



STRATEGIC REPORT

Edited by Ákos Boros

For internal circulation only.
Lake Fertő/Neusiedl © SPOT Image, CNES, ESA

EXECUTIVE SUMMARY

It is with great pleasure that I could offer my assistance to the Fertő-Neusiedler See Netzwerk during my internship. I am forever indebted to Mária Madarász-Kalmár for her continuous support.

This strategic proposal presents a comprehensive examination of the principal challenges and opportunities confronting the Fertő-Neusiedler See region. The primary objective herein is to delineate a sustainable pathway for the FERNENET network that not only ensures its long-term institutional stability but also cultivates an environment conducive to extending the average length of guest stays.

The analysis commences with a review of available statistical data, which reveals a concerning trend: while arrival and overnight stay figures have demonstrated a steady recovery since 2020 on both sides of the border, the average length of stay (LOS) is exhibiting a significant and continuous decline. This pattern poses a considerable risk to the long-term economic and environmental sustainability of the region's tourism. These circumstances are compounded by external pressures, such as a higher rate of inflation or other shocks (Covid-19, geopolitics), and internal difficulties like a deficiency in cohesive, integrated tourism products that conceptualise the destination as a singular entity.

Drawing from an extensive review of academic literature, in-depth interviews with network members, and case studies of analogous European cross-border regions, this report posits three foundational pillars for sustained organisational stability: **knowledge, trust, and public relations**. Focusing on the interplay of these three areas could help foster an environment in which collective action in developing better products and stronger advocacy measures.

Consequently, this proposal advances a two-faced strategy. The 'Vision for Later' section outlines a long-term ambition wherein the network evolves into a resilient, data-driven, and indispensable advocate for the entire Fertő-Neusiedler See destination. The 'Strategy Now' component recommends five immediate, practical building blocks designed to generate initial momentum and demonstrate tangible value, including the establishment of small, task-oriented working groups and the creation of a pilot knowledge hub.

Ákos Boros

Table of Contents

EXECUTIVE SUMMARY	1
Introduction	4
Understanding	6
Descriptive statistics	6
Literature on the region	11
Deeper understanding	17
Insights from the interviews	17
Case studies from around Europe	21
Vision for Later	27
Strategy Now	33
1. Establish small working groups with clearly defined tasks	34
2. Establish a pilot solution for a hub of knowledge	34
3. Deploy data-collection tools to examine the destination as a whole	35
4. Offer informal avenues to meet with other organisations	36
5. Create a pilot for a cross-border itinerary	36
Conclusion	38
Annex 1: Sentiment Analysis	39
Annex 2: Sample Questionnaire	42
Bibliography	45

List of abbreviations

EU — European Union
EUROSTAT — Statistical Office of the European Union
FERNENET — Fertő-Neusiedler See Netzwerk
GDP — Gross Domestic Product
HICP — Harmonised Indices for Consumer Prices
KSH — Központi Statisztikai Hivatal (Central Statistical Office of Hungary)
LOS — Length of Stay
NUTS — Nomenclature of Territorial Units for Statistics
STATAT — Statistik Austria (Statistical Office of Austria)
STOST – Sustainable Tourism Observatory of South Tyrol
UN – United Nations

List of figures and tables

Figure 1: Year-to-year percentage change of regional GDP from 2014 to 2023; the author's own formulation based on data from Eurostat.	7
Table 1: Year-to-year percentage change of annual average HICP from 2020 to 2024, Eurostat.	8
Table 2: Number of registered establishments providing accommodation from 2020 to 2024, Eurostat.	9
Table 3: Number of available bed-spaces at registered establishments providing accommodation from 2020 to 2024, Eurostat.	9
Table 4: Number of arrivals and number of nights spent at registered establishments providing accommodation from 2020 to 2024, Eurostat.	9
Figure 2: Changes in average annual length of stay 2020 to 2024; the author's own calculations.	10
Figure 3: Stylised relationships between the three pillars; the author's own formulation.	28

Introduction

This strategic proposal aims at examining how a cross-border organisation could survive the test of time, and with what measures it could retain guests in the region for longer. The first question will be answered in a more straightforward manner using three key conceptual pillars (knowledge, trust, and public relationships) as the foundation for long-run organisational stability. Regarding how guests may be retained for longer, the report does not offer a clear answer. This is because understanding guests' demand and behaviour in the region, their attitude towards cross-border tourism packages, and many other supply-side factors, is well-beyond the time frame I have been allocated during my internship. Instead, it focuses on short recommendations and a long-run vision, which in its entirety would aim at fostering an environment in which cross-border collaboration could thrive – potentially leading to an increased length of stay.

The proposal is split into four sections. Firstly, it discusses the available quantitative data and research on the region. Secondly, it will outline the findings from in-depth interviews with some members of the Netzwerk. Thirdly, it will discuss the focal points of a vision that extends the organisation's horizon for the future. Lastly, it will discuss some practical and highly recommended building blocks – a strategy for now.

For a faster read, the reader may focus their attention on the **light green** informational sections. At the end of each chapter or section, there will be a short summary of the topics, findings, or recommendations. Sometimes, there will be some **dark green** boxes which provide additional comments from the author. Numerical data is showcased in **blue**.

In case there are any questions regarding the information provided¹ below, please feel free to contact me at akos.boros@forward-college.eu or by reaching out to my supervisor, Mária Madarász-Kalmár.

¹ DISCLAIMER: As part of my internship project with FERNENET, I have developed this research-based strategic proposal to assist the network in its planning efforts. Please note that this document **is intended for discussion and informational purposes only**. The analysis and recommendations are based on the data available as of **18th of August 2025** and should not be considered as professional, legal, or financial advice. For specific guidance, consultation with a qualified expert is recommended.



UNDER- STANDING

Understanding

Any meaningful institutional change, driven by a strategy, requires a certain starting point. This proposal departs from a broad overview of economic, social and cultural overview. This section will serve as a basic foundation for understanding the current state of the Fertő-Neusiedler See tourism region, and similar cross-border tourisms in Europe. Firstly, it will outline selected descriptive statistics in order to show recent developments in the region's tourism. Later, it will review some of the literature that scholars, journalists, and professionals have published about the Fertő-Neusiedler See region.

Descriptive statistics

The data introduced here comes from EUROSTAT. I use this data source because it offers a reliable comparative approach. The period introduced here starts in 2020, except for the trends in economic activity (GDP). It is partly because the industry experienced unprecedented shock under the travel-restrictions of 2020, combatting the spread of the COVID-19 pandemic. This makes it impossible to compare tourism-related developments to the years prior. While exogenous shocks (geopolitical conflicts, macroeconomic crises, etc.) kept introducing difficulties for the sector, the severity of restrictions died down, and tourism businesses could start to re-build their stability.

A note...

Here, I would like to make my first remark and recommendation. In our current, data-driven economy, it is surprising how little information is released or available about tourism in the region. Clearly, this will likely become an issue in planning and informed decision-making. Later, this report develops this further. It would be recommended to partners to already start thinking about ways in which they could help their competitors – and collaborators – in acquiring valuable insights.

Each annual statistical measure (except for the annual rate of change of the Harmonised Index of Consumer Prices) is collected on the level of NUTS-2 regions. This is because, while this typographical decision is not the most representative of the region's specifics, it is still the most reliable in terms of comparison. It offers valuable approximations, even if it does not clearly match the destination's borders. The two regions that were selected are Burgenland and Nyugat-Dunántúl (Western

Transdanubia). The reader can see the following trends emerge, however, they cannot conclude—at least without any rigorous investigation—anything about what is driving these processes. They are at least useful in understanding how the economy around tourism forms in the region.

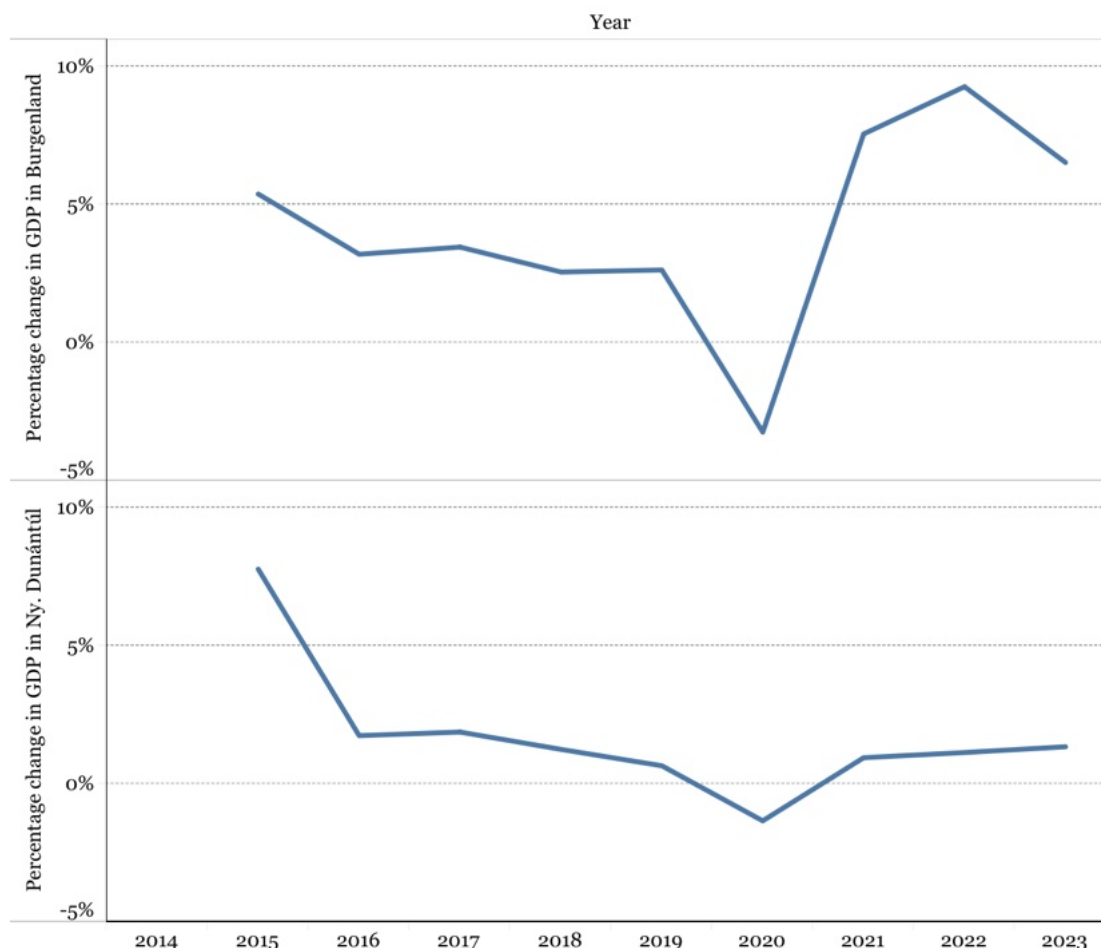


Figure 1: *Year-to-year percentage change of regional GDP from 2014 to 2023²; the author’s own formulation based on data from Eurostat.*

The gross economic activity in the region displays growth in both regions. However, the annual average growth rates of regional GDP are showing different paths to recovery after 2020. In this 8-year period, the Hungarian region shows a steady decline and stagnating growth rate, which seems to stay around the annual 2% mark after 2020. On the other hand, Burgenland shows a similar but less pronounced decline before 2020. Seeing the magnitude of change, the Austrian region suffered much more loss during heavy travel restrictions. Yet, it recovered with much larger growth rates which even exceeded pre-2020 trends. While annual change in GDP is a fair measure of trends in economic activity, it might be less telling for tourism in the case of Covid-19. This is because tourism was more substantially affected by the

² Eurostat, “Produit Intérieur Brut (PIB) Aux Prix Courants Du Marché Par Région NUTS 2.”

travel-restrictions than most other industries³, which makes aggregate GDP rates a bit less relevant. Hence, one should be cautious how they interpret the data in the Netzwerk's context. Nonetheless, it shows that Burgenland - by and large - seems to be more vulnerable to shocks like Covid-19, while still being able to recover its growth faster. These trends are coupled with stagnation in employment rates, which fluctuate around 72-77 percent in the two regions across years from 20⁴. This trend is well-founded in economic theory, and could signal a healthy economy.

