

Climate Adaptation in Tourism

From Risk Awareness to Resilient Tourism Management

Survey-based insights and practical
recommendations for destinations,
tourism businesses, policymakers
and development partners

*A global stakeholder survey by mascontour
in cooperation with ITB Berlin*

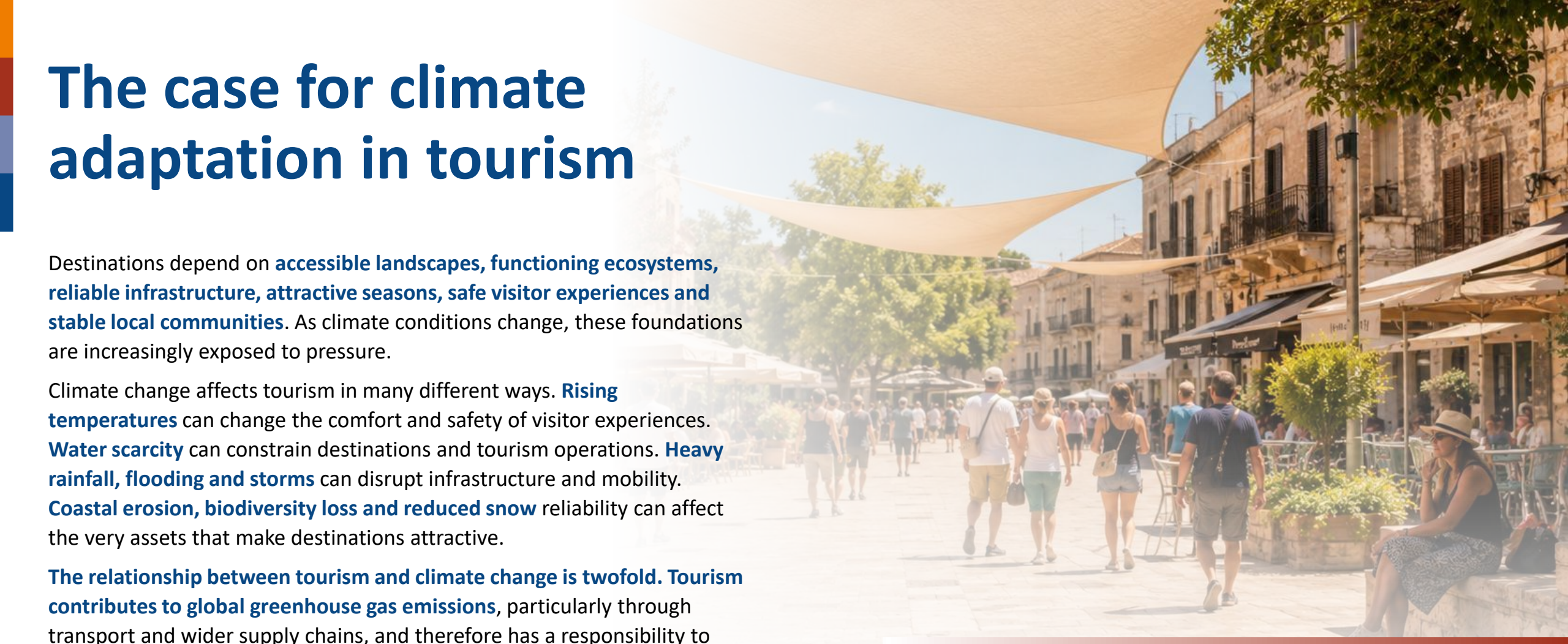


The case for climate adaptation in tourism

Destinations depend on **accessible landscapes, functioning ecosystems, reliable infrastructure, attractive seasons, safe visitor experiences and stable local communities**. As climate conditions change, these foundations are increasingly exposed to pressure.

Climate change affects tourism in many different ways. **Rising temperatures** can change the comfort and safety of visitor experiences. **Water scarcity** can constrain destinations and tourism operations. **Heavy rainfall, flooding and storms** can disrupt infrastructure and mobility. **Coastal erosion, biodiversity loss and reduced snow** reliability can affect the very assets that make destinations attractive.

The relationship between tourism and climate change is twofold. Tourism contributes to global greenhouse gas emissions, particularly through transport and wider supply chains, and therefore has a responsibility to reduce its climate footprint. At the same time, **tourism is highly exposed to climate impacts** because it depends on favourable environmental conditions, functioning infrastructure and the attractiveness of natural and cultural assets.



Tourism is deeply connected to the conditions of place

Adaptation is no longer optional

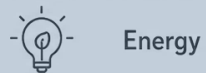
Responsible destination management

MITIGATION

Reduce tourism's climate footprint —
for example by addressing:



Emissions



Energy



Transport



Supply chains

ADAPTATION

Reduce vulnerability to climate impacts —
for example related to:



Heat



Water scarcity



Floods & storms



Seasonality



Health risks

For tourism, climate adaptation is therefore becoming a **strategic task**. It is not only about responding to individual hazards after they occur. It is about **anticipating changing conditions, reducing vulnerability, protecting people and assets, and maintaining the long-term viability** of destinations and tourism businesses.

Mitigation remains essential. The tourism sector must continue to **reduce emissions and contribute to global climate goals**. But even with ambitious mitigation, many climate impacts are already unfolding and will intensify over the coming years. **Adaptation is therefore no longer optional**. It is becoming part of responsible destination management, business continuity, infrastructure planning and policy development.

However, adaptation in tourism is still an emerging field of action. Compared with climate mitigation, it has often received **less attention** in tourism strategies, policies and business planning. This creates an **ADAPTATION GAP**: a growing distance between the climate risks facing tourism and the sector's current level of preparedness, coordination and implementation.

This white paper explores how tourism stakeholders perceive and respond to this challenge.

Survey approach and sample

This white paper is based on an **international online survey conducted by mascontour in cooperation with ITB Berlin**. The survey gathered destination-oriented perspectives from tourism stakeholders worldwide on climate adaptation in tourism.

Fieldwork took place from late September to early December 2025. The survey was conducted online and in English; participation was voluntary and anonymous. Respondents were invited to answer from the point of view of the destination they mainly work in or with. The survey was distributed via ITB Berlin channels, mascontour's professional network, LinkedIn and selected tourism sector newsletters. Overall, **172 valid responses** were included in the analysis.

