

WP3 FINAL RESULTS

EXCOVER | University of Bologna CAST

3rd Technical Meeting | online | 08 October 2020

Preamble: A Cross-border perspective

This presentation regards a **cross-border synthesis** of the SWOT and Reputation analyses brought about at the local level by EXCOVER partners,

In the report we point to give an integrated perspective based on 3 sources of information:

- the **residents' opinions (the supply)**, collected through semi-structured surveys, then discussed, integrated and rated in **Capacity building seminars**,
- **visitors and non-visitors' opinions (actual and potential demand)** collected through to further sample surveys.

Given the focus of the EXCOVER project on sustainable development, a special attention is paid to **residents' support to tourism**, that is measured through an innovative **participation index**, built based on the specific informative needs of project partners, and by investigating the **availability of the host communities to share** their unused accommodations, time, knowledge and skills with visitors.

OUTLINE

- **Cross-border analysis of the local tourism systems**
- **Cross-border analysis of residents' support to tourism**
- **Concluding Remarks**

Cross-border analysis of the local tourism systems

Destination	STRENGTHS (% distributions of those classified as most important (see local report))									
	Niche services	Natural heritage, environment	Cultural heritage	Rural lifestyle	Host community	Birthplace of famous scientists, artists	Sport	Geographic position	Typical food and productions	Low prices
Ostellato	0%	57%	14%	0%	0%	0%	14%	14%	0%	0%
Sasso Simone	0%	43%	29%	0%	0%	0%	14%	0%	14%	0%
Alfonsine	0%	43%	29%	0%	0%	0%	14%	0%	14%	0%
Carnia	14%	29%	14%	43%	0%	0%	0%	0%	0%	0%
Rive d'Arcano	0%	29%	14%	14%	0%	0%	14%	0%	29%	0%
Montefeltro	0%	29%	14%	29%	0%	0%	0%	0%	14%	14%
Campobasso	0%	43%	43%	0%	0%	0%	0%	0%	14%	0%
Gospic	0%	14%	0%	14%	14%	14%	0%	29%	14%	0%
Cavle	0%	0%	57%	0%	0%	0%	29%	0%	14%	0%
Karlovac	14%	29%	14%	0%	14%	0%	14%	14%	0%	0%
Characterize Italy/Croatia	HR	IT	HR	IT	HR	HR	HR	HR	IT	IT
Total	3%	31%	23%	10%	3%	1%	10%	6%	11%	1%