TIME	2020	2021	2022	2023	2024
European Union (EU27)	0,70	2,90	9,20	6,40	2,60
Austria	1,40	2,80	8,60	7,70	2,90
Hungary	3,40	5,20	15,30	17,00	3,70

Table 1: *Year-to-year percentage change of annual average HICP from 2020 to 2024, Eurostat⁵.*

However, a stark difference emerges when we look at the Harmonised Indices for Consumer Prices (HICP). This index is a way of measuring inflation which is calculated using a wide variety of comparable, cross-country bundles of goods and services. Compared to the average of the 27 member-states of the EU, the mean growth of this price index in Hungary consistently and considerably is higher than the cross-country average. In 2023, prices increased—based on this metric—more than 2.5 times faster in Hungary than on average in the Union. In the same year, the Austrian mean change was only around 20% higher than the EU27 average. This considerable difference should be paid attention to. While it is a structural issue, it can have grave consequences for the pricing of tourism-related services, which will impact guests' perception about the price-value nexus on the two sides of Lake Fertő.

Regarding metrics for tourism, we can see the following trends. The number of establishments does not show significant deviations in a cross-sectional analysis, with averages around 615 establishments in Western Transdanubia and circa 426 establishments in Burgenland, over the years. The number of bed-places, however, more than doubled in Burgenland between 2022 and 2023. This trend did not show up in Hungary, where the number of beds fluctuated closely to its multi-year average.

³ Plzáková and Smeral, "Impact of the COVID-19 Crisis on European Tourism."

⁴ Eurostat, "Taux d'emploi Des Personnes Âgées de 15 à 64 Ans, Par Région NUTS 2."

⁵ Eurostat, "HICP - Annual Data (Average Index and Rate of Change)."

TIME	2020	2021	2022	2023	2024
Burgenland	410,00	412,00	428,00	427,00	455,00
Nyugat-Dunántúl	:	595,00	642,00	618,00	606,00

Table 2: *Number of registered establishments providing accommodation from 2020 to 2024, Eurostat⁶.*

TIME	2020	2021	2022	2023	2024
Burgenland	27748,00	27912,00	28292,00	62626,00	62579,00
Nyugat-Dunántúl	:	53111,00	51156,00	49175,00	50217,00

Table 3: *Number of available bed-spaces at registered establishments providing accommodation from 2020 to 2024, Eurostat⁷.*

A steadily increasing number of tourists have arrived in Burgenland, who spent a similarly trending number of nights in tourist accommodation establishments. The growth was noticeable in Western Transdanubia as well, except for the year 2022 in which a higher growth rate could be seen in the region. After this bump, the slope of the overall trends returned to its previous level. Unsurprisingly, both arrivals and nights spent show the similarly correlated relationship in Hungary as well.

TIME	2020	2021	2022	2023	2024
Burgenland					
Arrivals	651267,00	703910,00	929686,00	1045486,00	1105626,00
Nights spent	1990790,00	2186092,00	2610132,00	2842291,00	2983732,00
Nyugat-Dunántúl					
Arrivals	1021075,00	1162922,00	1969123,00	1983926,00	2149107,00
Nights spent	2932768,00	3365820,00	5471517,00	5242339,00	5528461,00

Table 4: *Number of arrivals and number of nights spent at registered establishments providing accommodation from 2020 to 2024, Eurostat⁸.*

As indicated in the introduction, the challenge, which I am trying to address in this strategic proposal, is well-documented empirically. Despite the growth in the number of visitors and the number of nights spent, the average length of stay (LOS) is steadily decreasing on both sides of the border. On the graph below, the reader can see that

⁶ Eurostat, "Nombre d'établissements et Places-Lits Par Région NUTS 2."

⁷ Eurostat.

⁸ Eurostat, "Nuitées Dans Des Établissements d'hébergement Touristique Par Région NUTS 2"; Eurostat, "Arrivées Dans Des Établissements d'hébergement Touristiques Par Région NUTS 2."

the trend of average LOS is displaying a clearly significant ($R^2_{\text{Burgenland}}=0,83$ and $R^2_{\text{Ny. Dunántúl}}=0,91$) negative slope. This is problematic for multiple reasons.

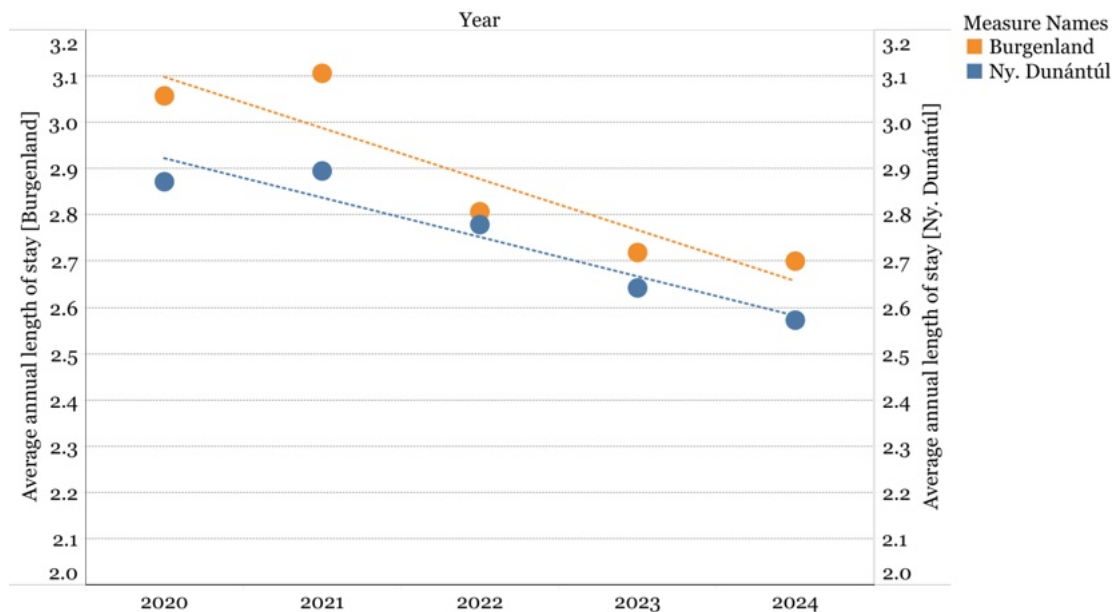


Figure 2: *Changes in average annual length of stay 2020 to 2024; the author's own calculations.*

A decreased LOS will eventually mean a decreased spending in the region, coupled with a less sustainable and financially viable form of tourism⁹. In addition, shorter stays typically introduce a stronger sense of central-periphery divide, leading to the economic abandonment of more rural areas in the region. This can introduce and strengthen regional disparities and increase mistrust. Hence, in this economic environment characterized by the statistics described above, it is a reasonable aim to reverse this trend through the efforts of a network with increased partnerships.

Key facts:

- Burgenland's GDP growth displayed stronger vulnerability to Covid-19 and more pronounced recovery, while Western Transdanubia's growth has been revolving around a relatively low yearly average.
- Average yearly inflation was considerably higher in Hungary.
- Recovery after 2020 has been steady in both regions, both in the number of arrivals and in nights spent.
- Simultaneously, the average length of stay (in both regions) has been showing a significant downward trend within the examined period.

⁹ Martínez-Roget et al., "Length of Stay and Sustainability."

Literature on the region

When reviewing the literature about the region, I have found 3 major topics that are covered by the authors: the supply-side, the demand-side and the future of the region. In brief, I will review what has been recently documented about the region. Later, I will use this review to further discuss the future of the Netzwerk.

The region is a unique and multifaceted area with rich historical-cultural and natural assets¹⁰. The region has been recognised as a UNESCO World Heritage Cultural Landscape¹¹ since 2001. This, however, does not immediately cause increased tourism demand and international interest. It is a common misconception that the UNESCO recognition would simply translate into more tourism¹². The following broad categories of tourism supply has been identified in the literature: a border-region with diverse cultures, climatic zones, and ecological habitats with a rich archaeological, ethnographic, and architectural heritage¹³. It is beyond the scope of this strategy to analyse each segment of the region. Instead, I introduce some general remarks to the reader. First and foremost, on the documented and available knowledge on the region. During my research, I have tried to synthesize tourism-specific information from many sources. Yet, I was surprised to find how little academic and professional research has been conducted or re-evaluated over the years. In addition, there is a lack of continuous data-collection about the visitors¹⁴. There would be ample opportunities that innovation and data-driven solutions could bring to the region. This, however, would need to be grounded in a depth of knowledge that is easily accessible to any and all actors. Later on, I will outline some actionable recommendations on this matter.

Secondly, I will talk about tourism supply in the Fertő-Neusiedler See region. There is a similar, yet qualitatively different, offer to tourists on the two sides of the border. The biggest strengths are identified in relation to cultural and heritage tourism (archaeological or ethnographic heritage; classical and popular music), active and ecotourism (biking, hiking, sailing, etc.), enotourism, health tourism (especially in Hungary—usually because of its affordable services¹⁵), shopping tourism (especially

¹⁰ Barcza, "A sopron-fertő-térség turisztikai kínálatának és a turisták mobilitásának vizsgálata"; Janisch et al., *Tourismusregion Neusiedler See - Risiken und Chancen einer europäischen Destination*.

¹¹ UNESCO, "Fertő/Neusiedlersee Cultural Landscape."

¹² Janisch et al., *Tourismusregion Neusiedler See - Risiken und Chancen einer europäischen Destination*.

¹³ Janisch et al.; Simon, "Kültúrturisztikai értékek feltárása és fejlesztési lehetőségei Balf és Fertőrákos térségében"; Barcza, "A sopron-fertő-térség turisztikai kínálatának és a turisták mobilitásának vizsgálata"; Makra and Szabó, "Sopron–Fertő, as a Priority Tourism Development Area."