The findings should be read as a **broad, perception-based snapshot** of current perceptions, adaptation responses, barriers and support needs rather than as a comprehensive measurement of the entire tourism sector.

in cooperation with



AT A GLANCE



Survey period

Late September to early December 2025



Format

Online survey, English language



Valid responses

172



Coverage

60 countries across all continents



Target group

Tourism stakeholders worldwide



Survey perspective

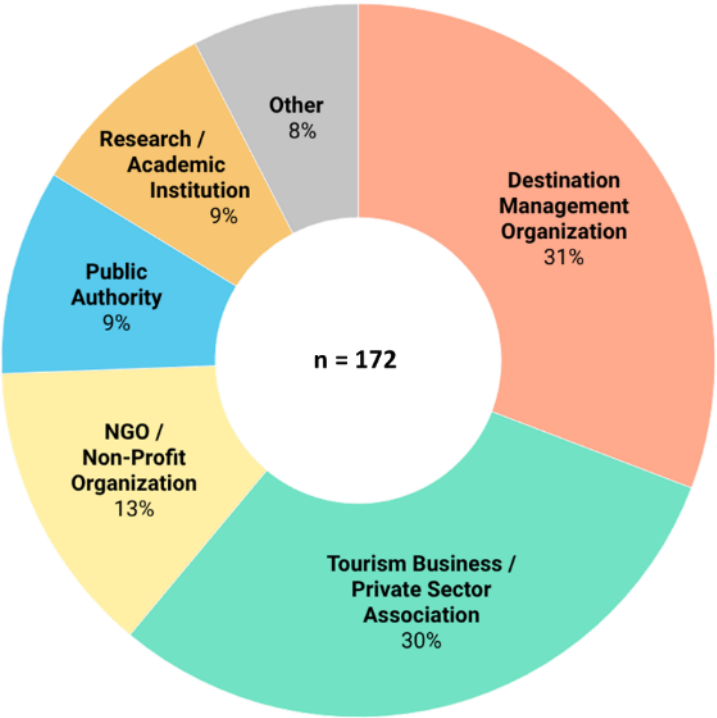
Respondents answered from the point of view of the destination they mainly work in or with



Conducted by

mascontour in cooperation with ITB Berlin

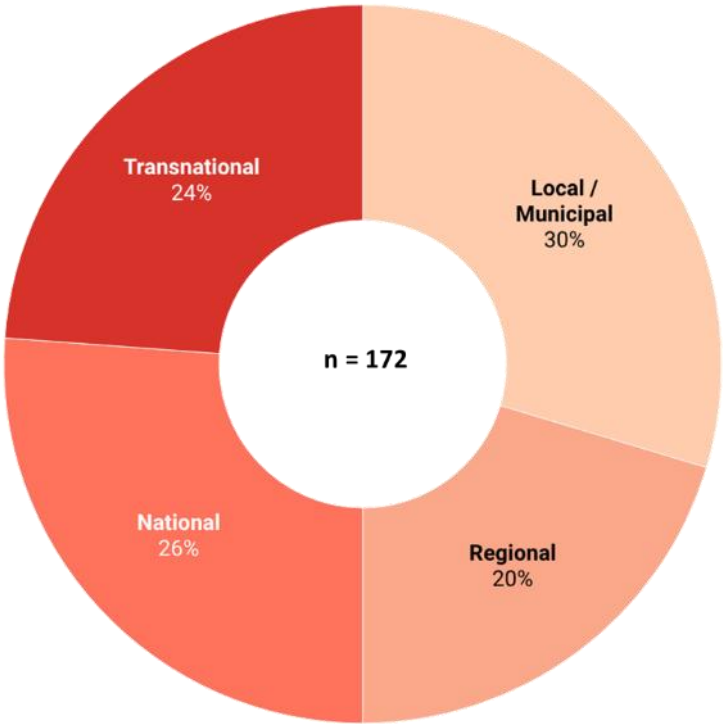
Survey Participants by stakeholder group



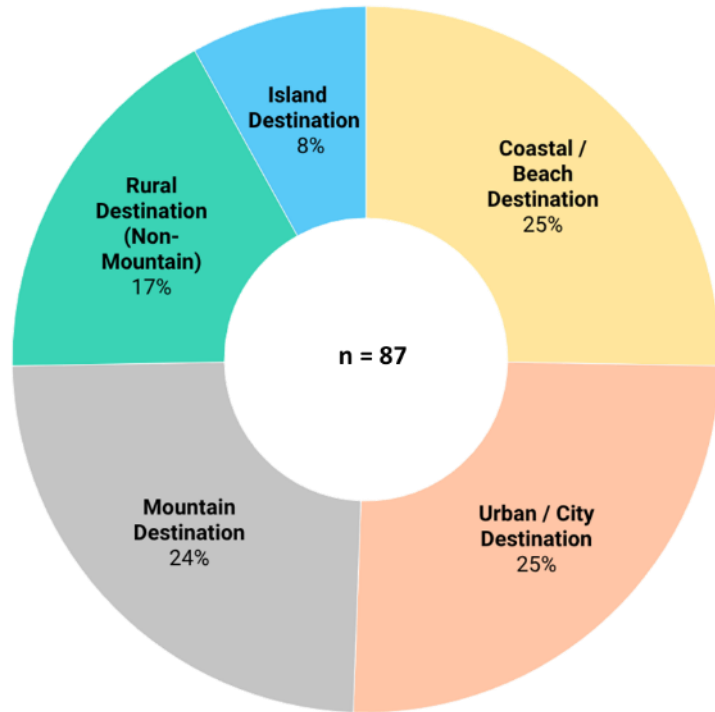
The sample covers a **wide range of stakeholder groups**, with destination management organisations and the private sector representing the largest groups. Followed by NGOs, public authorities and academic institutions. This mix is relevant because climate adaptation in tourism is not the responsibility of one actor group alone; it depends on the interaction between all stakeholders.

Responses cover **all destination scales**: local or municipal, regional, national and transnational or cross-border destinations in broadly comparable proportions. This distribution allows the survey to capture adaptation perspectives across different governance levels, from local implementation contexts to broader national and cross-border frameworks.

