

Walking the Talk: Tourism Performance vs. Sustainability Communication in Six European Destinations

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Abstract: Tourism destinations increasingly promote sustainability in their communication efforts in the post-Covid period. However, a persistent gap often exists between their measurable sustainability performance and the communicated brand narratives. This study examines how countries with different World Economic Forum Travel & Tourism Development Index (TTDI) 2024 scores utilize sustainability themes in their tourism communication. We compare Germany, Portugal, Turkey, Spain, Italy, and Greece — six destinations with diverse performance levels and strategies — through a comparative case study approach. Quantitative data from TTDI are complemented by the Tourism Potential Creation Index (TPCI) to capture tourism efficiency relative to population size. These benchmarks are combined with a qualitative content analysis of official tourism websites, campaigns (2020–2025), and social media materials. The analysis builds upon Zenker's stakeholder-oriented place branding model and extends Kiraz's Sustainability-Oriented City Branding Index (SOCBI) to national tourism contexts. We employ the Tourism Potential Creation Index (TPCI = Country Tourism Creation Capacity Ratio ÷ Country Population Ratio) to understand the relationship between actual performance and the authenticity of branding. Official tourism websites and sustainability communication strategies are analyzed across three dimensions: Environmental Communication, Adaptive Branding, and Communication Authenticity. Our findings reveal a strong negative correlation ($r = -0.913$, $p < 0.01$) between environmental performance and communication intensity, suggesting that destinations with lower environmental performance compensate through intensified sustainability messaging. Four distinct patterns emerge: high-performing destinations (Germany, Spain) integrate sustainability authentically, silent performers (Portugal) underutilize their achievements, while aspirational communicators (Turkey) employ intensive communication focused on cultural and environmental heritage, and moderate aligners (Italy, Greece) balance performance with communication. This reveals a performance-communication gap that carries both opportunities and credibility risks. The analysis suggests sustainability communication serves primarily as a defensive strategy to avoid negative perceptions rather than a proactive differentiator, reflecting the asymmetric influence of environmental credentials on destination choice. The study contributes theoretically by linking performance indices with destination branding research, and practically by offering recommendations for aligning sustainability branding with measurable outcomes. The findings provide valuable insights for tourism boards seeking to balance authenticity and aspiration in sustainable destination marketing.

Keywords: Sustainability Communication, Destination Marketing, Sustainability, TTDI, Tourism Performance, Comparative Analysis, SOCBI

1. Introduction

Sustainability has moved from a niche concern to a practice actively promoted by many international organisations, as it increasingly touches multiple spheres of everyday life. We are gradually recognising that sustainability is not only about the planet we currently inhabit, but about the long-term viability of our broader ecosystem. One helpful lens is the yin–yang paradigm. In its simplest form, yin–yang suggests that everything in the universe exists as complementary opposites that are interdependent and mutually constitutive (Wang, *Yinyang: The Way of Heaven and Earth in Chinese Thought and Culture*, Cambridge University Press). In this context, the focus is not on “good” versus “bad” in a moral sense, but on two forces that require each other to create balance. Commonly cited interpretations note that “within every positive element there is a latent negative potential, and within every negative element there is a potential for transformation into something positive.” The core objective, then, becomes balance. Translated into sustainability debates, the key question is how to hold the concepts of balance and sustainability together within the world of cities, countries, and socio-economic systems.

Within the framework of the SDGs—which aim, by 2030, to end poverty, fight inequality and injustice, and combat climate change—sustainability has, over time, become part of the **image and brand** of some countries. For decades, nations, regions and cities have engaged in place branding, deploying a range of marketing and communication practices. Empirically, one can already observe that sustainability has become a more prominent brand element in national policy documents and political rhetoric than in the past. However, countries integrate

sustainability into their identities and images in **very different ways**. In some cases, this incorporation appears largely cosmetic—amounting to a “green makeover” or superficial branding exercise. In others, governments seek to leverage early-mover advantages by investing in more substantive and systemic sustainability initiatives.

The imperative for sustainable tourism has transformed from a peripheral concern to a central strategic priority for destinations worldwide, fundamentally reshaping how tourism organizations communicate their environmental commitments and achievements. As climate change impacts intensify and traveler awareness of sustainability issues grows, destinations increasingly position themselves as responsible stewards of natural and cultural resources. However, a critical question emerges: do destinations' sustainability communication strategies accurately reflect their actual environmental performance, or do they represent strategic compensation for performance deficits?