¹⁴ Simon, "Kültúrturisztikai értékek feltárása és fejlesztési lehetőségei Balf és Fertőrákos térségében."

¹⁵ Barcza, "A sopron-fertő-térség turisztikai kínálatának és a turisták mobilitásának vizsgálata."

in Parndorf, Austria¹⁶). It is well-documented that the supply of tourist attractions in the region offers great diversity. This rules out the possibility that the region should focus on one or two key industries. Instead, it signals the importance of well-integrated touristic offers to the audiences.

The Hungarian side of the border has invested deeply in infrastructure and new opportunities. These developments did not always realise the hopes assigned to them. It is especially the case with the former water facility in Fertőrákos which was supposed to become a tourist hub after its reconstruction. After reconsideration from the national authorities, the Northern Port re-opened just recently and new discussions have started with stakeholders who criticised previous plans¹⁷. Despite the Hungarian government treating the region as a strategically important area for tourism, some challenges can still be noticed. Fragmented marketing initiatives and the lack of cohesive, integrated experiences burden the region. In one author's account, this is attributed to the perceived, negative attitude that some Hungarian service providers display towards networking and cooperation¹⁸. This also impacts standalone cultural heritage sites as well, whose potential is not fully grasped without integrating them into cohesive packages¹⁹. The existence of the FERNENET association, however, seems to defy this perceived trend, at least on a micro-level.

The Austrian side is organisationally different from its Hungarian counterpart. It is characterised by a mature and strategically managed approach. The regional destination management shifted from a historically fragmented set of associations to a centralised management company which could successfully pool resources²⁰. While the establishment of the "Burgenland Card" shows that internationally recognised good practices are available to the region, still challenges persist. Some authors and professionals see issues with communicating the benefits that the card or other integrated services could offer to the visitors. There is also an outdated public perception about the seasonality of the attraction. In addition, some symptoms of overtourism, especially with regard to transportation and traffic jams, have been identified²¹.

Thirdly, I would like to briefly describe the visitors in the region. Historically, Sopron's neighbourhood had significant international (Austrian, German, Slovak)

¹⁶ Vincze, "„Ha nem vettem volna semmit, akkor is megérte volna" – megnéztük, miért jár még mindig osztrák outletbe a magyar."

¹⁷ Zsuppán, "Tragikus látvány a szétdúlt Fertő-part, de lenne kiút a zsákutcából."

¹⁸ Barcza, "A sopron-fertő-térség turisztikai kínálatának és a turisták mobilitásának vizsgálata."

¹⁹ Simon, "Kultúrturisztikai értékek feltárása és fejlesztési lehetőségei Balf és Fertőrákos térségében."

²⁰ Janisch et al., *Tourismusregion Neusiedler See - Risiken und Chancen einer europäischen Destination*.

²¹ Janisch et al.

demand. In 2018, domestic tourism played the most significant role, with 65.6% of surveyed respondents having visited Sopron and its surroundings. In this period, examined by Dr. Attila Barcza, there was a growing trend of tourists from Slavic countries (Slovak, Czech, Polish, Slovenian) attracted by natural values, cycling, and quiet environments. For those staying in Sopron, popular additional destinations include Fertőrákos, Fertőd, and Vienna²². In Burgenland, historically (until the 1980s), mainly Austrian and German visits were dominant, typically for two-week, beachside holidays. Currently, some more visitors come from abroad, but Austrian and German travellers still dominate the tourism market. Domestic tourists account for about 70% of overnight stays in Burgenland. The highest proportion of international guests is attracted by experiences related to nature, especially in the Seewinkel National Park region. Guests from neighbouring countries include Hungary, the Czech Republic, Slovakia, and Switzerland. Vienna is an important market, as well as part of the region's cultural tourism offering (meaning, it offers both demand and supply)²³.



For both sides of the lake, tourists are increasingly seeking authenticity, individuality, and a return to nature, driving demand for camping, caravanning, and tiny houses²⁴. Authors describe that many visitors come to the region primarily for peace and quiet, which can be provided by wellness offerings and national park activities. Tourists' point of view often transcends national borders, as they are unbounded by administrative units²⁵.

²² Barcza, "A sopron-fertő-térség turisztikai kínálatának és a turisták mobilitásának vizsgálata."

²³ Fritz et al., "Ein Regionales Tourismus-Satellitenkonto Für Das Burgenland Und Regionale Effekte Der Nichttouristischen Freizeitwirtschaft. Fortführung Für Das Berichtsjahr 2018."

²⁴ Janisch et al., *Tourismusregion Neusiedler See - Risiken und Chancen einer europäischen Destination*.

²⁵ Simon, "Kültúrturisztikai értékek feltárása és fejlesztési lehetőségei Balf és Fertőrákos térségében."

While the overall cross-border destination offers a diverse range of attractions, visitors may not always perceive it as a unified tourist region. For instance, many German-speaking tourists frequently visit Sopron primarily for affordable services like dental care or hairdressing, overlooking other local attractions. Conversely, Hungarian cycling enthusiasts may find a lack of Hungarian-language programs on the Austrian side. However, some tourists actively engage in cross-border activities, such as cycling around the lake which they find to be a unique experience, especially, due to the border crossing²⁶. For these reasons, cross-border cooperation is an evident next step to evaluate.

Historically, cooperation across the border has been present but inconsistent, with the region regularly functioning more as a collection of cross-border entities rather than a cohesive 'shared cultural area' with no overall conceptual framework. Past collaborative efforts were frequently limited to EU-funded Interreg projects. Despite challenges, historically, there have been some successful initiatives, such as the introduction of the "Neusiedler See Card" which, starting in 2002, provided free access to numerous attractions on the Hungarian side of Lake Fertő²⁷. In more recent memory, as mentioned above, the efforts of the FERNENET association also show continued cross-border engagement. However, a unified destination marketing plan for the region is still lacking, and organisational structures for tourism marketing remain uneven across the border²⁸.

Looking to the future, there is a strong emphasis on networking and fostering deeper cooperation among tourism organisations, which should transcend co-funded EU-projects. Some recommendations suggest creating thematic 'experience chains' and specific tours that link cultural and natural attractions across the border, transforming them into a unified, engaging experience²⁹. In the end, the goal could be to seamlessly integrate the colourful palette of assets in the region into a unified tourism offer. This should encourage longer stays, attract a broader visitor base, and establish the area as a high-quality international destination³⁰.

On a final note, there is an issue which may require an even stronger and more urgent action collectively. Climate change is a further structural issue (alongside geopolitical or macroeconomic shocks) for both sides of the region. It is beyond the reach of my expertise to fully grasp the effects of global warming and a changing climate on the

²⁶ Janisch et al., *Tourismusregion Neusiedler See - Risiken und Chancen einer europäischen Destination*.

²⁷ Janisch et al.

²⁸ Janisch et al.

²⁹ Stoffelen and Vanneste, "Tourism and Cross-Border Regional Development"; Timothy and Gelbman, *Routledge Handbook of Borders and Tourism*.

³⁰ Timothy and Gelbman, *Routledge Handbook of Borders and Tourism*.

lake and its tourism. Yet, it is important to mention some relationships to the reader. The region is vulnerable to a significantly decreased water level of the Fertő-Neusiedler See³¹. Dependencies on eco and active tourism could hurt the industry significantly, should any negative developments happen to the environment of the lake. While regional sustainability efforts are continuously increasing³², there is a clear need for building resilience in the sector. A long-term vision could include making the region a model for sustainable tourism, ensuring that tourism benefits local communities beyond just economic gains, while integrating a sensitive approach to the environment.

At a glance...

I believe that there is a lack of research that is available currently in understanding the region's capabilities and the accessible demand. It is well-documented that the supply of tourist attractions in the region offers great variety. This rules out the possibility that the region should focus on one or two key industries. Instead, it signals the importance of well-integrated touristic offers to the audiences. Destination management differs significantly, with Burgenland leading the way in integrating multiple stakeholders into their marketing efforts. On both sides of the lake, regional, domestic and European visitors are dominating demand, with a growing trend in people searching for authentic, close-to-nature experiences. Data collection on these segments, however, is still fragmented on the regional level. Cross-border cooperation is historically scattered, a unified destination marketing plan for the region is still lacking, and organisational structures for tourism marketing remain uneven across the border. Climate change, especially with regard to the flora and fauna of Lake Neusiedl/Fertő, remains a key structural challenge for the destination.

³¹ Soja et al., "Climate Impacts on Water Balance of a Shallow Steppe Lake in Eastern Austria (Lake Neusiedl)."

³² Janisch et al., *Tourismusregion Neusiedler See - Risiken und Chancen einer europäischen Destination*.

The image is a full-page background photograph. It depicts a coastal or marshy landscape during the 'golden hour' of sunset or sunrise. The sky is filled with large, dark, textured clouds that are illuminated from below, creating a warm, orange-gold glow. The horizon line is visible in the distance, separating the sky from the land. In the foreground, there is a wooden viewing platform or walkway with a railing, partially obscured by tall, golden-brown reeds or grasses that are blowing in the wind. A small, dark silhouette of a person is visible on the right side of the platform, looking out towards the horizon. The overall mood is contemplative and serene.

DEEPER UNDER- STANDING

© László Hajdú

Deeper understanding

While the previous section offered a broad review on what is available knowledge on the region (and about where to look for more), this section goes a step further. In building an actionable proposal, we need not only to understand the region from ‘above’ but also, we need to understand it with a specific goal in mind. As outlined in the introduction, I am proposing actionable insights that bring the association closer to becoming a strong collective which could successfully retain guests in their network (and by extension, in the region) for longer. For this reason, in this section, I review two sources for inspiration. Firstly, I will outline the ideas that some members of the Netzwerk have kindly shared with me during some hour-long interviews. Later, I will respond to some of the themes that I saw emerge from those discussions. I do so by introducing similar European border regions who faced some challenges and arrived at a solution through the collective action of a diverse set of stakeholders.



Insights from the interviews

I have conducted interviews between the 9th of July and the 4th of August. The length of each individual discussion spanned around 35–55 minutes and followed a semi-structured³³ methodology. During the interviews we have explored themes of consumer segmentation, perceived strengths and challenges and also motivations and expectations regarding the network. Any and all details that could identify the interviewee has been removed from the description below. For this reason, I can also

³³ A semi-structured interview is a qualitative research method characterized by a flexible and fluid format. Instead of following a fixed sequence of standardized questions, it uses an interview guide with key topics or themes to cover. This allows the interviewer to adapt question order, explore emerging ideas, and follow the interviewee’s perspectives while still addressing the research objectives; Lewis-Beck et al., “Semistructured Interview.”

not share details about the interviewees, as it would be difficult to hide the identities of the participants in such a small community. I have interviewed an equal number of participants ($n_{AT}=3$, $n_{HU}=3$) from both sides of the border, from a wide range of organisational and professional backgrounds. In the following section, I will discuss the most interesting topics that have emerged from these discussions.