Survey Participants by geographical scope



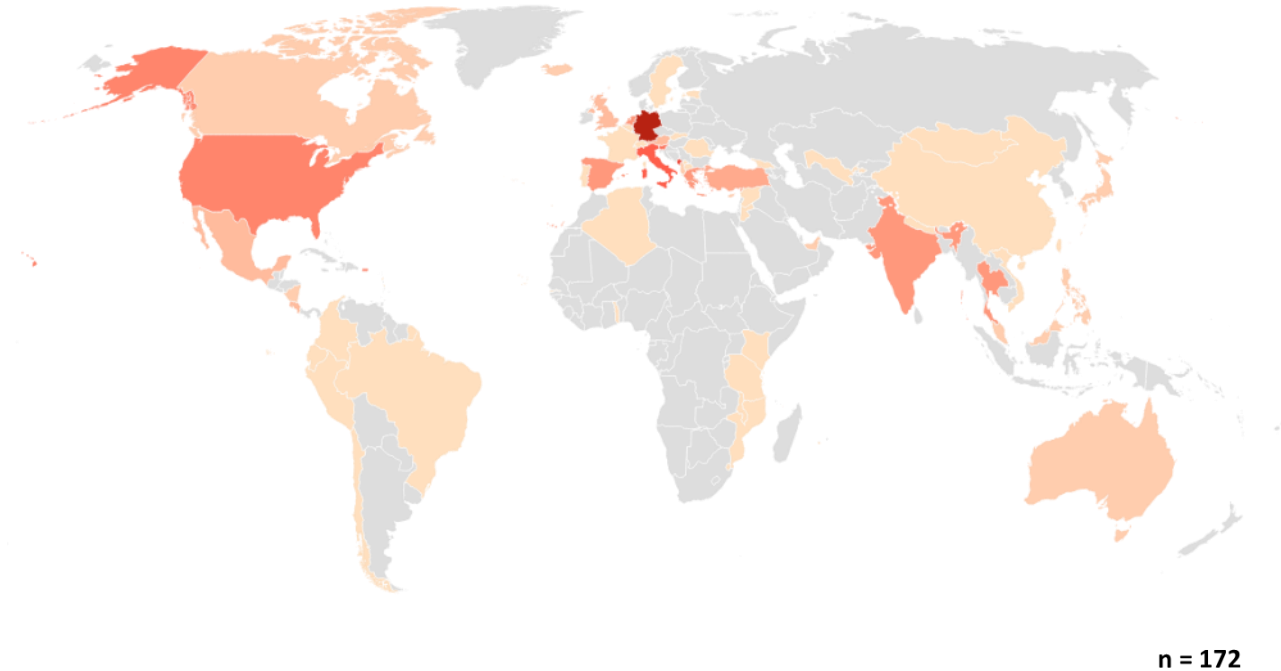
Survey participants by destination type



For respondents with a more specific **destination-type perspective** (n=87), the sample is **broadly balanced**: coastal or beach destinations and urban or city destinations account for around one quarter each, followed by mountain destinations, rural non-mountain destinations and island destinations. This diversity is important because climate risks and adaptation needs differ substantially by destination type.

Geographically, the survey includes respondents from **60 countries across all continents**. Europe accounts for the largest share of responses, followed by Asia and Oceania, the Americas and Africa. The results therefore provide a broad international perspective.

Survey participants by region



The risk signal: climate impacts are no longer abstract

Climate change is entering the near-term planning horizon of tourism stakeholders. Around **two thirds of respondents expect climate change impacts to be significant or very significant** for their destination within the next five years. Only a small minority consider these impacts to be slight or not significant.

Expected significance of climate change impacts (next 5 years)

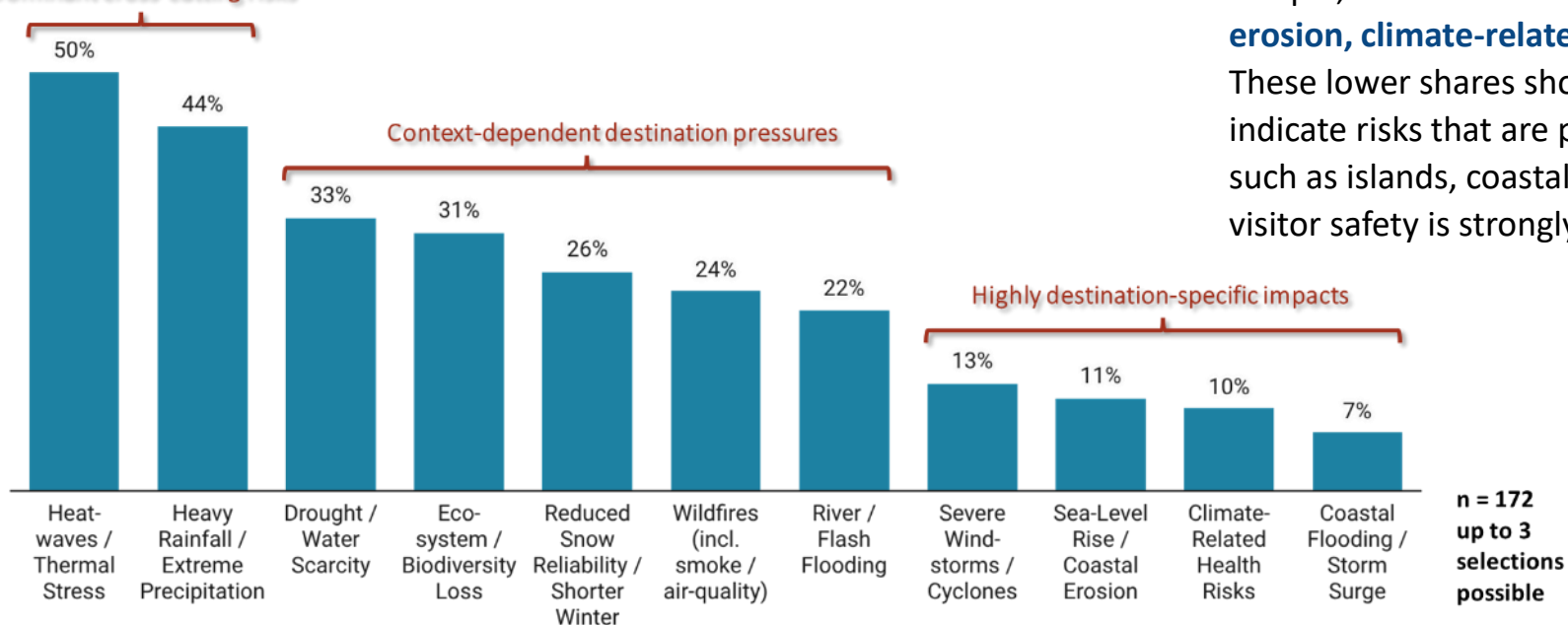


A five-year horizon is not a distant future scenario. It is the timeframe in which destinations, businesses and public authorities make investment decisions, develop tourism products, plan infrastructure, allocate budgets and define policy priorities.

The most frequently identified climate-related impacts are **heatwaves and thermal stress**, followed by heavy rainfall and extreme precipitation. Together, these form a first cluster of dominant cross-cutting risks that are relevant across many tourism contexts and directly affect visitor comfort, safety, infrastructure and operations.

Key climate-related impacts (next 5 years)

Dominant cross-cutting risks



Lower shares do not necessarily mean lower importance. Some climate impacts are highly destination-specific and can be critical where they occur.

A second cluster includes impacts such as **drought and water scarcity, ecosystem and biodiversity loss, reduced snow reliability, wildfires, and river or flash flooding**. These risks are still highly relevant, but their importance depends more strongly on the environmental and tourism profile of the destination. They point to the close connection between climate risks, natural assets, seasonal patterns and destination competitiveness.

A third cluster consists of impacts that appear less frequently in the overall sample, such as **severe windstorms or cyclones, sea-level rise and coastal erosion, climate-related health risks, and coastal flooding or storm surges**. These lower shares should not be read as low importance. Rather, they indicate risks that are particularly acute in specific destination contexts, such as islands, coastal areas, cyclone-prone regions or destinations where visitor safety is strongly affected by climate conditions.

This pattern reflects the broad range of climate pressures affecting tourism – from visitor comfort and safety to infrastructure, natural assets, seasonal demand and operational continuity. It also underlines that **adaptation priorities are highly place-specific**. Mountain destinations, coastal areas, islands, cities and rural destinations are exposed to different combinations of risks. Effective climate adaptation in tourism therefore needs to be grounded in the specific climate hazards, vulnerabilities and assets of each destination.

Strategy development is progressing – implementation remains limited

Results indicate that climate adaptation is **increasingly entering the strategic agenda of tourism destinations**. A considerable share of respondents report that a climate adaptation strategy or action plan has either been adopted, is being developed or is under discussion.

However, the transition from strategic recognition to operational implementation remains limited. **Only 18% of respondents indicate that a climate adaptation strategy or action plan has been adopted and is already being implemented**. A further 15% report that a strategy has been adopted but is not yet being implemented. This suggests that formal planning does not automatically translate into action.