This study addresses a significant gap in the destination branding literature by empirically examining the relationship between environmental sustainability performance and digital communication intensity across European tourism destinations. While previous research has extensively explored sustainability communication strategies (Font & McCabe, 2017; Tölkes, 2018) and destination branding practices (Kavaratzis & Hatch, 2013; Pike & Page, 2014), limited attention has been paid to the potential misalignment between what destinations achieve and what they communicate. This gap is particularly problematic given growing concerns about greenwashing and authenticity in tourism marketing (Hanna et al., 2018; Andersson & James, 2017).

We propose a “performance-communication paradox” hypothesis, suggesting that destinations with lower environmental performance compensate by intensifying their sustainability communication efforts, while high-performing destinations may underutilize their genuine achievements in marketing communications. This paradox challenges conventional wisdom that communication intensity should correlate positively with actual performance, instead suggesting that competitive pressures and reputational management concerns drive inverse relationships.

The European tourism context provides an ideal setting for investigating this phenomenon. European destinations operate within a relatively homogeneous regulatory framework while exhibiting substantial variation in environmental performance, tourism intensity, and communication approaches. The continent's leadership in sustainability initiatives, combined with intense competition for increasingly sustainability-conscious travelers, creates conditions where strategic communication choices become particularly salient.

1.1 Research Aim and Research Questions

This study aims to empirically examine the relationship between actual environmental sustainability performance and digital communication intensity across European tourism destinations. Specifically, we test the “performance-communication paradox” hypothesis suggesting that destinations with lower environmental performance compensate through intensified sustainability messaging.

To achieve this aim, we address three research questions:

- **RQ1:** What is the relationship between environmental sustainability performance (as measured by TTDI) and sustainability communication intensity in European tourism destinations?
- **RQ2:** How do destinations with varying performance levels strategically position themselves in terms of sustainability communication?
- **RQ3:** Does tourism efficiency (SPOE) influence sustainability communication strategies independently of environmental performance?

This research makes three primary contributions to the destination branding and sustainable tourism literature. First, it empirically demonstrates the existence of a performance-communication paradox through systematic content analysis and statistical correlation, providing quantitative evidence for a phenomenon previously discussed only conceptually. Second, it adapts the Sustainability-Oriented City Branding Index (SOCBI) framework from urban to national destination contexts, demonstrating its applicability across scales while identifying necessary modifications. Third, it develops a typology of destination sustainability communication strategies that links performance metrics with communication choices, offering practical guidance for destination management organizations (DMOs) seeking to align their messaging with authentic sustainability achievements.

The paper is organized as follows. Section 2 reviews relevant literature on destination branding, sustainability communication, and performance measurement, establishing the theoretical foundation for the performance-

communication paradox hypothesis. Section 3 details the methodology, including the adaptation of the SOCBI framework, sampling procedures, and analytical approaches. Section 4 presents the empirical findings, revealing patterns of alignment and misalignment across the six studied destinations. Section 5 discusses theoretical and practical implications, while Section 6 concludes with limitations and directions for future research.

2. Literature Review

Destination branding has evolved from promotional campaigns to strategic, multi-stakeholder processes that translate place identity into coherent images and reputations (Kavaratzis, 2004; Dinnie, 2011). Within this evolution, sustainability has emerged as a central promise in destination narratives, particularly following the COVID-19 pandemic's disruption of global tourism. However, as countries increasingly position themselves as "sustainable destinations," the extent to which they genuinely embody these claims remains uneven and under-examined. The integration of sustainability into destination branding reflects broader shifts in consumer consciousness and regulatory frameworks. The UN's Sustainable Development Goals have provided a common language for destinations to articulate their commitments, yet implementation varies dramatically based on factors including development levels, institutional capacity, and competitive pressures (Taecharungroj et al., 2019).

A recurring concern in place branding literature is claim-performance misalignment, including risks of greenwashing when brand messages outpace systemic change (Andersson & James, 2017; Holgersen & Malm, 2015). While scholarship warns about eco-branding unsupported by substantive transformation, limited empirical research quantifies this gap or examines its strategic implications. Font and McCabe (2017) emphasize that how sustainability is communicated matters as much as what is communicated, yet systematic analysis of this relationship remains scarce. The challenge is compounded by governance structures in destination branding, which are typically networked rather than hierarchical (Klijin & Eshuis, 2011). This distributed authority can lead to fragmented messaging and difficulty in aligning diverse stakeholder communications with measurable performance outcomes.

