

POLICY BRIEF 5 · TERRITORIAL INTELLIGENCE

From Place Marketing to Territorial Intelligence: Why Low-Density Regions Need Evidence Before Promotion

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KEY MESSAGE

Low-density regions should not start with promotion. They should start with territorial intelligence: evidence on housing, services, connectivity, local capacity, community priorities and risk. Promotion without diagnosis creates reputational, social and policy risks that undermine the very revitalisation it promises.

Why place marketing is not enough

The diffusion of digital-nomad visa schemes and rural-revitalisation narratives has produced a wave of place marketing by municipalities and regional agencies across southern and western Europe. Territories compete to be visible, to appear on nomad directories and to attract the first cohort of remote workers. The impulse is understandable: population loss is urgent, and promotion seems faster and cheaper than structural investment. But promotion is not a strategy, and marketing is not territorial development.

The European Commission's long-term vision for the EU's rural areas is explicit: revitalisation requires stronger connectivity, better services, diversified economies and institutional capacity — conditions that take time and investment to build (European Commission, 2021). Marketing without these conditions in place does not accelerate revitalisation; it overpromises it. The OECD has noted that the territorial benefits of remote-work attraction are conditional on local capacity, and that without deliberate policy support, remote work flows tend to concentrate in already-advantaged places rather than in the periphery (OECD, 2021).

Territorial intelligence is the missing step between ambition and action. It means building the evidence base that allows a region to understand what it can genuinely offer, what it risks, who it is trying to attract, and whether it is ready to do so responsibly. Without that foundation, promotion is a gamble with community trust and institutional credibility.

The risk of promoting what does not yet exist

The risks of premature or undifferentiated place marketing are both practical and institutional. They operate on four registers.

Overpromising and reputational damage. A territory that promotes itself as remote-work-ready before verifying its connectivity, housing and services will attract arrivals who

discover the gap between promise and reality. In tightly connected nomad communities, negative experience travels fast. A poor first cohort can undermine a territory's reputation for years, precisely when it is trying to establish one.

Low retention and wasted investment. Short, disappointing stays produce low economic impact and generate no integration benefit. The costs of promotion — time, budget, political capital — are sunk whether or not arrivals stay. Evidence-free attraction is an inefficient use of scarce municipal resources.

Community tension and social fracture. Arrivals that are not prepared for, in terms of housing, community orientation and local facilitation can generate friction with existing residents. This is especially acute in very small communities where even a small number of new faces represents a significant proportional change. Promotion that raises local expectations and then fails to deliver creates distrust of future initiatives.

Policy lock-in without evidence. Municipalities that launch attraction campaigns without a baseline are unable to measure impact, monitor risks or demonstrate results to regional and European funders. Evidence-free promotion makes it impossible to learn, adjust or scale responsibly. It also forecloses access to the impact-linked funding mechanisms that increasingly require documented territorial outcomes.

What territorial intelligence means

Territorial intelligence is a concept with roots in place-based policy, territorial cohesion research and applied geography (Medeiros, 2016; Camagni, 2009). In the context of digital-nomad attraction, it refers to the structured collection, interpretation and use of evidence about a territory's assets, constraints, risks and community priorities before and during any promotion or attraction effort.

Territorial intelligence is not a technology product or a proprietary scoring system. It is an analytical practice. It asks a set of structured questions about a place, assembles the available evidence honestly, identifies gaps and risks alongside strengths, and produces a picture of what the territory can currently offer and what it cannot. This picture is the foundation for responsible promotion and equally for the decision not to promote yet, or to invest first.

The distinction from place marketing is fundamental. Place marketing asks: how do we make this territory visible and attractive? Territorial intelligence asks: what is this territory genuinely capable of offering, to whom, under what conditions, and at what risk? The second question must come first (OECD, 2023).

What evidence municipalities should collect before promoting themselves

Territorial intelligence for remote-worker attraction is not a comprehensive audit of everything a place does or has. It is a focused evidence-gathering exercise organised around five domains.

1 · Housing capacity and affordability

How many properties are available for medium-stay rental, and in what condition? Are they work-capable — verified internet connectivity, ergonomic workspace, adequate heating, privacy? What is the current rent level, and how sensitive is the market to a modest increase in external demand?

Is there a housing-protection plan in place that ensures local residents retain access to affordable accommodation if external demand rises? These are the foundational questions, because housing is both the primary point of entry for remote workers and the primary point of risk for local communities.