At the same time, many respondents describe their destination as being in transition: strategies are being drafted, discussed or prepared, while others report no strategy or uncertainty about the current status. This points to an important implementation challenge. **For tourism stakeholders, the next step is not only to acknowledge climate risks, but to embed adaptation in mandates, budgets, responsibilities and concrete work programmes.**

Status of climate adaptation strategy or action plans



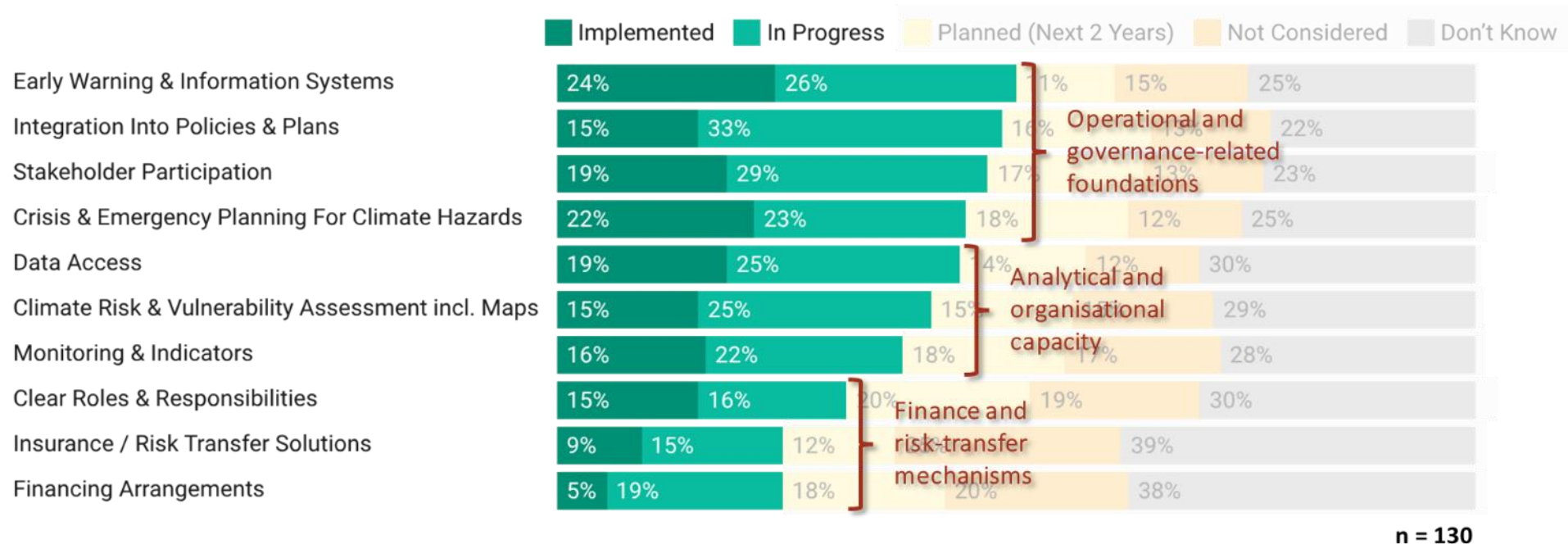
n = 171

Climate adaptation is increasingly on the agenda – but in many destinations, it has not yet moved from planning and discussion into operational implementation.

Adaptation is underway – but structural measures lag behind

The survey results show that tourism stakeholders are already addressing climate adaptation through both **foundational management steps** and practical **adaptation actions**. These two dimensions are closely connected: management steps create the conditions for adaptation, while concrete actions reduce specific risks on the ground.

Status of foundational management steps



Adaptation does not start with infrastructure alone. It also depends on information systems, planning routines, stakeholder coordination, responsibilities, monitoring and finance.

Among foundational management steps, the **most advanced areas are operational and governance-related**. Early warning and information systems, crisis and emergency planning, stakeholder participation and the integration of adaptation into policies and plans are comparatively well developed or in progress. These measures are important entry points because they help destinations anticipate risks, communicate with stakeholders and embed adaptation in existing planning and coordination processes.

A second group points to developing **analytical and organisational capacity**. Climate risk and vulnerability assessments, access to climate data, monitoring and indicators, and clearer roles and responsibilities are essential for moving from general awareness to informed adaptation planning. Their position in the chart suggests that many destinations are still in the process of building this capacity.

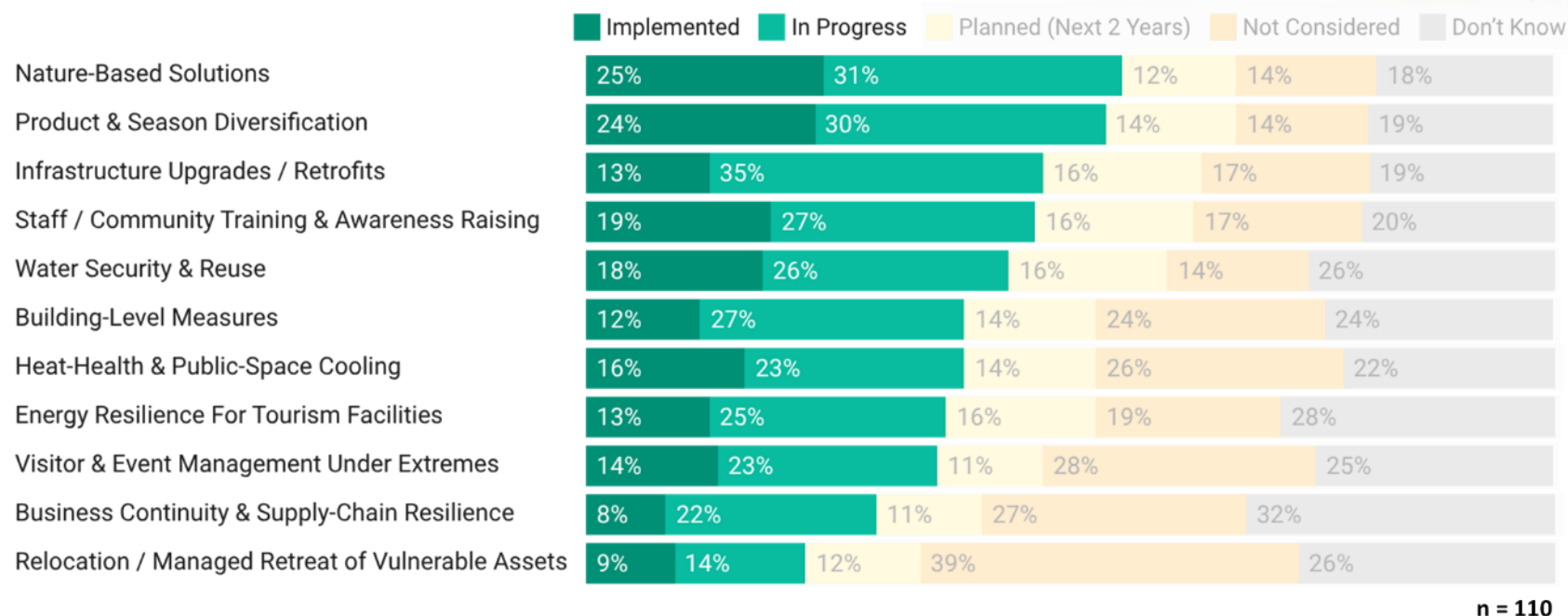
Financing arrangements and insurance or risk-transfer solutions form the least advanced group. This is significant because these mechanisms are often needed to move beyond planning and coordination towards long-term implementation, investment and risk management.