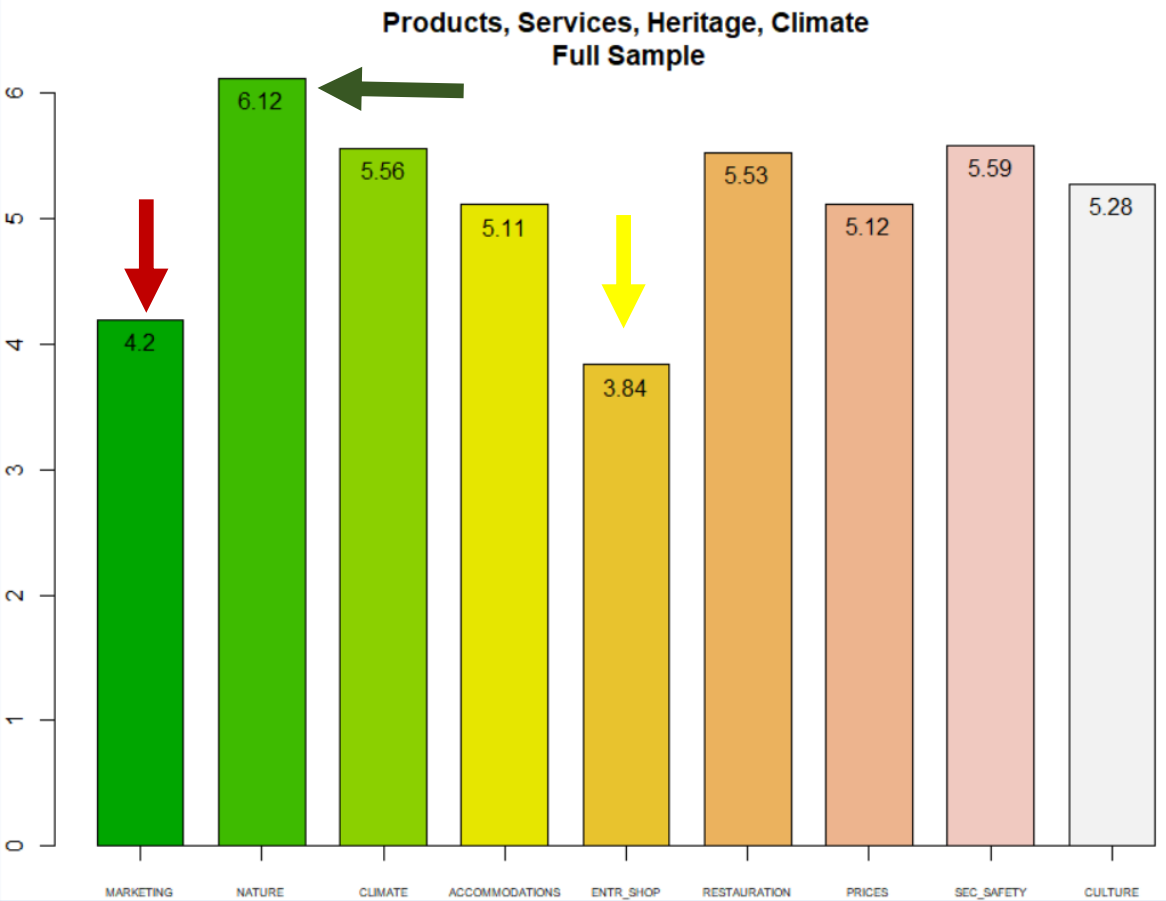
Cross-border analysis of the local tourism systems

Destination	WEAKNESSES (% distributions of those classified as most important (see local report))									
	Financial issues	Neglected cultural heritage	Community, related issues	Environmental problems	Institutional issues	Lack of services, accommodations	Lack of Infrastructures and Facilities	Difficult mobility	Scarce marketing, information	Scarce attractions, entertainment
Ostellato	17%	17%	33%	17%	17%	0%	0%	0%	0%	0%
Sasso Simone	0%	0%	29%	14%	0%	14%	14%	14%	14%	0%
Alfonsine	14%	0%	29%	0%	14%	14%	14%	0%	14%	0%
Carnia	14%	0%	57%	0%	14%	0%	0%	0%	14%	0%
Rive d'Arcano	0%	0%	57%	0%	14%	0%	0%	0%	14%	14%
Montefeltro	0%	0%	17%	17%	17%	17%	0%	17%	0%	17%
Campobasso	0%	0%	14%	14%	14%	14%	0%	14%	14%	14%
Gospic	0%	0%	43%	0%	14%	0%	0%	29%	14%	0%
Cavle	14%	0%	29%	0%	0%	14%	14%	14%	0%	14%
Karlovac	0%	0%	29%	0%	0%	29%	14%	0%	29%	0%
Characterize Italy/Croatia	IT	IT	IT	IT	IT	HR	HR	HR	HR	IT
Total	6%	1%	34%	6%	10%	10%	6%	9%	12%	6%

