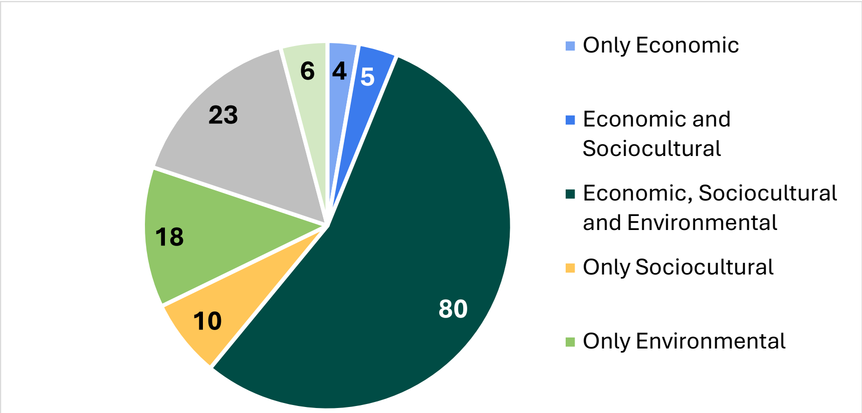


Figure 39 - Measures to improve the destinations' sustainability and resilience

2.5.1.1 Measure coverage by destination type

Concerning the measures – planned or implemented - per type of destination, the data consulted shows evenly distributed results, which also reflects the distribution of the sample (42% of respondents from natural and rural destinations, 36% coastal, 29% urban, 23% mountain and 16% mixed).

The figure below highlights how, out of all 146 DMOs having implemented or planned a measure, most of them come from natural and rural settings, with such solutions giving equal coverage to economic, environmental, and sociocultural factors.

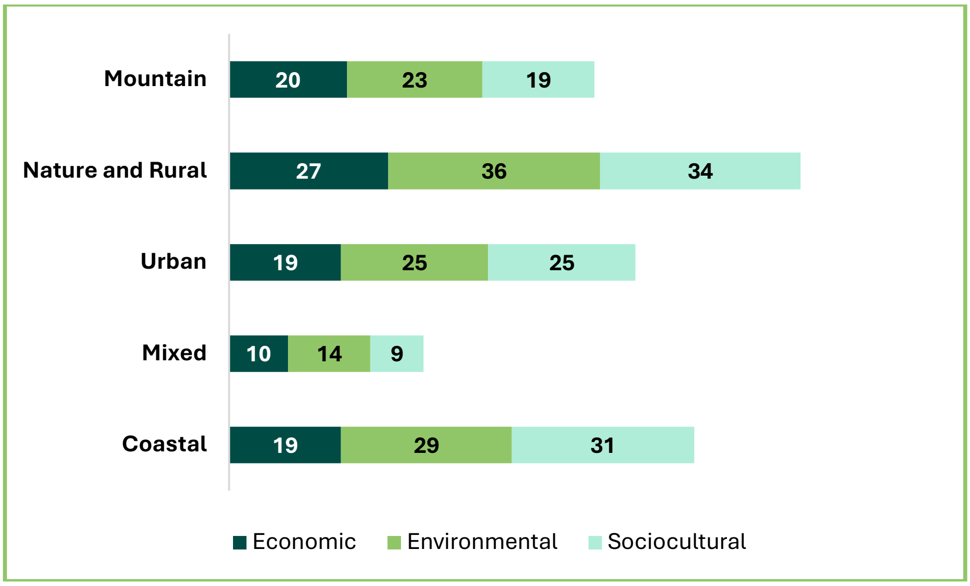


Figure 40 - Measures coverage per destination type

In detail, as mentioned above, the **solutions implemented by nature and rural destinations** mostly aim to preserve cultural and natural sites, support local economies (by promoting local products and financial incentives), as well as enhance sustainable mobility with green transportation solutions. Collaboration among stakeholders, also achieved through the provision of educational and certification programmes for improving sustainability practices, is highly stimulated.

Similarly, common sustainable tourism solutions adopted by **coastal destinations** align with the ones mentioned above, with a specific focus on preserving cultural and natural heritage, investing in eco-friendly infrastructures, and promoting off-season tourism through improved services and customised marketing campaigns.

Sustainable mobility, promotion of local products, and sustaining local businesses in acquiring sustainable certifications were also prioritised by **mountain DMOs**, which mostly focused on enhancing their environmental sustainability.

Lastly, DMOs under both the **mixed** and the **urban** categories demonstrated a high tendency towards organising marketing activities for promoting the destination, as well as incentivising local stakeholders to invest in sustainable tourism practices. These activities were also accompanied by upgrading local infrastructures and enhancing tourism-related services for ensuring wider stakeholder engagement.

2.5.1.2 Focus – Economic measures

Focusing on the economic impact of the solutions, most respondents (70) indicated a general improvement of the local economy, followed by a higher quality and improved infrastructure and increased employment opportunities.

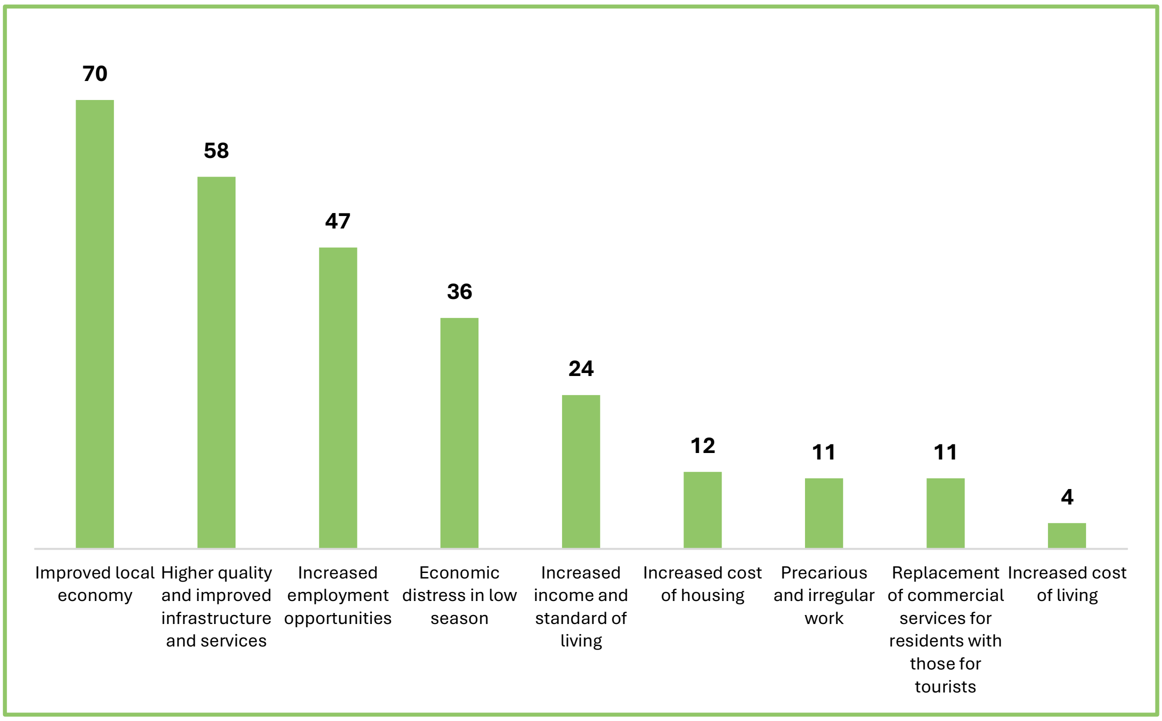


Figure 41 - Economic impacts addressed through the solution

In detail, these measures mainly consist of **significant investments in the DMOs' infrastructures**, entailing rehabilitating waterways opening up wider, cross-country business opportunities for trade and economic cooperation (i.e., the Bega Canal connecting Romania and Serbia). These measures also include the set-up of **data analysis mechanisms** – concerning both quantitative and qualitative data - for identifying **core indicators**[54] in order to measure aspects related to tourism seasonality, activities undertaken and localities visited in the destination, product and service evaluation, overall rating of visitor experience, and interest in revisiting/recommending the destination. Additionally, many DMOs also reported their **collaboration with local authorities as well as representatives of the MICE industry** for providing guidance on starting new businesses in the field of tourism, improving local economies and generating job opportunities. These measures also include **promoting the adoption of sustainability-related certifications for tourism businesses**, allowing them to generate added value (ecological, social, and economic), interact with a wider plethora of clients, and develop new business ideas, differentiating from their competitors.

2.5.1.3 Focus – Sociocultural measures

Concerning the sociocultural impact of the solutions, the majority of respondents (65) indicated social and cultural exchange, closely followed by an increased offer of entertainment and cultural events (64) and improved accessibility of facilities and services (56). Only 3 DMOs indicated that the measures addressed also the diminished safety of a destination. This is also in line with the low value recorded for the activities of DMOs linked to risk and crisis management. The low relevance of safety issues could be explained by the fact that it is not part of the core mission of the DMO, or that the DMO considers the destination to be safe.

[54] Through the survey, two sets of indicators have been identified. These indicators are being implemented/prepared in the following destinations:

- **Malta:** (i) energy consumption levels, (ii) water consumption levels, (iii) waste disposal, (iv) sewage management practices, (v) employment levels in tourism, and (vii) climate actions undertaken by the destination.
- **Andalusia:** (i) Sustainable tourism development strategy, (ii) Tourism employment, (iii) Tourist expenditures, (iv) Length of stay, (v) Bed occupancy, (vi) Tourism seasonality, (vii) Tourist satisfaction, (viii) Market dependency, (ix) Access to online booking, (x) Population under risk of tourism saturation, (xi) Gender equality, (xii) Youth employment, (xiii) Job security, (xiv) Accessibility in tourism, (xv) Public transport modes, (xvi) Green mobility infrastructure, (xvii) Air travel greenhouse gas emissions, (xviii) Tourism-induced greenhouse gas emissions, (xix) Use of renewable energies, (xx) Accommodation businesses with relevant and verified sustainability certification, (xxi) Tourism water use, (xxii) Bathing-water quality, (xxiii) Tourism pressure in protected areas, (xxiv) Monitoring and information systems in natural parks.

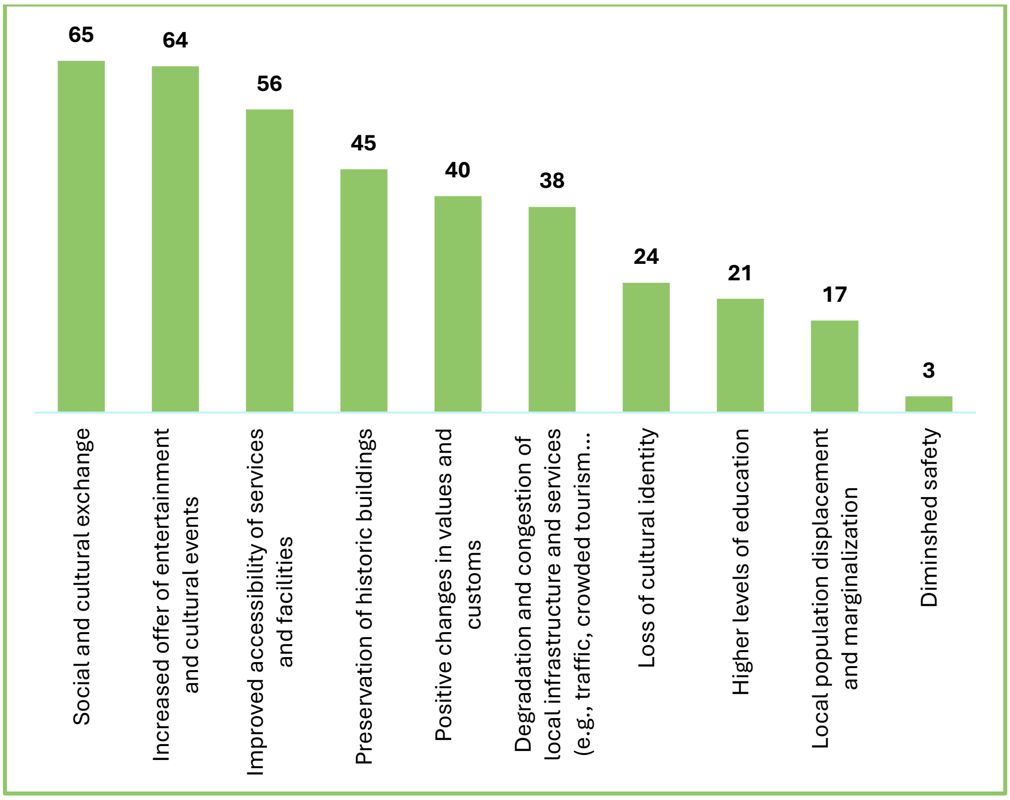


Figure 42 - Sociocultural impacts addressed through solutions

Entering in detail, sociocultural measures proposed by the respondents are related to the **renovation of cultural and tourist sites**, thus enhancing the DMOs' cultural heritage and overall offer. In addition, the respondents' cultural offer is also improved by **organising local festivals and conference events/workshops/seminars** focused on promoting local values, products, and traditions, complemented with the **development of ad hoc digital tools** to guide tourists throughout the events themselves. These events offer the opportunity to reinforce or create new relationships among stakeholders.

Accessibility of services and facilities, instead, is achieved through removal of social and physical barriers through the requalification of public spaces, improving the experience of both local residents and tourists. The measures adopted under this dimension also entail **forging relations with schools and universities to provide higher levels of education** in the tourism sector, as well as to organise and promote educational campaigns for spreading knowledge about responsible tourism.

2.5.1.4 Focus – Environmental measures

In order to address environmental impacts, the majority of respondents (82) indicated the adoption of solutions such as the protection of the natural environment, followed by a higher quality and improved infrastructure and services. Attention is also paid to pollution and waste production, as well as increased pressure on natural resource consumption (both with 54 responses), indicating a willingness and a general awareness to actively minimise the negative impacts of tourism. Finally, high vulnerability to unexpected events has recorded the lowest number of responses (14), again confirming the lack of consideration given to crisis and risk management capabilities.

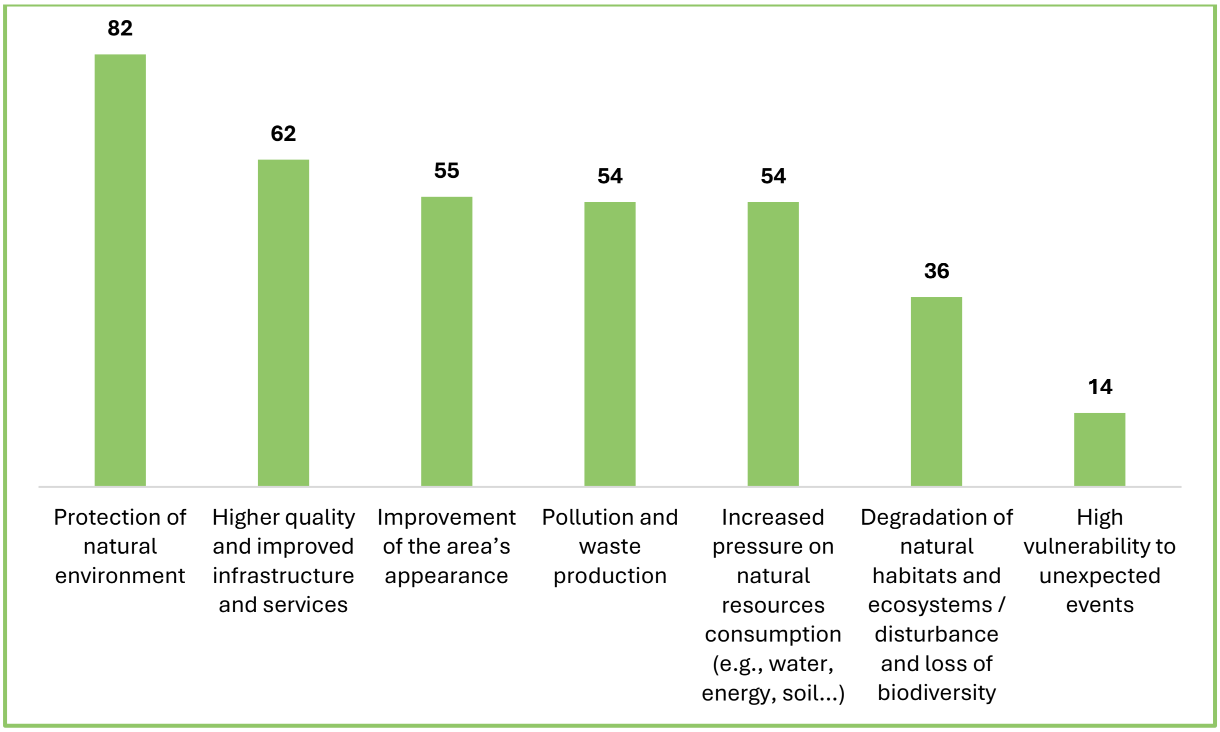


Figure 43 - Environmental impacts addressed through solutions

In this area, commonly implemented solutions include **free local transportation services**, **decentralisation of tourism** from highly visited places to countryside areas, and **zero-waste events**. These measures address multiple sustainability dimensions by protecting natural environments, reducing pollution and waste production, easing the pressure on natural resources, and supporting sociocultural activities by integrating local providers and enhancing the area's appearance. Moreover, they contribute to protecting natural environments and biodiversity by evenly distributing tourist activities and alleviating overtourism in sensitive areas. Other measures include the set-up of **coaching activities** for interested stakeholders to achieve sustainability-related certifications, as well as ensuring more efficient management of resources (e.g., water, electricity, waste, sewage, etc.).

2.5.2 Funding schemes

To acquire greater knowledge of the measures implemented at destination level, question 26 of the survey aimed to understand the funding mechanisms under which such initiatives were undertaken. In this context, **31% of the respondents who implemented the measures described before declared that EU or national funding schemes were used** (**68 DMOs**), while 1% indicated that funding is currently unavailable, but under development.

More specifically, of the 68 DMOs that have used funding schemes, **28 DMOs counted on EU funding exclusively** (**41%**), while 11 adopted national-level funding measures to finance their endeavours. 10 destinations relied on both types of funding, while 19 DMOs did not share specific information concerning the adopted scheme (Figure 29).

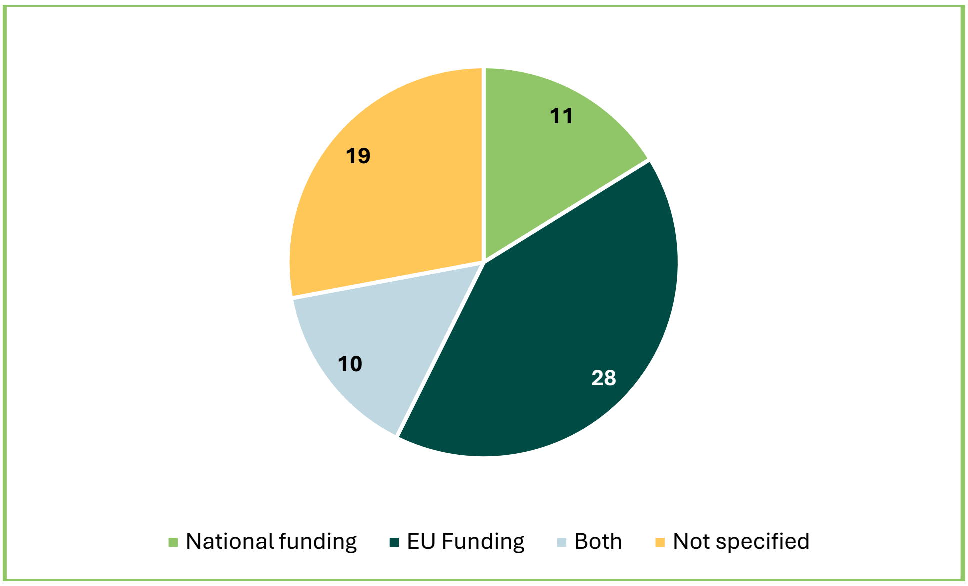


Figure 44 - Implemented measures' funding scheme

Question 26 also enabled to reflect on which countries' DMOs used the funding instruments mentioned above, as represented by figure 46. Notably, **Germany** is the nation which has benefited the most from EU-level funding tools, as **5 respondents (14%)** indicated that their solutions were mainly implemented through the **European Regional Development Fund (ERDF)**, as well as the **European Agricultural Fund for Rural Development (EAFRD)**. Similarly, **Austria** recorded **5** DMOs using both EU and national funding, with the **LEADER funding scheme**[55] being the most prominently utilised. **Portugal**, **Finland**, and **Italy** also made efficient use of EU funding (3 destinations each), with the latter also relying on national funds (2 respondents).

