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Workation as a new mode of work: analysis of top European destinations

Elżbieta Wąsowicz-Zaborek

SGH Warsaw School of Economics, Collegium of Word Economy Department of International Busieness
e-mail: ewasowi@sgh.waw.pl, https://orcid.org/0000-0001-8422-4383

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Abstract. This study investigates the rise of workation, which combines work and vacation, and evaluates 20 European cities as remote-work destinations. Using k-means cluster analysis, cities were grouped based on factors such as cost of living, safety, coworking spaces, climate, Internet speed, and tourist arrivals. The analysis identified four distinct clusters: cities like London with high costs and infrastructure; affordable cities such as Timisoara and Rijeka that appeal to budget-conscious workers; cities like Barcelona and Lisbon offering a balance of infrastructure and cost; and quieter, emerging hubs with moderate tourist numbers. The findings emphasise the importance of coworking spaces, affordability and digital infrastructure in shaping workation preferences. These insights offer valuable guidance for city planners and tourism stakeholders in attracting remote workers

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1. Introduction

In an era defined by increasing flexibility in work arrangements, the traditional boundaries between work and leisure are becoming less distinct. The rise of remote work, accelerated by the COVID-19 pandemic, has fundamentally changed how and where people perform their jobs. One significant consequence is the concept of "workation", which merges professional duties with leisure in vacation-like settings. This hybrid model of tourism and work introduces complexities related to clearly defining the boundary between labour mobility and tourist behaviour. Consequently, this raises important conceptual considerations – should workation be treated predominantly as labour migration, reflecting an extended relocation for professional reasons, or rather as a form of tourism, characterised by temporary stays motivated primarily by leisure preferences? Whereas the workationer continues to work and receive payment from their permanent place of residence, treating the new location as temporary to maximise the benefits from the change of environment, workation aligns more closely with tourism than with traditional labour migration.

This study aims to explore the phenomenon of workation and identify the factors that make certain European cities attractive to remote workers. The analysis focuses on key variables such as cost of living, safety, coworking spaces, climate, Internet speed, and tourist arrivals. Employing a k-means cluster analysis, this study categorises 20 European cities into distinct groups based on these factors, offering insights into how cities can position themselves as desirable workation destinations.

The workation concept reflects a growing trend in which individuals seek to combine productivity with leisure, benefiting from modern digital infrastructure and flexible work arrangements. This study focuses on understanding how key factors such as cost of living, coworking spaces, safety and digital connectivity shape the preferences of remote workers in selecting workation destinations. As the popularity of digital nomadism continues to expand, cities that offer the right balance of affordability, infrastructure and quality of life are becoming increasingly attractive to this new class of remote workers.

The next section of this paper will review the current literature on workation and related work-from-anywhere models, followed by an in-depth analysis of the key factors driving the attractiveness of European cities to remote workers. The results of the cluster analysis presented in the next part of the paper will provide a clear understanding of how cities differ in their appeal, helping stakeholders enhance their workation-friendly environment.

2. Literature review

The significance of work-from-anywhere (WFA) has gained considerable attention, especially since COVID-19. Recent data reflect this increased interest in the academic community. Currently, a Google Scholar search yields ~630,300 results for "remote work" and about 174,000 for "work from home". The terms "work-from-anywhere" and "workation" return around 9,300 and 1,310 results, respectively. These figures indicate a substantial focus on understanding how these evolving work models impact employee well-being, job satisfaction, organisational performance and stakeholder engagement. As this landscape continues to develop, the importance of researching these areas remains critical for both scholars and practitioners.

2.1. Digital nomadism, work-from-anywhere and workation concepts

Remote work, broadly defined as any job performed outside a traditional workplace, is often performed at an employee's home. This practice includes various models, such as teleworking (occasional remote work), permanent remote work, and work-from-anywhere (WFA), which allows employees to choose their living location. WFA is particularly attractive, as it provides the flexibility to live wherever one prefers, potentially enhancing a company's productivity, especially when geographic freedom is a rare perk offered by competitors (Choudhury et al., 2021).

A prominent trend within WFA is digital nomadism, where individuals work remotely while traveling and merging work with leisure. However, this lifestyle introduces complexities concerning social security, taxation and immigration, as digital nomads must navigate diverse regulations across countries. Employers may also encounter challenges in justifying to immigration authorities the necessity of their physical presence in remote roles (Hooper & Benton, 2022).

The WFA model is closely linked to tourism, which the World Tourism Organization (UN WTO) defines as "a social, cultural, and economic phenomenon which entails the movement of people to countries or places outside their usual environment for personal or business/professional

purposes" (International Recommendations for Tourism Statistics 2008, 2010). This definition emphasises that the primary aspect of tourism is the movement itself, with the purpose of the trip being secondary. A traveller is considered a tourist if they are not compensated by a resident or a company based at their destination.

Since remote work involves operating away from the company's headquarters, remote workers who relocate from their usual residence can be classified as tourists. This blending of work and travel is central to the digital nomad lifestyle. Digital nomads, defined as individuals who "use digital technologies to work remotely, have the ability to work and travel simultaneously, have autonomy over frequency and choice of location, and visit at least three locations a year that are not their own or a friend's or family home" (Cook, 2023), embody this trend.