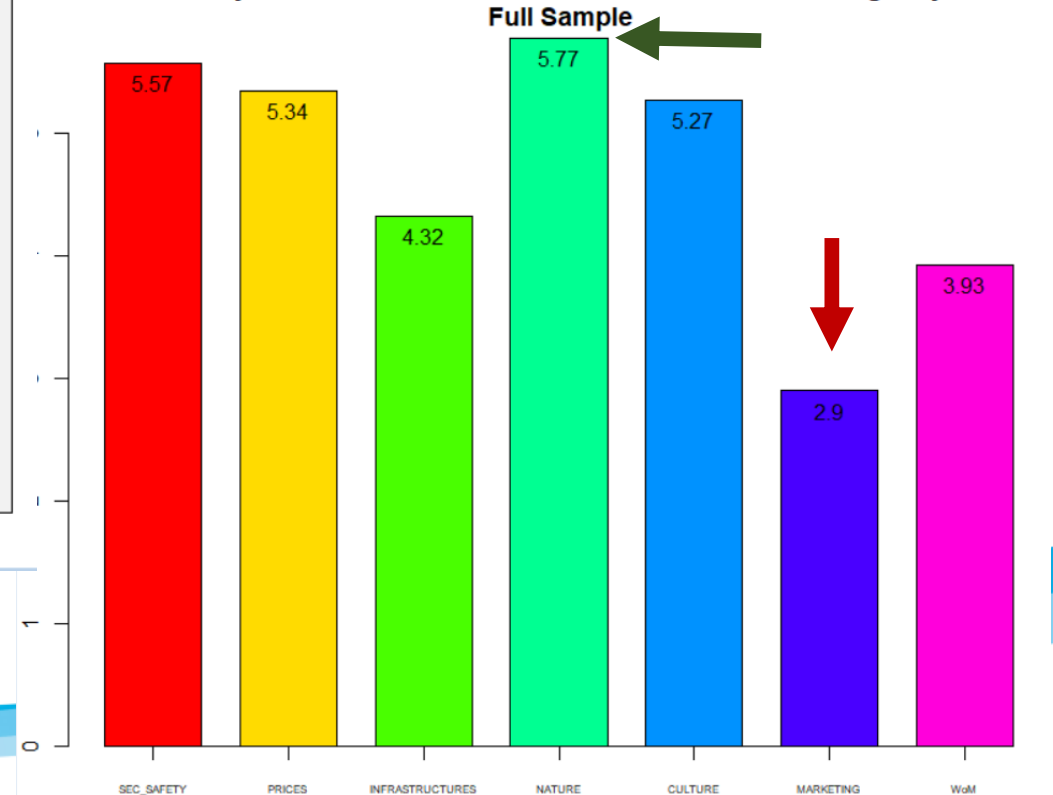
Cross-border analysis of the local tourism systems

Quality of destination attributes: Aggregate view (Visitors vs Non Visitors)

	Visitors	Non visit	DELTA
Safety	5.59	5.57	
Prices	5.12	5.34	*
Marketing	4.20	2.90	***
Infrastr.	4.8	4.32	***
Nature	6.12	5.77	***
Culture	5.28	5.27	