Recent developments in sustainability indices provide opportunities to empirically examine performance-communication relationships. The World Economic Forum's Travel & Tourism Development Index offers comprehensive metrics across environmental, social, and economic dimensions, enabling cross-destination comparisons. However, these performance metrics rarely connect directly to branding claims or communication strategies (Braun et al., 2018). The Sustainability-Oriented City Branding Index (SOCBI) developed by Kiraz (2023) addresses this gap by evaluating sustainability communication across multiple dimensions including environmental messaging, adaptive branding capacity, and communication authenticity. While developed for urban contexts, its framework offers potential for adaptation to national destination branding.

Drawing on stakeholder-oriented place branding theory (Zenker & Braun, 2017), we conceptualize destination sustainability communication as a multi-dimensional construct requiring alignment between internal identity (actual performance) and external image (communicated narratives). The potential misalignment between these dimensions — influenced by competitive pressures, institutional capacity, and strategic choices — forms our theoretical foundation for investigating the performance-communication paradox. Despite growing attention to sustainable tourism and destination branding independently, the intersection remains under-theorized and empirically understudied. This research addresses this gap by systematically examining how destinations with varying sustainability performance levels construct and communicate their environmental commitments.

3. Methodology

This study employs a mixed-method comparative case study approach to examine the relationship between sustainability performance and communication strategies across six European tourism destinations: Spain, Germany, Italy, Portugal, Greece, and Turkey. These countries were selected using maximum variation sampling (Patton, 2002) based on their World Economic Forum Travel & Tourism Development Index (TTDI) 2024 rankings and environmental sustainability scores, representing diverse performance levels: Spain (2nd, environmental score: 4.25), Germany (6th, 3.41), Italy (9th, 3.46), Portugal (12th, 4.76), Greece (21st, 4.29), and Turkey (29th, 4.32).

This exploratory research design prioritizes theoretical insight generation over statistical generalization. While the six-country sample limits inferential power, maximum variation sampling ensures sufficient heterogeneity

for pattern identification and hypothesis development in this nascent research domain (Eisenhardt, 1989; Yin, 2018). The sample represents approximately 45% of Southern and Central European tourism arrivals, capturing meaningful variation across TTDI rankings (2nd to 29th), environmental performance scores (3.41 to 4.76), and tourism efficiency ratios (2.48 to 10.18). This strategic case selection enables analytical generalization to theory rather than statistical generalization to populations (Yin, 2018).

We adapted Kiraz's (2023) Sustainability-Oriented City Branding Index (SOCBI) framework from urban to national destination contexts, evaluating sustainability communication across three dimensions with 20 indicators scored 0-5. Environmental Communication dimension includes keyword density, claim specificity, certification visibility, carbon tools, natural asset emphasis, sustainability visibility, navigation structure, and data provision. Adaptive Branding encompasses stakeholder coordination, policy integration, multi-channel integration, central coordination, program structure, and partnership legitimacy. Communication Authenticity comprises evidence-based claims, third-party verification, measurement tools, transparency, specific/general ratio, and outcome/intent balance.

Primary data collection involved systematic content analysis of official tourism websites: spain.info/sustainability, germany.travel, italia.it, visitportugal.com, visitgreece.gr, and goturkiye.com. For each destination, we analyzed the homepage, sustainability/environment pages (where available), and experiences/activities sections. Three independent coders from different disciplinary backgrounds (Philosophy/Communication, Marketing/Branding, Engineering/Public Relations) evaluated the content following pilot testing and protocol refinement.

The TTDI methodology employs a comprehensive framework measuring destination competitiveness across 17 pillars organized into five dimensions: Enabling Environment, Travel & Tourism Policy, Infrastructure, Travel & Tourism Demand Drivers, and Travel & Tourism Sustainability. The environmental sustainability pillar specifically evaluates performance through indicators including environmental treaty participation, stringency of environmental regulations, sustainability of travel and tourism development, particulate matter concentration, and environmental-related treaties in force (World Economic Forum, 2024, pp. 15-18). Each indicator is normalized on a 1-7 scale using min-max normalization methodology, with detailed scoring procedures and data sources outlined in the TTDI methodology section (World Economic Forum, 2024, pp. 89-92, see Appendix A for scaling methodology). This multi-faceted approach provides a robust measure of actual environmental performance independent of marketing communications.