Hybrid forms of tourism, such as workation – a blend of work and vacation – are becoming increasingly popular. Workation allows individuals to maintain productivity while enjoying the experiences offered by new destinations. The rise of workation has been significantly driven by advancements in digital technology, particularly the widespread availability of high-speed Internet, enabling digital nomads to stay connected and work effectively from virtually anywhere.

Bassyiouny and Wilkesmann (2023) further categorise these trends, identifying types such as working tourists – who see work as a form of enjoyment rather than income – and traveling workers, whose primary travel purpose is business but who may engage in leisure activities afterward. These developments highlight the evolving nature of work and travel in the modern digital age.

2.2. Implications of work-from-anywhere and workation

Research shows that work-from-anywhere (WFA) has significant implications for employee well-being, job satisfaction and organisational performance. Studies suggest that WFA generally boosts productivity and employee satisfaction, although some findings point to potential negative effects, such as diminished productivity in certain contexts (Gibbs et al., 2022). Challenges like family–work conflict, particularly in crowded home environments, further complicate the work–life balance (Thompson, 2019; Chevtaeva & Denizci-Guillet, 2021; Wang et al., 2021; Hakim, 2023).

The health impact of WFA is mixed, with some studies highlighting improved overall health through telecommuting, provided individuals maintain healthy behaviours (Fiorini, 2023). Gender disparities also play a role, as remote work tends to increase domestic responsibilities for women (Sullivan & Lewis, 2001), though flexibility can help manage these pressures (Sullivan & Smithson, 2007; Waszkiewicz, 2022).

The COVID-19 pandemic accelerated the adoption of remote work and spurred organisations to refine operational strategies, emphasising communication, trust and cybersecurity (Ramadan et al., 2021; Adekoya, Adisa & Aiyenitaju, 2022; Gibbs et al., 2022). Workation, combining work and leisure, emerged as a popular post-pandemic model. It appeals to travellers seeking productivity alongside relaxation, stimulating regional tourism and contributing to local economies (Vogl & Micek, 2023; Voll et al., 2023). Case studies also show how workation fosters collaboration between companies and communities, addressing social challenges while enhancing employee experiences (Matsushita, 2024).

However, legal complexities arise with workation, as it blurs traditional employment categorisations, necessitating clearer legal frameworks (Moras-Olaś, 2022; Podlepina & Kuchechuk, 2022; Voll et al., 2023). Additionally, consumer preferences now favour destinations that offer natural settings for both work and leisure, aligning with the workation model and increasing demand for agritourism (Bielska et al., 2022).

2.3. Workation destination selection criteria

The rise of workation reflects the growing demand for flexibility in professional environments. As individuals balance work with personal well-being, destination choice becomes crucial, driven by a range of factors. The literature categorises these factors into push and pull influences. Push factors are personal needs and desires motivating individuals to seek a break, while pull factors are destination attributes that attract them once they have decided to travel (Tolman, 1959; Dann, 1977; Decrop, 2006; Njagi et al., 2017).

Among the push factors, psychological escape stands out as a key motivator, driving individuals to seek workation destinations that offer a mental break from their routine (Nikjoo & Ketabi, 2015) Additionally, the desire for personal growth and skill development encourages workationers to choose locations that provide opportunities for

cultural immersion and learning, enriching both their professional and personal lives (Hinlayagan et al., 2023).

Similarly, the quest for a better work–life balance is another significant push factor influencing destination choices. Individuals are increasingly drawn to environments that offer both productivity and relaxation, as highlighted by Said and Maryono (2018). This balance also plays a crucial role in shaping tourist loyalty and satisfaction, with push factors related to work–life balance significantly impacting these outcomes (Ermawati & Prihandono, 2018).

Economic considerations, meanwhile, act as both push and pull factors. Cost-effectiveness is critical, particularly for remote workers who are mindful of their budget when selecting a destination. The perceived value for money, especially in terms of lodging, food and activities, is a key determinant in destination selection (Pavluković et al., 2021). As a result, destinations that strike a balance between quality and price are more likely to attract workation visitors.

Accessibility is another key work destination draw. It considers transportation, proximity to home or work, and availability of necessary facilities. Workation travellers prefer convenient air, rail and road connections. Huang and Levinson (2015) found that travellers prefer places near home and work. Gutiérrez and Miravet (2016) claim that efficient public transport options enhance the tourist satisfaction and competitiveness of a destination. This suggest that workationers may prioritise destinations with robust transportation networks that facilitate easy movement. Uribe et al. (2022) found that public transport availability is a vital consideration for tourists, as it affects their mobility and access to attractions. On the other hand, once at a destination, the ease of navigating the local environment is crucial for workationers. This includes the availability of maps, signage and information about local attractions and services.