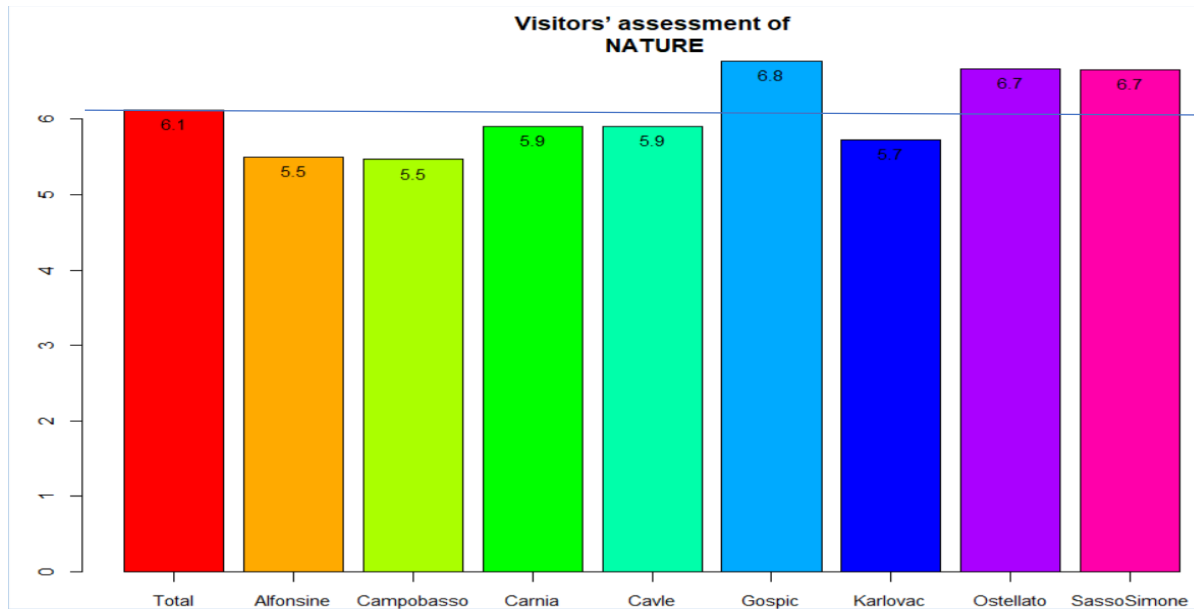


Quality of destination's attributes in the NON-visitors' imagery

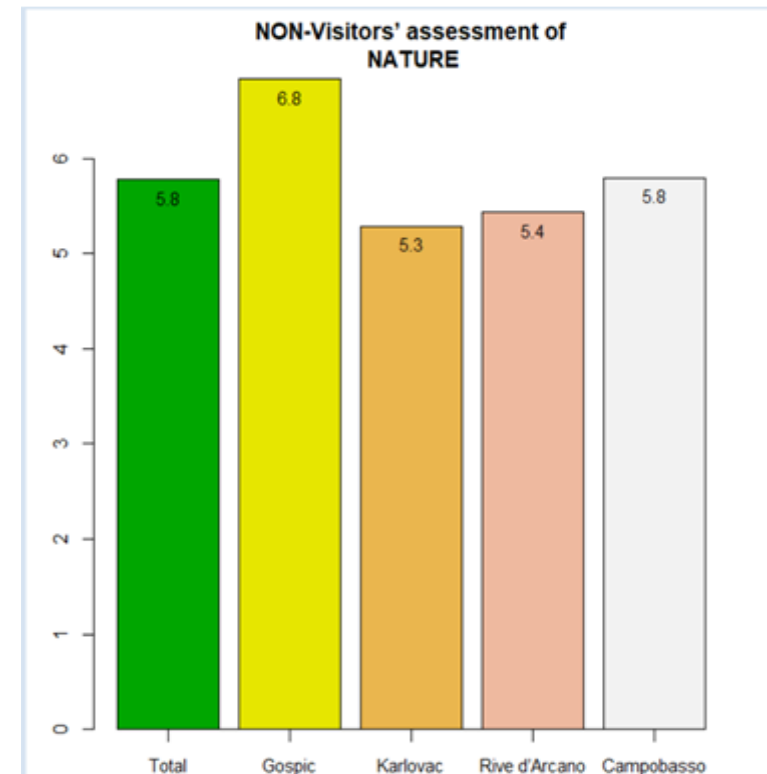


Cross-border analysis of the local tourism systems

Evaluation of nature:



Residents in Italian locations are more focused on strengths and weaknesses related to the environment