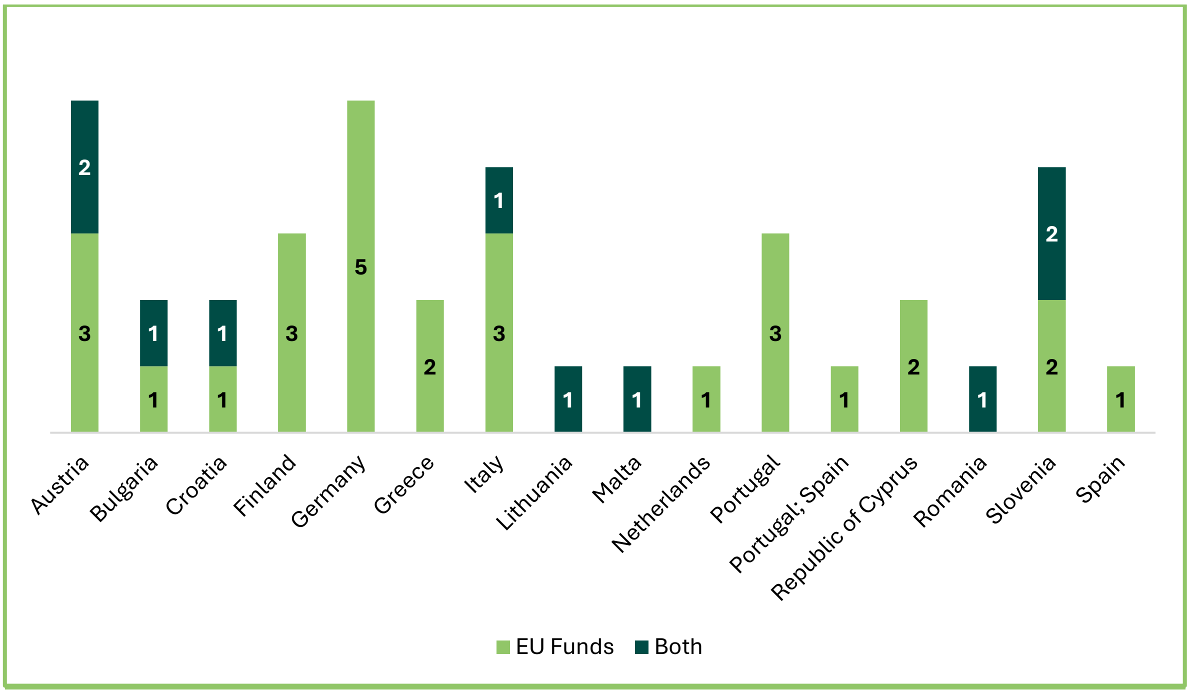


Figure 45 - Type of funding per country

[55] « Liaison Entre Actions de Développement de l'Économie Rurale », a programme aimed to engage the energy and resources of people and local organisations as development actors rather than beneficiaries, empowering them to contribute to the future development of their rural areas by forming area based Local Action Group (LAG) partnerships between the public, private and civil sectors.
Source: https://ec.europa.eu/enrd/leader-clld/leader-toolkit/leaderclld-explained_en.html

Further looking at both EU and national funding, figure 47 shows the primary tools utilised by the majority of destinations which benefitted from European and national funds. Overall, most respondents (43%) relied on the **European Regional Development Fund** (**ERDF**), specifically designed to strengthen economic, social and territorial cohesion in the European Union by reducing imbalances between regions through smarter and greener investments. Similarly, **Next Generation EU** (**NGEU**) served as a solid source of financial support for destinations committed at improving their environmental, economic and sociocultural dimensions. In addition, 18% of funding came from other sources like the **Environment and Climate Action**, the **European Agricultural Fund for Rural Development** (**EAFRD**), **Horizon projects**, and **Technical Support Instruments**. Lastly, respondents also counted on minor or now-dismissed funding programmes, like the **EU Green Leaf**, **LEADER funds**, or **URBACT**. Additionally, these main programmes were mostly used to fund **environmental** and **sociocultural measures**, while economic measures were given a lower priority given the nature of the funding schemes themselves. **This reflects the need for other funding instruments to address the negative impacts experienced by tourism destinations**, which consequently require ad hoc and specific funding mechanisms to face the issues which affect their local economy. Conversely, the funds reported above perfectly match the positive impacts tackling the sociocultural and environmental dimensions, as they aim to diminish cross-country imbalances by investing in social and environmental upgrades.

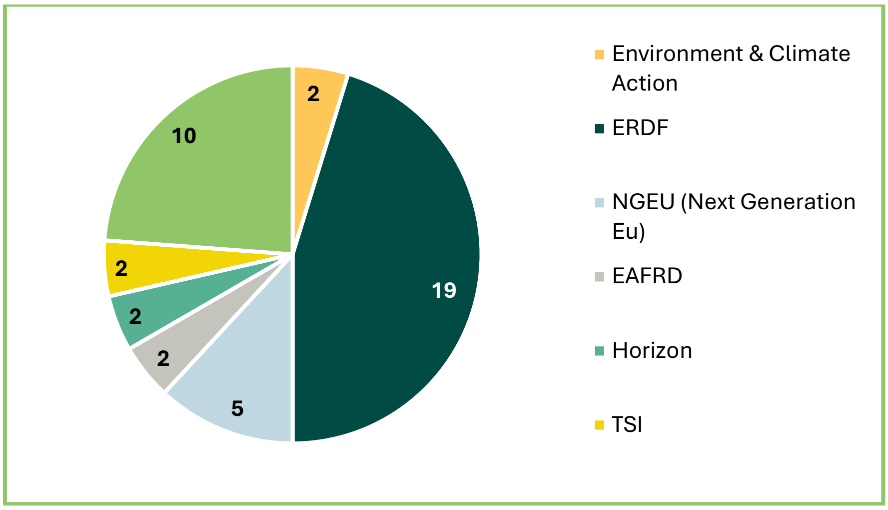


Figure 46 - Main programmes and funds

2.5.3 Key success factors

After having assessed the measures set up by the destinations involved in the survey, question 28 aimed to understand key success factors behind such initiatives, with main evidence being presented in the figure below.

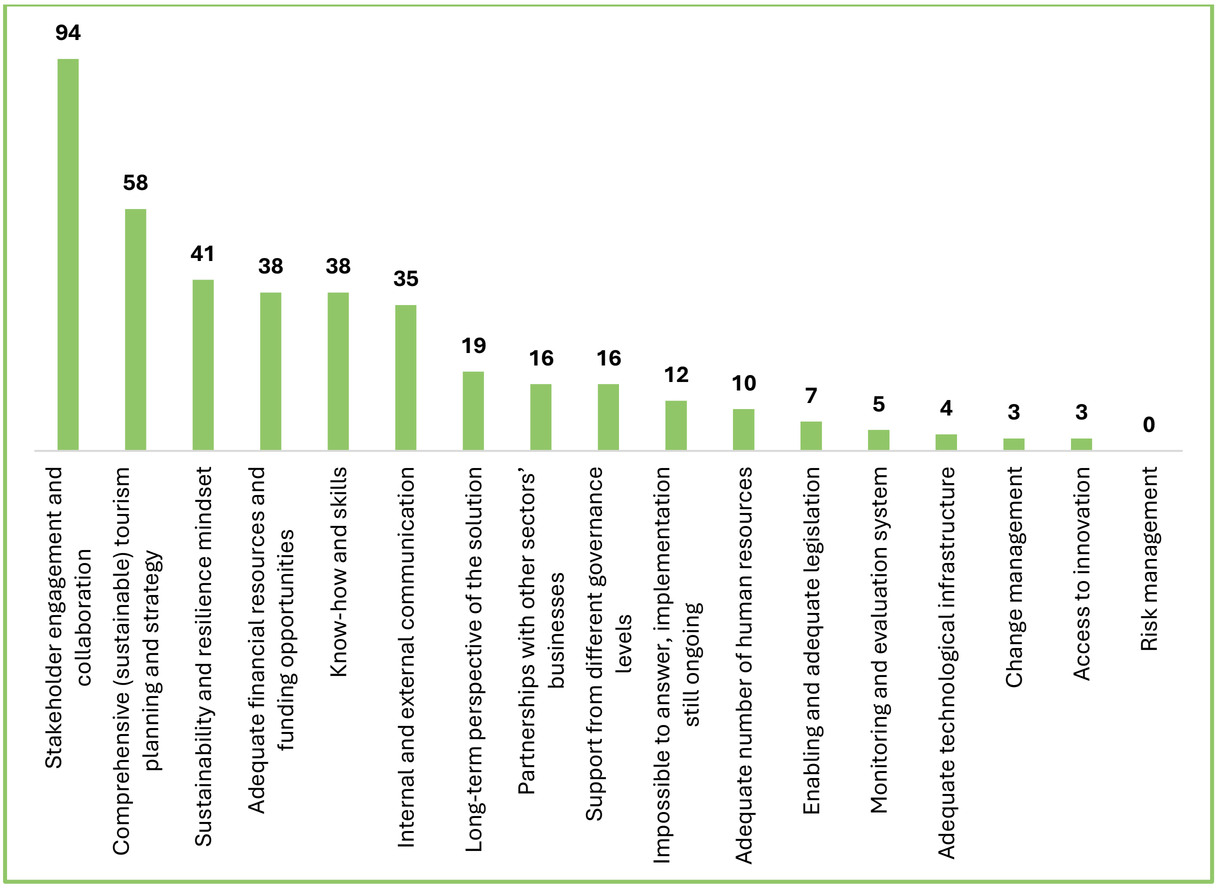


Figure 47 - Key success factors

Stakeholder engagement and collaboration was deemed as the most relevant factor to successfully implement the measures proposed (94 mentions), underlining how integrating stakeholders in decision-making processes can lead to effective collaboration and more sustainable tourism practices[56].

Similarly, **comprehensive (sustainable) tourism planning and strategy**'s relevance was recognised as important by respondents, as a well-thought-out and comprehensive strategy for sustainable tourism is critical for achieving success. Having a **sustainability** and **resilience-focused mindset** also has a crucial significance for respondents, as – with 41 mentions – it allows destinations to be prepared and capable of adapting to several challenges, including environmental changes and economic crises. In addition, **adequate financial resources and funding opportunities** (38 mentions) are necessary for implementing and sustaining successful tourism initiatives, requiring investments in infrastructures, marketing activities, and other pivotal areas like education (of both local residents and workers in the tourism industry), digitalisation of tourism destinations, tourism accommodation, environmental conservation, community development, as well as resilience and risk management. Surprisingly, **enabling and adequate legislation** recorded a low number of mentions (7), despite appropriate legal frameworks and regulations being essential for guiding and supporting tourism activities.

Analogously, **adequate technological infrastructures** and **access to innovation** received few mentions, even though such breakthrough factors have assumed a predominant role in most industries, including tourism. Lastly, no destination mentioned **risk management** as a key success factor. This underpins the information gathered when reflecting on the DMOs' key roles, as risk and crisis management recorded the lowest value. In this regard, it is necessary to affirm again the importance of a crisis management plan to limit the negative effects of disruptive events (pandemic, war, financial crisis, natural disaster etc.) that can cause harm to both the local economy and the destination's image. Therefore, such evidence indicates a

[56] Jens Newig, Nicolas W. Jager, Edward Challies, Elisa Kochskämper, Does stakeholder participation improve environmental governance? Evidence from a meta-analysis of 305 case studies, Global Environmental Change, Volume 82,2023, 102705, ISSN 0959-3780, https://doi.org/10.1016/j.gloenvcha.2023.102705

potential area for further attention to be addressed by reinforcing the role such components have for tourism destinations.

2.5.4 Key challenges

Together with the key success factors, the survey also permitted to determine the key challenges (Q29) related to the implementation of the solutions described above, as presented in the figure below.

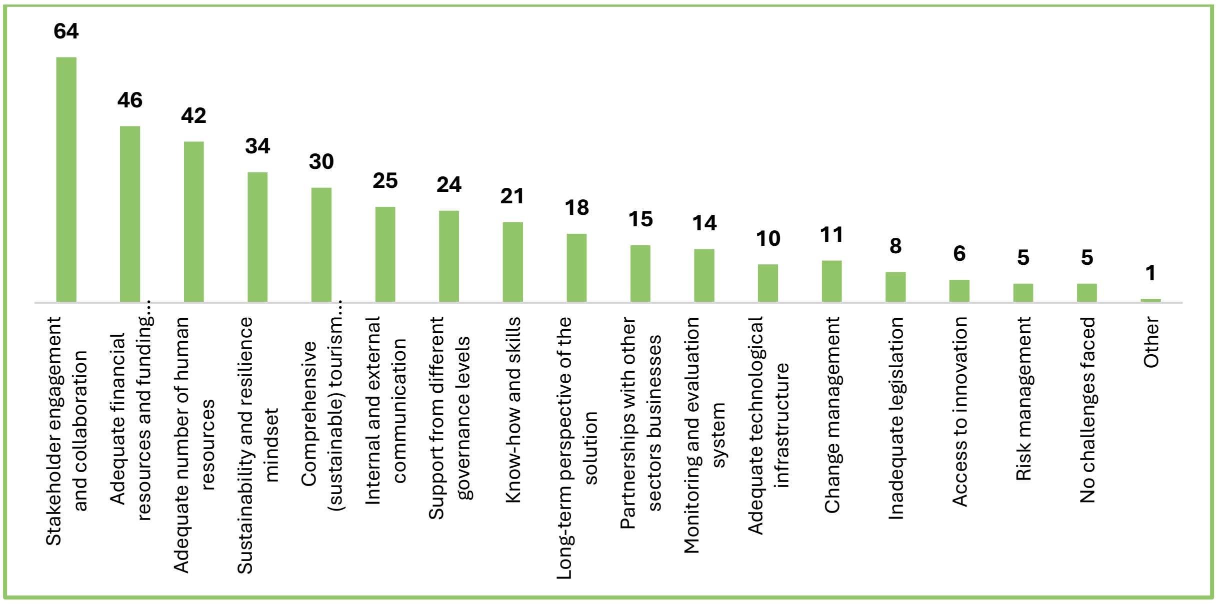


Figure 48 - Key challenges

As visible, these challenges match the key success factors presented above, thus allowing for further reflections.

Firstly, **despite being the most cited key success factor, stakeholder engagement and collaboration** (64 mentions) **is also the most frequently mentioned challenge**. This might suggest that while stakeholders' involvement is crucial, achieving effective collaboration is not easy, especially when considering small tourism locations. **Adequate financial resources and funding** (46 mentions) is both a key success factor and a significant challenge. Therefore, although funding is essential, accessing it remains a common obstacle, especially when considering EU-level funds. The availability of an **adequate number of human resources** (42 mentions) is also a notable challenge, underlining the need for upskilling tourism workers, allowing them to develop more advanced competencies for responding to customer needs. Similarly**, sustainability and resilience mindset** (34 mentions) represent both a success factor and a challenge for destinations, as fostering sustainable practices presents significant difficulties which might undermine their implementation.

2.5.5 Awareness raising activities

Promoting sustainable and resilient tourism practices requires organising awareness-raising activities for spreading knowledge about these topics. In light of this, question 31 of the survey sought to gather information concerning responsible tourism and awareness-raising initiatives implemented by destinations. To achieve this objective, Q31 was structured as an open question, also allowing respondents to add further comments and upload supporting documentation regarding the activities in question.

In general, 41% of the respondents have already undertaken awareness-raising activities, while 22% are currently developing such initiatives. In detail, it was possible to observe the following evidence:

- As observed when analysing the solutions adopted at DMO level, many destinations are already carrying out **educational campaigns** for informing visitors about sustainable practices they shall implement. These programmes are mostly delivered through destinations' websites, social media, ad hoc tourist brochures, and other printed materials, produced in collaboration with local schools and universities.
- **Partnerships with local organisations** (namely local NGOs, environmental organisations, national parks, local businesses, and tourism and other stakeholders) also represent valid opportunities to promote responsible tourism and spread knowledge among tourists.
- Similarly, some destinations are in the process of acquiring **sustainable certifications**/are undergoing **sustainable tourism assessments**, to promote responsible tourism among service providers as well as visitors.
- In addition, as mentioned above, many initiatives leverage **digital tools**, including **websites**, **apps**, and **social media**, which provide information on sustainable practices, tips for visitors, and details about local sustainable tourism efforts.
- Together with digital tools, a high number of destinations also rely on **workshops**, **sensitisation tours**, and **interactive**, **in-presence initiatives** to stimulate **visitor engagement**. This also includes activities like surveys, educational walks, and interactive exhibits.
- Some other initiatives focus on **improving local infrastructure** to support responsible tourism, such as installing trash cans, ashtrays on beaches, and walkways with guidelines for proper conduct. These activities were complemented throughout communication campaigns aimed at underlining the importance of responsible behaviours by tourists to preserve the DMOs' natural environment.
- Coherently, destinations are also producing **guidelines** for **responsible tourism behaviour** to respect local wildlife, providing rules for proper waste disposal, and recommending best practices for reducing tourists' carbon footprint.
- Lastly, encouraging the use of **bikes**, **public transportation**, and **other sustainable modes of travel** also turned out to be a common theme, with different destinations having made significant investments to promote these more sustainable alternatives.

2.6 Engagement in the project

The last section of the survey aimed to gather information on the DMOs' engagement in the project, as well as to understand their interest in proposing any experts in their organisation/among their collaborators involved in sustainable and resilient tourism to be engaged in TAIEX.

2.6.1 Engagement in the project and impacts to be addressed

93% of respondents expressed interest in the project's activities (Q33), with question 34 also assessing the impacts DMOs target to address during the project itself, as indicated in the figure below.