Inter-coder reliability was assessed using multiple metrics to ensure robustness. Cohen's weighted Kappa (quadratic weights) yielded $\kappa = 0.767$ indicating substantial agreement, while Krippendorff's Alpha ($\alpha = 0.939$) and Gwet's AC1 (0.986) demonstrated very high reliability. ICC(2,k) for average measures was 0.908, confirming excellent consistency. Perfect agreement occurred in 46.4% of ratings, with 98.6% falling within ± 1 point difference.

Secondary data included TTDI 2024 environmental sustainability scores and Tourism Potential Creation Index (SPOE) calculations following Akıncı and Yüzbaşıoğlu (2015): $SPOE = \text{Country Tourism Creation Capacity Ratio} \div \text{Country Population Ratio}$. This metric captures tourism efficiency relative to population size, providing insight into how demographic factors influence sustainability communication strategies. Statistical analysis employed Pearson correlation and regression analysis to examine performance-communication relationships, with Z-score normalization addressing scale differences between variables.

4. Findings

Content analysis of the six European destinations revealed significant variation in sustainability communication quality. Germany led with a SOCBI score of 4.88, followed by Spain (4.28), Turkey (3.80), Italy (3.36), Greece (3.28), and Portugal (2.18). The average communication score across all destinations was 3.63, with only Germany and Spain exceeding this threshold. Table 1 presents the comprehensive scoring across all SOCBI dimensions. Germany's superior performance stemmed from evidence-based claims, multiple certifications, and functional tools like CO₂ calculators, while Portugal's surprisingly low score reflected weak central coordination despite strong environmental performance.

Table 1: SOCBI Scores and Key Characteristics

Country	Environmental Communication	Adaptive Branding	Communication Authenticity	Total SOCBI	TTDI Env. Score	SPOE
Germany	4.75	5.17	4.83	4.88	3.41	2.54
Spain	4.63	4.17	4.17	4.28	4.25	5.95
Turkey	3.88	3.50	4.00	3.80	4.32	2.48
Italy	3.38	3.33	3.33	3.36	3.46	2.90
Greece	3.25	3.50	3.17	3.28	4.29	8.69
Portugal	2.38	2.33	1.67	2.18	4.76	10.18

The relationship between environmental performance and communication intensity revealed a striking paradox. Statistical analysis demonstrated a strong negative correlation ($r = -0.913$, 95% CI $[-0.99, -0.54]$, $p < 0.01$) between TTDI environmental scores and SOCBI communication scores, representing a very large effect size (Cohen's $d = 3.2$). Portugal exemplified this paradox with the highest environmental performance (4.76) but lowest communication score (2.18), while Germany showed the inverse pattern (environmental: 3.41, communication: 4.88). Regression analysis confirmed that environmental performance explained 83.3% of variance in communication intensity ($R^2 = 0.833$), suggesting systematic compensatory behavior. While these findings should be interpreted cautiously given the sample size ($n=6$), the effect magnitude and consistency across multiple analytical approaches strengthen confidence in the identified pattern.