A similar pattern can be seen in practical adaptation actions. **Nature-based solutions and product or season diversification stand out as leading adaptation entry points**. Both are comparatively accessible for many destinations because they can often be linked to existing destination development, product innovation, landscape management or sustainability agendas.

A broader middle group includes infrastructure upgrades, staff and community training, water security and reuse, building-level measures, heat-health and public-space cooling, energy resilience, and visitor and event management under extreme conditions. These actions show that practical adaptation is underway, but often still uneven across different operational areas.

The least advanced actions are business continuity and supply-chain resilience, and relocation or managed retreat of vulnerable assets. This is important because these measures point to deeper forms of adaptation: they require long-term risk assessment, investment decisions, coordination across actors and, in some cases, politically sensitive choices about where tourism infrastructure and activities can remain viable.

Status of adaptation actions



Overall, the implementation pattern points to a sector in transition. Tourism stakeholders are not starting from zero: adaptation is already visible in planning processes, operational routines, nature-based approaches and product development. However, **measures that require long-term finance, deeper coordination, infrastructure investment, business continuity planning or difficult location-based decisions appear less advanced.** The next question is therefore not only which measures exist, but whether they are sufficient and effective.

Current adaptation action is visible, but often still incremental. The more a measure requires long-term finance, infrastructure investment or structural change, the less advanced it appears to be.

Perceived effectiveness remains limited

Current adaptation efforts are not yet perceived as sufficiently effective. **Only 8% of respondents consider their destination's adaptation measures to be effective or very effective so far.** By contrast, the majority describe them as moderately effective, slightly effective or not effective at all.

Effectiveness of adaptation measures



This finding should be interpreted carefully. **Low perceived effectiveness does not necessarily mean that individual measures are poorly designed.** It may also reflect the fact that many destinations are still at an early stage of adaptation, that measures remain limited in scale, or that their effects are difficult to assess without systematic monitoring.

At the same time, the result points to a critical challenge for tourism stakeholders. **Adaptation should not be understood as a checklist of measures, but as an ongoing process of learning and adjustment.** To become more effective, adaptation efforts need clearer objectives, stronger implementation capacity and mechanisms to assess whether measures actually reduce risks and strengthen preparedness.

The question of effectiveness leads to the barriers that slow down adaptation. If measures remain fragmented, underfunded or weakly coordinated, their impact is likely to remain limited as well.

n = 108

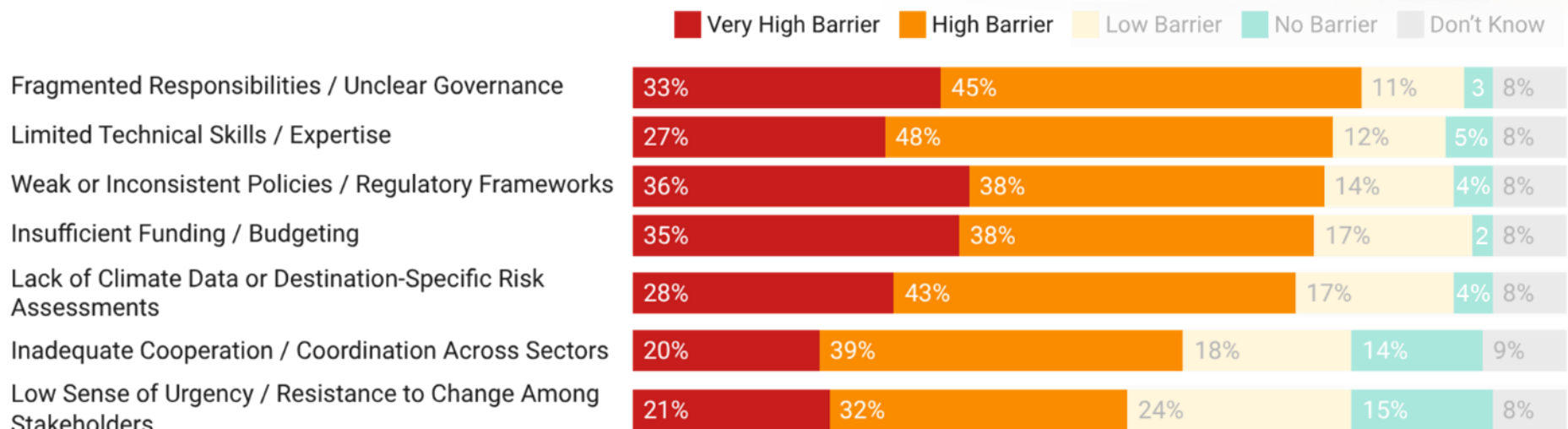


The existence of adaptation measures does not automatically mean that they are sufficient. Effectiveness depends on whether measures are targeted, coordinated, financed, monitored and adjusted over time.

Barriers and support needs: governance and finance are key levers

In the chart, barriers are ranked by the combined share of respondents rating them as either a high or a very high barrier. This highlights which constraints are most widely perceived as significant obstacles to adaptation.

Assessment of barriers for climate adaptation



n = 100

The strongest barriers are structural – not primarily motivational.



A first **group of structural barriers stands out**: fragmented responsibilities, weak or inconsistent policy and regulatory frameworks, and insufficient funding. These barriers not only rank among the highest overall, but also show particularly high shares of respondents rating them as very high barriers. They point to the structural conditions that often determine whether adaptation can move from general intention to practical implementation: clear mandates, coherent policy frameworks and reliable financial resources.

Compared with these barriers, inadequate coordination across sectors and a low sense of urgency or resistance to change appear less dominant. The main bottleneck seems to be less about convincing stakeholders to act, and more about creating the conditions that allow them to act.