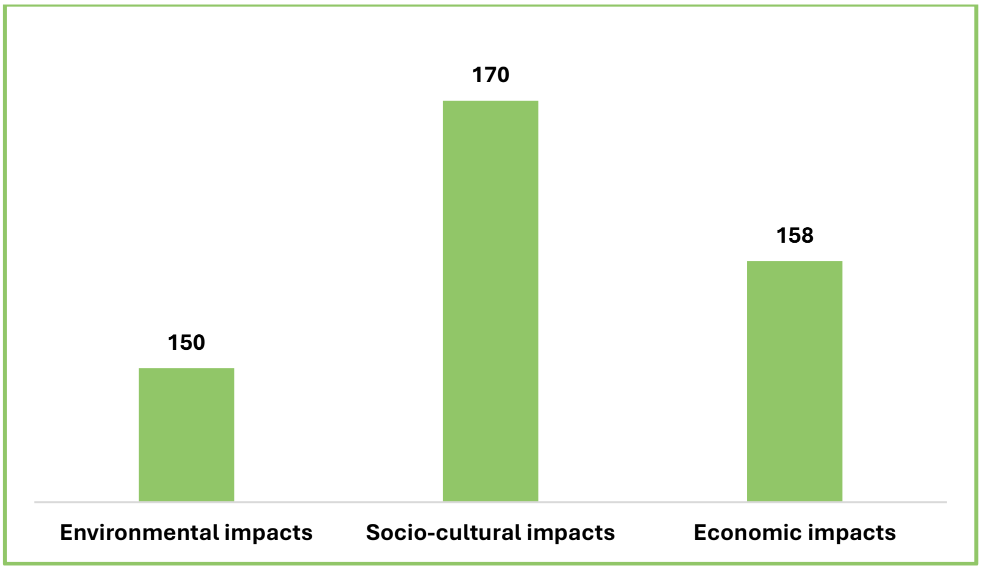


Figure 49 - Impacts to be addressed through the project activities

More specifically, **socio-cultural impacts represent the most prominent category**, having been indicated 170 times by both respondents interested in the project's activities and respondents not interested in them. Economic and environmental impacts, on the other hand, were given a slightly moderate priority, having been indicated 158 and 150 times respectively. This might indicate that respondents strongly emphasised social and cultural factors, possibly reflecting a focus on community benefits, cultural preservation, or social integration. Similarly, due consideration is given to the economic benefits which might be achieved thanks to the project, including financial sustainability, job creation, and economic growth. In addition, environmental aspects are considered, as respondents are convinced that issues connected to sustainability, ecological footprint, or resource usage can be addressed throughout the project.

2.6.2 Proposed TAIEX experts

The survey also investigated DMO's interest in proposing sustainability experts to join the TAIEX[57] instrument. Overall, only 28% of the respondents suggested relevant experts with whom they already collaborate, for a total of **78 experts**. Most experts were suggested by **Austrian DMOs** (**14 experts**), followed by **Italy** (**7 experts**), **Germany** and **Portugal** (**6 experts each**), and **Spain** (**5 experts**), as indicated in the following figure.

[57] https://neighbourhood-enlargement.ec.europa.eu/funding-and-technical-assistance/taiex_en

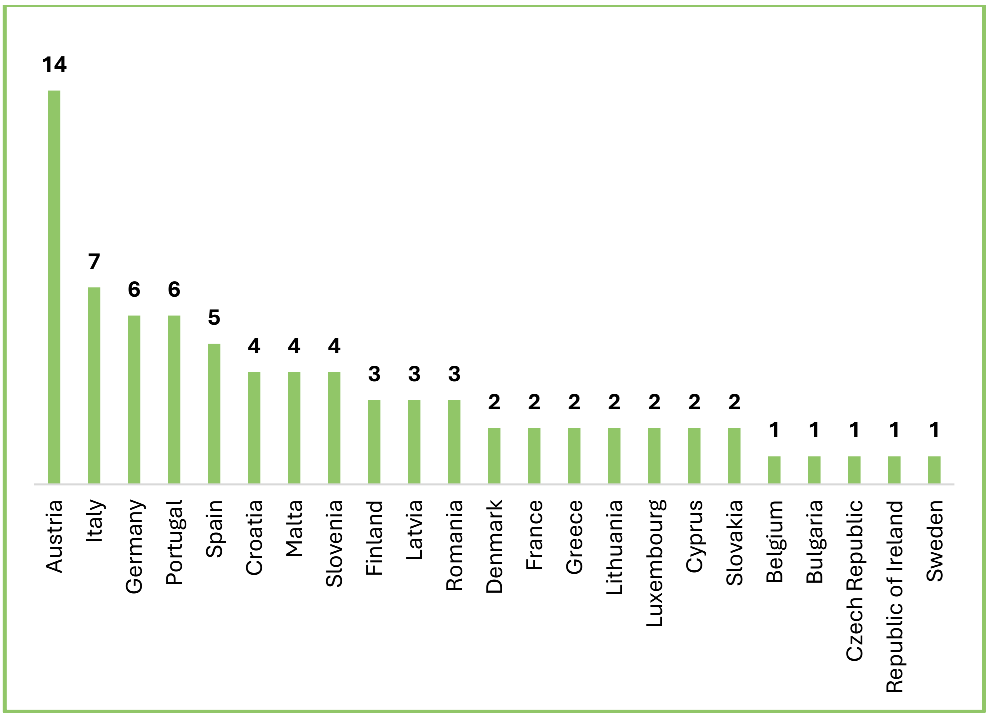


Figure 50 - Experts proposed per country

Following up on the survey analysis, the project team will proceed and engage the proposed experts verifying their willingness to collaborate and join the TAIEX instrument.

3 Conclusions and next steps

The survey reveals some important elements, such as high seasonality and rising costs of living and housing, which are common across the DMO sample, regardless of the type of destination. Key common challenges and success factors have also been identified, highlighting the importance of stakeholder collaboration and involvement in shaping solutions. Another recurrent key success factor is the availability of adequate funding.

DMOs seem to have homogeneous structures as well as common key roles, which will facilitate exchange of information and mutual learning during the **next phases of the project**. These comprise developing a path for establishing a twinning mechanism for destinations with shared challenges, based on the survey results. In detail, this entails the preparation of a twinning toolkit for DMOs which will include a section on challenges and best practices identified (output of Work Package 2) and a presentation of the objectives and the overall destinations' twinning journey. In addition, the toolkit will include the explanation of the online registration system (called "Destinations' sign-up") aimed at collecting DMOs' adhesions and information to set the matches. Then, leveraging the DMO preferences, 15 key challenges will be identified and will be later discussed during three ad hoc workshops to be held in presence in Brussels. The main output of these workshops will be represented by a *twinning roadmap* developed for peer-learning purposes and for setting up concrete collaborations among destinations. Lastly, follow-up webinars on potential funding opportunities and related EU-level initiatives will be organised as open events for all interested stakeholders.

Interestingly, DMOs do not seem to prioritise visitor flow management or risk and crisis management plans. This element reiterates the need for, and relevance of, **European initiatives** such as "D3HUB" on data management and the "Crisis Management and Governance in Tourism" project, to strengthen the capacity and skills of DMOs in these areas.

The solutions adopted to increase sustainability and resilience have been carefully assessed and those cases providing instructive and informative findings and having a potential for replicability in destinations with similar characteristics, have been selected and will be included in the **list of case studies** that will be delivered as part of Work Package 2 - *Recognise key challenges and gather best practices for supporting sustainable and resilient tourism in destinations*.

Moreover, the information collected in the survey will be used during the **matchmaking process** under Work package 3 - *Establish a twinning mechanism for destinations with shared challenges*. If DMOs confirmed their commitment to participate in the next phases of the project, the information that they provided will be key to understand their needs, structure and challenges, and will help in the matchmaking process.

4 Annexes

1. Final survey
2. Full list of valid responses
3. Full list of DMOs
4. Flash reports
5. Methodological notes

5.1 Final survey

Introduction

The EU project **"Sustainable EU Tourism – Shaping the Tourism of Tomorrow"** aims to support EU tourism destinations as they navigate towards achieving greater sustainability and resilience.
To know more about the project and this survey, including instructions on how to fill it, please refer to the **guide** attached below (EN). (Download)
Before you start, please find below a couple of important definitions:

- **Tourism destination** refers to a physical space in which a visitor can spend an overnight.
- **Destination Management/Marketing Organisation (DMO)** refers to the leading entity which facilitates the development of a collective destination vision (e.g. through the implementation of tourism policies, strategic planning, promotion, and marketing etc.). The governance structures of DMOs vary from a single public authority to a public / private partnership. Not every tourism destination has a DMO.
- **Sustainability** refers to the environmental, social, and economic sustainability of a destination.
- **Resilience** refers to a destination's ability to mitigate shocks and adapt to change (e.g. through capacity-building, skills development, data monitoring etc.).

General information

Contacts

1. ***Name** *(OQ max 100 car.)*
2. ***Surname** *(OQ max 100 car.)*
3. ***Role in the destination** *(OQ max 100 car.)*
4. ***Contact email** *(OQ max 100 car.)*
5. ***Do you consent to the collection and analysis of data in alignment with the following privacy statement?** *(Privacy statement to be uploaded – download)*
    - **Yes (necessary to proceed)**
    - **No**

Tourism in the destination

6. ***Name of your destination** *(OQ max 100 car.)*
7. ***Country of your destination**. If it is a transnational destination, please select all countries covered *(MCQ)*
    - Austria
    - Belgium
    - Bulgaria
    - Croatia
    - Republic of Cyprus
    - Czechia
    - Denmark
    - Estonia
    - Finland
    - France
    - Germany
    - Greece
    - Hungary
    - Ireland
    - Italy
    - Latvia

- Lithuania
- Luxembourg
- Malta
- Netherlands
- Poland
- Portugal
- Romania
- Slovakia
- Slovenia
- Spain
- Sweden
- Other→ please specify* *(OQ max 100 car.)*

8. ***How many residents live in your destination?** *(SCQ)*
- More than 7 million
- Between 3 million and 7 million
- Between 800.000 and 3 million
- Between 150.000 and 800.000
- Between 50.000 and 150.000
- Between 50.000 and 10.000
- Less than 10.000

9. ***How much does tourism contribute to the economy of your destination?** If you do not have an exact number, provide your best estimate *(Matrix, SCQ)*

Contribution to	Small extent (<5%)	Medium extent (5 to 10%)	High extent >10%
Local aggregated income (local GDP)			
Employment			

10. **Approximately, what % of your arrivals come from your 3 most significant international source markets for tourism (i.e. the tourists' country of origin)?** *(Matrix, SCQ)*
- Small extent (<15%)
- Medium extent (15 to 25%)
- High extent (>25%)

11. ***What does your destination offer in terms of types of attractions that may bring in tourism?** E.g., cultural heritage attractions, natural attractions, events, sports, fashion, and shopping, etc… *[1=low number of tourist attractions/reasons to visit, 3= many different tourist attraction/ reasons to visit] (Number slider)*

Destination governance

12. ***What are the key roles of your Destination Management Organisation (DMO)?** *(MCQ, max 5)*
- Tourism management and planning (for ex. elaboration of a tourism concept)
- Destination marketing and branding (including supporting digital visibility of local service providers)
- Designing local policy and regulations to favour tourism development
- Local and external stakeholders' management (including the monitoring of residents' attitudes towards visitors)

- Represent destination interests at regional, national and/or international levels
- Development and delivery of tourism initiatives and products
- Management of resources for destination development (e.g., human resources development and attraction of financial resources)
- Management, maintenance, and preservation of tourist attractions and services
- Visitors' flow management and steering
- Information and market research
- Risk and crisis management
- Destination sustainability enhancement (i.e. economic, environmental, social)
- Destination resilience enhancement (i.e. towards shocks, adaptation to changes)

13. ***Who are your destination's 3 most important stakeholders (i.e. the most affected by tourism and/or the ones whose actions can influence tourism)?** *(MCQ, max 3 answers)*
    - Local residents
    - Tourists
    - Accommodation providers
    - Restaurants and bars
    - Local shops
    - Tour operators
    - Local craftsmen, artisans
    - Organisations managing tourism attractions
    - Protected area managers
    - Local tourist guides
    - Event organisers (e.g. concerts, festivals, sport competitions…)
    - Local public transport companies
    - Other long-distance transport companies
    - Other sectors' businesses
    - Other→ please specify* *(OQ max 100 car.)*

14. ***What is your Destination Management Organisation's (DMO) relationship with the stakeholders identified in the question above?** *(SCQ)*
    - Occasional consultations (not every year) on key issues
    - Stakeholders are regularly consulted (at least once per year)
    - Stakeholders collaborate with the DMO (through a structured mechanism)
    - Stakeholders are part of the DMO
    - None of the above

Challenges and opportunities

15. ***To understand your destination's sensitivity to changes, please rate the following features of your destination** *(Matrix, SCQ)*

Feature	*Low*	*Medium*	*High*
Quality of utilities/facilities (e.g., public transport, parking, public water supply, waste management, etc.)			
Tourism seasonality (i.e., tourism concentrated on relatively short periods of the year)			
Access to and travel within the destination (e.g., through public transport, low-cost airlines connections, etc…)			
Accessibility of services and facilities (i.e., equal access to services and facilities for persons with disabilities)			

Feature	*Low*	*Medium*	*High*
Pressures exerted by productive sectors other than tourism (e.g., traffic, pollution, noise, etc.)			
Effectiveness of destination governance (e.g., coordination among stakeholders, general and tourism specific laws and regulations)			
Effectiveness of destination management (e.g., overall strategic approach, up-to-date tourism statistics, destination's branding strategy, etc.)			
Level of sustainable consumption and production (e.g. monopolistic economy, high concentration of capital, accumulation of foreign-owned businesses, dependence on exports, etc…)			
Dependency on tourism of local economy and employment			
Community participation in tourism activities (e.g. in terms of entrepreneurship, business ownership, ecosystem governance, etc…)			
Ability to respond to changes in destination's conditions (e.g. due to climate change and destructing natural events, security, prices inflation, etc…)			
Ability to respond to changes in tourism demand (e.g. in terms of types of tourists, requested activities, etc…)			
Level of conservation of natural features (e.g. natural landscape, protected areas, biodiversity…)			

16. ***Please indicate the 5 most negative impacts of tourism in your destination** *(MCQ, max 5 answers)*

- Increased cost of living
- Increased cost of housing
- Precarious and irregular work
- Replacement of commercial services for residents with those for tourists
- Economic distress in low season
- High vulnerability to unexpected events
- Pollution and waste production
- Increased pressure on natural resources consumption (e.g. water, energy, soil…)
- Degradation of natural habitats and ecosystems / disturbance and loss of biodiversity
- Degradation and congestion of local infrastructure and services (e.g. traffic, crowded tourism attractions/public spaces…)
- Loss of cultural identity
- Local population displacement and marginalisation
- Diminished safety
- None
- Other→ *please specify *(OQ max 100 car.)*

17. *Please indicate the 5 most positive impacts of tourism in your destination *(MCQ, max 5 answers)*

- Increased income and standard of living
- Improved local economy
- Increased employment opportunities
- Higher quality and improved infrastructure and services
- Protection of natural environment
- Preservation of historic buildings
- Improvement of the area's appearance
- Higher levels of education
- Positive changes in values and customs
- Social and cultural exchange
- Increased offer of entertainment and cultural events

- Improved accessibility of services and facilities
- None
- Other→ *please specify *(OQ max 100 car.)*

18. ***Please indicate the main risks to which your destination is exposed, that could hinder the sustainable and resilient development of tourism** *(MCQ, max 3 answers)*
    - **Natural and environmental disasters** (e.g. fires, floods, landslides, severe rains or windstorms, earthquakes, volcanic eruptions…)
    - **Health related risks** (e.g. epidemics, food poisoning, humanitarian crises…)
    - **Human-made risks** (e.g. war, terrorist attacks, social unrest, water and air pollution…)
    - **Financial risks** (e.g. economic crises, fiscal crises, exchange rate collapses…)
    - **Technological risks** (e.g. transportation accidents, cyberattacks, hazardous material accidents…)
    - **None**

19. **Please indicate current or emerging trends or developments (general and tourism-specific) that have a significant influence on the sustainable and resilient development of your destination** *(MCQ, max 5 answers)*

    - Sharing economy and peer-to-peer platforms (e.g., Airbnb, Uber)
    - Use of social media
    - Rise of new competitors
    - Changing consumer preferences
    - Slower economic growth
    - Growth-focused mindset of the tourism sector
    - Advanced technologies, e.g. artificial intelligence (AI), virtual reality (VR), and the Internet of Things (IoT)
    - Bad working conditions in the tourism sector
    - Other→ *Please specify *(OQ max 100 car.)*

Solutions

20. ***Did you already implement, or are you implementing, any measures to improve your destination's tourism sustainability and resilience?** *(SCQ)*
    - Yes
    - No

21. [If Q20=yes] **What aspects are your measures covering?** *(MCQ)*
    - Economic
    - Environmental
    - Sociocultural

22. [If Q21=Economic)] **Which ones?**
    - Increased cost of living
    - Increased cost of housing
    - Precarious and irregular work
    - Replacement of commercial services for residents with those for tourists
    - Economic distress in low season
    - Increased income and standard of living
    - Improved local economy
    - Increased employment opportunities
    - Higher quality and improved infrastructure and services

23. [If Q21= Environmental] **Which ones?**
    - High vulnerability to unexpected events
    - Pollution and waste production
    - Increased pressure on natural resources consumption (e.g. water, energy, soil…)
    - Degradation of natural habitats and ecosystems / disturbance and loss of biodiversity
    - Higher quality and improved infrastructure and services
    - Protection of natural environment
    - Improvement of the area's appearance

24. [If Q21=Sociocultural] **Which ones?**
    - Loss of cultural identity
    - Local population displacement and marginalization
    - Diminished safety
    - Degradation and congestion of local infrastructure and services (e.g. traffic, crowded tourism attractions/public spaces…)
    - Higher levels of education
    - Positive changes in values and customs
    - Social and cultural exchange
    - Increased offer of entertainment and cultural events
    - Preservation of historic buildings
    - Improved accessibility of services and facilities

25. [If Q20=yes] ***For the measures already implemented, please describe briefly the most successful one** *(OQ, max 1000 characters)*

26. [If Q20=yes] ***Was EU/national funding used to implement the given measures?** E.g. funded by European Regional Development Funds (ERDF) *(OQ, max 100 characters)*

27. [If Q20=yes] **Do you want to share any relevant materials relating to the measure described above?** *(upload)*

28. [If Q20=yes] ***What have been/what were the key success factors when developing the measure described above?** *(MCQ, 3 answers)*
    - Comprehensive (sustainable) tourism planning and strategy
    - Enabling and adequate legislation
    - Stakeholder engagement and collaboration
    - Internal and external communication
    - Know-how and skills
    - Adequate number of human resources
    - Adequate financial resources and funding opportunities
    - Partnerships with other sectors' businesses
    - Support from different governance levels
    - Adequate technological infrastructure
    - Sustainability and resilience mindset
    - Change management
    - Risk management
    - Monitoring and evaluation system
    - Access to innovation
    - Long-term perspective of the solution

- Other → please specify* *(OQ max 100 car.)*
- None
- Impossible to answer, implementation still ongoing

29. [If Q20=yes] ***What have been/what were the challenges when developing the measure described above?** *(MCQ, 3 answers)*
- Comprehensive (sustainable) tourism planning and strategy
- Inadequate legislation
- Stakeholder engagement and collaboration
- Internal and external communication
- Know-how and skills
- Adequate number of human resources
- Adequate financial resources and funding opportunities
- Partnerships with other sectors businesses
- Support from different governance levels
- Adequate technological infrastructure
- Sustainability and resilience mindset
- Change management
- Risk management
- Monitoring and evaluation system
- Access to innovation
- Long-term perspective of the solution
- Other → please specify *(OQ max 100 car.)*
- No challenges faced

30. [If Q20=yes] **Are there any other measures to improve your destination's sustainability and resilience that you would like to share?** If yes, please briefly describe them here *(OQ, max 500 characters)*

31. *Are there any awareness raising initiatives aimed at promoting responsible tourism among visitors in your destination? *(SCQ)*
- Yes
- No
- In development

32. [If Q31=yes or in development] ***Please briefly describe it.** If available, please insert a related URL *(OQ, max 500 characters)*

Engagement in the project

33. ***Would you be interested in participating in future project activities (i.e. twinning, workshops, and capacity building activities) focused on improving your destination's sustainability and resilience (e.g. by sharing your best practises or learning from good practise)?** For more information, please refer to the guide attached at the beginning of the survey *(SCQ)*
- Yes
- No