VISITORS vs NON VISITORS

Gospic, Ostellato and S.Simone are above the average in visitors' opinions

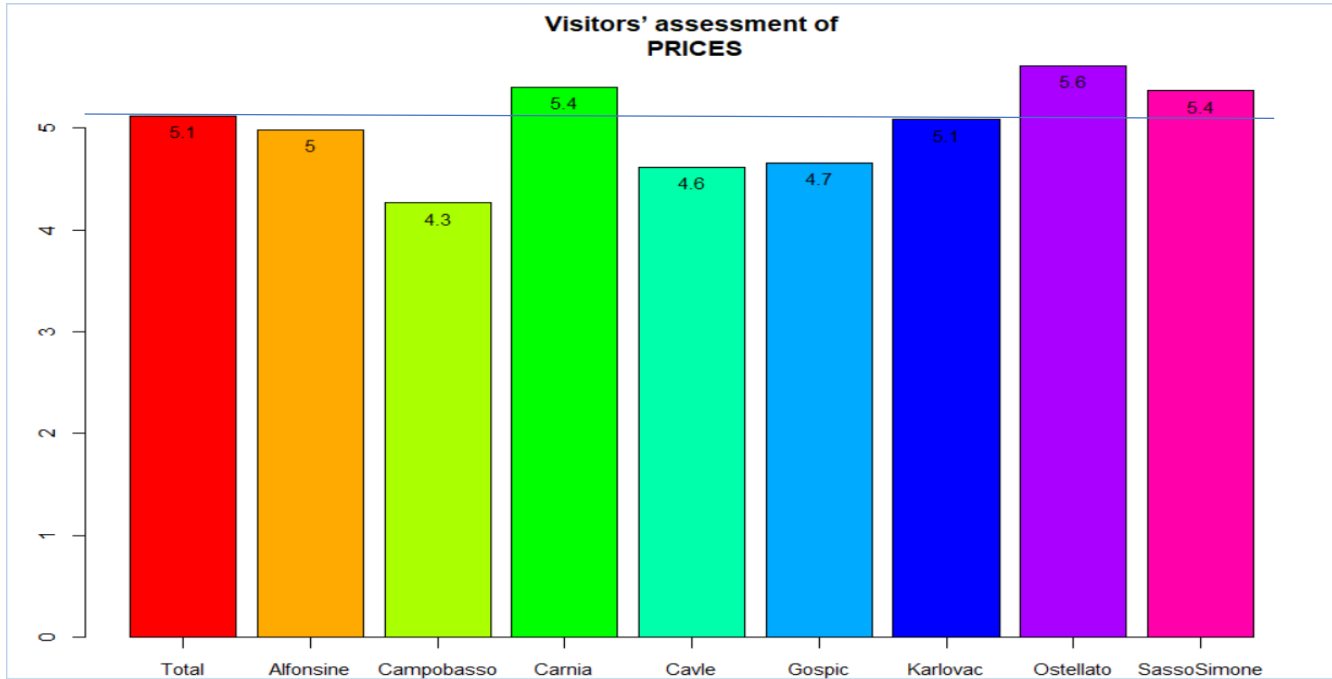
Generally speaking, non visitors expect a worse nature

Exceptions: Campobasso (has a better image among non visitors);

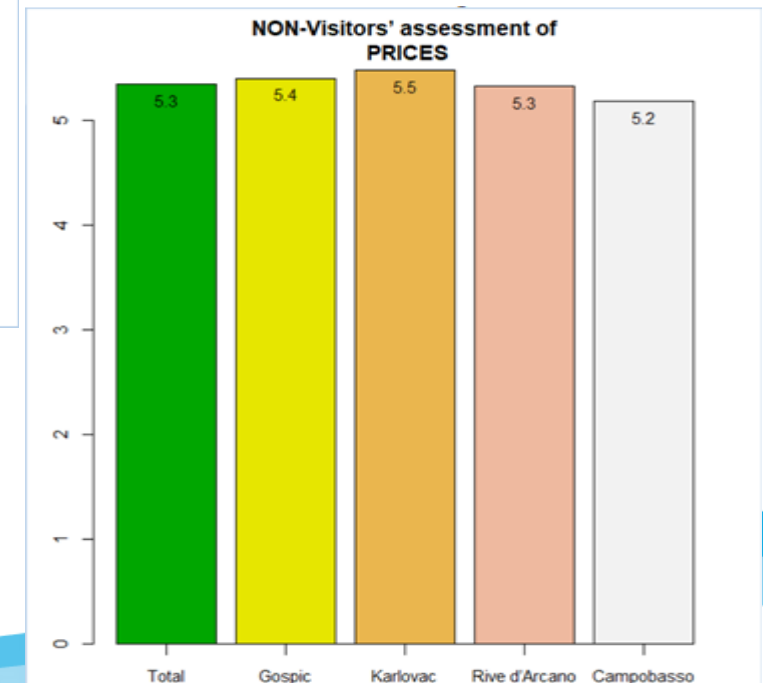
Gospic (shows high and balanced assessments).