Figure 1: Strategic Positioning Matrix

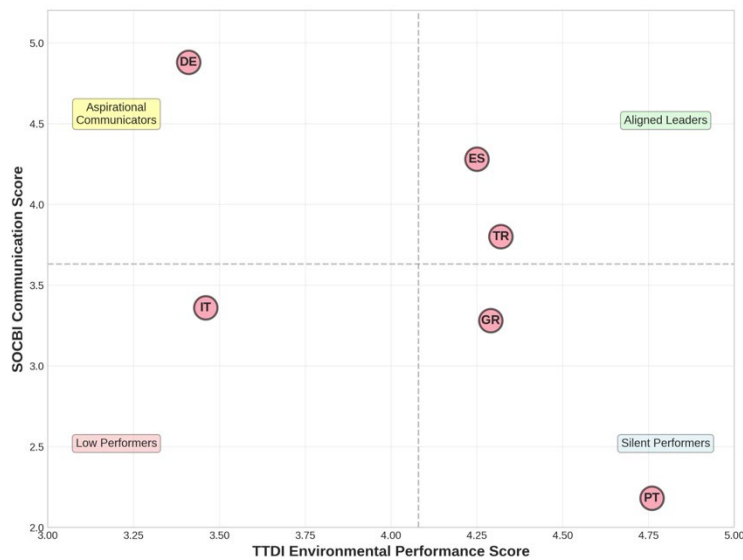


Figure 1: Strategic Positioning Matrix

Four distinct strategic patterns emerged from the analysis, as visualized in Figure 1. *Aligned Leaders* (Germany, Spain) demonstrated high communication scores matching their strong overall tourism development, though Germany's environmental performance lagged behind its messaging intensity. *Silent Performers* (Portugal) achieved excellent environmental outcomes but failed to leverage these achievements in communications. *Aspirational Communicators* (Turkey) employed intensive sustainability messaging despite moderate performance, emphasizing future commitments over current achievements. *Moderate Aligners* (Italy, Greece) showed balanced approaches with communication roughly matching performance levels.

The Tourism Potential Creation Index (SPOE) analysis provided additional insights into these patterns. Countries with high tourism efficiency relative to population (Portugal: 10.18, Greece: 8.69) showed lower communication intensity, while those with lower efficiency (Germany: 2.54, Italy: 2.90) compensated through enhanced sustainability messaging. The correlation between SPOE and communication scores ($r = -0.690$, $p < 0.05$)

suggested that destinations facing tourism competitiveness challenges use sustainability communication as a differentiation strategy (Figure 2).

To explore potential variations in sustainability sensitivity, we examined whether countries could be grouped by their environmental regulation stringency and tourism sustainability indices. While the limited sample size (n=6) precludes definitive clustering, preliminary analysis suggests that Central European countries (Germany) demonstrate higher regulatory compliance focus despite lower environmental outcomes, while Southern European destinations show varied patterns. This tentative distinction warrants further investigation with larger samples to determine if regional regulatory cultures influence the performance-communication relationship.

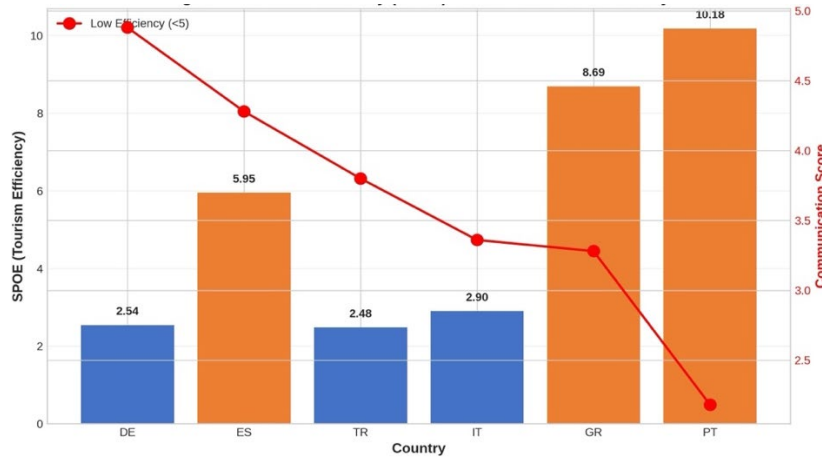


Figure 2: Tourism Efficiency (SPOE) vs Communication Intensity

Dimensional analysis revealed systematic strengths and weaknesses across the SOCBI framework. All destinations scored highly on natural asset emphasis (averaging 4.83) but poorly on carbon management tools (0.50), with only Germany offering CO2 calculators. Adaptive Branding showed the greatest variation ($\sigma = 1.89$), reflecting differences in institutional capacity and DMO coordination. Portugal's low Adaptive Branding score (2.33) despite environmental excellence highlighted how organizational weaknesses can undermine communication effectiveness. Communication Authenticity scores correlated strongly with overall DMO resources and professionalization, with Germany and Spain leading through comprehensive data provision and third-party verification.

5. Discussion

Our findings reveal a profound performance-communication paradox in European destination sustainability communication, with significant theoretical and practical implications. The strong negative correlation ($r = -0.913$) between environmental performance and communication intensity challenges conventional assumptions about authentic destination marketing. As illustrated in Figure 3, this inverse relationship suggests that sustainability communication serves primarily as a compensatory mechanism rather than a transparent reporting tool, raising critical questions about the credibility and effectiveness of destination branding strategies.