The availability of modern amenities and infrastructure is a crucial pull factor for workation destinations. Reliable Internet, comfortable workspaces, and leisure facilities significantly enhance a location's attractiveness (Mechinda et al., 2009). Coworking spaces have become essential for workationers, providing both professional and community hubs. Since the mid-2000s, these spaces have supported freelancers and remote workers, contributing to local tourism and economic growth, especially in rural or exotic areas (Grazian, 2020; Merkel, 2022). To digital nomads, coworking spaces are not only workplaces but essential components of their work–travel lifestyle, offering a blend of work, community and leisure (Aroles et al., 2020; Chevtaeva & Denizci-Guillet, 2021)

In addition to productivity, workationers seek destinations that enrich their leisure experiences. Cities like Lisbon and Canggu have implemented sustainable tourism strategies that attract digital nomads through cultural experiences (Mariati, 2023). Well-designed cultural activities are critical in drawing tourists and enhancing destination value (Zeng, 2017; Suhartanto et al., 2018; Douglas et al., 2023). Authentic cultural encounters aligned with visitors' tastes are particularly appealing to digital nomads (Yayla, 2024).

Furthermore, the incorporation of natural features – such as picturesque scenery, outdoor activities and favourable climate conditions – further enhances the attractiveness of workation destinations by offering a break from work-related stress (Becken & Wilson, 2013; Jeuring & Peters, 2013).

In addition to natural features, culinary attractions also play a crucial role in the decision-making process of digital nomads. Many seek authentic gastronomic experiences that reflect the local culture (Yayla, 2024). A variety of dining options, food markets and culinary events can significantly enhance the workation experience, making food-rich destinations particularly appealing. Moreover, the integration of intangible heritage and creative industries, such as art, music and local handicrafts, further enriches destinations by providing creative and cultural experiences that complement work–life balance (Arcos-Pumarola et al., 2023).

Safety is another key factor for workationers. Destinations with low crime rates, political stability and minimal health risks are more attractive to digital nomads, especially in urban settings, where safety concerns can heavily influence their overall experience (Pavluković et al., 2021; İlhan, 2024).

Finally, the image of a destination is a powerful factor. A positive and trendy destination image enhances competitiveness, making the location more appealing to workationers (Hong et al., 2006; Zhang et al., 2014; Ayikoru, 2015).

Building on the importance of destination image and safety, quality of life is another critical factor influencing workation destination choices. Research shows that workationers prefer destinations that offer a high quality of life, as it enhances their overall satisfaction during their stay (Lacárcel et al., 2024).

As sustainability becomes a growing concern, many travellers now prioritise destinations that

balance economic viability, social equality and environmental preservation. The Sustainable Travel Report 2023 (2023) highlights the increasing demand for sustainable solutions, influencing workationers' decisions to favour eco-conscious locations.

Finally, legal and tax regulations play a pivotal role in determining the viability of conducting remote work in certain regions. Favourable tax regimes and streamlined visa processes are attractive to digital nomads, as they simplify the legal complexities of remote work (Sánchez-Vergara et al., 2023). The emergence of digital nomad visas has addressed some challenges, allowing individuals to work remotely without full relocation or local tax obligations. However, the lack of comprehensive legislative frameworks in many countries remains a significant hurdle for medium- to long-term stays.

In conclusion, the current body of research on work-from-anywhere (WFA) and workation highlights the substantial and growing impact these phenomena have on both work practices and tourism. As the demand for flexible work arrangements continues to rise, especially in the post-pandemic era, understanding the factors that influence workation destination choices becomes increasingly important. The many push and pull factors, such as the desire for mental health and personal growth, as well as practical concerns like ease of access, modern amenities and convenient legal and tax environments, show how complicated this new trend is.

3. Research method

The study utilises secondary data analysis, relying on multiple data sources to evaluate the attractiveness of various European cities as a workation destination. The primary dataset is sourced from Nomad List, a popular platform that ranks cities based on several key factors relevant to remote workers. Nomad List crowdsources its data from a global community of digital nomads, which allows for real-time feedback on cities. Additional data related to characteristics of analysed places like cost of living, safety, climate and infrastructure were gathered from reputable sources such as Numbeo, Macer's Quality of life Index, Coworker.com and https://www.speedtest.net. The main source of the climate's data was the World Weather Information Service (WWIS) (https://worldweather.wmo.int), which is maintained by the World Meteorological Organization. The WWIS provides official climate statistics from local meteorological services. However, in some cases the data were incomplete, and in such cases the data were cross-checked with other available sources, such as climate portals and regional meteorological data. In cases where multiple figures were found (e.g., slight variations in annual rainfall usually, due to differences in time period or method of calculation), the mean of the available values were taken to ensure consistency. Additional sources of information were: Timeanddate.com (https://www.timeanddate.com/weather/), Climates to Travel https://www.climatestotravel.com) and En.climate-data.org: (https://en.climate-data.org).

Data collection focused on twenty European popular workation destinations, chosen based on their prominence on Nomad List and their presence in Europe. The cities analysed in this study were Barcelona, Tbilisi, Berlin, Lisbon, Copenhagen, London, Warsaw, Valencia, Athens, Kraków, Timisoara, Budapest, Ljubljana, Ploiesti, Varna, Porto, Riga, Alicante, Rijeka and Wrocław. The order is determined by the ranking presented on Nomad List.

To better understand which cities are most suitable for workation, this study employs a k-means cluster analysis, using variables such as:

- *economic factor* (to reduce the number of variables relating to economic factors, a factor analysis procedure was carried out allowing the creation of a new variable that included previous variables relating to the average cost of living and the cost of renting one- and three-bedroom apartments in urban centres and suburbs);
- *annual sunshine hours* (a measure of climate appeal);
- *safety index* (an important factor, especially for long-term remote workers);
- *quality of life index* (an indicator of overall living conditions);
- *number of coworking spaces* (professional infrastructure for remote work);
- *Internet speed* (essential for efficient remote work);
- *number of tourists arrivals in 2023* (indicating the level of tourism attractiveness and the supporting infrastructure).