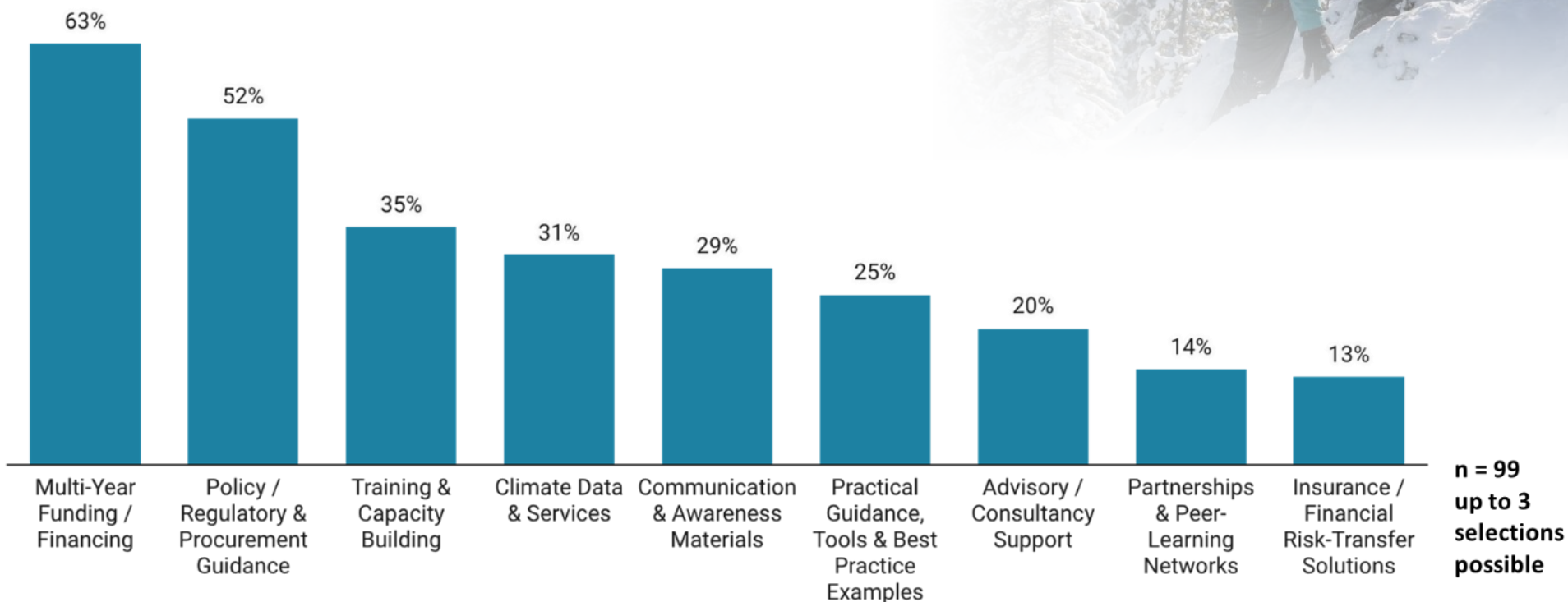
The support needs identified by respondents reflect this barrier landscape. **Multi-year funding and financing, together with policy, regulatory and procurement guidance, form the strongest support cluster.** This mirrors the finding that adaptation is held back by financial constraints and unclear or inconsistent frameworks.

Beyond these two dominant needs, the results point to a broader implementation challenge. **Tourism stakeholders require support that helps them build capacity, access and use relevant information, communicate effectively, and apply tools.** Lower-ranked support needs should therefore not be read as unimportant, but as more context-specific or relevant at particular stages of the adaptation process.



Taken together, the barriers and support needs point in the same direction. **Advancing climate adaptation in tourism depends less on adding isolated measures and more on strengthening the enabling conditions for implementation.** Clear responsibilities, coherent policy frameworks and reliable multi-year finance are central to this shift. Without them, adaptation is likely to remain fragmented, difficult to coordinate and limited in its operational impact.

Required support to advance climate adaptation



The strongest support needs are long-term finance and clearer policy guidance – two enabling conditions that determine whether adaptation can move from intention to implementation.

Reading the climate adaptation gap

Taken together, the findings point to a clear **adaptation gap** in tourism. This gap is not primarily defined by a lack of concern. On the contrary, many tourism stakeholders recognise that climate impacts are becoming relevant within a near-term planning horizon. The challenge lies in translating this awareness into systematic, financed and coordinated action.

The gap becomes visible across several dimensions. Climate risks are increasingly recognised, but adaptation strategies are not yet consistently implemented. Adaptation measures are already underway, but many remain operational, incremental or uneven across different areas of action. Current measures are not yet perceived as sufficiently effective, and the strongest barriers point to structural conditions: unclear responsibilities, inconsistent policy frameworks and insufficient funding.

This distinction matters. If the challenge were mainly a lack of awareness, the answer would be more information and communication. The survey findings suggest a more complex picture. Tourism stakeholders also need the conditions that allow them to act: **clear mandates, coherent frameworks, reliable finance, coordination across sectors and practical implementation capacity**.

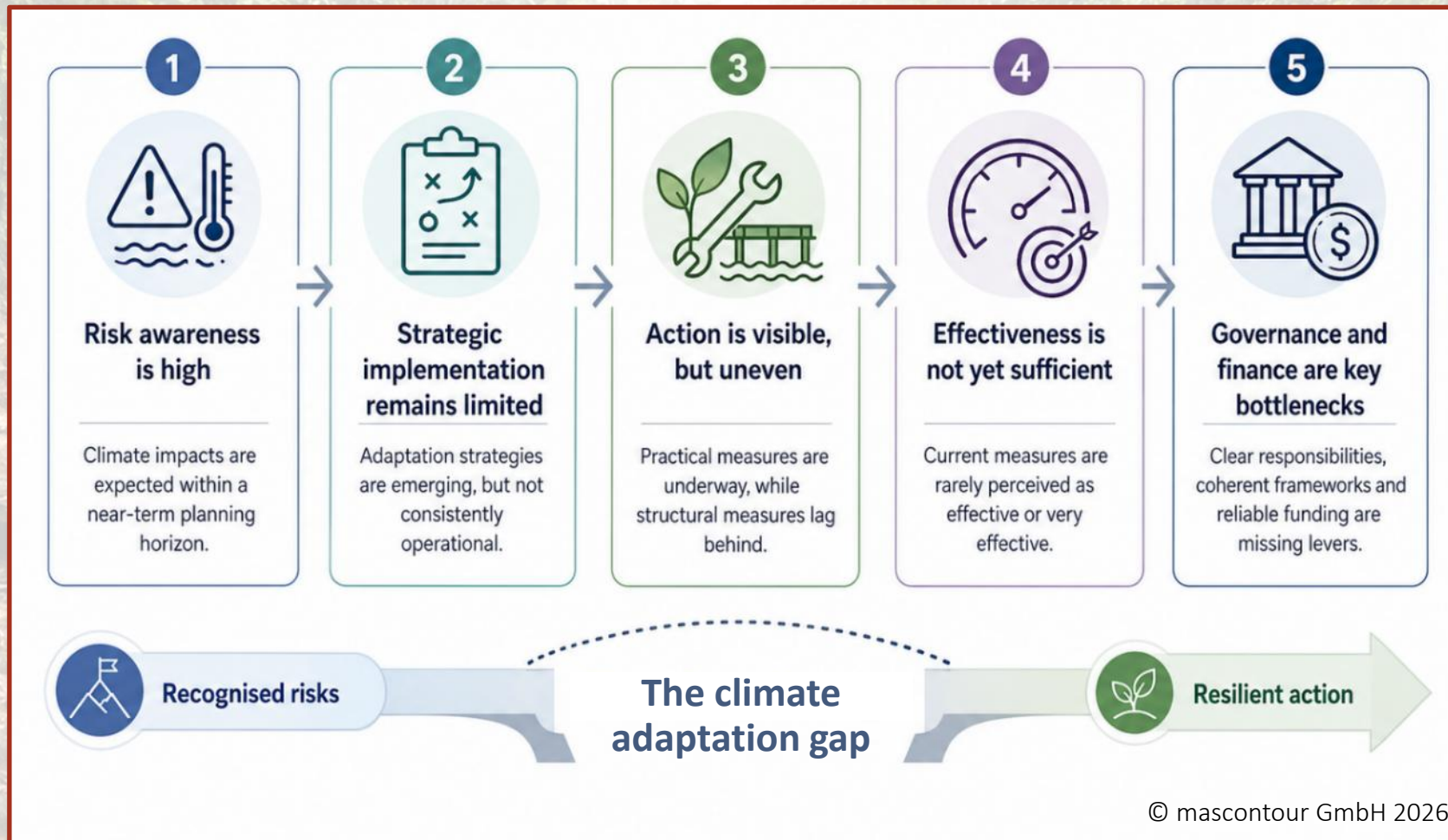
Reading the results through this lens shifts the discussion from isolated adaptation measures to the systems that enable adaptation. The question is therefore not only whether destinations or tourism businesses have started to respond to climate risks. The more strategic question is whether adaptation is embedded deeply enough in decision-making, investment, governance and learning processes to **strengthen long-term resilience**.