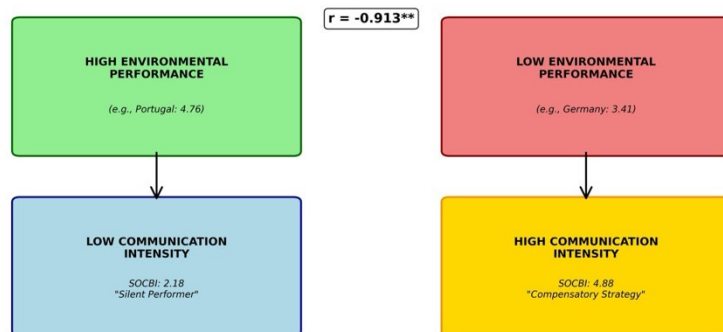


Figure 3: Performance-Communication Paradox Mechanism

The emergence of four distinct strategic patterns provides a nuanced typology for understanding destination approaches to sustainability positioning (Figure 4). Germany's case is particularly instructive: despite leading in communication sophistication, its actual environmental performance (3.41) falls below the six-country average (4.08). This misalignment exemplifies how advanced DMO capabilities and resources can mask performance deficits through professional communication strategies. Conversely, Portugal's position as a "Silent Performer" represents a significant missed opportunity, suggesting that institutional capacity constraints can prevent destinations from capitalizing on genuine sustainability achievements.

The SPOE analysis adds crucial context to these patterns. Destinations with high tourism efficiency relative to population size (Portugal, Greece) appear less motivated to invest in sustainability communication, possibly because their tourism sectors already operate at optimal capacity. In contrast, countries with lower tourism efficiency (Germany, Italy) use sustainability messaging as a differentiation strategy to enhance competitiveness. This finding aligns with resource-based theories of competitive advantage, suggesting that destinations deploy communication strategically based on their market position rather than actual sustainability performance.

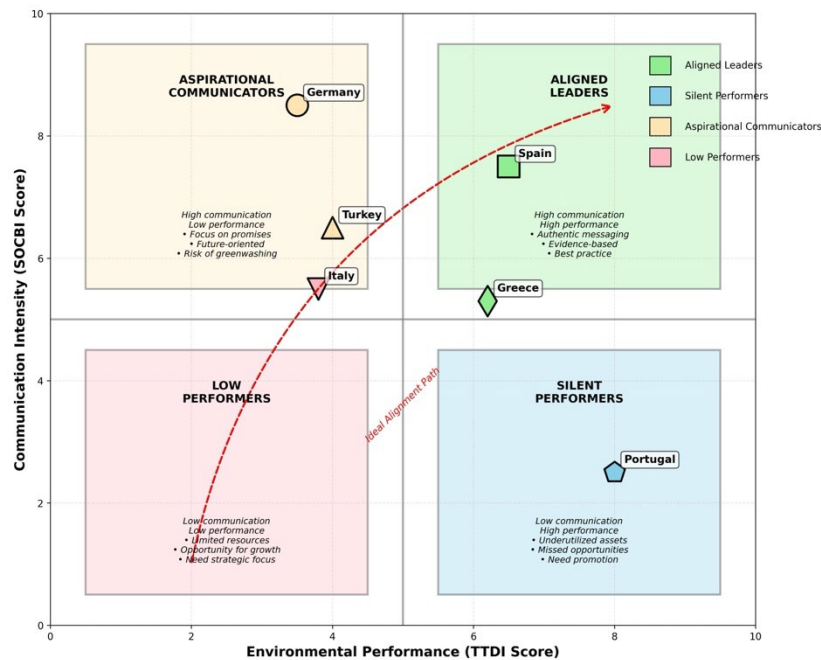


Figure 4: Strategic Positioning Framework

Our findings suggest that sustainability communication in tourism functions primarily as a defensive marketing tool rather than a proactive differentiator. This defensive positioning aligns with the concept of 'hygiene factors' in consumer behavior — sustainability credentials may not drive destination selection but their absence can trigger rejection, particularly in an era of heightened social media scrutiny. The performance-communication paradox thus reflects rational strategic behavior: destinations with weak environmental performance must invest heavily in communication to avoid negative perceptions and potential social media backlash.

This defensive dynamic is amplified by the 'greenwashing paradox' evident in our data. Destinations appear caught between two risks: under-communicating genuine achievements (Portugal) leaves them vulnerable to being overlooked, while over-communicating relative to performance (Germany) risks exposure and reputational damage if inconsistencies are revealed. Social media's role as an accountability mechanism intensifies this dilemma, as travelers can instantly share experiences that contradict official sustainability narratives, creating viral negative publicity that can undermine years of brand building.