In developing the method and establishing the indicators adopted in the study, some simplifications were made relating to the climate measure and tourist attractiveness. In the first case, the number of days of sunshine per year was used for the analysis. It should be emphasised that, although climate is usually described by a number of additional indicators (e.g., amount of precipitation,

average temperature), sunlight is an important contributor to human well-being. To determine tourist attractiveness, the outcome indicator of the number of tourist arrivals was used, which represents the effect of the destination's popularity, accessibility and tourist infrastructure.

With the k-means clustering algorithm, the cites were grouped into four clusters based on their similarities across the mentioned variables. Each cluster represents cities with distinct profiles in terms of affordability, infrastructure and appeal to workationers. The statistical significance of each variable in differentiating the clusters was evaluated using ANOVA, with F-tests used to assess the relative importance of each variable.

4. Results

4.1. The main workation destinations in Europe

The workation concept, which integrates work and travel, has emerged as a notable trend within the tourism industry. Prior to COVID-19, tourism was a major economic driver globally, but the pandemic significantly disrupted the sector. In response, many destinations began targeting digital nomads to stimulate tourism and mitigate losses, a trend that is projected to expand. The WFA model has transformed tourism by enabling individuals to work from diverse locations, including traditional tourist destinations. This shift offers substantial opportunities for the tourism sector, as digital nomads, through prolonged stays, contribute to local economies by spending on accommodation, dining and leisure activities. As such, the WFA model has become a key catalyst for tourism recovery and regional economic development.

To attract digital nomads, several factors are essential, including affordable living, reliable infrastructure, a supportive local community, diverse cultural experiences, and clear legal frameworks. Numerous European countries have introduced digital nomad visas, recognising their economic potential. Currently, European nations including Croatia, Cyprus, Estonia, Greece, Hungary, Iceland, Latvia, Malta, Romania, the Netherlands and Norway (Svalbard only) offer such visas (SchengenVisaInfo.com).

The rise of digital nomadism is also transforming the hospitality industry, with destinations and service providers adapting to this demographic by offering tailored services. Central and Eastern Europe stand out for their low living costs, strong remote work infrastructure, coworking spaces and safe environments, making them particularly appealing for workation.

Platforms like Nomad List and NomadX (in Portugal) help digital nomads choose destinations by ranking cities on factors like Internet speed, quality of life, cost of living, entertainment and safety. The ranking is based extensively on user-generated feedback. According to Nomad List (access 01.09.2024), the top European workation destinations (listed in descending order of ranking on Nomad List) are Barcelona (Spain), Tbilisi (Georgia), Berlin (Germany), Lisbon (Portugal), Copenhagen (Denmark), London (United Kingdom), Warsaw (Poland), Valencia (Spain), Athens (Greece), Kraków (Poland), Timisoara (Romania), Budapest (Hungary), Ljubljana (Slovenia), Ploiesti (Romania), Varna (Bulgaria), Porto (Portugal), Riga (Latvia), Alicante (Spain), Rijeka (Croatia), Wrocław (Poland).

To conduct a deeper analysis of the identified 20 cities concerning their attractiveness for workation, a compilation of key indicators relating to the key criteria for selecting workation destinations was prepared (see Table 1).

4.2. Cluster analysis

The analysis of workation destinations in Europe offers a nuanced understanding of how cities differ in terms of economic conditions, infrastructure and other key factors that influence their attractiveness to remote workers and digital nomads. By employing k-means cluster analysis, we have identified four distinct groups of cities, each offering a unique combination of features. These clusters, while sharing some common attributes, differ in ways that significantly impact their appeal to workationers.

The algorithm began by determining the initial centres for each cluster based on the variables mentioned. These centres were calculated and provided the starting points for each cluster's characteristics. The clustering method aimed to minimise the distances between cities within the same cluster while maximising the distances between clusters (see Table 2 and 3).

In the next step, the k-means algorithm performed iterative calculations to refine the cluster centres and reduce the distances between the cities within each cluster. After three iterations, the algorithm converged, indicating that there were no

significant changes in the cluster centres, and the clustering was finalised.

After three iterations, the final cluster centres were calculated, defining the characteristics of each cluster based on the selected variables. The clusters represent groups of cities with similar features (see Table 4 and 5).

The final step involved assigning each city to a specific cluster based on their characteristics (see Table 6).

The visual presentation of grouped cities is presented in Figure 1. Each cluster is described and analysed below.