34. ***Which key impacts would you be interested to address through the project activities?** *(MCQ)*
- Environmental impacts
- Socio-cultural impacts

- Economic impacts

35. *** As part of project activities, we will invite experts to join TAIEX (see page 3 of the guide). For this purpose, are there any experts in your organisation/among your collaborators involved in sustainable and resilient tourism that you would like to point out?** *(SCQ)*
    - Yes
    - No

36. [If Q35=yes] **Please provide the expert's name** *(OQ max 100 car.)*
37. [If Q35=yes] **Role** *(OQ max 100 car.)*
38. [If Q35=yes] **Expertise** *(OQ max 100 car.)*
39. [If Q35=yes] **Contact email** *(OQ max 100 car.)*

4.2 Full list of valid responses

N	Country	Destination
1	Austria	Wagrain-Kleinarl
2	Austria	Montafon
3	Austria	Innsbruck Tourismus
4	Austria	Tourismusverband Alpbachtal & Tiroler Seenland
5	Austria	Saalbach Hinterglemm
6	Austria	Nassfeld-Pressegger See / Lesachtal / Weissensee
7	Austria	Tourismusverband Südburgenland
8	Austria	Gastein
9	Austria	Hall-Wattens Tourismus
10	Austria	Nordburgenland
11	Austria	Region Seefeld - Tirols Hochplateau
12	Austria	Mittelburgenland-Rosalia
13	Austria	Pinzgau
14	Austria	Salzburger Saalachtal
15	Austria	Mostviertel
16	Austria	Wachau
17	Austria	Alpenregion Bludenz Tourismus GmbH
18	Austria	Niederösterreich
19	Austria	Saalfelden Leogang
20	Austria	Linz
21	Austria	Graz
22	Belgium	Provincie Antwerpen
23	Belgium	Brussels
24	Belgium	Brugge
25	Bulgaria	Veliko Tarnovo Region
26	Bulgaria	Община Габрово
27	Bulgaria	Burgas Black Sea Tourist Organisation
28	Bulgaria	област Търговище
29	Bulgaria	гр. Елена
30	Croatia	Topusko
31	Croatia	Novigrad - Cittanova
32	Croatia	Grubisno Polje, Veliki Grdjevac (Tourist board Southern Bilogora)
33	Croatia	Zaton
34	Croatia	Sisak-Moslavina county
35	Croatia	Town of Prelog
36	Croatia	Rovinj-Rovigno
37	Croatia	NIN
38	Croatia	Poreč
39	Croatia	Kraljevica
40	Croatia	Preko, otok Ugljan
41	Croatia	ZADAR
42	Croatia	Vodnjan
43	Croatia	Kukljica, Ugljan island
44	Croatia	Ogulin
45	Croatia	City of Split
46	Croatia	TURISTIČKA ZAJEDNICA PODRUČJA ZLATNI ISTOK ZAGORJA
47	Croatia	Osijek city
48	Croatia	Tkon

49	Croatia	Novi Vinodolski
50	Croatia	Sisak
51	Croatia	Kaštela
52	Croatia	Selca
53	Croatia	National Park Plitvice lakes county
54	Croatia	Sveti Ivan Zelina
55	Croatia	Tourist board of the town Skradin
56	Croatia	Cavtat Konavle
57	Croatia	Lovran
58	Croatia	Oroslavje
59	Croatia	Općina Pitomača
60	Croatia	MUNICIPALITY OF FAŽANA
61	Croatia	MEĐIMURSKA ŽUPANIJA (MEĐIMURJE COUNTY)
62	Croatia	Gorski Kotar County
63	Croatia	TZP Tuhlja, Klanjca i Trgovišća
64	Croatia	Croatian Rural Tourism Association
65	Croatia	Estate Visnjica
66	Croatia	Sveti Martin na Muri
67	Czechia	South Bohemia
68	Czechia	Jižní Morava
69	Czechia	Pilsen Region
70	Czechia	East-Moravian Tourist Authority
71	Czechia	Východní Čechy East Bohemia
72	Czechia	Vysočina Tourism
73	Czechia	City of Ostrava
74	Czechia	Hradecko
75	Czechia	Destinační management Česká Kanada z.s.
76	Czechia	Destinace Sušicko, z.s.
77	Czechia	Brněnsko - destinační společnost pro Brno a okolí
78	Czechia	Královéhradecká krajská centrála cestovního ruchu, příspěvková organizace
79	Czechia	Plzeňský kraj
80	Czechia	Šumavsko
81	Czechia	Lednicko-valtický areál a Hustopečsko
82	Czechia	Turistická oblast Kutnohorsko a Kolínsko z.s.
83	Czechia	Prague
84	Denmark	Vejle
85	Denmark	Destination Limfjorden
86	Denmark	Aarhusregionen
87	Denmark	Destination Trekantområdet
88	Denmark	Middelfart
89	Estonia	Central Estonia DMO
90	Estonia	Lahemaa
91	Estonia	Tallinn
92	Finland	Oulu
93	Finland	Visit Kotka-Hamina
94	Finland	Visit Turku Archipelago
95	Finland	Lapland North Destinations
96	Finland	Porvoo

97	Finland	Raahe region/ Visit Raahe (City of Raahe, municipalities of Siikajoki and Pyhäjoki)
98	Finland	Finland (Visit Finland)
99	Finland	Vaasa region
100	Finland	Arctic Lakeland Finland
101	Finland	Vantaa
102	Finland	Discover Muonio (association Luoteis-Lapin Matkailuyhdistys ry)
103	Finland	Visit Kristinestad
104	France	France
105	France	Strasbourg
106	France	DINAN-CAP FREHEL
107	France	ALSACE
108	France	LYON
109	Germany	Bad Dürrheim
110	Germany	Nordseeheilbad Insel Borkum
111	Germany	Düsseldorf
112	Germany	Winterberg
113	Germany	Free Hanseatic City of Bremen
114	Germany	Grafschaft Bentheim
115	Germany	NORDPFADE Wanderregion im Landkreis Rotenburg (Wümme)
116	Germany	Karlsruhe
117	Germany	Mecklenburg-Vorpommern
118	Germany	Urlaubsregion Mittelelbe
119	Germany	Saarland
120	Germany	Darmstadt
121	Germany	Nördlicher Schwarzwald
122	Germany	Regensburg
123	Germany	Nordrhein-Westfalen
124	Germany	Bremerhaven
125	Greece	Halkidiki
126	Greece	IONIAN ISLANDS
127	Greece	ΘΕΣΣΑΛΙΑ
128	Greece	Thessaloniki
129	Greece	Heraklion/ island of Crete
130	Greece	Αθήνα
131	Greece	Municipality of Katerini, Pieria Perfecture
132	Hungary	Sárvár
133	Hungary	Székesfehérvár and its destination
134	Hungary	Mátra
135	Hungary	Baja
136	Hungary	Pécs-Villány
137	Hungary	Irottko Naturpark
138	Hungary	Vác and Surroundings
139	Ireland	Sligo
140	Ireland	Kilkenny
141	Ireland	County Louth, Ireland
142	Italy	Madonna di Campiglio
143	Italy	Comune di Ferrara

intellera consulting

144	Italy	apt valsugana lagorai
145	Italy	Garda Trentino
146	Italy	Alpe Cimbra
147	Italy	Isola di Capri
148	Italy	Tuscia
149	Italy	Agro Falisco e Monti Cimini - Northern Lazio
150	Italy	Francigena sud nel Lazio
151	Italy	Valdichiana Senese
152	Italy	Val do Fassa
153	Italy	Grosseto City in Tuscany Region
154	Italy	Dolomiti Paganella Tourism Board
155	Italy	Castelli Romani
156	Italy	Livigno
157	Italy	Langhe Monferrato Roero
158	Italy	Meran
159	Italy	La Riviera d'Ulisse
160	Italy	Dolomitenregion Seiser Alm
161	Italy	Carbonia
162	Latvia	Latgale Region
163	Latvia	Tukuma novads | Visit Tukums
164	Latvia	Latvia
165	Latvia	Kurzeme (region)
166	Lithuania	Joniskis tourism and business information center. Non profit organization
167	Lithuania	Rokiškio turizmo informacijos centras
168	Lithuania	Plungė
169	Luxembourg	Luxembourg
170	Luxembourg	Luxembourg City
171	Malta	Malta
172	Netherlands	municipality of Ede
173	Netherlands	Visit Zuid-Limburg
174	Netherlands	Noordenveld
175	Netherlands	Breda
176	Other	Montenegro
177	Poland	Pomorskie
178	Poland	Wielkopolska
179	Portugal	Azores
180	Portugal	Vizela
181	Portugal	iNature
182	Portugal	Portugal
183	Portugal	Câmara Municipal de Arouca
184	Portugal	Lisboa
185	Portugal	Alentejo
186	Portugal	Center of Portugal
187	Portugal; Spain	Meseta ibérica Transboundary Biosphere Reserve
188	Republic of Cyprus	Pafos Region- Cyprus
189	Republic of Cyprus	Cyprus
190	Romania	TIMIȘ
191	Romania	The Northern Territory of Pescaresc Prut-Danube Galati

192	Romania	CLUJ COUNTY
193	Romania	Colinele Transilvaniei / Transylvanian Highlands
194	Romania	Valea Jiului
195	Romania	OMD COLINELE MOLDOVEI
196	Romania	Toplita
197	Romania	Timisoara
198	Romania	Munții Apuseni
199	Slovakia	Kosice
200	Slovenia	Radlje ob Dravi
201	Slovenia	Šalek Valley
202	Slovenia	Laško
203	Slovenia	Destinacija Jeruzalem Slovenija
204	Slovenia	Razkriški kot
205	Slovenia	Rogla - Pohorje
206	Slovenia	Maribor
207	Slovenia	Logarska dolina- Solčavsko
208	Slovenia	Slovenia
209	Slovenia	Kranj
210	Spain	ISLAS CANARIAS
211	Spain	Puerto del Carmen
212	Spain	BENIDORM
213	Spain	BARCELONA
214	Spain	Andalusia
215	Spain	Las Rozas de Madrid
216	Sweden	Värmland county
217	Sweden	Umeå
218	Sweden	Småland
219	Sweden	Stockholm
220	Sweden	northern Småland
221	Sweden	Helsingborg
222	Sweden	Gothenburg

4.3 Full list of DMOs

N	Country	Destination
1	Austria	Graz
2	Austria	Mostviertel Tourism
3	Austria	Tourismusverband Linz
4	Austria	Austrian National Tourist Office
5	Austria	b2b austria info
6	Austria	Bund Österreichischer Tourismusmanager
7	Austria	Burgenland Tourismus GmbH
8	Austria	City of Gmund
9	Austria	DMC Austria
10	Austria	Federal Ministry of Labour and Economy, Directorate General VIII – Tourism, Department VIII/2 – International Tourism Affair
11	Austria	Graz Tourismus & Stadtmarketing GmbH
12	Austria	Grosses Walsertal Biosphere Park
13	Austria	Innsbruck Tourismus
14	Austria	Kärnten Information
15	Austria	Kärnten Werbung (Carinthia Tourism Board)
16	Austria	Kaunertal Valley
17	Austria	Linz City Administration
18	Austria	Niederösterreich Information
19	Austria	Niederösterreich-Werbung (Lower Austria Tourism)
20	Austria	Oberösterreich Tourismus (Upper Austria Tourism)
21	Austria	Pielachtal
22	Austria	Region Seefeld
23	Austria	Saalfelden Leogang
24	Austria	Salzburger Land Tourismus
25	Austria	Seelentium
26	Austria	smartworksevents
27	Austria	Steiermark Tourismus (Styria Tourism Board)
28	Austria	Steirisches Vulkanland
29	Austria	Tirol Werbung (Tyrol Tourism Board)
30	Austria	Tourismus Salzburg GmbH
31	Austria	Tourismusverband Lesachtal
32	Austria	Tourismusverband Salzkammergut
33	Austria	Tourismusverband Schladming-Dachstein
34	Austria	Vienna Tourist Board
35	Austria	Vorarlberg Tourismus
36	Austria	Wachau Tourismus
37	Austria	Wagrain-Kleinarl
38	Austria	Werfenweng
39	Austria	Saalfelden Leogang
40	Belgium	Ath
41	Belgium	Durbuy
42	Belgium	Government of the German-speaking Community of Belgium

43	Belgium	La Louvière
44	Belgium	Lacs de l'eau d'heure
45	Belgium	Marche-en-Famenne
46	Belgium	Ministry/Tourism Office
47	Belgium	Ottignies-Louvain-la-Neuve
48	Belgium	Tourism East-Flanders
49	Belgium	Tourism Mechelen
50	Belgium	Viroinval Nature Park
51	Belgium	Visit Antwerp
52	Belgium	Visit Bruges
53	Belgium	Visit Flanders
54	Belgium	Visit Gent
55	Belgium	Visit Hasselt
56	Belgium	Visit Leuven
57	Belgium	Visit Liège
58	Belgium	Visit Limburg
59	Belgium	Visit Namur
60	Belgium	Visit Wallonia
61	Belgium	visit.brussels
62	Belgium	visitMons
63	Belgium	Waimes
64	Belgium	Westtoer apb
65	Bulgaria	Belitsa
66	Bulgaria	Belogradchik
67	Bulgaria	Bulgarian Tourism Authority
68	Bulgaria	City of Sofia
69	Bulgaria	Gabrovo
70	Bulgaria	Kostenets
71	Bulgaria	Organization for management of the Burgas Black Sea tourist region
72	Bulgaria	Organization for management of the Danube tourist region
73	Bulgaria	Organization for management of the Thracian tourist region
74	Bulgaria	Silistra region
75	Bulgaria	The Ministry of Tourism of the Republic of Bulgaria
76	Bulgaria	Varna Black Sea tourist region
77	Bulgaria	Yambol municipality
78	Bulgaria	Valley of Roses
79	Bulgaria	Stara Planina
80	Bulgaria	Burgas
81	Bulgaria	Trakia
82	Bulgaria	Rodopes
83	Bulgaria	Balchik
84	Bulgaria	Belogradchik
85	Bulgaria	Chepelare
86	Bulgaria	Devin
87	Bulgaria	Elen
88	Bulgaria	Lovech
89	Bulgaria	Sandanski

90	Bulgaria	Pleven
91	Bulgaria	Plovdiv
92	Bulgaria	Ruse
93	Bulgaria	Sapareva Banya
94	Bulgaria	Sliven
95	Bulgaria	Stara Zagora
96	Bulgaria	Tryavna
97	Bulgaria	Velikoturnovo
98	Croatia	Adriatic Ionian Euroregion
99	Croatia	Estate Visnjica
100	Croatia	Sveti Martin na Muri
101	Croatia	City of Dubrovnik
102	Croatia	Croatian National Tourist Board
103	Croatia	croatio concierge
104	Croatia	dt-croatia
105	Croatia	Dubrovnik-Neretva County Tourist Board
106	Croatia	Durdevac
107	Croatia	Gornje Medimurje
108	Croatia	Istria Tourist Board
109	Croatia	Kiratravel
110	Croatia	Kvarner Tourist Board
111	Croatia	Lika-Senj County Tourist Board
112	Croatia	Ministry of Tourism of the Republic of Croatia, Sector for Strategic Planning and Implementation of European Union Programmes and Projects
113	Croatia	Nin
114	Croatia	Northern Velebit National Park
115	Croatia	Opatija Tourist Board
116	Croatia	Pustara Visnjica
117	Croatia	Rebrand DMC Croatia
118	Croatia	Šibenik Tourist Board
119	Croatia	Šibenik-Knin County Tourist Board
120	Croatia	Split Tourist Board
121	Croatia	Split-Dalmatia County Tourist Board
122	Croatia	Stancija 1904
123	Croatia	Travel croatia
124	Croatia	Turistička zajednica grada Dubrovnika
125	Croatia	VisitRijeka
126	Croatia	Vukovar-Vučedol-Ilok
127	Croatia	Zadar County Tourist Board
128	Croatia	Zadar Tourist Board
129	Croatia	Zagreb Tourist Board
130	Croatia	Ministry of Tourism of the Republic of Croatia, Sector for Strategic Planning and Implementation of European Union Programmes and Projects
131	Cyprus	Agros
132	Cyprus	Askas
133	Cyprus	Atheniou
134	Cyprus	Gourri Village

135	Cyprus	Kalopanayiotis
136	Cyprus	Visit North Cyprus
137	Cyprus	Kato Pyrgos
138	Cyprus	Larnaka Tourism Board
139	Cyprus	Limassol Tourism Board
140	Cyprus	Miliou
141	Cyprus	Ministry of Tourism
142	Cyprus	Orini Larnakas
143	Cyprus	Pafos Regional Board of Tourism
144	Cyprus	Community of Pissouri
145	Cyprus	Pitsilia region
146	Cyprus	Platres
147	Cyprus	Polis Chrysochous Municipality
148	Cyprus	Troodos
149	Cyprus	Visit Famagusta
150	Cyprus	Visit Nicosia
151	Cyprus	Visit Cyprus
152	Cyprus	Visit Pafos
153	Cyprus	Visit Solea
154	Cyprus	Vouni Panagias
155	Czech Republic	Bohemian Switzerland
156	Czech Republic	Bystricko
157	Czech Republic	Central Bohemia Tourism
158	Czech Republic	City of Prague
159	Czech Republic	DMO Novohradsko-Doudlebsko
160	Czech Republic	East Moravia
161	Czech Republic	Jeseniky
162	Czech Republic	Karlovy Vary Region Tourism
163	Czech Republic	Karlovy Vary Region Tourism
164	Czech Republic	Liberec Region Tourism
165	Czech Republic	Lipno
166	Czech republic	Ministry/Tourism Office
167	Czech Republic	Moravian-Silesian Tourism
168	Czech Republic	Olomouc Region Tourism

169	Czech Republic	Plzeň Region Tourism
170	Czech Republic	Slovacko
171	Czech Republic	South Moravian Tourist Authority
172	Czech Republic	The Eagle Mountains and Foothills
173	Czech Republic	TIC BRNO
174	Czech Republic	Visit Czech Republic
175	Czech Republic	Východní Krkonoše
176	Czech Republic	Vysočina Region Tourism
177	Czech Republic	Zlín Region Tourism
178	Czech Republic	Zlínsko and Luhačovicko
179	Danmark	Danish West Coast Partnership
180	Denmark	Aarhusregionen
181	Denmark	Middlefart
182	Denmark	BDP Business Events
183	Denmark	Destination Bornholm
184	Denmark	Destination Limfjorden
185	Denmark	Destination Trekantområdet
186	Denmark	DMC Denmark
187	Denmark	DMC Nordic - Denmark
188	Denmark	Enjoy Aalborg
189	Denmark	Enjoy Nordjylland
190	Denmark	First United - EUROMIC Denmark
191	Denmark	Idéa Nordic
192	Denmark	Ministry of culture Office
193	Denmark	Nordic liberty
194	Denmark	Obo Tours
195	Denmark	Thisted
196	Denmark	V.O.S Destination Management
197	Denmark	VisitAarhus
198	Denmark	VisitCopenhagen
199	Denmark	VisitDenmark
200	Denmark	VisitHaderslev
201	Denmark	VisitHerning
202	Denmark	VisitNordsjælland (North Zealand)
203	Denmark	VisitOdense
204	Denmark	VisitSønderjylland
205	Denmark	VisitVejle
206	Denmark	VisitVestsjælland (West Zealand)