From the interviews, three major topics have emerged. I will use these as the foundation of my further recommendations, as they coincide with and are supplementing the reviewed literature above. Before I turn to these topics, I would like to briefly outline some general remarks about the experiences shared with me. At the most basic levels, each participant stressed strongly that now it is the time that true collaboration happens in the region. This comes as no surprise, as my sample is restricted to members who already believe in the vision that the association carries. In general, they noted that bilateral collaborations between private firms involving both sides of the border works perfectly, it is less the case with some public administration bodies and adjacent organisations. Alongside this, there were multiple mentions of creating connections between individual attractions, contributing to an integrated package offer, which has been a recurring talking point not only during interviews but also in what the organisation has covered already so far. In accordance with other professional opinion³⁴, respondents would like to benefit from a unified marketing strategy for the region. In the following, I will outline three themes that I heard repeating and which, I believe, can help this organisation succeed in the goals set out by the Netzwerk.

“Let’s work really together.” – an interviewee

Most of the respondents agreed that there still exists a mental barrier between the two sides of the border. While being part of the Schengen zone alleviated any difficulties with mobility in the region, most respondents noted that socio-economic differences are still visible. This confirms what others have found already³⁵. They also tended to agree that these invisible walls need to be ‘broken down’ for good cooperation. Some participants explicitly referred to the necessity of building trust among the members. They noted that through these newly formed networks of organisations, support mechanisms could and should arise, which will go beyond ‘listening’ and ‘understanding’ the difficulties of others. Instead, the information that

³⁴Janisch et al., *Tourismusregion Neusiedler See - Risiken und Chancen einer europäischen Destination*.

³⁵ Barcza et al., “Sopron turisztikai szezonálisának és a turizmusfejlesztés szükséges irányainak vizsgálata.”

respondents shared with me pointed to the need for creating resources (ranging from advice to even material) which are available to the members in need. This, however, would require a really tightly-knit community. According to the interviewed members, this could be achieved through smaller working groups (“cliques”), and a growing legitimacy within. In inquiring about legitimacy, the patterns of responses pointed to a strong and decisive leadership team with an “act now” attitude as a basis for cultivating it.



Businesses and other stakeholders who are currently participating in the network are deeply knowledgeable about their organisations’ place in the region. All interviewees were very well-informed about their target segments and organisational roles available to them. Most participants also seemed to have a balanced view on their own offerings and the possibilities in the region. While this is not surprising, it is nonetheless noteworthy because it highlights the breadth of knowledge that could be shared. Interviewees have shared that regardless of the size of their organisation, they see great value and potential in hearing others’ experiences and feedback. However, this is not all. A majority of respondents have indicated that knowing “more” is essential in informed decision-making. Some participants would actively seek a platform where they can learn from each other. Hence, the second pillar of this strategic proposal rests on the understanding that collaborative knowledge production is key in furthering the region's position as a sought-after destination.

Lastly, and again, unsurprisingly, shaping the public’s opinion on the destination emerged as a key factor from the discussions. The patterns of responses pointed to two main areas of public relations: advocacy and marketing. First, some respondents asserted that there would be a growing need for a strong advocacy organisation in the

region, which could represent the interest of tourism related stakeholders. They mentioned that public authorities would take development and policy related recommendations or requests more seriously, given, there was a strong entity which connected many stakeholders in the region. This could, in their view, also help ensure that the collaborations with public authorities also gets smoother. Secondly, visibility as a unified destination seemed to be a recurring topic. The majority of respondents believe that an association like FERNENET should have the ability to promote the region's touristic offers at a larger scale. This was imagined by some as a 'deepening,' that is attracting more customers from the segments already interested in the region. Others have imagined a 'widening', which means that communal marketing efforts in the association could result in attracting different target groups (even beyond Europe).

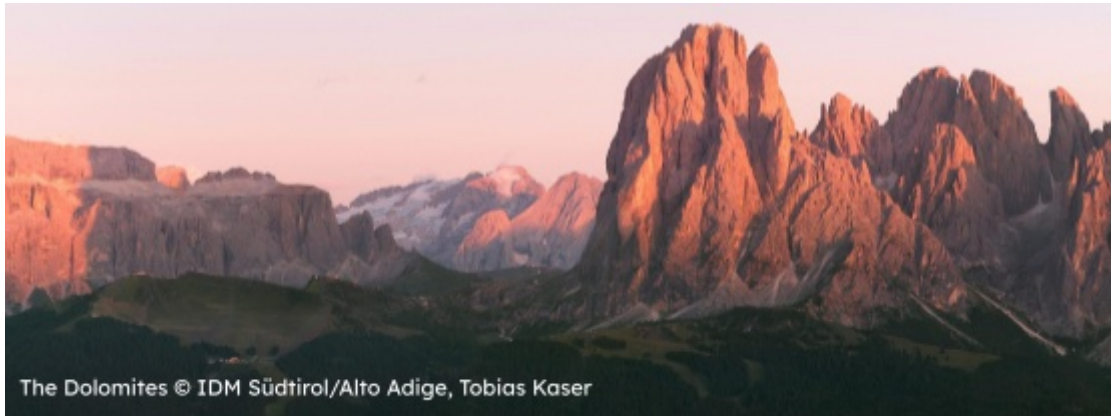
In summary, I have found that there are three major topics that concern those who responded in my interviews: trust-building, knowledge-sharing, advocacy and marketing. As I explain further in the 'Vision for Later' section of this document, they are deeply embedded elements that are mutually reinforcing each other. However, before turning to the vision itself, I would like to introduce some short cases that I will use later on as reference when recommending next steps for the organisation.

At a glance...

There are three key topics that emerged from discussions with stakeholders in the region. Respondents feel that there is still a strong sense of division between the two sides of the border. **Trust-building** could be achieved through establishing a strong leadership which signals legitimacy and drive. It is necessary for any future collective action. **Collaborative knowledge production** seems to be a relevant and intuitive area to focus on. Members of FERNENET have a depth of industry experience, which could potentially benefit all members if shared in a mutually agreed upon manner. **Advocacy and marketing** is necessary in both shaping public authorities' policy decisions and the perception of target audiences. Representing the interests of private tourism businesses could make development more tailored to the needs of organisations in the region. Regional marketing efforts could elevate the region to the level of an internationally recognised destination.

Case studies from around Europe

In the following section, I will discuss two case studies from cross-border tourism regions in Europe. These should serve as a source for inspiration when discussing the possibilities of the Network in the following chapters. I selected these benchmark cases based on how well they describe solutions in which at least one of the three elements are in the focus of development efforts. The key takeaways are summarised after each case in a brief format.



South Tyrol³⁶ (Austria-Italy)

Tourism in the region: Tourism plays a major role in South Tyrol's economy. It contributed to 11.4% of the local GDP in 2019 through direct impacts alone. In 2023, the Italian province recorded over 8.4 million tourist arrivals and 36.1 million overnight stays, reflecting significant increases over the past two decades. The region's success raised concerns about overtourism and burden on social and natural resources, suggesting a need to shift from quantitative growth to redistributing demand. The hospitality sector shifted toward higher-quality accommodation facilities, with the share of 1- and 2-star hotels decreasing from 46.1% in 2004 to 24.5% in 2023, while 4- and 5-star hotels surged from 5.6% to 15.4% in the same period. Other accommodation types like campsites, private lodgings, and agro-tourism ventures have also experienced significant growth, accounting for 66.7% of all accommodation establishments and 36.1% of all beds as of 2023. The key types of holidays include active/sports (54%), culinary (31%), and family holidays (20%). Other offers include thermal baths, traditionally used for therapeutic treatments but now also for well-being. The region promotes itself as a region for gourmets with high-quality wines, fruits, and pork products. Culinary tourism and

³⁶ The case is presented based on reviewing the following three sources: Wallnöfer et al., *The Sustainable Tourism Observatory of South Tyrol (STOST). Annual Progress Report*; Schnitzer et al., "Analyzing the Coopetition between Tourism and Leisure Suppliers—A Case Study of the Leisure Card Tirol"; Kreisel and Reeh, "Tourism and Landscape in South Tyrol."

farmhouse holidays are expanding, supporting local farmers and enhancing the region's image.

Inspiration for knowledge production: Launched in 2018 as a component of UN Tourism's observatory network, the Sustainable Tourism Observatory of South Tyrol (STOST) tracks the effects of tourism in the region. It works by focusing on the 11 mandatory issue areas proposed by UN Tourism (seasonality, employment, economic benefits, governance, energy, water, wastewater, solid waste management, climate action, accessibility) and four additional, context-specific areas (mobility, nature conservation, land use, culture). They collect data from various sources, including both publicly and privately available databases. STOST's governance includes core organizations like a research centre, an IDM, a hotel and restaurant association, and the provincial government. Based on the findings of STOST, these stakeholders developed a sustainability program for tourism, including a new South Tyrol label for both accommodation facilities and municipalities. This program builds on existing third-party certifications and encourages destinations to create sustainability strategies and action plans through a participatory process. Those destinations that joined need to appoint sustainability managers who act as "change agents" fostering these innovations. Training sessions and workshops on sustainability communication are organised for partners. A sustainability community meets regularly for knowledge exchange with international experts. Some examples of their actions include reforming regional supply chains or encouraging public transport use by guests.

At a glance...

In South Tyrol, the STOST research hub focuses on understanding the specific context of the region related to sustainable tourism. It offers recommendations to decision-makers, both in the public and private spheres. The approach of establishing an independent, cross-border research centre, could potentially be implemented in the Lake Fertő/Neusiedl region as well. While its funding would be a major concern initially, a pilot programme, possibly by inviting regional higher education institutions, would be worth considering. The case study shows that there are viable initiatives for knowledge production and sharing in a tourism context.

Cerdanya Valley³⁷ (Spain-France)

Tourism in the region: The Cerdanya Valley is a traditional mountain tourism destination in the Pyrenees, divided by the Spanish-French border. Similarly to the Hungaro-Austrian border region, the sides are sharing history, culture, language, and traditions. The region has been popular since the 1950s, attracting visitors mostly from nearby cities (Barcelona, Perpignan, Toulouse). It features over 10 ski resorts within a 30 km catchment area, along with other cultural and heritage sites. The entire Cerdanya region is functionally considered a single tourism destination, as accommodation on the Spanish side also serves ski resorts on the French side. The high border permeability allows transborder destinations to function as natural extensions of each 'local' market.

“Regarding cultural identities across the border, long periods of sociocultural separation favoured the emergence of mistrust, envy, rivalry, suspicion and other negative emotions between the two communities³⁸.”



Inspiration for trust-building and advocacy: The development of cross-border tourism networks and governance structures is shaped by institutional similarity, bridging actors (what we might call “institutional brokers³⁹”), entrepreneurial capacities, and close relationships. In 2013, a formal collaboration agreement was signed between public and private partners, leading to the establishment of a cross-border, public-private Steering Committee. This committee is responsible for

³⁷ The case is presented based on reviewing the following three sources: Blasco et al., “Emergence of Governance in Cross-Border Destinations”; Timothy and Gelbman, *Routledge Handbook of Borders and Tourism*; Makkonen and Williams, “Cross-Border Tourism and Innovation System Failures.”