2 · Service layer and daily liveability

What services can a medium-stay resident rely on? Food access, pharmacy, basic healthcare, transport connections and, for families, schooling. The OECD's analysis of remote work and place-based policy identifies service availability as one of the primary determinants of whether a territory can sustain a remote-working population (OECD, 2021). Territories should map their service layer honestly, identify gaps and either address them or communicate them transparently to potential arrivals.

3 · Connectivity: verified, not assumed

Broadband coverage data is not the same as functional connectivity in specific properties and shared spaces. A territory should verify, not assume, that its internet infrastructure delivers what remote workers require in the actual locations being promoted, houses, coworking spaces, cafés. Overstating connectivity is one of the most common and most damaging forms of overpromising in this space. Exploratory evidence from the NomadVillage pre-registration survey suggests connectivity is necessary but not sufficient, only around half of prospective remote workers cited it as the decisive factor, with the remainder citing the liveability bundle.

4 · Integration capacity and community readiness

Is there a designated local facilitator? Is there a structured channel through which arrivals can contribute to local economic or cultural life? Has the existing community been informed about and involved in shaping the initiative? Integration capacity is not about goodwill; it is about designed mechanisms. Without them, even willing communities and willing arrivals fail to connect, and the potential social and economic benefits of the interaction are lost.

5 · Risk profile and institutional capacity

What are the specific risks for this territory: housing price sensitivity, service-load pressure, community cohesion fragility, institutional bandwidth? Is there a responsible actor within the municipality with the mandate and capacity to manage an attraction programme, collect evidence and respond to emerging problems? Risk-aware attraction, knowing in advance what could go wrong and having a response plan, is a precondition for responsible promotion, not an optional extra.

From evidence to responsible promotion

Territorial intelligence does not replace promotion. It makes promotion honest, targeted and durable. A territory that has assembled evidence across the five domains above is in a position to make three decisions that evidence-free marketing cannot support.

- **What to promote and what not to.** Honest diagnosis reveals which assets are genuinely strong and which gaps should be addressed before being exposed to external scrutiny. Responsible promotion communicates only what exists and works today, not what is planned or aspirational.

- **Who to target and with what message.** Evidence about local assets (nature, culture, affordability, community) and local constraints (limited services, small housing market) allows a territory to identify the specific profile of remote worker most likely to stay and contribute, rather than broadcasting to the widest possible audience and hoping for the best.
- **When to promote and when to invest first.** Territorial intelligence makes the 'not yet' decision possible and legitimate. A municipality that can demonstrate it has assessed its readiness, identified specific gaps and decided to close them before promoting has a credible position with regional agencies, European funders and its own residents. That position is stronger, not weaker, than one built on an untested marketing campaign.

This evidence-to-promotion sequence is consistent with the place-based policy framework that structures EU cohesion and rural development instruments (Medeiros, 2016). Diagnosis before investment, investment before promotion, promotion before scaling: this is the logic that makes territorial development programmes effective and accountable.

Practical checklist for municipalities and regional agencies

- ✓ Before any promotion begins, verify connectivity in the actual properties and shared spaces you intend to promote — not from coverage maps.
- ✓ Map the service layer that a medium-stay resident would rely on and identify gaps honestly. Communicate gaps transparently or close them first.
- ✓ Audit available housing for medium-stay rental: quantity, condition, work-capability, rent levels and sensitivity to external demand.
- ✓ Assess integration capacity: Is there a local facilitator? A structured contribution channel? A plan for involving existing residents in shaping the initiative?
- ✓ Identify the top two or three risks for your territory (housing pressure, service load, community cohesion) and design a response before attraction begins.
- ✓ Establish a baseline — housing prices, vacancy rates, local business revenues, community sentiment — before the first arrivals, so impact can be measured and demonstrated.
- ✓ Define responsible promotion: what you can honestly say today about what your territory offers, to whom, and on what terms.
- ✓ Identify the regional and European frameworks (rural development, cohesion, LEADER, INTERREG) that your evidence base can unlock for additional investment.

Methodological note

The dataset is exploratory by design. It does not represent the entire population of digital nomads or low-density territories. Its value lies in documenting early demand, testing conceptual assumptions, identifying preference patterns and informing the development of a territorial-readiness approach. Exploratory evidence from the NomadVillage pre-registration survey is referenced where it directly illustrates a specific point about demand-side preferences. It should be read as an early signal, not as representative evidence about the full population of remote

workers or low-density territories. The policy and risk dimensions in this brief draw on published OECD and European Commission analyses, peer-reviewed research on territorial cohesion and place-based policy, and the academic literature on digital nomadism. No causal claims are made.

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