207	Denmark	Wonderful Copenhagen (Greater Copenhagen)
208	Denmark	Destination Limfjorden
209	Denmark	Destination Trekantområdet
210	England	Nordic Tourism Directive
211	England	Visit county Durham
212	England	VisitWiltshire/Great West Way- England
213	Estonia	Estonia Tourism Board
214	Estonia	Haapsalu
215	Estonia	Hiiumaa
216	Estonia	Lahemaa National Park Manors
217	Estonia	Lake Vortsjarv
218	Estonia	Ministry/Tourism Office
219	Estonia	Pärnu
220	Estonia	Pärnu Tourist Information
221	Estonia	Saaremaa Tourist Information
222	Estonia	Soomaa National Park
223	Estonia	Tallinn City Tourist Office & Convention Bureau
224	Estonia	Tartu Tourist Information
225	Estonia	Viljandi
226	Estonia	Visit Hiiumaa
227	Estonia	Visit Tartu
228	EU	CityDNA
229	EU	Euromontana
230	EU	European Cultural Tourism Network
231	EU	European Travel Commission
232	EU	Forum of the Adriatic and Ionian Chambers of Commerce (Forum AIC)
233	EU	NECSTOUR
234	Finland	Arctic Lakeland Finland
235	Finland	Discover Muonio (association Luoteis-Lapin Matkailuyhdistys ry)
236	Finland	Ministry/Tourism Office
237	Finland	Vantaa
238	Finland	Visit Kristinestad
239	Finland	Vaasa region
240	Finland	Fiskars Village
241	Finland	Helsinki Partners
242	Finland	Helsinki Tourism and Destination Management - City of Helsinki
243	Finland	Saimaa
244	Finland	Vaasa region
245	Finland	Visit Åland
246	Finland	Visit Espoo
247	Finland	Visit Finland
248	Finland	Visit Hämeenlinna
249	Finland	Visit Helsinki
250	Finland	Visit Jyväskylä
251	Finland	Visit Kainuu
252	Finland	Visit Kotka-Hamina
253	Finland	Visit Kouvola

254	Finland	Visit Lahti
255	Finland	Visit Oulu
256	Finland	Visit Pori
257	Finland	Visit Porvoo
258	Finland	Visit Rovaniemi
259	Finland	Visit Seinäjoki
260	Finland	Visit Tampere
261	Finland	Visit Turku Archipelago
262	Finland	Visit Vaasa
263	Finland	Western lakeland
264	Finland	Wild Taiga
265	France	Agency for Sustainable Mediterranean Cities and Territories
266	France	Aisne Tourism
267	France	Alsace Destination Tourism
268	France	Alsace Destination Tourisme
269	France	Anjou Toursm
270	France	Ardèche Hermitage Tourism
271	France	Atout France (National Tourism Development Agency)
272	France	Auvergne
273	France	Avignon Tourism
274	France	Bayonne Tourism
275	France	Biarritz Tourism
276	France	Bordeaux Tourism & Conventions
277	France	Bordeaux Tourism & Conventions
278	France	Bourgogne Franche-Comté Tourism
279	France	Bourgogne-Franche-Comté Tourism Board
280	France	Brittany Tourism Board
281	France	Centre-Val-de-Loire Regional Tourism Committee
282	France	Chantilly-Senlis Tourism
283	France	City Destinations Alliance
284	France	City of Nice
285	France	Comité Régional du Tourisme Côte d'Azur France
286	France	Corsica Tourism Board
287	France	Dawn in Champagne Tourism
288	France	Destination Rennes Tourisme Congrès
289	France	Dinan Cap-Fréhel Tourism
290	France	Eure & Loir Tourism
291	France	Evian Tourism & Conventions
292	France	Fécamp Tourism
293	France	Grand Site du Marais Poitevin
294	France	Guadeloupe Islands Tourism Board
295	France	Guyana Tourism Authority
296	France	Hauts-de-France Regional Tourism Board
297	France	Hello Lille
298	France	Ile-de-France Europe
299	France	Issy-les-Moulineaux
300	France	La Rochelle Tourism & Events

301	France	Le Voyage A Nantes
302	France	Martinique Tourism Board
303	France	Mayotte Tourisme
304	France	Mediterranean Protected Areas Network
305	France	Ministry/Tourism Office
306	France	Morvan Region Nature Park
307	France	Nice Cote d'Azur Metropolitan Convention and Visitors Bureau
308	France	Normandy Regional Tourism Committee
309	France	Normandy Tourism Board
310	France	Northern Vosges Regional Natural Park
311	France	Nouvelle-Aquitaine Regional Tourism Committee
312	France	Nouvelle-Aquitaine Tourism Board
313	France	Occitania / Pyrenees-Mediterranean Tourism Board
314	France	Occitanie Regional Committee for Tourism and Leisure
315	France	Office de Tourisme de Dijon Métropole
316	France	Office de Tourisme de Toulouse Métropole
317	France	Office du Tourisme et des Congrès de Paris
318	France	Only Lyon
319	France	Paris Je t'aime
320	France	Paris Region
321	France	Pays de la Loire Regional Tourism Board
322	France	Provence-Alpes-Côte d'Azur Regional Tourism Committee
323	France	Provence-Alpes-Côte d'Azur Tourism Board
324	France	Regional Committee of Tourism and Congress of Hauts de France
325	France	Regional Federation of Provence-Alpes-Côte d'Azur Tourist Offices
326	France	Regional Tourism Committee of Auvergne-Rhône-Alpes
327	France	Reunion Island Tourism
328	France	Réunion Island Tourism Board
329	France	Roubaix
330	France	St. Maarten Hospitality & Trade Association
331	France	Syndicat Mixte CANIGÓ Grand Site
332	France	The Euroregion Pyrenees Mediterranean
333	France	The Jura Wine Route
334	France	The Mining History Centre Lewarde
335	France	Toulouse Métropole Attractiveness Agency - So Toulouse
336	France	tourisme-valdemarne
337	France	Tournus et le Tournugeois
338	Germany	Ahrtal-Tourismus Bad Neuenahr-Ahrweiler e.V.
339	Germany	Baden-Württemberg Tourism Board
340	Germany	Bavaria Tourism
341	Germany	Brandenburg Tourism
342	Germany	Bremen Tourist Information Office
343	Germany	Bremerhaven
344	Germany	Erlebnis Bremerhaven
345	Germany	Mecklenburg-Vorpommern Tourism
346	Germany	Deutscher Tourismusverband e.V
347	Germany	Dresden Marketing Board

348	Germany	Exzellenzinitiative Nachhaltige Reiseziele
349	Germany	German National Tourist Board (GNTB)
350	Germany	Hamburg Tourismus GmbH
351	Germany	Heidelberg Marketing GmbH
352	Germany	Hessen Tourismus
353	Germany	Karlsruhe Tourismus GmbH
354	Germany	KölnTourismus GmbH
355	Germany	Landeshauptstadt München und der Stadtwerke München GmbH
356	Germany	Lower Saxony Tourism Board
357	Germany	Monaco Tourist and Convention Authority
358	Germany	Nordrhein-Westfalen Tourismus
359	Germany	Nuremberg Convention and Tourist Office
360	Germany	Ovationdmc
361	Germany	Rheinland-Pfalz Tourism
362	Germany	Rheinland-Pfalz Tourismus GmbH
363	Germany	Saarland Tourismus
364	Germany	Saxony Tourism
365	Germany	Saxony-Anhalt Tourism
366	Germany	Schleswig-Holstein Tourism
367	Germany	Stuttgart region
368	Germany	Sylt Marketing GmbH
369	Germany	Thüringen Tourismus
370	Germany	tmu Tourismus Marketing Uckermark
371	Germany	Tourismusverband Schleswig-Holstein e.V.
372	Germany	Usedom Tourismus GmbH
373	Germany	Visit Ruhpolding (Bavaria)
374	Germany	visitBerlin
375	Germany	Western Pomeranian River District
376	Germany	Nordrhein-Westfalen
377	Greece	Crete Region Tourism Board
378	Greece	Delphi
379	Greece	Destination Organization of Heraklion - Crete
380	Greece	Destination Piraeus
381	Greece	Heraklion/ island of Crete
382	Greece	Municipality of Katerini, Pieria Perfecture
383	Greece	Αθήνα
384	Greece	Χαλκιδική
385	Greece	Florina
386	Greece	Greek Ministry of Tourism
387	Greece	Greek National Tourism Organisation
388	Greece	Grevena
389	Greece	Halkidiki Tourism Organization
390	Greece	Heraklion/ island of Crete
391	Greece	Katerini
392	Greece	Lesvos
393	Greece	Marathon
394	Greece	Mount Athos Area Tourism Organization

395	Greece	Municipality of Kavala
396	Greece	Patra
397	Greece	Peloponnese Tourism Organization
398	Greece	REGION OF ATTICA
399	Greece	Region of Attica Tourism Committee
400	Greece	Region of Central Macedonia
401	Greece	Region of Eastern Macedonia and Thrace Tourism
402	Greece	Region of South Aegean
403	Greece	Regional Unit of Trikala
404	Greece	Serres
405	Greece	Thessaloniki Tourism Organization
406	Greece	THIS IS ATHENS
407	Greece	Tourism Department of Ioannina municipality
408	Greece	Visit Meteora (Kalampaka, Meteora)
409	Greece	Visit West Macedonia
410	Greece	Αθήνα
411	Hungary	Aggtelek National Park Directorate
412	Hungary	Budapest Brand P.L.C.
413	Hungary	Budapest Convention Bureau
414	Hungary	Bükk National Park Directorate
415	Hungary	Danube-Drava National Park Directorate
416	Hungary	Fertő-Hanság National Park Directorate
417	Hungary	Hortobagy
418	Hungary	Hortobágy National Park Directorate
419	Hungary	Hungarian Tourism Agency
420	Hungary	Irottko Nature Park
421	Hungary	Kaposvar and Zselic
422	Hungary	Kiskunság National Park Directorate
423	Hungary	Lake Balaton Regional Tourism Organization
424	Hungary	Lake Tisza
425	Hungary	Mecsek greenway
426	Hungary	Mecsek
427	Hungary	Ministry/Tourism Office
428	Hungary	Őrség
429	Hungary	Őrség National Park Directorate
430	Hungary	Visit Tokaj
431	Hungary	Visit Debrecen
432	Hungary	Visit Gyula
433	Hungary	Szeged Tourism
434	Hungary	Pécs
435	Hungary	Gyor
436	Hungary	Sopron Régiò
437	Hungary	Baja
438	Hungary	Orfù
439	Hungary	Szigetvar
440	Hungary	Nagyatad
441	Hungary	Zalakaros

442	Hungary	Heviz
443	Hungary	szombathely
444	Hungary	Celldomolk
445	Hungary	Sarvar
446	Hungary	Kehidakustány
447	Hungary	Keszthely
448	Hungary	Balathonfured
449	Hungary	Veszprem
450	Hungary	Szekszard
451	Hungary	Velence
452	Hungary	Bogacs
453	Hungary	Nyireghyaza
454	Hungary	Hajdúszoboszló
455	Hungary	Szarvas
456	Hungary	Orosháza
457	Hungary	Szekesfehrvar
458	Hungary	Zirc
459	Hungary	Balantonmariafurdo
460	Hungary	Vac
461	Hungary	Salgotarjan
462	Hungary	Gyongyos
463	Hungary	Gyenesdiás
464	Hungary	Mohacs
465	Hungary	EGER TURISZTIKAI HONLAPJA
466	Hungary	The Route of Medieval Churches in the Upper
467	Iceland	Icelandic Tourist Board
468	Iceland	Skagafjordur Food Chest
469	Iceland	Stykkishólmur
470	Iceland	Westfjords
471	Ireland	Carlingford and the Cooley Peninsula
472	Ireland	Carlow tourism
473	Ireland	Cavan County Council - Tourism Unit
474	Ireland	Cavan Town and Environs
475	Ireland	Clonakilty District
476	Ireland	County Louth, Ireland
477	Ireland	Donegal Tourism
478	Ireland	Dublin City Council
479	Ireland	Dublin Convention Bureau
480	Ireland	Fáilte Ireland / National Tourism Development Authority
481	Ireland	Fingal County Council - Tourism Unit
482	Ireland	County Louth
483	Ireland	Kerry County Council - Tourism Unit
484	Ireland	Loop Head Peninsula
485	Ireland	Louth County Council - Tourism Unit
486	Ireland	Mayo County Council - Tourism Unit
487	Ireland	Meath County Council - Tourism Unit
488	Ireland	Monaghan County Council - Tourism Unit

489	Ireland	Scattery Island/Kilrush
490	Ireland	Strandhill
491	Ireland	The Burren Food Trail
492	Ireland	The Great Western Greenway
493	Ireland	The Sheep's Head Peninsula
494	Ireland	This is Galway
495	Ireland	Tourism Ireland ltd.
496	Ireland	Visit Armagh
497	Ireland	Visit Cork
498	Ireland	Visit Derry - Derry City & Strabane District
499	Ireland	Visit Kilkenny
500	Ireland	Visit Laois
501	Ireland	Visit Leitrim
502	Ireland	Visit Longford
503	Ireland	Visit Offaly
504	Ireland	Visit Roscommon
505	Ireland	Visit Sligo
506	Ireland	Visit Waterford
507	Ireland	Visit Westmeath
508	Ireland	Visit Wexford
509	Italy	A.T.L.DEL CUNEESE VALLI ALPINE E CITTÀ D'ARTE S.C.A R.L.
510	Italy	Abruzzo turismo
511	Italy	AGENZIA CAMPANIA TURISMO
512	Italy	AGENZIA REGIONALE PER LA PROMOZIONE TURISTICA "IN LIGURIA"
513	Italy	AGENZIA TURISTICA LOCALE DELLA PROVINCIA DI NOVARA
514	Italy	AGENZIA TURISTICA LOCALE DISTRETTO TURISTICO DEI LAGHI
515	Italy	ALPE DI SIUSI MARKETING
516	Italy	ALTA VAL VENOSTA
517	Italy	AMALFI COAST CONVENTION BUREAU
518	Italy	Anci Abruzzo
519	Italy	Anci Basilicata
520	Italy	Anci Calabria
521	Italy	Anci Campania
522	Italy	Anci Emilia-Romagna
523	Italy	Anci Friuli Venezia Giulia
524	Italy	Anci Lazio
525	Italy	Anci Liguria
526	Italy	Anci Lombardia
527	Italy	Anci Marche
528	Italy	Anci Molise
529	Italy	Anci Piemonte
530	Italy	Anci Puglia
531	Italy	Anci Sardegna
532	Italy	Anci Sicilia
533	Italy	Anci Toscana
534	Italy	Anci Umbria
535	Italy	Anci Veneto

536	Italy	ANCONA TOURISM
537	Italy	APT ALPE CIMBRA
538	Italy	APT LIVIGNO
539	Italy	APT SAN MARTINO DI CASTROZZA PRIMIERO E VANOI SOC. COOP.
540	Italy	APT VAL DI FASSA
541	Italy	APT VALLI DI SOLE, PEIO E RABBI SCPA
542	Italy	APT VALSUGANA SOC. COOP.
543	Italy	Around Rome
544	Italy	ASSOCIAZIONE DISTRETTO TURISTICO COSTA D'AMALFI
545	Italy	ATL ALEXALA
546	Italy	ATL BIELLA VALSESIA VERCELLI
547	Italy	AZIENDA AUTONOMA DI SOGGIORNO E TURISMO TERMOLI
548	Italy	AZIENDA DI SOGGIORNO DI MERANO
549	Italy	AZIENDA DI SOGGIORNO E TURISMO DI BOLZANO
550	Italy	AZIENDA PER IL TURISMO DOLOMITI PAGANELLA SB
551	Italy	AZIENDA PER IL TURISMO VAL DI NON
552	Italy	Azienda Promozione Turismo Regione Emilia- Romagna (Official Tourism Board Emilia-RomagnaRegion)
553	Italy	BARI CONVENTION BUREAU
554	Italy	BIBIONE E SAN MICHELE AL TAGLIAMENTO
555	Italy	BOLOGNA WELCOME
556	Italy	Bologna's Convention & Visitors Bureau
557	Italy	BUDONI WELCOME
558	Italy	Calabria Straordinaria
559	Italy	CAMMINO DEL PERDONO
560	Italy	CAVALLINO TREPORTI
561	Italy	CITTÀ D'ARTE E VILLE VENETE DEL TERRITORIO TREVIGIANO
562	Italy	COMUNE ARZACHENA
563	Italy	COMUNE CASTIGLIONE DELLA PESCAIA
564	Italy	COMUNE CATANZARO
565	Italy	COMUNE DI ANACAPRI
566	Italy	COMUNE DI ASSISI
567	Italy	COMUNE DI BARI
568	Italy	COMUNE DI CAGLIARI - UFFICIO TURISMO
569	Italy	COMUNE DI FERRARA
570	Italy	Comune di Genova
571	Italy	COMUNE DI GENOVA
572	Italy	COMUNE DI GRADO
573	Italy	COMUNE DI LICODIA EUBEA
574	Italy	COMUNE DI MELENDUGNO
575	Italy	Comune di Milano
576	Italy	COMUNE DI MODENA
577	Italy	COMUNE DI MONTECATINI TERME
578	Italy	COMUNE DI ORBETELLO
579	Italy	COMUNE DI SIRMIONE
580	Italy	COMUNE L'AQUILA
581	Italy	COMUNE NAPOLI

582	Italy	COMUNE PERUGIA
583	Italy	COMUNE POTENZA
584	Italy	COMUNE SALERNO
585	Italy	COMUNE SAN VINCENZO
586	Italy	COMUNE SORRENTO
587	Italy	COMUNE TRIESTE
588	Italy	COMUNE VIESTE
589	Italy	Comuni Bolzano
590	Italy	Consorzio degli Enti locali della Valle d'Aosta
591	Italy	CONSORZIO DMO DOLOMITI
592	Italy	Consorzio Turistico Riviera del Corallo (visit Alghero)
593	Italy	CONVENTION BUREAU DELLA RIVIERA DI RIMINI
594	Italy	CONVENTION BUREAU GENOVA
595	Italy	CONVENTION BUREAU PISA
596	Italy	COOPERATIVA TURISTICA ALTA BADIA
597	Italy	Corinaldo
598	Italy	Cortina
599	Italy	DESTINATION FLORENCE CVB
600	Italy	DESTINAZIONE SILA
601	Italy	DESTINAZIONE TURISTICA EMILIA
602	Italy	DESTINAZIONE TURISTICA ROMAGNA
603	Italy	DISTRETTO TURISTICO DELLA SICILIA OCCIDENTALE
604	Italy	DMC MARSICA
605	Italy	DMO CAORLE
606	Italy	DMO DISTRETTO TURISTICO VALLE DEI TEMPLI
607	Italy	DMO FRANCIGENA SUD NEL LAZIO
608	Italy	DMO LAGO DI GARDA
609	Italy	DMO Provincia di Latina e dei Monti Lepini
610	Italy	DOLOMITES VAL GARDENA
611	Italy	Emilia-Romagna turismo
612	Italy	ENTE TURISMO LANGHE MONFERRATO ROERO
613	Italy	FIEMME VALLE VIVA
614	Italy	Firenze Convention Bureau
615	Italy	GARDA DOLOMITI AZIENDA PER IL TURISMO SPA
616	Italy	Guardiagrele, City of Taste
617	Italy	AZIENDA DI SOGGIORNO DI MERANO
618	Italy	Castelli Romani
619	Italy	IDM SÜDTIROL - ALTO ADIGE
620	Italy	ISLAND OF SICILY D.M.O. S.R.L.
621	Italy	Italian National Tourist Board (ENIT)
622	Italy	JESOLO ERACLEA
623	Italy	COMUNE DI CARBONIA
624	Italy	Comune di Grosseto
625	Italy	LA RIVIERA D'ULISSE - ENTE TURISTICO DI TERZO SETTORE
626	Italy	LAKE COMO CONVENTION BUREAU
627	Italy	Dolomitenregion Seiser Alm
628	Italy	Dolomiti Paganella Tourism Board