³⁸ Blasco et al., “Emergence of Governance in Cross-Border Destinations,” 167.

³⁹ Timothy and Gelbman, *Routledge Handbook of Borders and Tourism*.

developing a cross-border strategic plan, creating joint products, promotional materials, a shared website, and managing new training courses and staff recruitment.

A note...

The key sentiment that this case teaches the Fertő-Neusiedl region is that even entrenched and historical “mistrust, envy, rivalry, suspicion” can be overcome by building resilient communities across the border. While ‘neutral’ institutional brokers are difficult to find in our own region, efforts to bring similarities, entrepreneurial capacities and collegial relationships together in the region is more than possible. It is also very much needed.

Early attempts at cross-border collaboration, especially those driven by public administrations and EU funding, were often surface-level. **It is important, from an early stage onwards, that EU funding does not become an obstacle to meaningful connections.** Stakeholder engagement faced the challenge of parochialism among regional destination managers and political limitations for local authorities to operate beyond their mandated territories. Power struggles are also observed among municipalities. Some organisations tried to manage these dynamics by inviting representatives from various French and Spanish entities to discuss cross-border initiatives. Previously, attempts at product development did not consider new markets, leading to products that were only sold to existing visitors without real impact. Tourism maps commonly presented to visitors frequently only showed one side of the valley, disregarding the potential for cross-border tourism. Interestingly, initiatives led by private firms or organisations tended to be more stable. The most effective combination for success is business initiatives supported by public administrations that provide funding.

The sources mention that **close personal and informal relationships**, based on friendship or kinship, **are crucial for building trust** and creating new, collectively designed products. The case shows that only about a third of businesses on both sides are active participants in organising initiatives. This suggests that **identifying and supporting the most entrepreneurial actors is a more effective** strategy than forcibly including everyone at all times. The region moved towards an “industrial cluster⁴⁰” logic, recognizing that this benefits destination management.

⁴⁰ Timothy and Gelbman.

Industrial cluster logic is opposed to territorial cluster logic. This means that whereas thinking with a territorial cluster, logic destination management will stop at the border – the official ‘end’ to the territorial cluster. An industrial cluster will focus on strengthening management efforts within industries (transportation, accommodation, etc.), even if they are beyond the border. Current efforts include developing and organizing dedicated cross-border networking events and co-working spaces that can facilitate interaction between different businesses.

At a glance...

Building trust between cross-border stakeholders is not impossible. Even if historical divides and entrenched feelings of mistrust are present in a cross-border context. It requires personal-informal relationships. Instead of involving every stakeholder at all times, it is worth supporting the most entrepreneurial organisations. This could increase a sense of legitimacy in all other collaborators, essentially building trust within the organisation. This is a sentiment that has been shared in interviews previously as well.

Collaboration between private businesses in the region helped with building longer-lasting product development efforts. Adopting an industrial cluster logic benefits cross-border cooperation, as territorial clustering would stabilise the sentiment of ‘othering’. New markets also need to be considered, hence, confirming that widening markets is a possibility.

© Olaf Jürgens



VISION
FOR LATER

Vision for Later

In light of everything that the reader now knows, this section will provide a long-term vision for the Fertó-Neusiedler See Netzwerk. This strategic vision proposes a set of goals that could be used as a guide in the association's day-to-day activities. It is founded in the research that has been presented previously, drawing not only on formal descriptions but also the experiences of current members and industry opinions on other, similar transborder destinations. This section sets out to explore both the problem statement that was introduced in the beginning of this proposal, and the three pillars that were identified. In the beginning, it briefly discusses why increasing length of stay is key in the long-run. After that, it sets out long-term goals in line with the research above.

As briefly noted above, length of stay is an important characteristic of tourists visiting a region, not only for understanding demand, but also because of sustainable tourism development. Length of stay is typically determined by a complex interplay of factors, including tourists' sociodemographic profiles, trip characteristics, destination attributes, psychological and experiential factors, and other external conditions like political stability⁴¹. Longer stays are typically correlated with higher average spending per person (boosting the local economy), lower local environmental burden and lower division between central and peripheral attractions (trips become more 'spread out' among different attractions⁴²). Considering this, it is especially key in the context of the Lake Fertő/Neusiedl region, as statistics showed that regardless of recovered numbers in arrivals and nights spent, on average, the destination is facing a negative trend in LOS. Sustainable regional development, hence, will require a more focused approach to LOS on the macro-level. Taking this into account, it will be continuously relevant, even in the long-run, that the region considers this indicator. No wonder why the association itself is particularly focused on the issue.

However, the ways in which LOS may be increased differ. Both interviewees and the case study about the Cerdanya valley confirmed that integrated package offers and destination-level marketing effort could increase average length of trips. Intuitively, the more attractions people would like to visit, the more time they would like to spend exploring the region. Yet, based on the determinants of LOS, we might think of reversing the negative trend from a different angle as well. In line with the findings from the interviews and the cases above, a strategic widening of market segments

⁴¹ Barros and Machado, "The Length of Stay in Tourism"; Martínez-Roget et al., "Length of Stay and Sustainability"; Timothy and Gelbman, *Routledge Handbook of Borders and Tourism*; Mihai et al., "Exploring the Factors Involved in Tourists' Decision-Making and Determinants of Length of Stay."

⁴² Martínez-Roget et al., "Length of Stay and Sustainability."

might also be necessary. In the context of LOS, this could mean specifically targeting households with higher average disposable income or segments with significantly more time to spend embarking on tours. As there are documented remarks on fragmented efforts in becoming a cross-border destination, both strategies might face challenges. Therefore, any tangible long-run goal requires that a solid foundation is laid out in terms of transborder collaboration. It is the vision of this proposal that by fostering the three pillars – trust, knowledge and public relationships – the divisions and fragmented relationships could be reduced. Hopefully, they can even be eliminated.

In short, I propose that the association's vision would be becoming an organisation, which businesses, audiences and public authorities can trust. One in which members understand not only market trends but each other as trustworthy partners. An association which is well-known and respected in tourism development and policymaking.

In the following, I will use the words trust, knowledge and public relations in many shapes. I try to adopt a broad definition for each. More specifically, when I talk about trust, I consider it applying not only between members but also between FERNENET and the 'greater public' or regional authorities. Similarly, knowledge is considered in its fullest, from private innovation to sharing details about oneself in informal conversations. Public relations will largely refer to how the association is perceived by others, and how much legitimacy it is attributed.

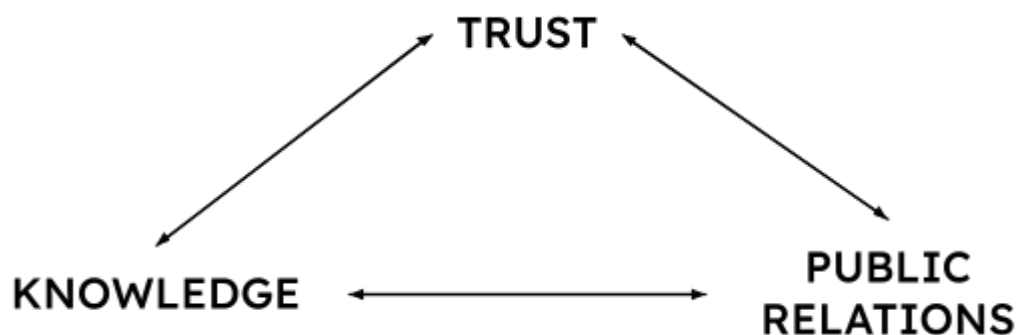


Figure 3: *Stylised relationships between the three pillars; the author's own formulation.*

It is not the goal of this proposal to elaborate on the philosophy of trust. The reader will have a strong attachment to the meaning of this word, and can apply it to the relationships in their daily life. Yet, as described above, it is difficult to foster a trustworthy relationship in business, especially, when historical differences make it even more difficult. FERNENET needs, therefore, to become an entity which is fostering an environment of trust both from within and outside. Trust, then, is largely built upon understanding each other as businesses and organisations working in the same environment. This understanding, then, becomes a part of knowledge sharing. The better people know details about each other, the more easily they can trust the other person. In turn, knowledge production and innovation requires trust. Intuition tells us that it would be difficult sharing our best practices, our family recipes, and so on, with people whom we think of as malicious or someone with unknown intentions. Trust could provide a common understanding and an expected level of mutual respect that would align the interests of economic actors, overcoming the free-rider problem⁴³. As much as classical economic theory is convinced that competition fosters innovation, in thinking about social capital, trust within the context of collaborative learning processes is necessary⁴⁴. Hence, it should not be beyond our imagination to think of trust and knowledge as mutually reinforcing areas for long-run development. On Figure 3, this connection is visualised by the double-sided arrow on the left-hand side: trust needs knowledge, knowledge (sharing/production or innovation) needs trust.



⁴³ The free-rider problem is a well-documented economic paradox introduced by the political economist Mancur Olson. It is a situation, in which rationally thinking individual actors fail to contribute to a public good. While it would benefit everyone to advance the “commons” there would be individuals recognising that they could benefit without contributions. To find out more, please read: Olson, *The Logic of Collective Action*.

⁴⁴ For further discussion on the matter, please consider reading: Dovey, “The Role of Trust in Innovation.”

Armed with knowledge about each other – but also about the resources, demand, supply and innovative practices available – members of the FERNENET would face their (future) guests with attractive packages that could potentially achieve a longer length of stay. Additionally, they could better target audiences that are not yet available to them as a business or to the region as a whole. Conversely, a well-known way of learning more about our guests is through looking at the efficiency of our marketing campaigns. The best practices that come from these experiences are valuable on a level beyond individual businesses. Similarly, while simply knowing more would not translate directly to greater influence on policy-makers, it could signal a strong collective commitment to change. It would do so by communicating the depth of knowledge present in regional organisations as the experience of a whole community, rather than the experience of separate individual actors. Yet again, it is not a one-sided dependency. Public authorities could allow for research and development funds, or they could invest in regional innovation. The knowledge-relationship nexus should be a long-term goal in the mind of the members of the association. On Figure 3, this relationship is visualised by the double-sided arrow on the bottom: public relationships require knowledge, knowledge needs public relationships.

Lastly, building outward facing relationships – through marketing or advocacy – also demands a certain level of trust. As noted above, trust is necessary in aligning common expectations, as it is based on informal ties that go well-beyond economic interest. Hence, if the organisation would like to act as a coherent destination, both towards (potential) guests and public administrators, then trust is inevitable in communication. Building a strong public image – regardless of its nature – is also necessary for building trust within the organisation. If, in the long-run, FERNENET becomes an organisation that could successfully bargain with policymakers, or an organisation which brought growing international attention to the region, then legitimacy (and by extension) trust in the association should increase. It is true for both member organisations and public policy representatives, as they both benefit from better collaboration or an increased attention. Thus, fostering a good connection between public relationships and trust becomes a palpable long-term goal for the network.