Cluster 1. Sunshine Capitals

This cluster includes cities (Barcelona, Lisbon) that combine abundant sunshine, a high number of coworking spaces and a significant influx of tourists. These cities are attractive to workationers who prioritise sunny climates and professional infrastructure but are willing to contend with higher tourist activity and accept potentially higher living costs. The large number of tourists ensures robust services and amenities but may also lead to challenges such as overcrowding and high costs during peak seasons. The number of coworking spaces is particularly significant in supporting

Table 1. Key metrics of European top workation destinations

Wrocław (Poland)	Rijeka (Croatia)	Alicante (Spain)	Riga (Latvia)	Porto (Portugal)	Varna (Bulgaria)	Ploiesti (Romania)	Ljubljana (Slovenia)	Budapest (Hungary)	Timisoara (Romania)
704.90	758.30	916.20	704.90	840.55	510.00	514.05	949.45	699.35	528.50
800.00	650.00	750.00	750.00	1022.37	500.00	Nda	1050.00	900.00	625.00
550.00	500.00	600.00	500.00	833.02	400.00	nda	850.00	650.00	300.00
1500.00	1100.00	1400.00	1400.00	1930.97	900.00	nda	2000.00	1800.00	850.00
1000.00	850.00	900.00	900.00	1414.31	650.00	nda	1500.00	1200.00	600.00
620.0	1500	304.0	660.0	1200	470.0	550.6	1400	599.8	599.5
1700	2200	3000	1800	2500	2200	2100	2000	2050	2000
9.0	14,2	18,4	7,2	15.0	12,5	11,4	10.0	11,5	11,2
71,4	78,3	70,2	61,2	68,2	64,5	nda	78,6	65,6	74,3
106	nda	nda	93	55	nda	nda	78	80	nda
148,5	nda	nda	154,9	177,2	143,4	nda	177,2	136,4	161,2
17	2	10	23	47	5	1	11	62	5
53,53	84,62	48,64	132,96	226,38	107,44	62,5	70,74	80,39	62,5
154,69	55,48	207,9	103,71	167,75	78,7	203,54	93,17	216,65	203,54
nda	nda	nda	nda	71	nda	nda	nda	46	nda
1,272	0,221	2,750	1,2	~ 2,6	2	0,454 (Prahova County)	1,11	5,3	0,240

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Kraków (Poland)	Athens (Greece)	Valencia (Spain)	Warsaw (Poland)	London (United Kingdom)	Copenhagen (Denmark)	Lisbon (Portugal)	Berlin (Germany)	Tbilisi (Georgia)	Barcelona (Spain)	City
741.10	741.10	944.00	745.60	1916.50	2,045.75	897.40	1070.25	549.15	1124.30	Average Cost of Living (euros) (as of 09.2024) 1
725.00	600.00	1069.64	1001.70	2500.00	1798.89	1245.00	1225.10	543.38	1072.95	1 Bedroom (City Centre) (as of 09.2024) 2
550.00	460.00	800.22	730.60	1785.00	1392.67	873.75	879.39	352.82	801.61	1 Bedroom (Outside of Centre) (as of 09.2024) 3
1200.00	1150.00	1728.30	1904.26	4950.00	3384.87	2207.50	2321.64	1024.89	1733.98	3 Bedrooms (City Centre) (as of 09.2024) 4
850.00	800.00	1154.81	1420.83	3200.00	2238.85	1555.00	1739.11	716.70	1244.29	3 Bedrooms (Outside of Centre) (as of 09.2024) 5
671.2	405.1	454.3	681.2	611.0	524.6	750.5	571.0	499.7	619.4	Annual Precipitation (mm) (based on data from 1991–2022) 6
1500	2811	2750	1580	1631	1780	2806	1650	2250	2524	Annual Sunshine (hours) (based on data from 1991–2020) 7
9,2	18,4	18,3	8,5	11.0	8,9	16,5	10,1	12,7	16.9	Average Annual Temperature (°C) (based on data from 1991–2021) 8
73,2	44,1	70,2	73,8	45,5	73,8	70	55,8	74,5	48,4	Safety index Numbeo (as of 09.2024) 9
99	94	nda	84	45	4	39	18	nda	48	Quality of life – position in Mecer's ranking (for 2024) 10
146,9	122,2	197,8	150,4	139,8	203,7	154,7	169,1	nda	148	Quality life index Numbeo (as of 09.2024) 11
43	41	49	94	1293	54	122	194	29	194	Co-working spaces (as of 09.2024) 12
97,04	98,23	48,64	109,08	86,66	254,14	238,49	91,9	38,43	83,7	Internet speed mobile (as of 09.2024) 13
182,36	51,06	207,9	171,9	105,39	219,01	119,77	83,34	28,84	216,93	Internet speed fixed broadband1 (as of 09.2024) 14
54	25	nda	40	1	nda	23	12	59	13	Tourism infrastructure (top 100 city destinations) (in 2023) 15
7,05	7,9 (Attica Region)	10,5	9,646	20,28 inbound + ~ 12 domestic	~ 7	18,76	12,1	6,6	15,6	Number of tourist arrivals in 2023 (in mln) 16