629	Italy	LATIUM EXPERIENCE
630	Italy	LIGNANO SABBIADORO GESTIONI S.P.A.
631	Italy	La Riviera d'Ulisse
632	Italy	Langhe Monferrato Roero
633	Italy	Love VDA
634	Italy	MADONIE E TARGA FLORIO
635	Italy	MADONNA DI CAMPIGLIO AZIENDA PER IL TURISMO S.P.A.
636	Italy	MARCA TREVISO CONVENTION BUREAU
637	Italy	Livigno
638	Italy	Ministry of Tourism
639	Italy	Monte Isola
640	Italy	Montevecchio, City of Guspini
641	Italy	OGD VENEZIA
642	Italy	onsorzio Comuni Trentini
643	Italy	Peninsola del Sinis Protected Marine Area and Isola di Mal di Ventre
644	Italy	Pistoia
645	Italy	PromoTurismoFVG
646	Italy	Provincia di Rovigo
647	Italy	Ravenna turismo
648	Italy	Regione Emilia-Romagna
649	Italy	Regione Lazio
650	Italy	Regione Liguria
651	Italy	Regione Lombardia
652	Italy	Regione Puglia
653	Italy	Regione Toscana
654	Italy	RIMINI WELCOME
655	Italy	Riviera dei Fiori
656	Italy	Roma & Lazio Convention Bureau
657	Italy	Specchia
658	Italy	Turismo Marche
659	Italy	Turismo Torino e Provincia s.c.r.l.
660	Italy	Umbria tourism
661	Italy	Valdichiana Senese
662	Italy	Viaggiare in Puglia
663	Italy	Visit Basilicata
664	Italy	Visit Lazio
665	Italy	Visit Liguria
666	Italy	Visit Molise
667	Italy	Visit Piedmont
668	Italy	Visit Sardinia
669	Italy	Visit Sicily
670	Italy	Visit Trentino
671	Italy	Visit Tuscany
672	Italy	Visit Veneto
673	Italy	YesMilano
674	Kosovo	Destination Kosovo
675	Latvia	2Z events

676	Latvia	BALTIC DMC GROUP
677	Latvia	Baltic event tours
678	Latvia	Baltic Travel Group Latvia
679	Latvia	balticjourney
680	Latvia	Cēsis Municipality
681	Latvia	Con-ex
682	Latvia	DMC VIA Baltic
683	Latvia	Investment and Development Agency of Latvia (LIAA)
684	Latvia	Jurmala
685	Latvia	Kuldiga
686	Latvia	Latgale
687	Latvia	Latgalian Potters, Masters of Clay
688	Latvia	Latvian Tourism Development Agency
689	Latvia	Liepāja region tourism information office
690	Latvia	Liepaja turisms
691	Latvia	Ligatne Village
692	Latvia	Kurzeme (region)
693	Latvia	mellenesarpienu
694	Latvia	Riga Investment and Tourism Agency
695	Latvia	Tervete Nature Park
696	Latvia	Veclaicene
697	Lithuania	A spit cake in Jaskonys, Druskininkai
698	Lithuania	Go Vilnius
699	Lithuania	Lithuania travel
700	Lithuania	Ministry of the Economy and Innovation of the Republic of Lithuania
701	Lithuania	Ministry/Tourism Office
702	Lithuania	Nemunas River Delta Regional Park
703	Lithuania	Pakruojis Manor
704	Lithuania	Paliesius
705	Lithuania	Plateliai
706	Lithuania	Rokiskis Manor
707	Lithuania	Telsiai
708	Lithuania	Zarasai Region
709	Luxembourg	Haff Reimech Recreation Area and Nature Reserve
710	Luxembourg	La Ville D'Echternach
711	Luxembourg	Luxembourg City Tourist Office
712	Luxembourg	Luxembourg For Tourism (LFT)
713	Luxembourg	The Nature Park of the Upper Sûre
714	Malta	Gharb
715	Malta	Isla (Senglea)
716	Malta	Kercem - Hamlet of Santa Lucija
717	Malta	Malta Tourism Authority
718	Malta	Malta Tourism Society
719	Malta	Mellieha and the Hamlet of Maikata
720	Malta	Ministry/Tourism Office
721	Malta	Nadur
722	Malta	Qrendi

723	Malta	Xaghra
724	Malta	Żejtun
725	Monaco	Monaco Government Tourist and Convention Office
726	Montenegro	Montenegro travel
727	Montenegro	Ministry of Sustainable Development and Tourism, Directorate for Competitiveness Development and Investments in Tourism
728	Montenegro	MUNICIPALITY OF ULCINJ
729	Montenegro	National Tourism Organisation of Montenegro
730	Montenegro	visit montenegro
731	Netherlands	Discover Utrecht
732	Netherlands	Horsterwold and Hulkenstein Forest
733	Netherlands	I amsterdam
734	Netherlands	Maastricht Convention Bureau
735	Netherlands	Nederlands Bureau voor Toerisme & Congressen (NBTC)
736	Netherlands	Park Gravenrode
737	Netherlands	Rotterdam Partners
738	Netherlands	The Hague & Partners
739	Netherlands	Toerisme Veluwe Arnhem Nijmegen
740	Netherlands	Veenhuizen
741	Netherlands	Visit Achterhoek
742	Netherlands	Visit Brabant
743	Netherlands	Visit Breda
744	Netherlands	Visit Drenthe
745	Netherlands	Visit Flevoland
746	Netherlands	Visit Fryslân
747	Netherlands	Visit Gelderse Streken
748	Netherlands	Visit Groningen
749	Netherlands	Visit Midden-Limburg
750	Netherlands	Visit Netherlands
751	Netherlands	Visit Noord-Holland
752	Netherlands	Visit Overijssel
753	Netherlands	Visit Rivierenland
754	Netherlands	Visit Twente
755	Netherlands	Visit Veluwe
756	Netherlands	Visit Zeeland
757	Netherlands	Visit Zuid-Limburg
758	Netherlands	WaterReijk Weerribben Wieden - Giethoorn and the wetlands
759	Norway	Visit Norway
760	Norway	Visit Tromso
761	Other	Montenegro
762	Poland	Dolnośląska Organizacja Turystyczna
763	Poland	Dolnośląskie Tourist Organization
764	Poland	Gołdap
765	Poland	Greater Poland Tourist Organization
766	Poland	Krakowskie Biuro Festiwalowe
767	Poland	Kuyavia-Pomerania Tourist Organization
768	Poland	Łódźkie Tourist Organization

769	Poland	Lublin Regional Tourist Organization - LROT
770	Poland	Lubuskie Tourist Organization
771	Poland	Małopolska Tourist Organization
772	Poland	Mazovia Tourist Organization
773	Poland	Ministry/Tourism Office
774	Poland	Multicultural current of the Bug River
775	Poland	Opolskie Tourist Organization
776	Poland	Podkarpackie Tourist Board
777	Poland	Podlasie Tourist Organization
778	Poland	Polish National Tourist Office (National DMO)
779	Poland	Pomorskie Tourist Organization
780	Poland	Poznan metropolia
781	Poland	Silesian Tastes Culinary Route
782	Poland	Śląskie Tourist Organization
783	Poland	Sopot
784	Poland	Świętokrzyskie Tourist Organization
785	Poland	The Biebrza Valley and Wetlands
786	Poland	The Bird Republic in the Warta Mouth
787	Poland	VISIT GDANSK
788	Poland	Visit Krakow
789	Poland	Warmińsko-Mazurskie Tourist Organization
790	Poland	Warsaw Tourism Office
791	Poland	Wielkopolska Tourist Organization
792	Poland	Zyrardow
793	Portugal	Alentejo Regional Tourism Entity
794	Portugal	Algarve Tourism Board
795	Portugal	Direção Regional do Turismo da Madeira
796	Portugal	Faial nature park
797	Portugal	Lisbon Tourism Board
798	Portugal	Madeira Promotion Bureau
799	Portugal	Alentejo
800	Portugal	Ministry/Tourism Office
801	Portugal	Autonomous Region of the Azores
802	Portugal	Azores Tourism Board
803	Portugal	Center of Portugal
804	Portugal	Centro de Portugal Regional Tourism Entity
805	Portugal	NEST Tourism Innovation center Portugal
806	Portugal	Lisboa
807	Portugal	Setúbal
808	Portugal	Startup Madeira
809	Portugal	Terras de Trás-os-Montes Tourism
810	Portugal	Turismo de Lisboa Visitors & Convention Bureau
811	Portugal	Turismo do Algarve Portugal Regional
812	Portugal	Turismo do Porto e Norte de Portugal
813	Portugal	Viseu Dão Lafões Tourism
814	Portugal	Visit Porto
815	Portugal	VisitPortugal (National DMO)

816	Portugal	ZASNET
817	Portugal	Eurocities Valongo
818	Portugal; Spain	Meseta ibérica Transboundary Biosphere Reserve
819	Romania	Alba Iulia
820	Romania	Apuseni Natural Park
821	Romania	Asociatia aer
822	Romania	Asociația Pentru Turism Bucovina
823	Romania	Brasov City Council
824	Romania	Bucharest Tourism Board
825	Romania	Buzău
826	Romania	Buzau County Council
827	Romania	Cluj County Tourism Association
828	Romania	Consiliul Județean Maramureș
829	Romania	Covasna County Tourism Association
830	Romania	Danube Delta Tourism Board
831	Romania	Euforia Travel
832	Romania	Geoagiu Bai
833	Romania	Harghita County Tourism Association
834	Romania	Horezu Depression
835	Romania	Jurilovca
836	Romania	Maramureș Tourism Board
837	Romania	Ministry of Economy, Entrepreneurship and Tourism
838	Romania	Neamt County Tourism Association
839	Romania	Oltenia Trade Fair
840	Romania	Paloma Tours
841	Romania	Primăria Comunei Frumosu
842	Romania	romania DMC
843	Romania	Romanian Tourism Board
844	Romania	Munții Apuseni
845	Romania	Sibiu County Tourism Association
846	Romania	Smart tours RO
847	Romania	Suceava
848	Romania	Tăuții măgherăuş
849	Romania	Timis County Council
850	Romania	Timisoara
851	Romania	Toristic Information Center Valcea (County Council Valcea)
852	Romania	Transylvania Regional Tourism Board
853	Romania	Trip2Ro
854	Romania	Timisoara
855	San Marino	State Office for Tourism
856	Scotland	Cairngorms Business Partnership, T/a VisitCairngorm
857	Scotland	South of Scotland Destination Alliance SSDA
858	Serbia	Knjazevac
859	Serbia	Kuršumlija
860	Serbia	National Tourism Organization of Serbia (NTOS)
861	Serbia	Novi Pazar

862	Serbia	Pirot
863	Slovakia	BRATISLAVA TOURIST BOARD
864	Slovakia	Region High Tatras Tourist Board
865	Slovakia	Slovakia Travel - Snina
866	Slovakia	Visit Kosice
867	Slovakia	Central Slovakia Tourist Board
868	Slovakia	Slovakia Travel
869	Slovenia	Bela Krajina Tourism
870	Slovenia	Bohinj Tourist Board
871	Slovenia	Brda
872	Slovenia	Celje Tourism
873	Slovenia	Dolenjska Tourism
874	Slovenia	Goriška Brda Tourism
875	Slovenia	Haloze Tourism
876	Slovenia	Institute for Innovation and Development of University of Ljubljana
877	Slovenia	Izola
878	Slovenia	Koper-Capodistria Tourism
879	Slovenia	Koroška Tourism
880	Slovenia	Kozjansko Tourism
881	Slovenia	Kranjska Gora
882	Slovenia	Krvavec Ski Resort
883	Slovenia	KŠTM Sevnica
884	Slovenia	Lasko
885	Slovenia	Ljubljana Tourism
886	Slovenia	Logar Valley Tourism
887	Slovenia	Maribor-Pohorje Tourism
888	Slovenia	Ministry/Tourism Office
889	Slovenia	Municipality of Postojna
890	Slovenia	Notranjska-Kras Tourism
891	Slovenia	Pomurje Tourism
892	Slovenia	Portorož and Piran Tourism
893	Slovenia	Posavje Tourism
894	Slovenia	Postojna Cave Tourism
895	Slovenia	Ptuj Tourism
896	Slovenia	Radovljica Tourism
897	Slovenia	Regional development centre Koper
898	Slovenia	River Kolpa
899	Slovenia	Rogaška Slatina Tourism
900	Slovenia	Rogla-Pohorje Tourism
901	Slovenia	Šaleška Valley Tourist Board
902	Slovenia	Škofja Loka Tourism
903	Slovenia	Slovene Chamber of Agriculture and Forestry - Institute of Agriculture and Forestry Maribor
904	Slovenia	Slovenian Tourist Board (National DMO)
905	Slovenia	Soča Valley Tourism
906	Slovenia	Solcavsko
907	Slovenia	Solcavsko

908	Slovenia	The Soca Valle
909	Slovenia	Triglav National Park Tourism
910	Slovenia	Turizem Bled
911	Slovenia	Velenje Tourism
912	Slovenia	Visit Idrija
913	Slovenia	Visit Kranj
914	Slovenia	Visit Podčetrtek
915	Slovenia	VisitKranj
916	Slovenia	Žalec Tourism
917	Slovenia	Zasavje Tourism
918	Slovenia	Zavod za turizem in šport Kamnik
919	Slovenia	ZPTM Brežice
920	Slovenia	ABC Tourism Slovenia
921	Slovenia	Alfaris Travel
922	Slovenia	DT Slovenia Destination management
923	Slovenia	INTOURS DMC
924	Slovenia	Kompas
925	Slovenia	palma-travel
926	Slovenia	Regional Development Agency Green Karst Ltd.
927	Spain	A Guarda turismo
928	Spain	Alicante
929	Spain	Ambroz Valley
930	Spain	Andalusian Federation of Towns and Provinces
931	Spain	Andorra
932	Spain	Aragon
933	Spain	Asturias
934	Spain	Ayuntamiento de Gijón
935	Spain	Ayuntamiento de Girona
936	Spain	Ayuntamiento de Herrera del Duque
937	Spain	Ayuntamiento de Huesca
938	Spain	Ayuntamiento de Málaga
939	Spain	Balearic Islands
940	Spain	Barcelona Activa
941	Spain	BARCELONA TURISME
942	Spain	Basque Country
943	Spain	Bilbao Bizkaia
944	Spain	Canary Islands
945	Spain	Cantabria
946	Spain	Castellón
947	Spain	Castilla y León
948	Spain	Castilla-La Mancha
949	Spain	Castilla-La Mancha Region
950	Spain	Catalan Tourist Board and Directorate for Tourism of the Catalan Government
951	Spain	Cititravel
952	Spain	Consell de Mallorca
953	Spain	Diputació de Barcelona
954	Spain	Dirección General de Turismo, Comercio y Consumo de Gobierno de Navarra

955	Spain	Ecoparque de Trasmiera en Arnuero
956	Spain	El HIERRO
957	Spain	Elche
958	Spain	Empresa Pública para la Gestión del Turismo y del Deporte de Andalucía
959	Spain	Extremadura Turismo
960	Spain	Fuerteventura
961	Spain	FUNDACIÓ VISIT VALÈNCIA
962	Spain	fundacion.valenciaport
963	Spain	Galicia
964	Spain	Goierri turismo
965	Spain	Govern de les Illes Balears
966	Spain	Gran Canaria
967	Spain	Guardamar
968	Spain	Ibiza
969	Spain	INDIGO DMC Group Spain
970	Spain	Junta de Andalucía - Ministry of Tourism, Regeneration, Justice and Local Administration
971	Spain	LA CORUÑA TOURIST BOARD
972	Spain	La Rioja
973	Spain	Land of Saint Ignatius
974	Spain	Latin Arc
975	Spain	Lloret Turisme
976	Spain	MADRID DESTINO CULTURA TURISMO Y NEGOCIO
977	Spain	Melilla
978	Spain	Menorca
979	Spain	Ministry/Tourism Office- tourespagna**
980	Spain	Municipality of Muro
981	Spain	Murcia
982	Spain	Natural Park of Guara's Mountains and Canyons
983	Spain	Navarre
984	Spain	Palma de Maiorca
985	Spain	Parc Natural del Delta de l'Ebre
986	Spain	Patronat de Turisme Costa Brava
987	Spain	Promoción Exterior de Lanzarote
988	Spain	Regional Government of Extremadura
989	Spain	RTA Group - Barcelona
990	Spain	RTA Group - Costa del sol & Malaga
991	Spain	RTA Group - valencia
992	Spain	San Sebastián Turismo-Donostia Turismoa, S.A.
993	Spain	Sevilla tourist board
994	Spain	Sierra de Cazorla
995	Spain	Sierra de las nieves
996	Spain	Spanish Network of Smart Tourism Destinations (SEGITTUR)
997	Spain	SPET, Turismo de Tenerife, S.A.
998	Spain	Andalusia
999	Spain	The Valencian Federation of Municipalities and Provinces (FVMP)
1000	Spain	Catalunya

1001	Spain	Turespaña - Instituto de Turismo**
1002	Spain	Turisme de Barcelona Consortium
1003	Spain	Turismo de Ceuta
1004	Spain	Turismo de Santiago – Incolsa
1005	Spain	Valencia
1006	Spain	Valencian Community
1007	Spain	Las Rozas de Madrid
1008	Spain	Visit Benidorm Foundation
1009	Spain	RTA Group - Balearic Island Office
1010	Spain	RTA Group - Madrid
1011	Spain	Welcome to Seville
1012	Spain	AGENCIA DE OBRA PUBLICA DE LA JUNTA DE ANDALUCIA. Regional Government of Andalusia
1013	Sweden	City of Stockholm
1014	Sweden	Destination Uppsala
1015	Sweden	Gotebord
1016	Sweden	Gotland Convention Bureau
1017	Sweden	Heart of Lapland Sweedish Lapland
1018	Sweden	Malmö stad
1019	Sweden	Ministry/Tourism Office- visit sweeden
1020	Sweden	northern Småland
1021	Sweden	Region Stockholm
1022	Sweden	Sweden's National Tourism Organisation
1023	Sweden	Tourism in Skåne AB
1024	Sweden	Visit Blekinge
1025	Sweden	Visit Dalarna
1026	Sweden	Visit Gävleborg
1027	Sweden	Visit Halland
1028	Sweden	Visit Härjedalen
1029	Sweden	Visit Jämtland Härjedalen
1030	Sweden	Visit Karlskrona
1031	Sweden	Visit Norrbotten
1032	Sweden	Visit Öland
1033	Sweden	Visit Öland
1034	Sweden	Visit Östergötland
1035	Sweden	Visit Skåne
1036	Sweden	Visit Skellefteå
1037	Sweden	Visit Småland
1038	Sweden	Visit Sörmland
1039	Sweden	Visit Stockholm
1040	Sweden	Visit Trollhättan Vänersborg AB
1041	Sweden	Visit Värmland
1042	Sweden	Visit Västerbotten
1043	Sweden	West Sweden
1044	Sweden	City of Gothenburg
1045	Sweden	Helsingborg
1046	Sweden	Arrangers

1047	Sweden	Destination Beaurau
1048	Sweden	DMC Stockholm
1049	Sweden	Swedish Lapland Visitors Board
1050	Sweden	Visit Helsinborg
1051	Türkiye	City of Tarakli
1052	Türkiye	Edirne
1053	Türkiye	Gaziantep
1054	Türkiye	Gürsu Municipality
1055	Türkiye	Invest in Balıkesir
1056	Türkiye	Nemrut Crater Lake

4.4 Flash reports

Sustainable EU Tourism Survey – Flash Report #1 – 12 April 2024

Survey dissemination

The survey was officially launched concurrently with the ITB fair in Berlin on **Tuesday 5th of March 2024,** and its dissemination has been revolving around four streams:

- **In-person destinations' and multipliers' engagement** at ITB in Berlin (5th–7th March 2024) and at the 2-year anniversary of the Transition Pathway for Tourism (15th March) in Brussels. At ITB, the team directly reached out to **around 100 national** (in the role of multipliers), **regional, and local destinations**; while the Transition Pathway for Tourism event was an occasion mainly to network with EU tourism sector networks and association that could act as multipliers. In both occasions, the Team distributed business cards with a QR code directing to the online survey.
- **Targeted email invitations** include both written follow-ups to the above-mentioned events and new sending. The recipients list came from Consortium's contacts coming from previous projects, as well as from extensive desk research. The team sent tailored emails to destinations with whom it has a relationship and general emails in 22 languages to the others. Tailored emails were also sent to multipliers, with the specific request to disseminate the survey among their networks. After a month from survey opening, all contacts have been reminded of the survey and invited to the project presentation webinar (18th April). In total, the Consortium reached out to **813 destinations and associations** via email.
- **Social media posts** for DG GROW, LinkedIn, Facebook, and X accounts were prepared to both promote the survey and the project presentation webinar, and the materials were shared with the Commission for publication. Moreover, the week before the webinar, two posts were shared on the LinkedIn page[58] of the project.
- **Survey and webinar news were enclosed in the 8th of April European Capital & Green Pioneer of Smart Tourism newsletter issue**[59]. The team is also in contact with other tourism sustainability and resilience related newsletters to establish collaborations.