Cross-border analysis of the local tourism systems

Evaluation of Prices



Residents do not considered low prices as a strength (except in Montefeltro)



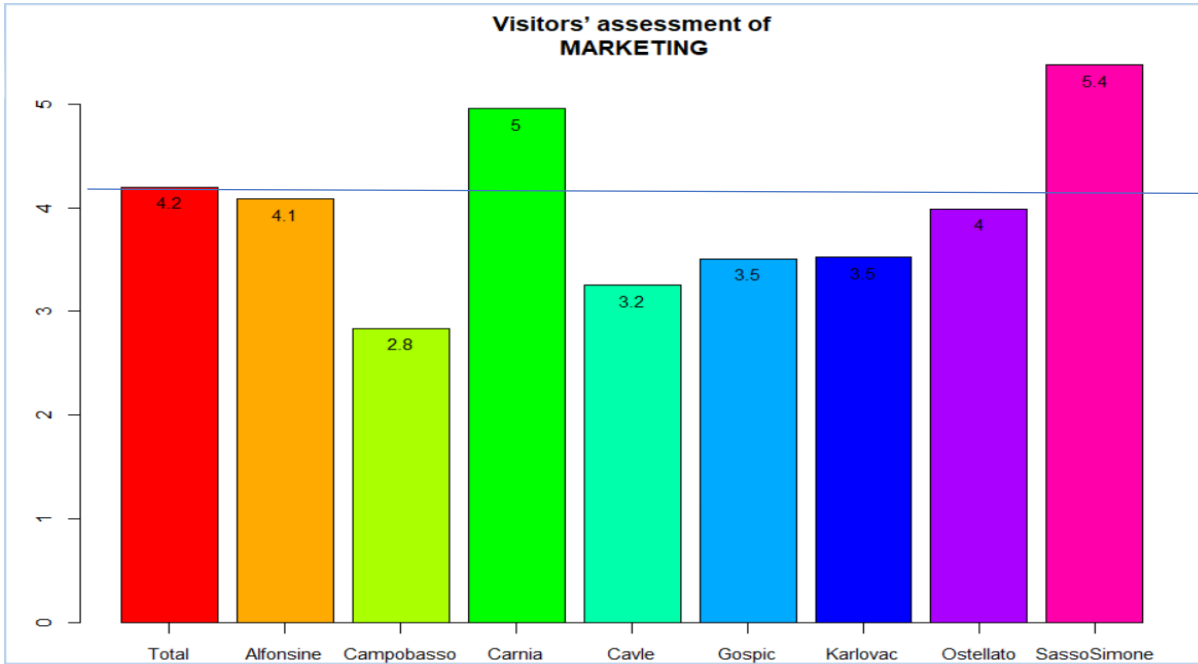
VISITORS vs NON VISITORS

Visitors perceive worse (higher) prices, non-visitors expect better (lower) prices

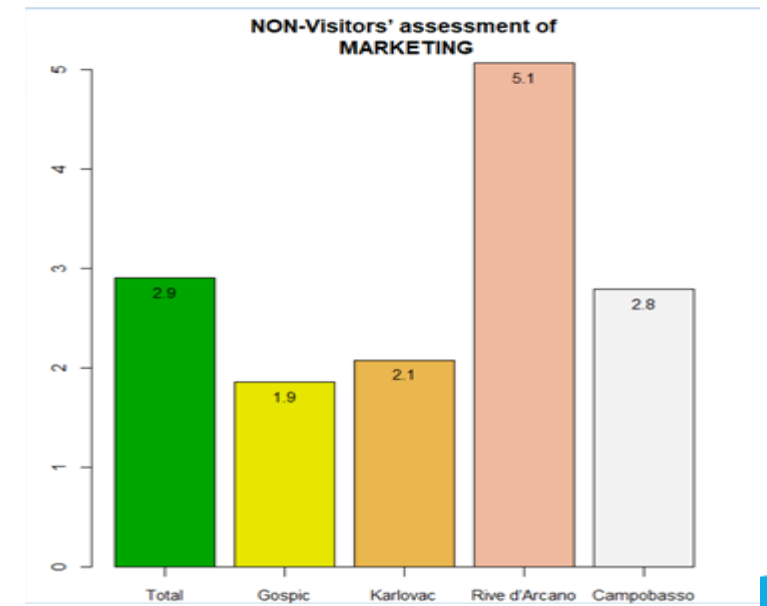
Gospic and Campobasso displays "significant" gaps.

Cross-border analysis of the local tourism systems

Evaluation of Marketing



The perception of Marketing as a weakness is greater among Croatian residents (especially in Karlovac but not in Cavle). In Italy it is not considered a weakness in Ostellato and in the Montefeltro.