nda – no data available

Source: own elaboration based on data collected in September 2024 from:
1–5, 9, 11 https://www.numbeo.com
6–8 https://worldweather.wmo.int; https://www.timeanddate.com/weather/, https://www.climatestotravel.com), https://en.climate-data.org
10 https://www.mercer.com/insights/total-rewards/talent-mobility-insights/quality-of-living-city-ranking/
12 https://www.coworker.com
13, 14 https://www.speedtest.net
15 https://www.observatoriturisme.barcelona/en/key-figures-2023
16 https://www.geostat.ge – data for the 2022 cause the data for 2023 were available only for the first 6 months
https://www.ine.pt
https://about.visitberlin.de/en/press/press-releases/2023-berlin-tourism-continue-rise
https://www.ons.gov.uk/peoplepopulationandcommunity/leisureandtourism/articles/traveltrends/2023
https://go2warsaw.pl/wp-content/uploads/Szacunek_ruchu_turystycznego_w_Warszawie_2023.pdf
https://www.bankofgreece.gr/en/useful-links/search-results?term=tourism%20statistics
https://timis.insse.ro
https://www.ksh.hu/stadat_eng?lang=en&theme=tur
https://www.stat.si/StatWeb/en/News/Index/11653
https://www.varna.bg/en/189
https://www.liveriga.com/en/13185-number-of-tourists-in-riga-sees-stable-recovery-reaching-1-2-million-in-2023
https://glashrvatske.hrt.hr/en/domestic/a-record-tourist-year-in-rijeka-11274769
https://www.wonderfulcopenhagen.com
https://insse.ro/cms/en
https://alicanteturismo.com/en/

workationers in these cities, with Barcelona and Lisbon offering some of the highest numbers in the dataset.

Cluster 2. Balanced Urban Innovators

The second cluster represents cities (Tbilisi, Berlin, Copenhagen, Warsaw, Kraków, Budapest, Athens, Valencia) that offer a more even balance between infrastructure, cost and liveability. These cities are characterised by moderate sunshine, strong safety indices, and a balanced number of coworking spaces. They are popular among remote workers seeking a stable and secure work environment without the excessive costs or tourist-driven congestion found in cities of Cluster 1. While the number of tourists is still significant, it is lower than in the first cluster, which means these cities can provide a more relaxed atmosphere for workationers. They offer a more moderate approach to workation, where neither extreme costs nor extreme tourist numbers dominate the landscape.

Cluster 3. Emerging Gems

The cities in this cluster (Timisoara, Ljubljana, Varna, Ploiesti, Rijeka, Riga, Porto, Alicante, Wrocław) are affordable, with moderate sunshine, but lack the same level of infrastructure as the previous clusters. These cities are emerging workation destinations. While they do not have extensive coworking spaces or fast Internet speeds, they make up for it with high safety and relatively affordable living conditions. These cities attract workationers who prioritise safety and budget over advanced professional infrastructure. They are less crowded, quieter and more affordable, making them ideal for those who prefer tranquillity and a slower pace of life. The relatively low number of tourists also means that these cities provide a less commercialised workation experience, which may appeal to digital nomads who prefer more peaceful destinations.

Cluster 4. Global Elite Metropolis

London is the sole city in this cluster, standing out for its high number of coworking spaces, its status as a global hub, and the enormous volume of tourist arrivals. However, it comes with significantly higher costs and lower safety levels compared to the other clusters. It boasts a vast number of coworking spaces, making it attractive for professionals seeking networking and professional growth. However, the very high tourist numbers and lower safety index may detract from its appeal, especially for

Table 2. Initial cluster centres

	Cluster			
	1	2	3	4
Annual Sunshine (hours)	2,524.00	2,750.00	2,000.00	1,631.00
Safety index (Numbeo)	48.40	70.20	74.30	45.50
Quality life index (Numbeo)	148.00	197.80	161.20	139.80
Co-working spaces	194.00	49.00	5.00	1,293.00
Internet speed fixed broadband	216.93	207.90	203.54	105.39
Economical factor score	0.15874	0.04083	-1.07967	3.01262
Number of tourists arrivals 2023	15,600,000	10,500,000	240,000	32,000,000

Source: own elaboration with SPSS 29

Table 3. Iterative calculations

Iteration	Change in Cluster Centres			
	1	2	3	4
1	1,580,000.001	1,814,857.335	1,474,700.009	0.000
2	0.000	423,142.858	398,366.667	0.000
3	0.000	0.000	0.000	0.000