In sum, the aim to increase the average length of stay in the Fertő/Neusiedl locality is well-justified. As described, achieving a longer average period can be achieved through multiple channels. Yet, it would be difficult without building an organisation that has strong foundations in the pillars explained above. In addition, it is almost

impossible to imagine these pillars in reality without thinking about the interdependencies examined above. A caveat, however, needs to be made: while these recommendations are grounded in research, they are temporally contingent. While certain trends (for example, expecting higher income travellers to stay longer) should not change significantly, some other key aspects (like the needs and expectations of the member organisations in the association) might fluctuate. In line with my own recommendation, producing accurate knowledge about the direction of the Fertő-Neusiedler See Netzwerk is key. Continuous institutional development requires continuous monitoring, re-evaluation and an entrepreneurial mindset⁴⁵.

At a glance...

In this section, I have reviewed the three key areas that were identified during the interviews with the members. I recommended that these are viewed as the bedrock that is necessary in achieving the association's goal in boosting average length of stay. I pointed out that fostering one will advance another, and vice versa. Abandoning one will inevitably hurt the other. Hence, this proposal advocates for paying attention to the dependencies between knowledge sharing/production, trust-building, and public relations. In short, I propose that the association's vision would be becoming an organisation, which businesses, audiences and public authorities can trust. One in which members understand not only market trends but each other as trustworthy partners. An association which is well-known and respected in tourism development and policymaking.

⁴⁵ North, "An Introduction to Institutions and Institutional Change."

STRATEGY NOW



Strategy Now

By now, the reader should have a clear picture about what I believe are key aspects to understanding the opportunities and possible difficulties facing the region. I have also introduced a suggested long-term vision that the association could aim at. These carve out the focal points that an immediate and actionable strategy should address. The reader might rightly ask: “okay, but what now?” – and they would not be wrong. Based on the long-term vision for the organisation, I will recommend a few actionable steps with regard to each key pillar. These should all aim at answering the query about increasing the length of stay in the region.

A note...

Generally, I would recommend adopting a human-centred design approach⁴⁶ in any change-making processes. There are ample resources and knowledge available freely online that could guide the association’s work on how to approach difficult problems with the ‘human’ in the centre. While it is an approach usually aimed at startup businesses, solving issues with the users in mind is beneficial to a broader audience.

In brief, this is a process that starts by discovering what concerns the stakeholders face, researching and clarifying the ecosystem. The outcome should be a clear problem statement here. Then, it moves on to designing a possible solution that directly responds to the defined problem statement. Next, this solution should be tested on a small scale, then all new learnings from these should be used to develop the ‘final’ solution. At a certain point, when development seems to not produce better outcomes, the solution is launched. After that, an iterative understanding-testing-deploying cycle starts.

A recommended reading on this topic would be “Smart Tourism Destination Governance: Technology and Design-Based Approach” by Tomáš Gajdošík⁴⁷.

While I tried compiling most steps that would cover the association’s work holistically, the following should not be considered as an exhaustive list. It is partly because innovation is based on a continuous effort of trying and failing, which could only be carried out in practice. Instead, I aimed at providing a short toolbox to the Fertő-Neusiedler See Netzwerk that could be utilised as the organisation grows.

⁴⁶Landry, “What Is Human-Centered Design?”

⁴⁷Gajdošík, *Smart Tourism Destination Governance*.

These should be understood more as a collection of possible steps to take, rather than a step-by-step guide. It is for two reasons: it is beyond the scope of this proposal to ascribe anything to the members, and more importantly, innovation might be easier using ‘building blocks’ rather than a strict schedule. I believe that each recommendation could be used or at least pondered upon, even if the organisation does not immediately discuss each element immediately.

1. Establish small working groups with clearly defined tasks

Some interviewees have noted that they would like decisive and driven leadership in the association’s life. As most members of the network face significant time constraints, it would be necessary to share the burden of actions while still achieving small steps towards a bigger goal.

This could foster the trust-building aspect by bringing a few members together with a task that would allow them to get better acquainted with one another. I have noted above that it is not necessary to include everyone in these working groups, only those who actively seek engagement and have some time to offer. While members get to know each other, they also work on something that is necessary for the improvement of the organisation. This could be combined with either or both of the two remaining pillars. As more tasks get assigned and more things achieved, the legitimacy of the organisation grows.

Recommended areas to cover with working groups would be, but are not limited to:

- Inter-association trust building: organising platforms or events for members to engage more frequently.
- Extra-association (business) relationships: managing efforts to promote the association among businesses, organising efforts to collectively influence development decisions
- Knowledge production and innovation
- Destination marketing

2. Establish a pilot solution for a hub of knowledge

There is an incredible amount of knowledge ready to be explored, discussed and potentially used for innovation within the association. However, this could only be shared when members are in the same physical location, when they started trusting each other, when they ask the right questions from each other, and so on. Instead, I encourage the association to co-create a solution where industry experts – possibly

also the person currently reading these lines – could share their experiences, concerns, or inquiries.

As knowledge production, documentation, and co-creation are time-consuming tasks, I would recommend thinking of opportunities that are readily available. This could range from an exclusive, digital ‘box-of-ideas’ (blog posts, newsletters, Slack community, etc.) where members could post their ideas to enhance cooperation to organised study tours in the region with written documentation on the recommendations of fellow members. These solutions are important not only to explore the best practices or development areas of other members, but by openly and honestly sharing ideas, members could learn about how others think, allowing trust to sprout. Additionally, it might remove a sense of isolation. In the face of public authorities, it might happen that some organisations feel that they are powerless and that their struggle is individual. Sharing information on a centralised platform should help with coordinating advocacy efforts in policymaking.

3. Deploy data-collection tools to examine the destination as a whole

Nowadays, data collection is key to informed decision-making. Especially, because a lot of information is readily available without exerting much effort. During my interviews, it became clear that there are some organisations that have the know-how that could be utilised in examining trends in the whole region. Obviously, this burden is also to be shared, or as seen in the case of South Tyrol, outsourced. However, it is possible to build methodologies which allow for fast-tracked, data-driven innovation.

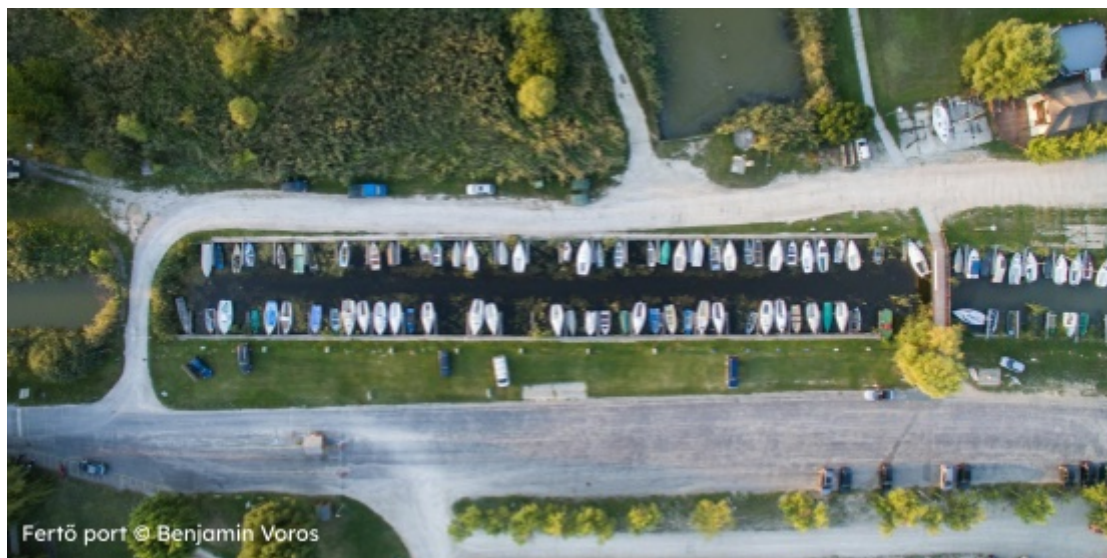
With regard to this point, I have attached two annexes to this proposal. The first briefly describes a tool that can collect actionable information to businesses in the region based on Google reviews. This I am happy to release in a fully working format upon request. The second annex contains a short survey that could potentially be circulated among members to share with their customers – possibly in exchange for a discount or benefit of sorts. This way, the association could already start accumulating input that is necessary for quantitative analysis.

Intuitively, there are already member organisations, like higher education institutions or larger firms, which could take a lead in communal data collection efforts. In addition, with the help of smaller businesses – who might be incentivised

by learning new technologies, FERNENET could provide its members with reliable and accurate sources of information. This, then, could be used to guide destination marketing efforts or help convince public authorities about necessary developments. And again, it is not necessary to think of major technological solutions: a short monthly newsletter with some flash information could already serve the interest of the members, and help with figuring out what areas need a closer attention from the destination.

4. Offer informal avenues to meet with other organisations

As described in the case studies above, informal and familiar relationships decrease the chances of mistrust and resentment to remain. The context within which I am writing this proposal is highly specific. It is beyond the reach of my previous research to understand the needs of each member individually. Hence, this recommendation would encourage the association to ask its members in what ways they imagine getting to know each other. While meetings and workshops might seem as a straightforward idea, it might be worth considering alternative options as well – depending on the needs of the members.



An extension to this recommendation could be a member-to-member showcase programme. In this programme, members could offer experiences to their cross-border partners at a discount. This aims at better cross-referencing each other after having been exposed to the experience offered by the other member. This potentially leads to a better overall grasp of the available services in the region, allowing also informal relationships to form.

5. Create a pilot for a cross-border itinerary

From informal discussions, I picked up that there have already been discussions about creating a possible solution for cross-border integrated offers. Before any major developments are invested in, it would be worth testing the viability and desirability of these cross-border products. Even if the demand for such products exists, the association may not be clear on what challenges there might be in a customer's transborder journey.

Hence, it would make sense to offer – as a pilot in development – some individual package deals to a given set of consumers (even a designated focus group). In exchange for a certain discount of the services that they have benefited from, it would be advisable to collect survey data and a qualitative evaluation (interview, written discussion, travel-journal, etc.) on their experiences. This could signal to the members that integrated products are thoughtfully curated (increasing trust), and could help with later destination marketing efforts.

In sum, these recommendations aim at connecting the three conceptual pillars in actionable, short-term steps. While they do not concretely describe how it would be possible to increase length of stay, they do offer a clear answer to what areas could be improved in search of integrated solutions. This will eventually result in a longer length of stay.

Key recommendations:

1. Establish small working groups with clearly defined tasks
2. Establish a pilot solution for a hub for knowledge
3. Deploy data-collection tools to examine the destination as a whole
4. Offer informal avenues to meet with other organisations
5. Create a pilot for a cross-border itinerary

Conclusion

This strategic proposal endeavoured to address two major questions: how a cross-border organisation might achieve long-term viability, and what could effectively lengthen guest stays within the region. My research indicates that the resolution to the second question is contingent upon the first. A sustained increase in the average length of stay is not achievable through fragmented, short-term initiatives; rather, it necessitates a robust, trustworthy, and well-informed touristic organisation capable of following through with a cohesive, long-term strategy.