The asymmetric nature of sustainability's influence on destination choice — where presence doesn't attract but absence repels — explains why lower-performing destinations feel compelled to compensate through intensive communication. This defensive imperative is particularly acute for destinations with established reputations that could be damaged by perceived environmental negligence. Germany's high communication intensity despite moderate performance may reflect this reputational risk management, using sophisticated messaging to preempt criticism rather than showcase genuine leadership.

The systematic absence of functional sustainability tools across most destinations — with only Germany offering CO2 calculators — reveals a critical gap between rhetorical commitment and practical implementation. All destinations scored highly on natural asset emphasis, yet this traditional approach to showcasing environmental beauty fails to address modern expectations for active sustainability management. This disconnect between passive appreciation and active stewardship represents a fundamental misunderstanding of contemporary sustainability communication requirements.

These findings contribute to destination branding theory by empirically demonstrating how competitive pressures and institutional capabilities shape the relationship between performance and communication. The strategic positioning framework (Figure 4) offers practical guidance for destinations seeking to move along the "ideal alignment path" toward authentic integration of achievements and messaging. For practitioners, our research underscores the risks of communication strategies divorced from performance realities. As travelers become increasingly sophisticated in evaluating sustainability claims, the credibility gap identified in this study may undermine destination competitiveness rather than enhance it. DMOs must therefore prioritize authentic alignment between achievements and messaging, investing in both performance improvements and communication capabilities to achieve sustainable competitive advantage in the evolving tourism marketplace.

6. Conclusion

This study empirically demonstrates a performance-communication paradox in European destination sustainability communication, revealing that destinations with lower environmental performance compensate through intensified communication efforts. By adapting the SOCBI framework to national contexts and integrating it with TTDI performance metrics, we provide a comprehensive methodology for assessing authenticity in destination sustainability positioning. The identification of four distinct strategic patterns offers practical guidance for DMOs seeking to align their communications with actual achievements. The defensive nature of sustainability communication revealed in this study — functioning more as risk mitigation than competitive advantage — highlights the need for destinations to move beyond greenwashing toward authentic environmental transformation that can withstand social media scrutiny and evolving traveler expectations. This raises an important question: is there any kind of standard for sustainability practices across countries of different sizes and geographies — and should there be? A German proverb captures the current situation succinctly: *“Ein gutes Pferd springt nur so hoch, wie es muss”* (“a good horse only jumps as high as it has to”). Many countries appear to do precisely what is minimally required—meeting the formal expectations of international frameworks, but not necessarily exceeding them. In line with this, the literature on branding often examines isolated parts of branding processes and tends to focus on drivers of successful branding or ways to enhance brand performance. When it comes to sustainability branding, many public actors still treat sustainability primarily as a tool to access national or international funds, or as a set of rules to be complied with and legitimised within legal frameworks. As the tourism industry faces increasing pressure for genuine sustainability transformation, destinations must move beyond compensatory communication toward authentic integration of performance and messaging.

Several limitations warrant acknowledgment. First, the six-country sample, while strategically selected for maximum variation, constrains statistical power and limits generalizability to broader European or global contexts. The strong correlations observed ($r = -0.913$) should be validated with larger samples before drawing definitive conclusions. Second, the cross-sectional design captures a single temporal snapshot; sustainability communication strategies evolve rapidly in response to market pressures and regulatory changes. Third, our analysis focused exclusively on official DMO websites, excluding social media presence, third-party platforms, and user-generated content that increasingly shape destination perceptions. Fourth, the SOCBI framework adaptation from city to national contexts, while theoretically grounded, requires further validation across diverse geographical and cultural settings.

Future research should address these limitations through expanded samples encompassing diverse global regions, longitudinal designs tracking communication evolution, and multi-platform analyses incorporating social media and user-generated content. Additionally, tourist perception studies could validate whether the identified performance-communication paradox influences actual destination choice behavior, while experimental designs might test causal mechanisms underlying compensatory communication strategies.

Ethics Declaration

Ethical review and approval were not required for this study because it did not involve human participants, identifiable personal data, or interventions, and all data analyzed were publicly available and anonymized. The research complied with relevant institutional and national guidelines.

AI Declaration

No generative artificial intelligence tools were used in the conception, design, analysis, or writing of this manuscript. Standard software (e.g., reference managers, statistical packages, spelling/grammar checkers) was used only for routine tasks, and the authors take full responsibility for the content.

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