Source: own elaboration with SPSS 29

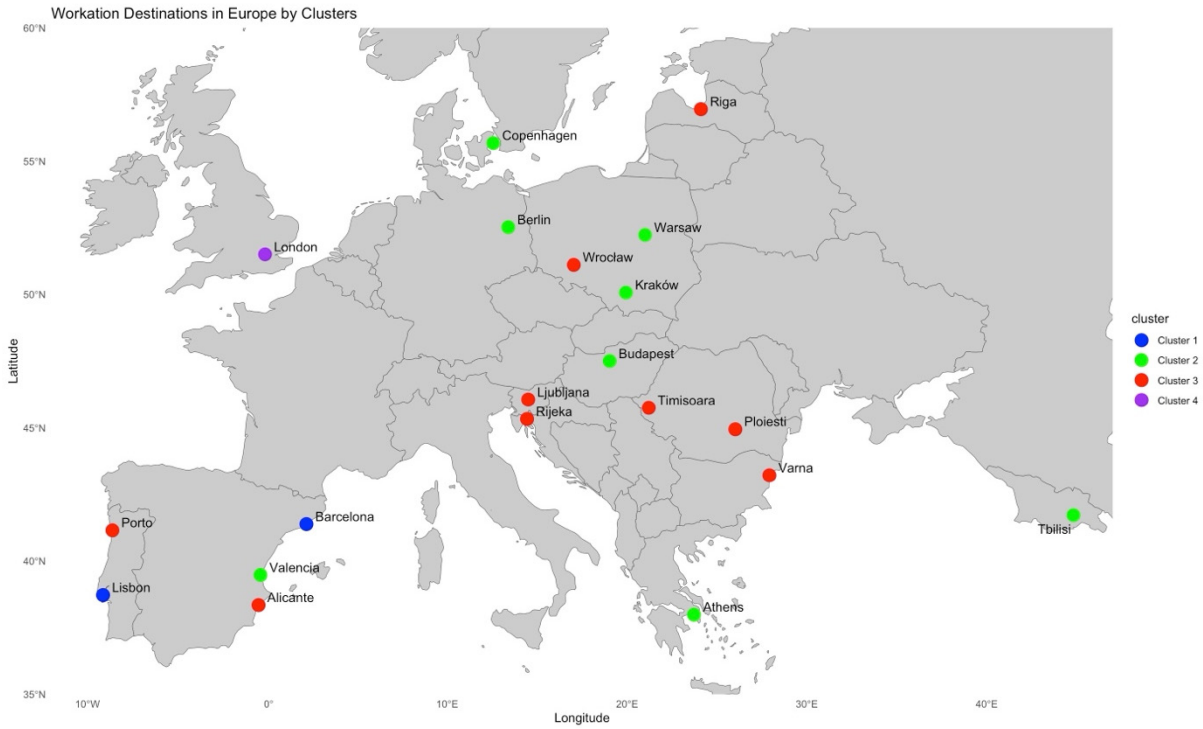

Fig. 1. Clusters of top workation destinations in Europe
Source: own elaboration.

Table 4. Final cluster centres

	Cluster			
	1	2	3	4
Annual Sunshine (hours)	2,524.00	1,937.14	2,166.67	1,631.00
Safety index (Numbeo)	59.20	66.38	70.84	45.50
Quality life index (Numbeo)	151.35	160.93	160.40	139.80
Co-working spaces	158.00	70.75	13.44	1,293.00
Internet speed fixed broadband	168.35	145.13	140.94	105.39
Economical factor score	0.26230	0.01547	-0.45763	3.01262
Number of tourists arrivals 2023	17,180,000	8,262,000	1,316,333.33	32,000,000

Source: own elaboration with SPSS 29

Table 5. Distances between final cluster centres

Cluster	1	2	3	4
1		8,918,000.020	15,863,666.671	14,820,000.071
2	8,918,000.020		6,945,666.671	23,738,000.033
3	15,863,666.671	6,945,666.671		30,683,666.698
4	14,820,000.071	23,738,000.033	30,683,666.698	

Source: own elaboration with SPSS 29

Table 6. Cities by cluster

City	Cluster	Distance
Barcelona (Spain)	1	1,580,000.001
Tbilisi (Georgia)	2	1,662,000.034
Berlin (Germany)	2	3,838,000.013
Lisbon (Portugal)	1	1,580,000.001
Copenhagen (Denmark)	2	1,262,000.013
London (United Kingdom)	4	0.000
Warsaw (Poland)	2	1,384,000.047
Valencia (Spain)	2	2,238,000.149
Athens (Greece)	2	362,000.016
Kraków (Poland)	2	1,212,000.080
Timisoara (Romania	3	1,076,333.348
Budapest (Hungary)	2	2,962,000.003
Ljubljana (Slovenia)	3	206,333.407
Ploiesti (Romania)	3	862,333.338
Varna (Bulgaria)	3	683,666.671
Porto (Portugal)	3	1,283,666.711
Riga (Latvia)	3	116,333.918
Alicante (Spain)	3	1,433,666.910
Rijeka (Croatia)	3	1,095,333.337
Wrocław (Poland)	3	44,335.793

Source: own elaboration with SPSS 29

Table 7. Significance of variables in differentiating the clusters

Variable	F	Sig.
Annual Sunshine (hours)	1.171	0.356
Safety index (Numbeo)	2.589	0.091
Quality life index (Numbeo)	0.306	0.821
Co-working spaces	330.171	<0.001
Internet speed fixed broadband	0.195	0.898
Economical factor score	7.660	0.002
Number of tourist arrivals 2023	124.263	<0.001

Source: own elaboration with SPSS 29

workationers who prefer a more peaceful and secure working environment. Despite these challenges, London remains a top choice for high-income workationers and those looking for global business opportunities.

An ANOVA analysis was performed in the next step to determine the statistical significance of each variable in differentiating the clusters. The F-values and p-values were computed for each variable, showing that coworking spaces, economic factors and the number of tourists were the most significant variables for clustering (summary in Table 7).

With an F-value of 330.171 and a p-value of less than 0.001, the number of coworking spaces is the most statistically significant factor in defining the clusters. This indicates that access to coworking spaces is a crucial driver for remote workers in choosing a workation destination in the analysed sample. Cities with a higher number of coworking spaces are more likely to attract professionals seeking productive environments.