The proposed foundational pillars of knowledge, trust, and public relations are not merely abstract ideals but the essential focal points for any meaningful collective action. By developing a shared market understanding through a central knowledge hub, fostering trust via informal structures, and communicating with a unified voice, the network can start addressing the touristic challenges the region confronts.

The building blocks described in the proposal are conceived as the initial catalysts for this transformation, representing tangible and low-risk points of departure from which to build momentum and cultivate a culture of cooperation. Even though this report does not offer a silver bullet to stop the drop in guest stays, it does offer a clear plan of action. By committing to this foundational work, the FERNENET association can transition from a mere aggregation of individual stakeholders into a genuinely integrated and resilient entity, capable of positioning the entire Fertő-Neusiedler See region as a unified, sustainable destination. It certainly has the potential to become.

Annex 1: Sentiment Analysis

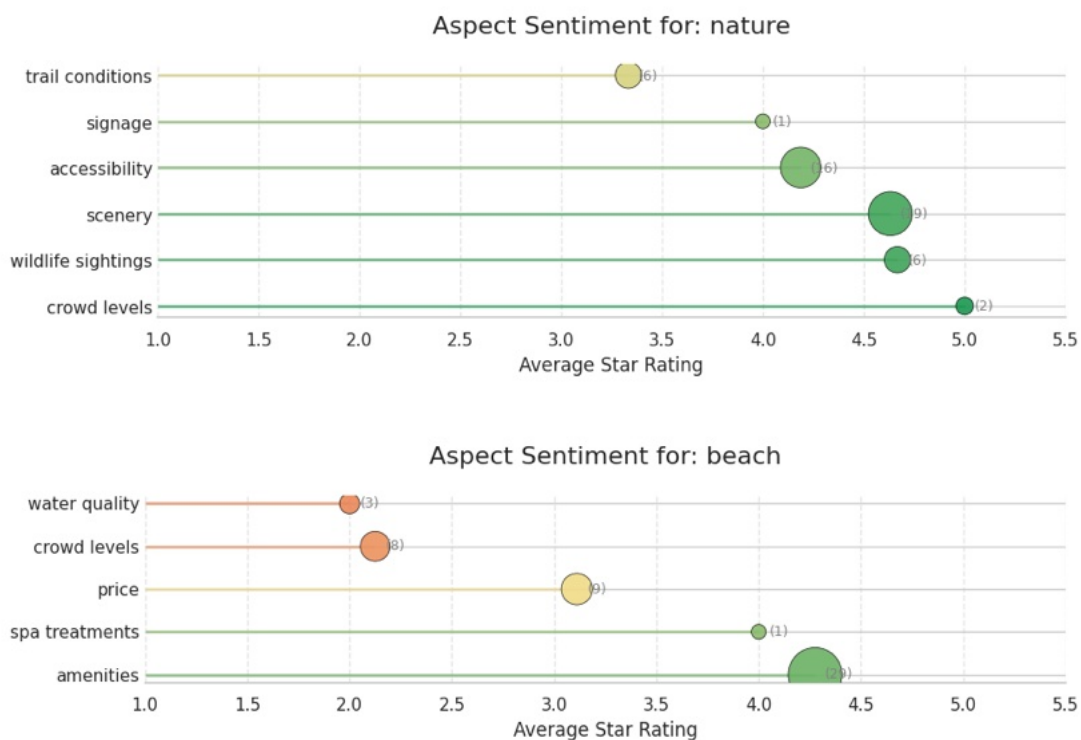
This short description is aimed at describing a tool that is designed to translate the vast amount of customer feedback into clear insights. I have developed this tool with the help of Google's Gemini 2.5 artificial intelligence, in lieu of coding experience. The process begins with a simple dataset. I have collected my data by scraping Google reviews (n=3729) from 50 different attractions around the lake. These included 25 Austrian and 25 Hungarian venues. As it was a pilot solution, I used a strata-specific convenience sampling. I have collected between 2 and 5 attractions per country to the following strata: beach (spas, beaches, etc.), beverage (wineries, breweries, etc.), nature (national parks, viewpoints, etc.), culture and entertainment (theatres, heritage sites, etc.), hotel, restaurant, and transportation (bike rentals, boats, canoes, etc.) I have produced an Excel file, where each row represents a single customer review. This source file must contain five key pieces of information: the venue's name and type (stratum), its country, the original star rating provided by the customer, and the complete text of their comment. For optimal performance, all review texts are first translated into English.

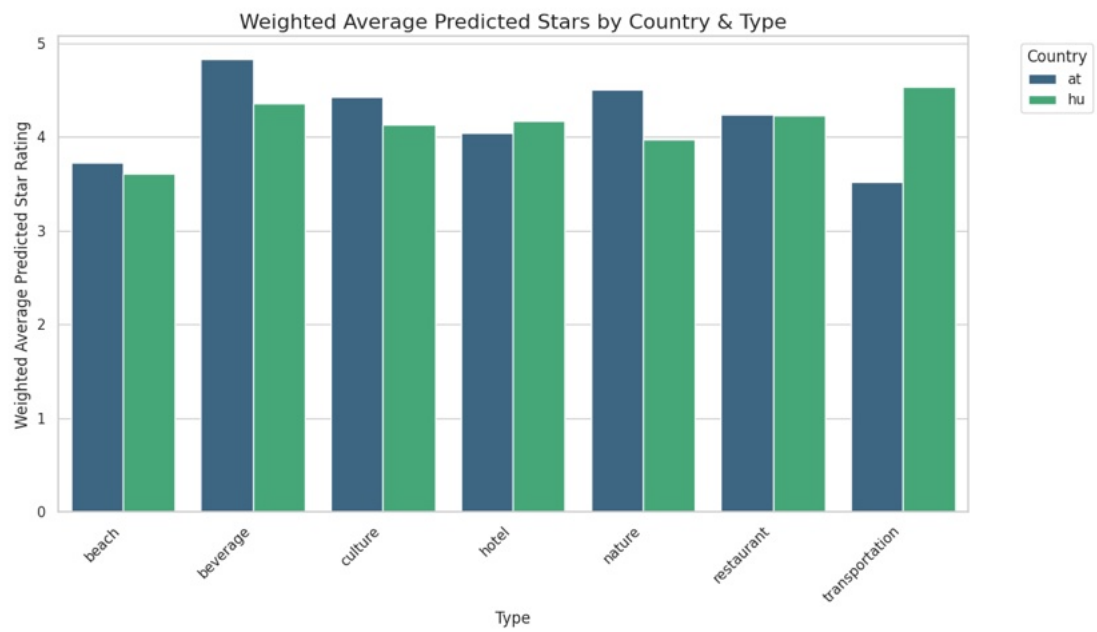
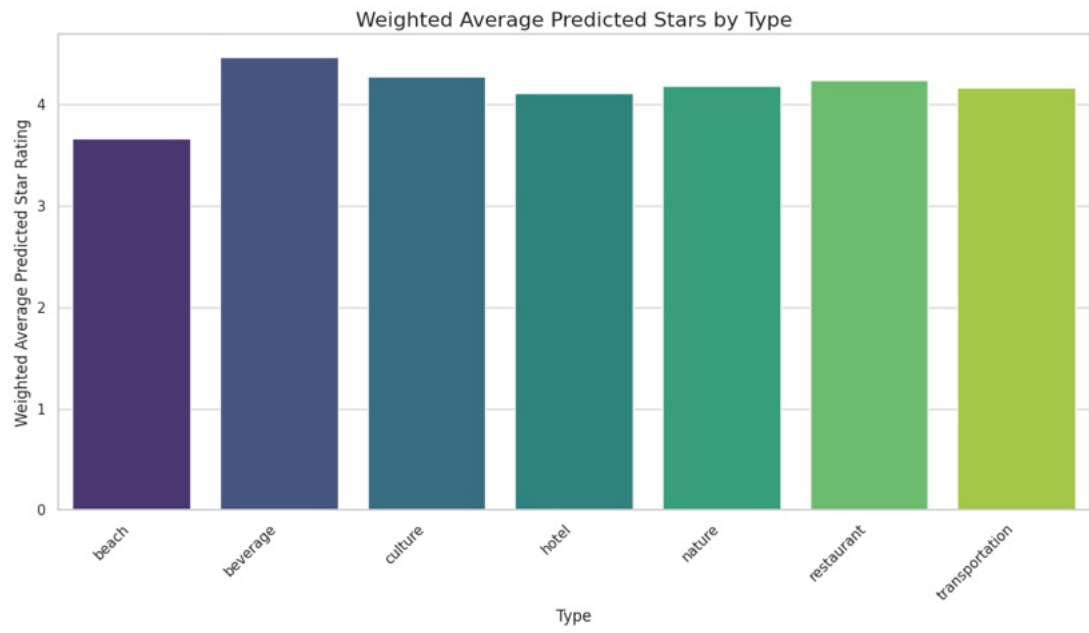
Once the data was loaded, it underwent a preparation phase. The review text was cleaned and standardized to strip away unnecessary 'noise,' like emojis. More importantly, I applied an intelligent weighting system. This step ensured that longer, more detailed reviews were given more prominence, while also balancing how many individual reviews a given attraction got. This method guarantees that feedback from smaller categories is adequately valued, leading to a more balanced final analysis. The core of the analysis involves a dual-model approach, where two specialized large language models work to extract necessary information from each review. The first, a language model trained to analyse what feelings do people attach to text, read the text to understand the underlying emotion and assign a score from 1 (very negative) to 5 (very positive). Simultaneously, a second model identified what 'topic' the review was referring to. These topics were assigned previously to each stratum, with the model 'only' sorting reviews into these categories.

The analytical power of this system lies in synthesising the outputs from both models to generate actionable metrics. **It is important to note that the following examples are based on the initial pilot analysis of reviews from the 50 selected venues and serve to illustrate the tool's capabilities.** The tool can calculate and compare high-level sentiment scores to provide a general performance benchmark between countries. It can also effectively rank different business

categories by customer sentiment, identifying which sectors are perceived most positively (like the beverage sector in this analysis) and which face challenges (such as the beach category). Furthermore, the system can reveal significant performance disparities within the same category across different regions, as was seen in the transportation sector between Hungary and Austria. Its most powerful feature is its diagnostic capability; it moves beyond simply identifying a low score to pinpointing the exact root causes. It can determine if a low rating is driven by specific complaints about, for example, ‘vehicle condition’ or ‘staff attitude,’ providing clear areas for improvement.

The following visualisations, along two detailed reports, are the output of this tool. These are available upon request from the author. You can see the example outcomes below:





Annex 2: Sample Questionnaire

In the following lines, I outline a basic and simple questionnaire that can be easily modified, reviewed and implemented, in order to start actively and collectively seeking consumer feedback from the region.