Survey participation

Overall, **79 valid replies** were collected thought both the survey and the survey pilot test[60]. Of the respondent destinations, **92%** (73) declared to be interested in being **engaged in the project activities**.

In terms of **country coverage**, the replies came from **19 EU Member States** and **one extra-EU country** (Montenegro). Moreover, one respondent represented a transnational destination (Meseta Ibérica Transboundary Biosphere Reserve in Portugal and Spain). As shown in Figure 1, Italy is the country with the highest number of answers, representing the 19% of the total. This

[58] Available at: https://www.linkedin.com/company/73223989/admin/feed/posts/

[59] Available at: https://archive.newsletter2go.com/?n2g=3kep4y0z-cec6bjlu-jli

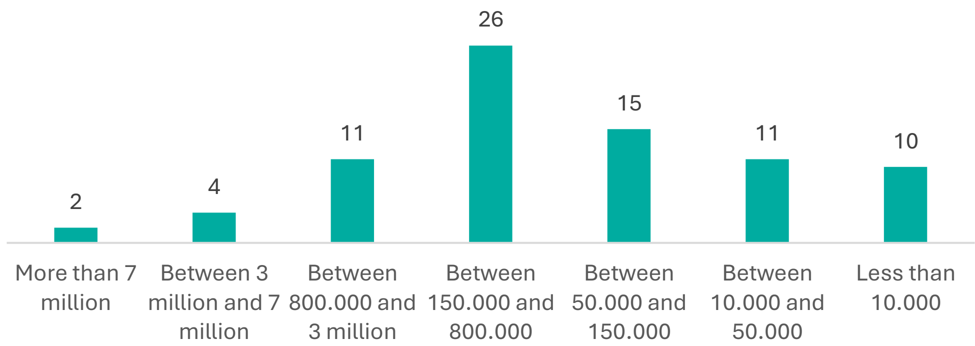
[60] 74 destinations answered the survey and 8 answered the pilot test. Three destinations – Grosseto (IT), Linz (AT), and Kristinestad (FI) – answered both questionnaires.

high response rate is partially due to the successful collaboration of some multipliers, who spread the survey among their networks.

Figure 51 - Survey country coverage

Regarding the **dimension**, most answers (**92%**, 73) come from destinations with a population comparable to **NUTS 2**[61]**, NUTS 3**[62] **or lower geographical levels**. Of these, most replies (36) were collected from destinations with a number of inhabitants lower that the standard NUTS 3 population. The remaining 8% (6) is mainly composed of large cities[63], regions[64], or a country[65].

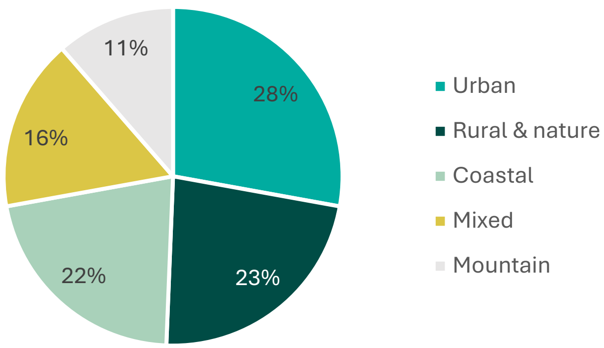
Figure 52 - Respondents destinations population



[61] Between 800.000 and 3 million inhabitants
[62] Between 150.000 and 800.000 inhabitants
[63] Athens (GR) and Lyon (FR)
[64] Andalucia (SP), North Rhine-Westphalia (DE), and Destination Limfjorden (DK). However, it is likely that this last destination misclassified itself.
[65] Finland

In terms of **main destination typology**, the answers collected provide a balanced representation of the 4 typologies. The leading typologies are "Urban" (22), "Rural & nature" (18), and "Coastal" (17), which together constitute almost three fourth of all respondent destinations.

Figure 53 - Destinations tourism typology



In conclusion, 26 destinations proposed at least one expert to be invited to register to the **TAIEX experts database,** for a total of **27 names collected** from 13 different countries.

Next steps

In the next weeks, the Consortium will work to increase the number of replies and ensure their balance in terms of Member States and destination type. The foreseen activities are:

- **Project presentation webinar (18th of April at 15-16 CEST)** to present destinations the benefits of participating in the project and answer any question they may have both on the project and the survey. 91 participants already registered to the webinar.
- The team will continue with the ongoing survey dissemination activities described above, i.e. social media posts, newsletters partnerships, and targeted email invitations. Particular attention will be dedicated to reaching **destinations in countries[66] from which no response was received yet**.

The next Survey Flash Reports will be sent three weeks before the survey end (10th of May) and following its closure (3rd of June), to grasp a preliminary overview of survey final results. The survey will close on **Friday 31st of May**.

Sustainable EU Tourism Survey – Flash Report #2 – 10 May 2024

Survey dissemination

The survey was officially launched concurrently with the ITB fair in Berlin, held on **Tuesday 5th of March 2024**. In addition to the dissemination activities detailed in the previous Flash Report (submitted on Friday 12th of April), the Team carried out the following tasks:

- **Project presentation webinar**, held on Thursday 18th of April. The webinar aimed to present destinations the benefits of participating in the project, including details on the survey, their involvement in the project, as well as to answer any doubts they had. Overall, the webinar was followed by 180 attendants coming from 21 EU Member States, as well as other extra-EU countries like Argentina, Iran, Montenegro, and Türkiye. All materials presented during the webinar, as well as its recording, have been uploaded on the project website[67].
- **Targeted email invitations** include both ITB and 2-year anniversary of the Transition Pathway for Tourism written follow-up emails and new sending (see Flash Report #1 for further details). After two months from the opening of the survey, on the 7th of May, at least one reminder has been sent to all the contacts. In total, the Consortium reached out to **890 destinations and associations** via email.

[66] Bulgaria, Cyprus, Estonia, Hungary, Lithuania, Luxembourg, Poland, and Slovakia
[67] Available at: [Sustainable EU Tourism – Shaping the Tourism of Tomorrow]()

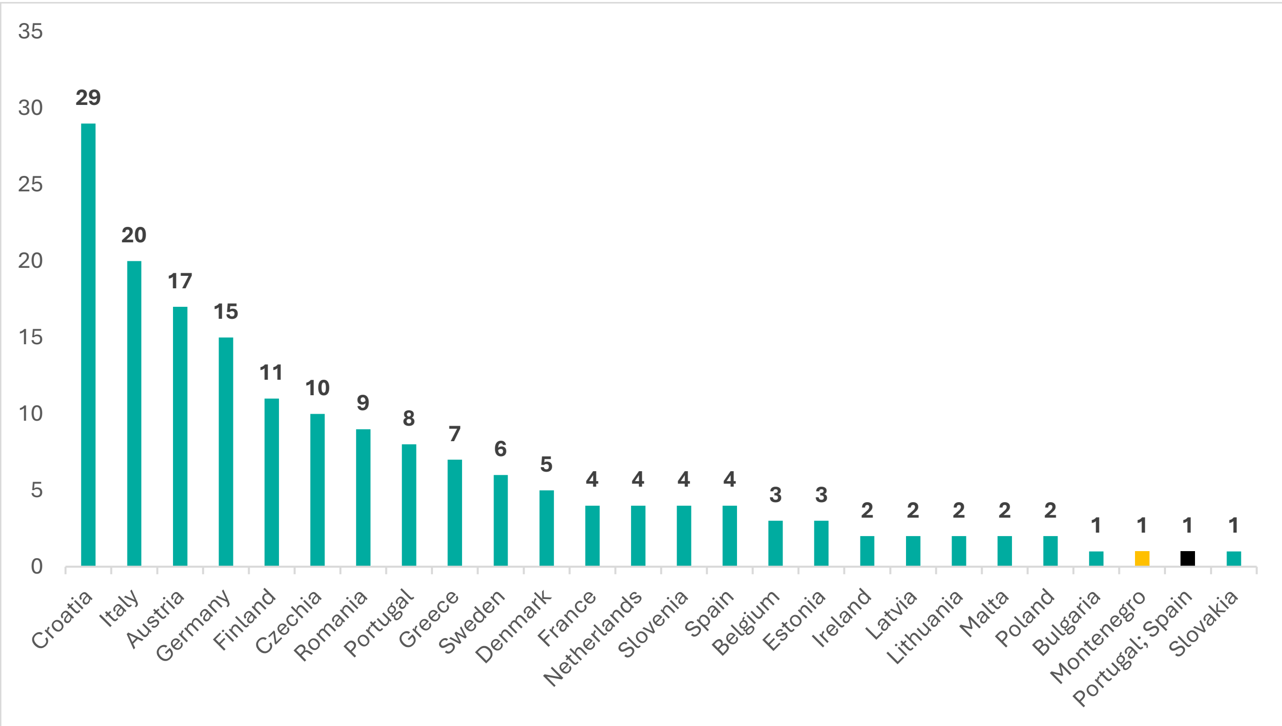
- **May Social media posts** for DG GROW's LinkedIn, Facebook, and X accounts were prepared to both promote the survey and the project presentation webinar, and the materials were shared with the Commission for publication. In addition, 5 posts were shared on the LinkedIn page[68] of the project. This resulted in attracting 190 visitors (100 of them being unique visitors), peaking on Thursday 18th of April (date of the project presentation webinar).
- **New communication collaborations** were established with tourism sustainability and resilience related newsletters and networks. This led to the publication of articles on the International Social Tourism Organisation (ITSO) webpage[69], Tourismusntezwerk[70], Exzellenzinitiative Nachhaltige Reiseziele[71], ERRIN[72], and Leggo Newsletter[73].

Overall, these activities allowed to collect answers from **5** new EU Member States, namely **Bulgaria**, **Estonia**, **Lithuania**, **Poland**, and **Slovakia**.

Survey participation

Overall, **173 valid replies** were collected thought both the survey and the survey pilot test[74]. Of the respondent destinations, **91%** (**158**) declared to be interested in being **engaged in the project activities**.
In terms of **country coverage**, the replies came from **24 EU Member States** and **one extra-EU country** (Montenegro). Moreover, one respondent represented a transnational destination (Meseta Ibérica Transboundary Biosphere Reserve in Portugal and Spain). As shown in Figure 1, **Croatia** is the country with the highest number of answers (**29**), representing the **17%** of the total, followed by **Italy** (**20** responses), which represents the **12%** of the total. These higher response rates are probably due to the successful collaboration with multipliers, who spread the survey among their networks.

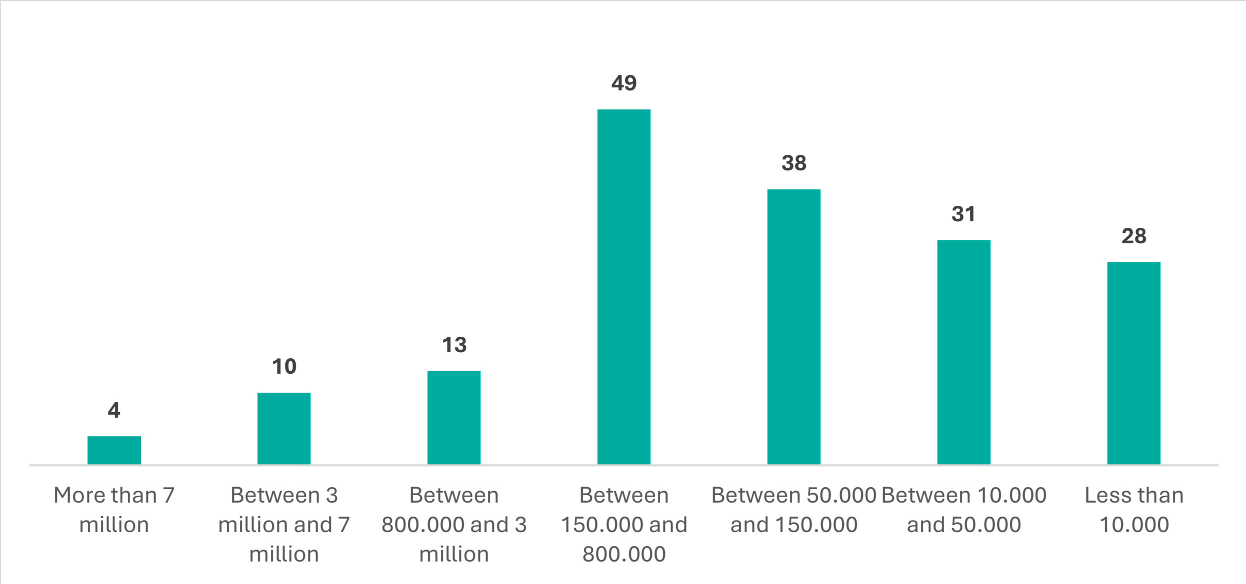
Figure 54 - Survey country coverage



68 Available at: https://www.linkedin.com/company/73223989/admin/feed/posts/
69Available at: https://www.facebook.com/photo/?fbid=426194730054593&set=a.156031797070889 ; https://twitter.com/OITSISTO/status/1787431485475094562
70 Available at: https://nds.tourismusnetzwerk.info/2024/04/22/umfrage-zur-unterstuetzung-von-dmos-auf-dem-weg-zu-nachhaltigkeit-und-resilienz/
71 Available at: https://www.linkedin.com/posts/exzellenzinitiative-nachhaltige-reiseziele_sustainable-eu-tourism-shaping-the-tourism-activity-7182032665741545472-A1jE/?originalSubdomain=de
72 Available at: https://errin.eu/news/eu-has-launched-survey-sustainable-and-resilient-future-eu-tourism
73 Available at: https://www.leggonewsletter.it/2024/04/19/issue-67-certificazioni-beauty-tutto-quello-che-devi-sapere-nellambito-cosmetico/
74 174 destinations answered the survey and 8 answered the pilot test. Four destinations – Grosseto (IT), Linz (AT), Benidorm (ES), and Kristinestad (FI) – answered both questionnaires.

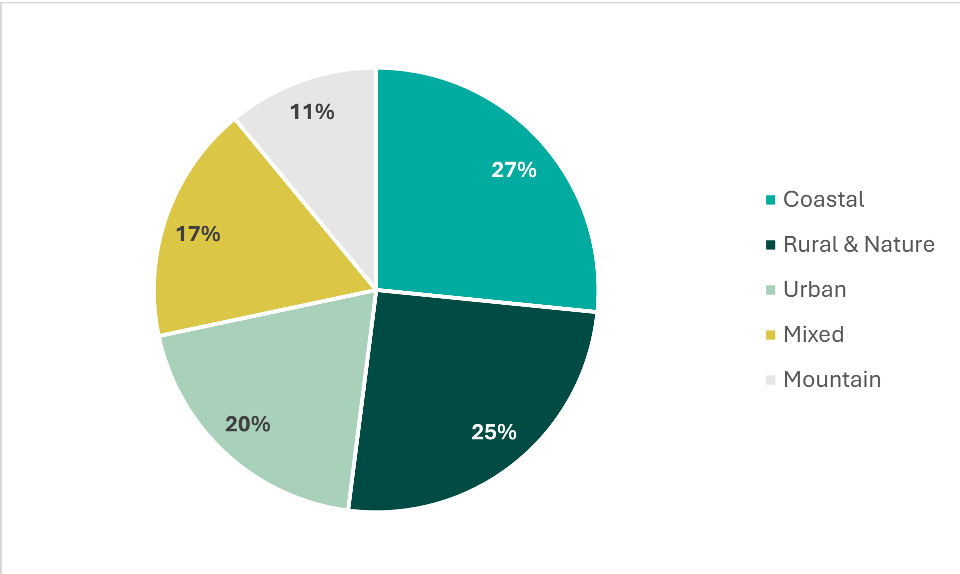
Regarding the **dimension**, most answers (**92%**, **159**) come from destinations with a population comparable to **NUTS 2**[75]**, NUTS 3**[76] **or lower geographical levels.** Of these, most replies (97) were collected from destinations with a number of inhabitants lower that the standard NUTS 3 population. The remaining 8% (**14**) is mainly composed of large cities[77], regions[78], or countries[79].

Figure 55 - Respondents destinations population



In terms of **main destination typology**, the answers collected provide a balanced representation of the 4 typologies. The leading typologies are "Coastal" (46), "Rural & nature" (44), and "Urban" (34), which together constitute almost three-quarters (72%) of all respondent destinations.

Figure 56 - Destinations tourism typology



In conclusion, 44 respondents proposed at least one expert to be invited to register to the **TAIEX experts database,** for a total of **52 names collected** from **15** different countries.

Next steps

[75] Between 800.000 and 3 million inhabitants
[76] Between 150.000 and 800.000 inhabitants
[77] Athens (EL), Kraljevica (HR), Lyon (FR), and Pomorskie (PL). However, it is likely that Kraljevica misclassified itself.
[78] Andalucia (SP), North Rhine-Westphalia (DE), Golden East of Zagorje (HR), Greater Poland (PL), and Destination Limfjorden (DK). However, it is likely that this last destination misclassified itself.
[79] Finland, Latvia, Malta, Portugal, and Slovenia.

In the next weeks, the Consortium will work to increase the number of replies and ensure their balance in terms of Member States and destination type. The team will continue with the ongoing survey dissemination activities described above, i.e. social media posts, communication partnerships, and targeted email invitations and reminders. Particular attention will be dedicated to reaching destinations in countries from which no response was received yet, namely **Cyprus, Hungary,** and **Luxembourg**.
The survey will close on **Friday 31st of May** and the next Survey Flash Report will be sent on Monday 3rd of June, to grasp a preliminary overview of survey results

Sustainable EU Tourism Survey – Flash Report #3 – 3 June 2024

Survey dissemination

The survey was officially launched concurrently with the ITB fair in Berlin, held on **Tuesday 5th of March 2024** and closed on **Friday 31st of May**. In addition to the dissemination activities detailed in the previous two Flash Reports, the Team carried out the following tasks:

- **Targeted email invitations** continued with a focus on collecting answers from countries that were not yet covered. Additional stakeholders mapping was conducted to identify new destinations contacts in Cyprus and Hungary. Regarding Luxembourg, further reminders were sent, as we already had an exchange with the main stakeholders. On the 30th of May – one day before closure – a reminder was sent to destinations where only few answers were collected. In total, the Consortium reached out to around **935 destinations and associations** via email.
- **3 additional posts** were published on the project LinkedIn page before survey closure.