The number of tourists arriving in 2023 was also highly significant, with an F-value of 124.263 ($p<0.001$). This suggests that cities with a higher number of tourists arrivals tend to have better infrastructure. However, they may also face challenges such as congestion and higher costs. Cities in Clusters 1 and 4 in particular, which attract millions of tourists annually, benefit from the infrastructure supported by tourism but face trade-offs in terms of crowding and cost. Too many visitors can lead to the negative phenomenon known as overtourism. In addition to the already mentioned rising costs associated with access to infrastructure, accessibility to attractions can be significantly reduced or waiting times for basic services lengthened. In addition, there is environmental degradation as a result of significant human impact. This situation may lead to a reduction in attractiveness in the long term or discourage longer stays.

The economic factor, which encapsulates the cost of living and rent, is another significant variable with an F-value of 7.660 ($p=0.002$). This shows that affordability plays a key role in differentiating the clusters, with cities in Cluster 3 emerging as the most affordable, while cities in Clusters 1 and 4 are much more expensive.

The analysis revealed that certain factors, such as annual sunshine hours, safety index, quality of life index, and Internet speed, were not statistically significant in differentiating the clusters. These non-significant factors suggest that, while they may be relevant for choosing workation destinations, their variation across the analysed European cities is insufficient to meaningfully impact the cluster formation in this study.

5. Discussion and conclusion

The phenomenon of workation, which blends work and leisure, has emerged as a significant trend in the post-pandemic world, reshaping how professionals balance their work–life commitments and how destinations cater to a new wave of digital nomads. This study, through the analysis of 20 European cities, provides important insights into the factors that influence the attractiveness of workation destinations. By clustering cities based on key variables such as economic affordability, safety, infrastructure and coworking spaces, this research highlights the diversity among various cities in terms of appeal to remote workers.

The findings demonstrate that cities such as Barcelona and London attract workationers with their extensive coworking infrastructure and strong tourism appeal, though they face challenges related to high costs and overcrowding. In contrast, emerging destinations like Timisoara and Rijeka offer more affordable, quieter environments, making them ideal for workationers seeking a balance between professional productivity and tranquillity. This diversity of workation hubs emphasises the varying priorities of remote workers, from infrastructure needs to cost-effective living, and reinforces the growing importance of coworking spaces, as demonstrated by their statistical significance in the cluster analysis.

The study's results are consistent with prior research on work-from-anywhere (WFA) and digital nomadism. For example, scholars such as Aroles, Granter and de Vaujany (2020) and Merkel (2022) have emphasised the crucial role of coworking spaces in supporting the digital nomad lifestyle – a finding that this study corroborates. Similarly, Voll et al. (2023) and Vogl and Micek, (2023) have pointed to the economic benefits that workationers bring to local economies, particularly through prolonged stays, which stimulate demand for services such as accommodation, dining and local experiences. This research extends these findings by demonstrating how European cities can position themselves to capitalise on the workation trend, particularly considering the increased demand for remote work opportunities post-COVID-19.

The implications of this research extend beyond academic theory to practical applications for city planners, tourism boards and businesses catering to digital nomads. Cities in the "Emerging Gems" cluster, such as Rijeka and Wrocław, can use their affordability and safety to attract remote workers who prioritise cost-effective living and peaceful environments. Conversely, cities like Lisbon and Barcelona, while already popular, may need to address issues such as congestion and high costs to maintain their attractiveness. Tourism boards could also enhance their offerings by promoting cultural experiences and sustainability initiatives. This would align with the evolving preferences of digital nomads, as suggested by research from scholars like Suhartanto et al. (2018) and Yayla (2024), who highlight the growing importance of authentic local experiences and eco-conscious tourism.

Furthermore, it should be noted that workationers who are actually digital nomads do not move permanently to a workation destination. They usually spend a few days, weeks or months at the workation destination and then look for another location.

Interestingly, although the statistical significance of the studied sunshine days indicator in the choice of destination was not confirmed, perhaps it is the climatic factors described in a broader context that could prove to be an important predictor of the destination choice decision. Certainly, however, workation destinations with large weather differences between seasons will experience seasonality. Nevertheless, the differences here can be expected to be lower than those observed for traditional forms of tourism, mainly due to the importance of the economic factor (lower cost of living in the off-season).

Despite the valuable insights provided by this study, there are limitations that should be acknowledged. The reliance on secondary data, while comprehensive, may not fully capture the nuanced preferences of individual workationers. Future research could benefit from incorporating primary data collection methods, such as interviews or surveys, to better understand the motivations and expectations of digital nomads. What is more, an important factor could be the nationality or place of living of the workationers, which can affect the differences in their decisions towards destination choice.

Furthermore, this study focuses exclusively on European cities, limiting the generalisability of the findings to other regions. Expanding the scope of research to include cities in Asia, Africa and the Americas could offer a more global perspective on workation destinations.

There is also room for further exploration into the cultural and experiential dimensions of workation. While this study emphasises economic and infrastructural factors, future research could delve deeper into how workationers value local culture, gastronomy and recreational activities when choosing their destinations. The integration of these experiential factors would provide a more holistic understanding of the workation experience and offer actionable insights for cities seeking to differentiate themselves in an increasingly competitive market.

In conclusion, the rise of workation represents a transformative shift in both work practices and tourism, offering new opportunities for regional development. By identifying key characteristics that make cities attractive to remote workers, this study contributes to the growing body of literature on hybrid work models and digital nomadism. As the demand for flexible work arrangements continues to rise, understanding the dynamics of workation destination selection will be crucial for cities looking to thrive in the evolving global economy.

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