ATLAS ECOSYTEM MAP

Extended survey Analysis of cultural tourism ecosystem map Introduction This document represents the analysis of the main characteristics of cultural tourism in the Adriatic area. One of the main growth challenges of the Italy-Croatia Programme area is to find the way to preserve the rich cultural heritage that would support economic development in a sustainable way. There are several main aspects that must be tackled, including the lack of technological innovation in tourism sector, with a special accent on cultural tourism. Therefore, one of the main aims of the ATLAS project is to test new innovative solutions with the goal of improving the attractiveness of the area, while highlighting the development of culturalbased economy, by integrating different tourism products and offers. Furthermore, it is rather important to accentuate the need for alternative strategies, aiming at diversifying the tourism offer, thus, shifting to less valorized areas and low seasons. The baseline methodology and tools developed by SMARTINNO project will be capitalized and focused within the cultural tourism sector. First step along this way is to map the relevant stakeholders from the cultural tourism sector, in order to identify needs, strengths, competences, but also threats and weaknesses. Thus, the purpose of this document is to provide an overview of mapped stakeholders and analyze the main aspects of cultural tourism in the Adriatic area. Therefore, this analysis is based on the SWOT analysis of the mapped stakeholders. It will give an overview of the main players in the field of cultural tourism in the programme area, and it will present their success and fostering factors, as well as barriers and limiting factors. This analysis is the first step along the way. Mapping of stakeholders is important to identify needs, strengths and competences, while the project will provide an open space to find specialized services, partners and working groups where topics of interest for cultural tourism operators will be developed. Further to this, this path will lead to the implementation of demo actions on innovative ideas in the addressed field. Field analysis on cultural tourism sector – cultural tourism ecosystem map Within Activity 3.1 and deliverable D3.1.1 project partners were actively involved in creating cultural tourism ecosystem map, which gathers relevant stakeholders from the cultural tourism sector and provides general information about them, as well as success and fostering factors, along with barriers and limiting factors. Furthermore, the map also includes the level of quality of digital solutions, which includes the existence of website, available languages, social media presence, accessibility for people with reduced mobility and other sorts of disabilities. On the level of the programme area, a total of 159 stakeholders were

mapped. The following table provides information on the number of mapped stakeholders per region. Table 1: Mapped stakeholders Region Mapped stakeholders Friuli-Venezia Giulia 18 Emilia-Romagna 10 Apulia 44 Veneto 14 Kvarner/Croatia 21 Istria/Croatia 52 Total: 159 The structure of mapped stakeholder differs between the regions. Partners from Croatia, who have mapped stakeholders from Istria and Kvarner, mapped predominantly stakeholders from public sector (national/regional/local tourist boards; nature parks, museums, projects runned by local or regional authorities etc.), while there are only few stakeholders that belong to the private sector. On the other side, Italian partners (although depending on the region) mapped a significant number of stakeholders from the private sector. Another rather important detail that emerged as a result of the analysis of mapped stakeholders is that a significant percentage of websites are available only in the local language (Croatian or Italian). The next most dominant language is English. This is not such a good aspect, since a lot of those destinations have a high number of tourists coming from Germany, Austria, or France, and availability of those languages are very important. However, there are four noticeable examples of website language choices that merit accentuation: • Kvarner County Tourist Board – 13 languages: Croatian / English / German / Italian / Polish / Czech / French / Slovenian / Hungarian / Spanish / Dutch / Russian / Chinese • Uniline d.o.o. – 12 languages: : Croatian / English / German / Italian / Slovenian / Slovakian / Polish / Spanish / Czech / Romanian / Hungarian / French • Provincia di Ferrara – Ferrara Terra e Acqua – 8 languages: Italian / French / German / English / Russian / Danish / Chinese / Dutch • Veneto Region Tourism Department – 8 languages: Italian / French / German / English / Russian / Spanish / Portuguese / Chinese. Virtual tours provide a compelling alternative to people with disabilities or different kinds of expenses, time and other issues, but still they are not a common practice within mapped stakeholders. Still the Tourist Board of Pula, Town of Pula, Morosini - Grimani Castle, Istrian de Dignan – ECOMUSEUM, Archeological Museum of Istria and National Park Brijuni represent good examples of virtual experiences. Furthermore, a high number of mapped stakeholders do not use social media and some of the websites do not provide all the necessary information, while some projects/initiatives do not have a website at all. However, those who do not have a website usually disseminate information via social media channels. SWOT Analysis Conclusions This document has been created with the aim to present the analysis of stakeholders in cultural tourism sector, within the programme area. This represents a first step in the ATLAS project, since this analysis of mapped stakeholders will result in identifying needs, strengths and competences of the stakeholders, but also threats and weaknesses, since they also must

be taken into account, as they are a crucial aspect of any planning. This analysis provides a basis for further steps on the project, and the ultimate goal, or one of the goals, is to develop concrete opportunities that will help improving competitiveness, seasonality and accessibility. Preparation of a strategy that will lead to the final above mentioned goals, requires some in-depth analysis of positive and negative aspects. Furthermore, the analysis of mapped stakeholders points to some rather important facts that must and will be taken into account while continuing activities within the project. Moreover, there are also certain differences between the regions, especially when comparing Croatian and Italian regions, and those aspect must also be taken into account, while also bearing in mind that the focus must be placed on those aspects that can benefit the growth of the Italy-Croatia Programme area. Common characteristics of the two regions are target users, i.e. cultural, family and rural tourism, which is in compliance with expected outputs of the project, giving the base for an integrated approach in unlocking potential of cross-border cultural tourism.