Module 1: General Trip Characteristics

1. How many nights did you stay in the Lake Fertő/Neusiedl region on this trip?
 - Single choice, ranging between '1' and '10+'
2. What was the main purpose of your visit? (Single choice)
 - Leisure
 - Visiting family or friends
 - Business
 - Other (Please specify)
3. Including yourself, how many people are you travelling with? (Single choice)
 - 1
 - 2
 - 3-4
 - 5+
4. Is this your first time visiting the Lake Fertő/Neusiedl region?
 - Yes
 - No

Module 2: Destination Attributes & Activities

5. Before your trip, how important were the following factors in your decision to visit the Lake Fertő/Neusiedl region? (Use a 1 to 5 scale, where 1 = Not at all important and 5 = Extremely important)
 - Historical and cultural sites
 - Nature and landscape
 - Recreational activities
 - Water sports
 - Local cuisine and wine culture
 - Events or festivals
 - Health-related facilities

6. Which of the following activities did you participate in during your visit?

(Multiple choice)

- ☐ Visiting historical buildings
- ☐ Cycling or hiking
- ☐ Nature walks
- ☐ Water sports
- ☐ Visiting wineries
- ☐ Dining at restaurants
- ☐ No activities, just relaxing
- ☐ Other (Please specify)

Module 3: Experience & Satisfaction

7. Using a 1 to 5 scale, where 1 = Very dissatisfied and 5 = Very satisfied, please rate your satisfaction with the following aspects of your trip:

- ☐ Accommodation
- ☐ Food and restaurants
- ☐ Hospitality of locals
- ☐ Overall value for money
- ☐ Quality of cultural attractions
- ☐ Quality of natural attractions

8. Thinking about your overall experience, to what extent do you agree with the following statements? (Use a 1 to 5 scale, where 1 = Strongly disagree and 5 = Strongly agree)

- ☐ I felt truly relaxed and recharged during my stay.
- ☐ The experience felt unique and authentic.
- ☐ I felt a deep connection to the nature or the culture of the region.
- ☐ The visit was a memorable and impactful experience.

Module 4: Spending & Logistics

9. What was your approximate total expenditure for this trip, excluding travel to/from the region? (Single choice)

- ☐ Under 200 euros
- ☐ 200-500 euros
- ☐ 501-1,000 euros
- ☐ 1,001-2,000 euros
- ☐ Over 2,000 euros

10. What type of accommodation did you use for the majority of your stay?

(Single choice)

- ☐ Hotel
- ☐ Short-term rental
- ☐ Guesthouse
- ☐ Camping
- ☐ Staying with friends/family
- ☐ Other (Please specify)

Module 5: Demographics

11. What is your age? (Single choice)

- ☐ 18-25
- ☐ 26-35
- ☐ 36-45
- ☐ 46-55
- ☐ 56-65
- ☐ Over 65

12. What is your gender? (Single choice)

- ☐ Male
- ☐ Female
- ☐ Non-binary
- ☐ Prefer not to say

13. What is your country of residence? (Select from a list)

Bibliography

- Barcza Attila. "A sopron-fertő-térség turisztikai kínálatának és a turisták mobilitásának vizsgálata." PhD thesis, Pécsi Tudományegyetem (PTE), Természettudományi Kar, Földtudományok Doktori Iskola, 2022.
- Barcza Attila, Csapó János, Hinek Mátyás, and Marton Gergely. "Sopron turisztikai szezonálisitásának és a turizmusfejlesztés szükséges irányainak vizsgálata." *Földrajzi Közlemények* 144, no. 1 (2020): 65–78. <https://doi.org/10.32643/fk.144.1.5>.
- Barros, Carlos Pestana, and Luis Pinto Machado. "The Length of Stay in Tourism." *Annals of Tourism Research* 37, no. 3 (2010): 692–706. <https://doi.org/10.1016/j.annals.2009.12.005>.
- Blasco, Dani, Jaume Guia, and Lluís Prats. "Emergence of Governance in Cross-Border Destinations." *Annals of Tourism Research* 49 (November 2014): 159–73. <https://doi.org/10.1016/j.annals.2014.09.002>.
- Dovey, Ken. "The Role of Trust in Innovation." *The Learning Organization: An International Journal* 16, no. 4 (2009): 311–25. <https://doi.org/10.1108/09696470910960400>.
- Eurostat. "Arrivées Dans Des Établissements d'hébergement Touristiques Par Région NUTS 2." Eurostat, 2025. https://doi.org/10.2908/TOUR_OCC_ARN2.
- Eurostat. "HICP - Annual Data (Average Index and Rate of Change)." Eurostat, 2022. https://doi.org/10.2908/PRC_HICP_AIND.
- Eurostat. "Nombre d'établissements et Places-Lits Par Région NUTS 2." Eurostat, 2025. <https://doi.org/10.2908/TGS00112>.
- Eurostat. "Nuitées Dans Des Établissements d'hébergement Touristique Par Région NUTS 2." Eurostat, 2025. <https://doi.org/10.2908/TGS00111>.
- Eurostat. "Produit Intérieur Brut (PIB) Aux Prix Courants Du Marché Par Région NUTS 2." Eurostat, 2025. https://doi.org/10.2908/NAMA_10R_2GDP.
- Eurostat. "Taux d'emploi Des Personnes Âgées de 15 à 64 Ans, Par Région NUTS 2." Eurostat, 2025. <https://doi.org/10.2908/TGS00007>.
- Fritz, Oliver, Anna Burton, Sabine Ehn-Fragner, et al. "Ein Regionales Tourismus-Satellitenkonto Für Das Burgenland Und Regionale Effekte Der Nichttouristischen Freizeitwirtschaft. Fortführung Für Das Berichtsjahr 2018." *WIFO Studies*, WIFO, 2021. <https://ideas.repec.org/b/wfo/wstudy/67338.html>.
- Gajdošík, Tomáš. *Smart Tourism Destination Governance: Technology and Design-Based Approach*. Routledge, 2022.
- Janisch, Christian, Alois Lang, and Bibi Watzek. *Tourismusregion Neusiedler See - Risiken und Chancen einer europäischen Destination*. Residenz Verlag, 2024.
- Kreisel, Werner, and Tobias Reeh. "Tourism and Landscape in South Tyrol." *Open Geosciences* 3, no. 4 (2011). <https://doi.org/10.2478/s13533-011-0040-4>.

- Landry, Lauren. "What Is Human-Centered Design? | HBS Online." *Harvard Business School Online Business Insights Blog*, December 15, 2020. <https://online.hbs.edu/blog/post/what-is-human-centered-design>.
- Lewis-Beck, Michael, Alan Bryman, and Tim Futing Liao. "Semistructured Interview." In *The SAGE Encyclopedia of Social Science Research Methods*. Sage Publications, Inc., 2004. <https://doi.org/10.4135/9781412950589.n909>.
- Makkonen, Teemu, and Allan M. Williams. "Cross-Border Tourism and Innovation System Failures." *Annals of Tourism Research* 105 (March 2024): 103735. <https://doi.org/10.1016/j.annals.2024.103735>.
- Makra, Alexandra Éva, and Attila Szabó. "Sopron–Fertő, as a Priority Tourism Development Area." *Economica* 10, no. 2 (2020): 9–14. <https://doi.org/10.47282/ECONOMICA/2019/10/2/3717>.
- Martínez-Roget, Fidel, José Alberto Moutela, and Xosé A. Rodríguez. "Length of Stay and Sustainability: Evidence from the Schist Villages Network (SVN) in Portugal." *Sustainability* 12, no. 10 (2020): 4025. <https://doi.org/10.3390/su12104025>.
- Mihai, Valentin C., Diana E. Dumitras, Camelia Oroian, Gabriela O. Chiciudean, Felix H. Arion, and Iulia Cristina Mureșan. "Exploring the Factors Involved in Tourists' Decision-Making and Determinants of Length of Stay." *Administrative Sciences* 13, no. 10 (2023): 215. <https://doi.org/10.3390/admsci13100215>.
- North, Douglass C. "An Introduction to Institutions and Institutional Change." In *Institutions, Institutional Change and Economic Performance*. Political Economy of Institutions and Decisions. Cambridge University Press, 1990. <https://doi.org/10.1017/CBO9780511808678.003>.
- Olson, M. *The Logic of Collective Action: Public Goods and the Theory of Groups*. Harvard University Press, 2003.
- Plzáková, Lucie, and Egon Smeral. "Impact of the COVID-19 Crisis on European Tourism." *Tourism Economics* 28, no. 1 (2022): 91–109. <https://doi.org/10.1177/13548166211031113>.
- Schnitzer, Martin, Maximilian Seidl, Philipp Schlemmer, and Mike Peters. "Analyzing the Coopetition between Tourism and Leisure Suppliers—A Case Study of the Leisure Card Tirol." *Sustainability* 10, no. 5 (2018): 1447. <https://doi.org/10.3390/su10051447>.
- Simon Dániel. "Kultúrturisztikai értékek feltárása és fejlesztési lehetőségei Balf és Fertőrákos térségében." Master's Thesis, Soproni Egyetem, 2025.
- Soja, Gerhard, Johann Züger, Markus Knoflacher, Paul Kinner, and Anna-Maria Soja. "Climate Impacts on Water Balance of a Shallow Steppe Lake in Eastern Austria (Lake Neusiedl)." *Journal of Hydrology* 480 (February 2013): 115–24. <https://doi.org/10.1016/j.jhydrol.2012.12.013>.
- Stoffelen, Arie, and Dominique Vanneste. "Tourism and Cross-Border Regional Development: Insights in European Contexts." *European Planning Studies* 25, no. 6 (2017): 1013–33. <https://doi.org/10.1080/09654313.2017.1291585>.

- Timothy, Dallen J., and Alon Gelbman. *Routledge Handbook of Borders and Tourism*. 1st ed. Routledge, 2022. <https://doi.org/10.4324/9781003038993>.
- UNESCO. "Fertő/Neusiedlersee Cultural Landscape." UNESCO World Heritage Centre. Accessed August 13, 2025. <https://whc.unesco.org/en/list/772/>.
- Vincze Barbara. "„Ha nem vettem volna semmit, akkor is megérte volna” – megnéztük, miért jár még mindig osztrák outletbe a magyar." *Életmód. Telex*, September 23, 2024. <https://telex.hu/életmod/2024/09/23/parndorf-bevasarloturizmus-buszut-vasarlas>.
- Wallnöfer, Valentin, Felix Windegger, Maximilian Walder, and Philipp Corradini. *The Sustainable Tourism Observatory of South Tyrol (STOST). Annual Progress Report*. Eurac Research, 2024.
- Zsuppán András. "Tragikus látvány a szétdúlt Fertő-part, de lenne kiút a zsákutcából." *Válasz Online*, 05 2025. <https://www.valaszonline.hu/2025/05/27/ferto-part-fertorakos-vizitelep-fejleszt-es-projekt-idegenforgalom-civilek-vizpart-barcza-attila/>.