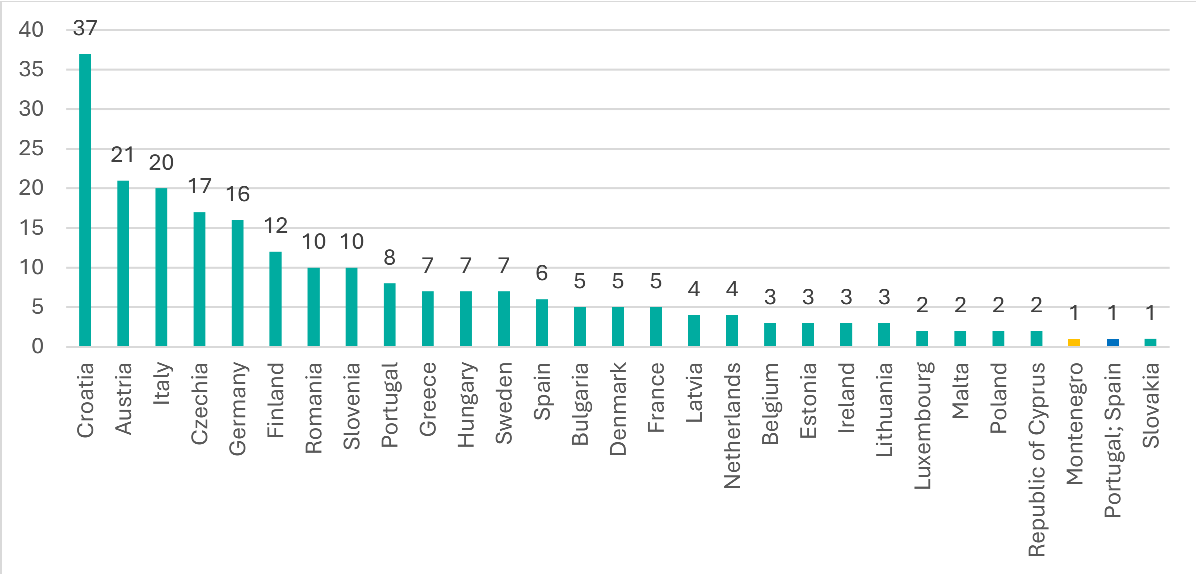
Overall, these activities allowed to collect answers from **Cyprus, Hungary,** and **Luxembourg**, from which no answers were yet collected when the last Flash Report was delivered (10th May). Overall, dissemination efforts resulted in a **full coverage of EU Member States.**

Survey participation

Overall, **224 valid replies** were collected thought both the survey and the survey pilot test[80]. Of the respondent destinations, **93%** (**209**) declared to be interested in being **engaged in the project activities**.
In terms of **country coverage**, the replies came from **28 countries: all 27 EU Member States** and **one extra-EU country** (Montenegro). Moreover, two answers came from outermost regions (Azores, Portugal and Canary Islands, Spain) and one respondent represented a transnational destination (Meseta Ibérica Transboundary Biosphere Reserve in Portugal and Spain).
As shown in Figure 1, **Croatia** is the country with the highest number of answers (**37**), representing the **17%** of the total, followed by **Austria** (21) and **Italy** (20 responses), which both represent the **9%** of the total. These higher response rates are probably due to the successful collaboration with multipliers, who spread the survey among their networks.

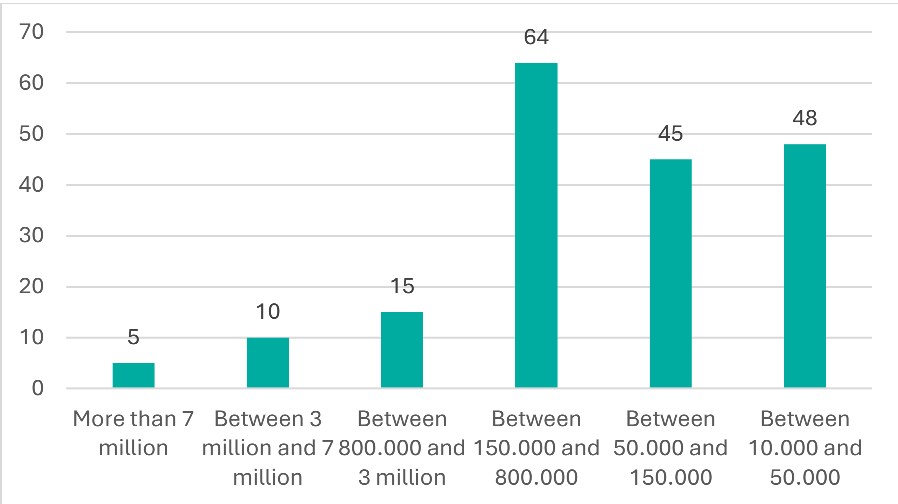
[80] Four destinations – Grosseto (IT), Linz (AT), Benidorm (ES), and Kristinestad (FI) – answered both questionnaires.

Figure 57 - Survey country coverage



Regarding the **dimension**, most answers (**93%**, **209**) come from destinations with a population comparable to **NUTS 2**[81]**, NUTS 3**[82] **or lower geographical levels.** Of these, most replies (130) were collected from destinations with a number of inhabitants lower than the standard NUTS 3 population. The remaining 7% (**15**) is mainly composed of large cities[83], regions[84], or countries[85].

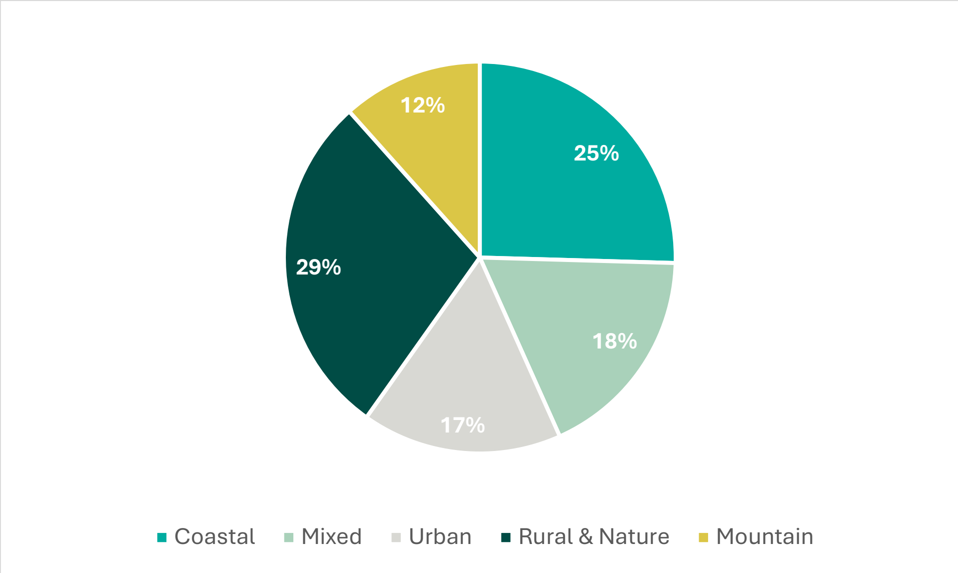
Figure 58 - Respondents destinations population



In terms of **main destination typology,** the leading typologies are “Rural & nature” (64), “Coastal” (57) and “Mixed” (40), which together constitute almost three-quarters (72%) of all respondent destinations.

[81] Between 800.000 and 3 million inhabitants
[82] Between 150.000 and 800.000 inhabitants
[83] Athens (EL), Kraljevica (HR), Lyon (FR), and Pomorskie (PL). However, it is likely that Kraljevica misclassified itself.
[84] Andalucia (SP), North Rhine-Westphalia (DE), Golden East of Zagorje (HR), Greater Poland (PL), and Destination Limfjorden (DK). However, it is likely that this last destination misclassified itself.
[85] Finland, France, Latvia, Malta, Portugal, and Slovenia.

Figure 59 - Destinations tourism typology



In conclusion, 58 respondents proposed at least one expert to be invited to register to the **TAIEX experts database,** for a total of **71 names collected** from **21** different countries.

Next steps

In the next weeks, the Consortium will work on the two deliverables linked to the survey – "D1.2: Report on the implementation of the DMO survey" and "D1.3: Summary of DMO survey results and full set of survey data" – to be delivered by the **15th of July**.

4.5 Methodological notes

4.5.1.1 Limitations

This deliverable presents considerations and results that only regard the sample of destinations for which a Destination Management Organization (DMO) undertook the survey. Results cannot be extended to the whole population of European tourism destinations, mainly for two reasons: the sample is not balanced in terms of country nor in terms of destination types. Moreover, it should be noted that the data collected corresponds to the respondent's perceptions and may thus be subject to bias.

Finally, it should be taken into consideration that the analysis assumes that DMOs responded referring to the destinations they are managing. Thus, the terms DMO and destinations are often used interchangeably.

1. Data Management

Collected data have been treated according to their meaning. When necessary and possible, ordered data ("low", "medium", "high") have been transformed into discrete numerical values (respectively 1, 2, and 3). This is the case of Q9, Q10, Q11, and Q15.

Thanks to further aggregation (i.e. mean by group and composite indexes), discrete responses have been transformed into continuous variables. These pre-treated variables have been used for different analysis (i.e. logistic regressions and mean confrontations).

No data imputation has been conducted for missing responses.

2. Weighting (G6 – G7 – I4A – I4B)

Our responses have been collected with a non-probability setting. This means that we did not know the exact weight that should be associate to each respondent. Still, in some cases (i.e. heatmaps), we aimed to give higher visibility to sub-represented respondents controlling for some grouping variable (i.e. DMOs dimension). To do so, we introduced reverse weights, and we introduced the assumption that each group should be equally represented in the final result.

This is not exactly a normalization technique, as we are not considering standard deviations and variability. Still, it is useful for seeing our observations from a "standardized" perspective.

$$c = \frac{sum(\#\, obs)}{sum(\#\, obs_i)}$$

$$reverse\ weight = \frac{c}{sum(c)}$$

Where:

- $\#\, obs$ = Total number of respondents
- $\#\, obs_i$ = Total number of respondents belonging to group I
- i = grouping variable (i.e. DMOs dimension or DMOs country)

Reference:

- Non-probability sampling. Info page in "Statistics – Power from Data!" training tool. Statistics Canada. Link: [3.2.3 Non-probability sampling (statcan.gc.ca)] (last visited 09:12 12/07/2024)
- Weighting. Info page in "Statistics – Power from Data!" training tool. Statistics Canada Link: [3.5.1 Weighting (statcan.gc.ca)] (last visited 09:12 12/07/2024)

3. Mean confrontation (I6 – I11)

We conducted a hypothesis testing for difference in mean. The aim of the test is to understand if the difference between group means is equal to 0 ($\mu = \overline{\mu_a} - \overline{\mu_b} = 0$).
We conducted a two-sided test to test both positive / negative differences. Population variance is unknown and not assumed equal. We rejected H0 ($\overline{\mu_a} - \overline{\mu_b} = 0$) if:

$$\frac{\overline{\mu_a}-\overline{\mu_b}}{\sqrt{\frac{s_a^2}{n_a}+\frac{s_b^2}{n_b}}} < -t_{v,\frac{\alpha}{2}} \quad \text{or} \quad \frac{\overline{\mu_a}-\overline{\mu_b}}{\sqrt{\frac{s_a^2}{n_a}+\frac{s_b^2}{n_b}}} < +t_{v,\frac{\alpha}{2}}$$

Where:
$\bar{\mu}$ = observed mean observed of group a or b
s^2= observed standard deviation of group a or b
$t_{v,\frac{\alpha}{2}}$ = Student's t statistics with v grades of freedom and significance level (α)
n = number of observations for group a or b
Reference:

- Hypothesis test for a difference between means (r-project.org)
- "Two Population Hypotesis Tests", chp. 10.2. Chapter in Newbold, P., Carlson, W.L., Betty, M., T. (2013). Statistics for Business and Economics.

4. Logistic regression (I5 – G5)

We used logistic regression to understand the contribution of several indexes to the probability of selecting some impacts (pos/neg). Statistically speaking, we conducted a binomial regression (logistic regression) considering the following model:

$$y = \beta_0 + \beta_1 x + \varepsilon$$

Where:
β_1= regression coefficient of the dependent variable
y = dummy variable (Yes-No) for a specific choice (e.g. Social and cultural exchange = Yes)
ε = error component
Significance level (α): *** = $\alpha \leq 0.001$, ** = $\alpha \leq 0.01$, * = $\alpha \leq 0.05$

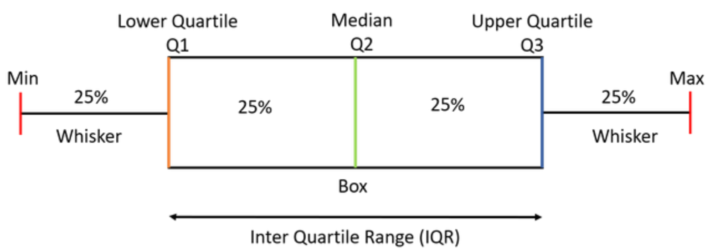
Reference: "Binary Regression" (Chp. 11.6). Ruppert, D., Matteson, D.S. (2015). Chapter in Statistics and Data Analysis for Financial Engineering. Springer.

5. Boxplot interpretation (I6 – I11)

This plot is useful to understand the distribution of a variable. Each box is divided into 4 parts:

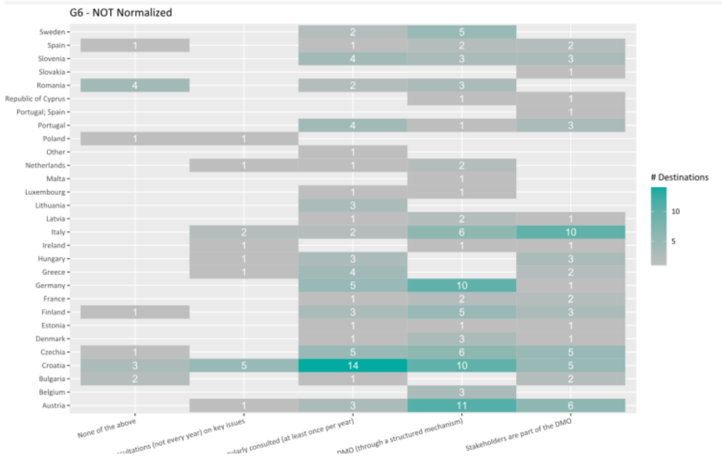
1. Two "wiskers", that both include the extreme (positive or negative) 25% of observations
2. Two "boxes", that both include the central 25% part of observation.

The more concentrated each part, the less distributed / variable are the observations within that segment of the distribution.



6. Heatmap interpretation

It is basically a colour scale contingency table. Each box represents a combination of categories (see x and y axis). The colour intensity indicates the level of the observations (see legend).



7. Composite indicators (resilience, quality, vulnerability and economic reliance)

Once each categorical variable was turned into a numerical one assuming values 1, 2 or 3 respectively for "low", "medium", and "high", composite indicators have been produces in the following way:

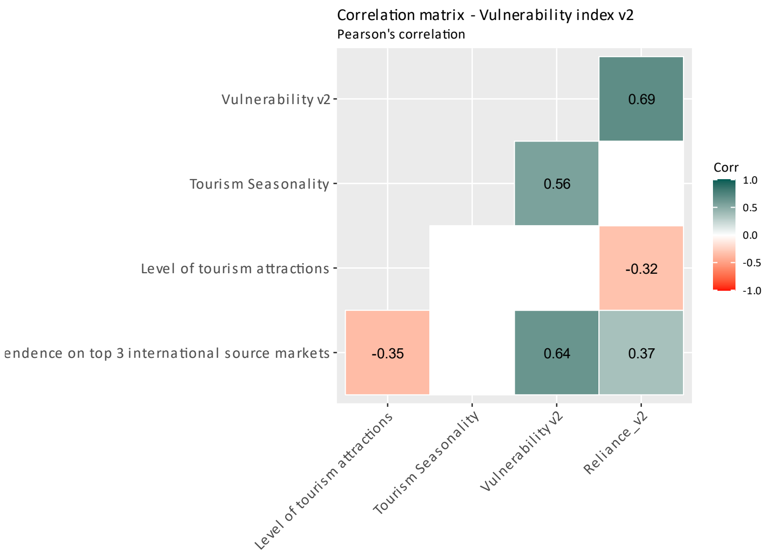
DIMENSION	COMPONENT ID	POLARITY	WEIGHTS	AGGREG	PENALTY
QUALITY	Q15_A	POS	EQ	ARITM_MEAN	NO
QUALITY	Q15_C	POS	EQ	ARITM_MEAN	NO
QUALITY	Q15_D	POS	EQ	ARITM_MEAN	NO
QUALITY	Q15_M	POS	EQ	ARITM_MEAN	NO
RESILIENCE	Q15_F	POS	EQ	ARITM_MEAN	NO
RESILIENCE	Q15_G	POS	EQ	ARITM_MEAN	NO
RESILIENCE	Q15_K	POS	EQ	ARITM_MEAN	NO
RESILIENCE	Q15_L	POS	EQ	ARITM_MEAN	NO
VULNERABILITY	Q9_A	POS	0.125	ARITM_MEAN	NO
VULNERABILITY	Q9_B	POS	0.125	ARITM_MEAN	NO
VULNERABILITY	Q10	POS	0.25	ARITM_MEAN	NO
VULNERABILITY	Q11	NEG	0.25	ARITM_MEAN	NO
VULNERABILITY	Q15_B	POS	0.25	ARITM_MEAN	NO
RELIANCE	Q9_A	POS	EQ	ARITM_MEAN	NO
RELIANCE	Q9_B	POS	EQ	ARITM_MEAN	NO
RELIANCE_V2	Q9_A	POS	EQ	ARITM_MEAN	NO
VULNERABILITY_V2	Q9_A	POS	EQ	ARITM_MEAN	NO
VULNERABILITY_V2	Q10	POS	EQ	ARITM_MEAN	NO
VULNERABILITY_V2	Q11	NEG	EQ	ARITM_MEAN	NO
VULNERABILITY_V2	Q15_B	POS	EQ	ARITM_MEAN	NO
VULNERABILITY_V3	Q9_A	POS	EQ	ARITM_MEAN	NO
VULNERABILITY_V3	Q10	POS	EQ	ARITM_MEAN	NO
VULNERABILITY_V3	Q15_B	POS	EQ	ARITM_MEAN	NO

Where:

- Polarity indicates the relationship between each component and the main index. "Pos" polarity underlies a direct direction between the component and the main index;
- Once different weights have been used, they were reported. In some cases, equal weights have been used;
- No penalties have been applied to lower values of some components;
- Weighted arithmetic means have been used for aggregations.

The index construction has been supported by both a theoretical knowledge and a data-driven process, in which the Pearson's correlation between the final index and its components has been validated. We represented this correlation using a correlation map, in which:

- The color scale / the numerical label indicates the intensity / direction of the correlation
- In case of statistically non-significant results, the referred square has been blanked



Once an index is created, we should expect:

- Statistically significant correlations
- Same direction for each component

Reference: Mazziotta, M., Pareto, A. (2022). Gli indici sintentici. Giampicchelli editore