The climate adaptation gap is the distance between recognised risks and resilient action



The climate adaptation gap in tourism

Five main findings from the survey



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From adaptation measures to resilient tourism management

A practical way to address the adaptation gap is to place climate adaptation within a broader resilience framework. The survey findings show that **adaptation cannot be reduced to individual measures or short-term responses**. What is needed is a management perspective that connects climate risks with the long-term viability, competitiveness and functionality of destinations and tourism businesses.

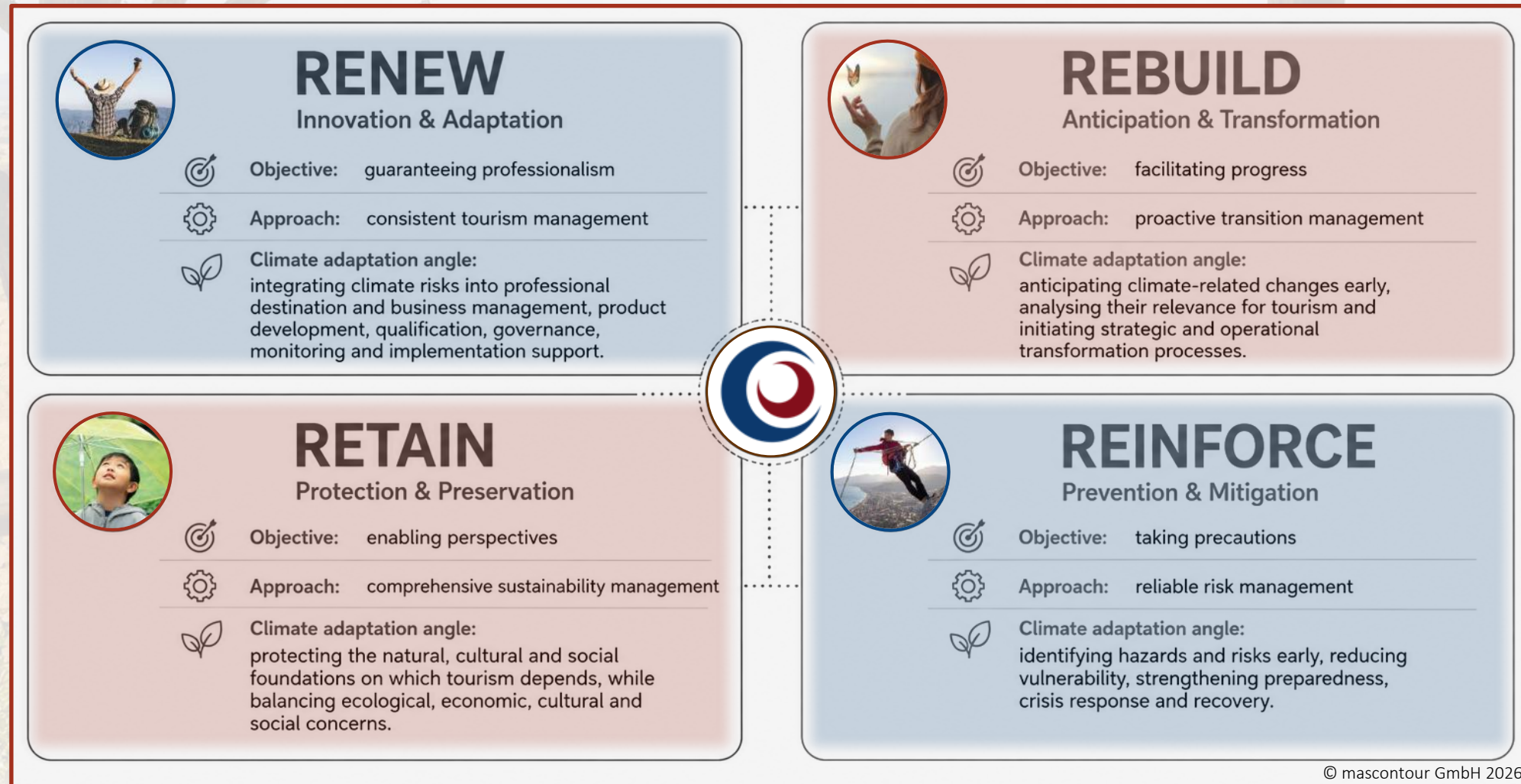
This is where mascontour's concept of resilient tourism management becomes relevant. It is not limited to risk reduction, but **brings together competitiveness, modernisation, sustainability and risk prevention** as complementary dimensions of future-oriented tourism development. Climate adaptation can therefore be understood as one entry point into a wider management approach that helps tourism systems remain attractive, responsible and adaptable under changing conditions.

Applied to climate adaptation, this means that destinations and tourism businesses need to do more than reduce exposure to individual hazards. They need to renew products and management structures, anticipate future challenges, protect the natural, cultural and social foundations of tourism, and reinforce their capacity to prevent, manage and recover from risks. **mascontour's Resilient Tourism Model** provides a framework for organising these tasks and translating climate adaptation into a more integrated management agenda.

Climate adaptation becomes effective when it is embedded in the management systems that shape resilient tourism development

mascontour's Resilient Tourism Model

Four dimensions for integrating climate adaptation into resilient tourism management



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For climate adaptation, the model creates a clear management agenda: destinations and tourism businesses need to integrate adaptation into how they renew, rebuild, retain and reinforce their tourism systems.



RENEW

Make climate adaptation part of professional tourism management, product innovation and destination development

Climate adaptation should be reflected in destination strategies, business planning, product development, governance structures, qualification processes and monitoring systems. This means moving adaptation from an environmental side topic into the regular management routines of destinations and businesses. Climate risks need to inform how tourism products are designed, how seasons and target groups are developed, how investments are prioritised and how destination management is organised.



REBUILD

Anticipate future challenges and transform where necessary

The survey shows that many tourism stakeholders expect significant climate impacts within a near-term planning horizon. Resilient tourism management therefore requires anticipation: recognising climate trends early, analysing their relevance for tourism, and initiating transformation processes before disruption becomes acute. This may include adjusting seasonal strategies, diversifying products, rethinking infrastructure, developing new visitor flows or supporting businesses in adapting their operating models.





RETAIN

Protect the natural, cultural and social foundations on which tourism depends

Tourism relies on intact landscapes, ecosystems, cultural assets, local communities and functioning public spaces. Climate adaptation must therefore be linked to the protection and preservation of these foundations. Nature-based solutions, water security, biodiversity protection, cultural heritage management and community wellbeing are not only environmental or social concerns; they are also part of maintaining the long-term attractiveness and viability of destinations.



REINFORCE

Strengthen risk management, preparedness and recovery

Climate change increases the relevance of hazards such as heatwaves, floods, storms, droughts, wildfires, biodiversity loss and coastal risks. Resilient tourism management requires reliable risk management: risk and vulnerability assessments, early warning systems, emergency planning, business continuity, visitor safety protocols, crisis communication and recovery mechanisms. This is where adaptation becomes operationally tangible – but it needs to be connected to strategy, financing and governance to become effective.

“ The value of the resilience model lies in connecting individual adaptation measures with a broader management logic.

It helps frame climate adaptation not as a parallel agenda, but as part of how destinations and tourism businesses organise their long-term viability under changing conditions.

For tourism stakeholders, this means that the next step is not simply to add more adaptation measures. It is to strengthen the management capacity to prioritise, coordinate and improve adaptation over time – so that responses become more consistent, more effective and more resilient. ”

Matthias Beyer,
Managing Director,
mascontour



Practice snapshots

Climate adaptation through resilient tourism management

The following examples illustrate how climate adaptation initiatives can be read through the lens of resilient tourism management. They are not presented as certified best practices, but as practice snapshots drawn from the survey and complemented with external sources. Together, they show how adaptation can connect to innovation, transformation, preservation and risk management.

RENEW – Innovation & Adaptation

Adapting tourism products, management models and destination development to changing conditions

SENTRUM Sustainable Green Destinations Project, UNDP – Türkiye

Location: Küçükköy / Ayvalık, Birgi / Izmir and other small-scale destinations

Measure type: Integrated green destination development

What it shows: SENTRUM develops a green destination model that links sustainable tourism transformation with local economic development, energy efficiency, renewable energy, water, waste, awareness raising and destination management. The project started in Ayvalık Küçükköy and was later expanded to Birgi and other destinations.

Resilience angle: The example shows how adaptation can be connected with destination innovation, product renewal and professional management rather than treated as a stand-alone environmental measure.

Further information

Green Scheme of Slovenian Tourism – Slovenia

Location: National framework, Slovenia

Measure type: Destination management, certification and improvement framework

What it shows: The Green Scheme of Slovenian Tourism brings destinations and tourism providers together under the Slovenia Green brand and offers tools to assess, improve and communicate sustainability performance. The scheme covers destinations, accommodation providers, parks, agencies, attractions, restaurants and other tourism actors.

Resilience angle: While not a climate adaptation programme alone, it illustrates how structured management tools can support continuous improvement, destination quality and adaptive capacity.

Further information

REBUILD – Anticipation & Transformation

Preparing tourism systems for future challenges through foresight, proactive transition management and strategic transformation

Mountain Tourism Transition in the Alpine Region – Italy

Location: Dolomiti Paganella, Trentino / Italy

Measure type: Season diversification, product transformation, participatory destination foresight

What it shows: Dolomiti Paganella is a strong example of a mountain destination actively rethinking its future beyond a traditional winter-sports logic. The destination's Future Lab explicitly treats climate change as one of its core future themes, while the destination has developed a broad bike & outdoor offer, including extensive MTB trails and bike parks. External reporting also describes Paganella as a case where mountain biking and summer tourism have become central to diversification as snow reliability declines.

Resilience angle: A valuable example illustrating proactive transition management: climate change is not only treated as a risk to winter tourism, but as a trigger to rethink seasons, products, target groups and long-term destination positioning.

Further information

All-year Tourism Strategy for the Spessart Mountain Region – Germany

Location: Spessart, Bavaria, Hesse / Germany

Measure type: Transition from snow-dependent winter tourism to year-round tourism

What it shows: Spessart is documented as a winter-tourism adaptation case in which the region responds to declining skiing opportunities by shifting towards year-round tourism. Measures include developing new biking and hiking trails, removing one no-longer-useful ski lift, using remaining lifts for mountain bikers and hikers in summer where possible, and broadening the tourism offer around hiking, biking, wellness and culture.

Resilience angle: This example shows a destination adjusting its operating model before traditional winter-tourism structures become unviable. It is about transformation of the destination offer, not only about individual adaptation measures.

Further information

RETAIN – Protection & Preservation

Protecting the natural, cultural and social foundations on which tourism depends

Sargassum Management in Quintana Roo – Mexico

Location: Quintana Roo, Mexico

Measure type: Coastal and marine ecosystem management / sargassum containment and use

What it shows: Quintana Roo is developing approaches to manage recurring sargassum influxes, which affect beaches, marine ecosystems and tourism operations along the Caribbean coast. Recent initiatives include collaboration between public and private actors to improve containment, collection and mitigation systems, while wider regional efforts explore how sargassum can be repurposed into products such as biofuels, fertilisers or biomaterials.

Resilience angle: This example shows how climate-related coastal pressures can be addressed through ecosystem protection, destination management and cross-sector cooperation. It focuses on preserving the environmental foundations of coastal tourism while reducing disruption for destinations and businesses.

Further information

Elbe Dyke Relocation and Floodplain Restoration – Germany

Location: Elbe river landscape, Germany

Measure type: Nature-based flood protection and floodplain restoration

What it shows: Dyke relocation on the Elbe created additional floodplain space and combined flood protection with ecological restoration. In one case, the measure created around 600 hectares of additional flooding area for the river.

Resilience angle: The project shows how nature-based adaptation can reduce flood risk while restoring ecosystems and maintaining landscape functions that are relevant for recreation and tourism.

Further information

REINFORCE – Prevention & Mitigation

Strengthening preparedness, risk management and operational safety

Easy-to-know Disaster Prevention App – Taiwan

Location: Taiwan

Measure type: Disaster information, early warning and public preparedness

What it shows: Taiwan's easy-to-know disaster prevention app provides the public with real-time disaster information, disaster preparedness guidance, instant weather conditions and forecasts. It was launched by the National Fire Agency under the Ministry of the Interior as part of a broader disaster prevention information service.

Resilience angle: It's about how digital information systems can strengthen preparedness and risk communication and helps people access timely information before and during hazardous events, supporting prevention, response and operational safety.

Further information

Beira Municipal Recovery and Resilience Plan – Mozambique

Location: Beira, Mozambique

Measure type: Urban recovery, coastal protection, drainage and resilience planning

What it shows: After cyclone Idai, Beira developed a Municipal Recovery and Resilience Plan to guide rebuilding and strengthen the city against future climate-related risks. The plan identifies coastal protection as vital for the city's future and addresses infrastructure areas such as drainage, sewage, solid waste and roads.

Resilience angle: This initiative shows how recovery after an extreme event can become a structured resilience process and it links risk reduction, protection infrastructure, preparedness and recovery planning in a highly exposed urban destination context.

Further information



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