VISITORS vs NON VISITORS

Carnia and S.Simone display the better visitors' evaluations

Non-visitors gives systematically lower rates except in Campobasso where assessments equalize) →

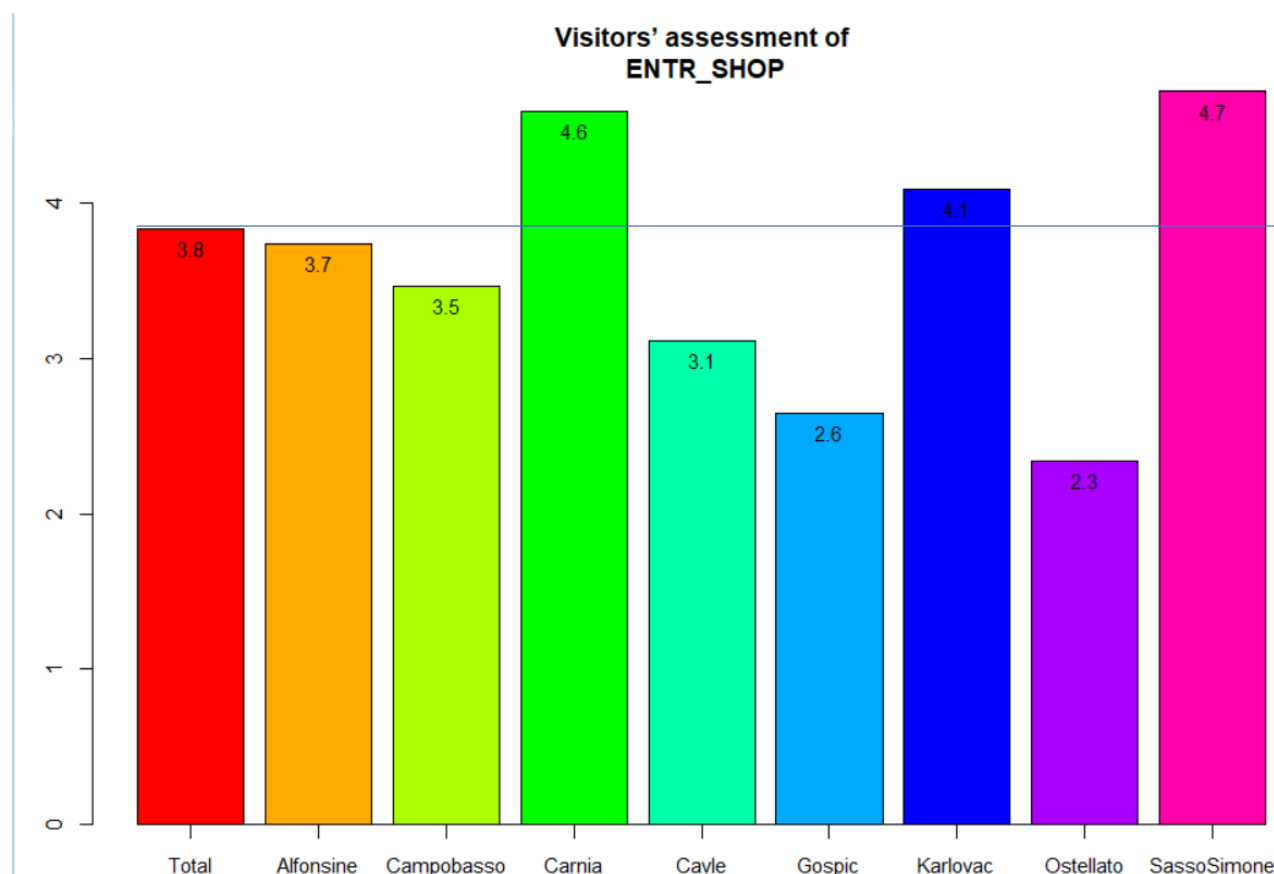
*Marketing "works" at local level but is unable to inform (attract) potential visitors: **bad digital marketing or lack of attractions in comparisons with other "touristic" destinations?***

Cross-border analysis of the local tourism systems

Evaluation of infrastructures (Shopping)

VISITORS vs RESIDENTS

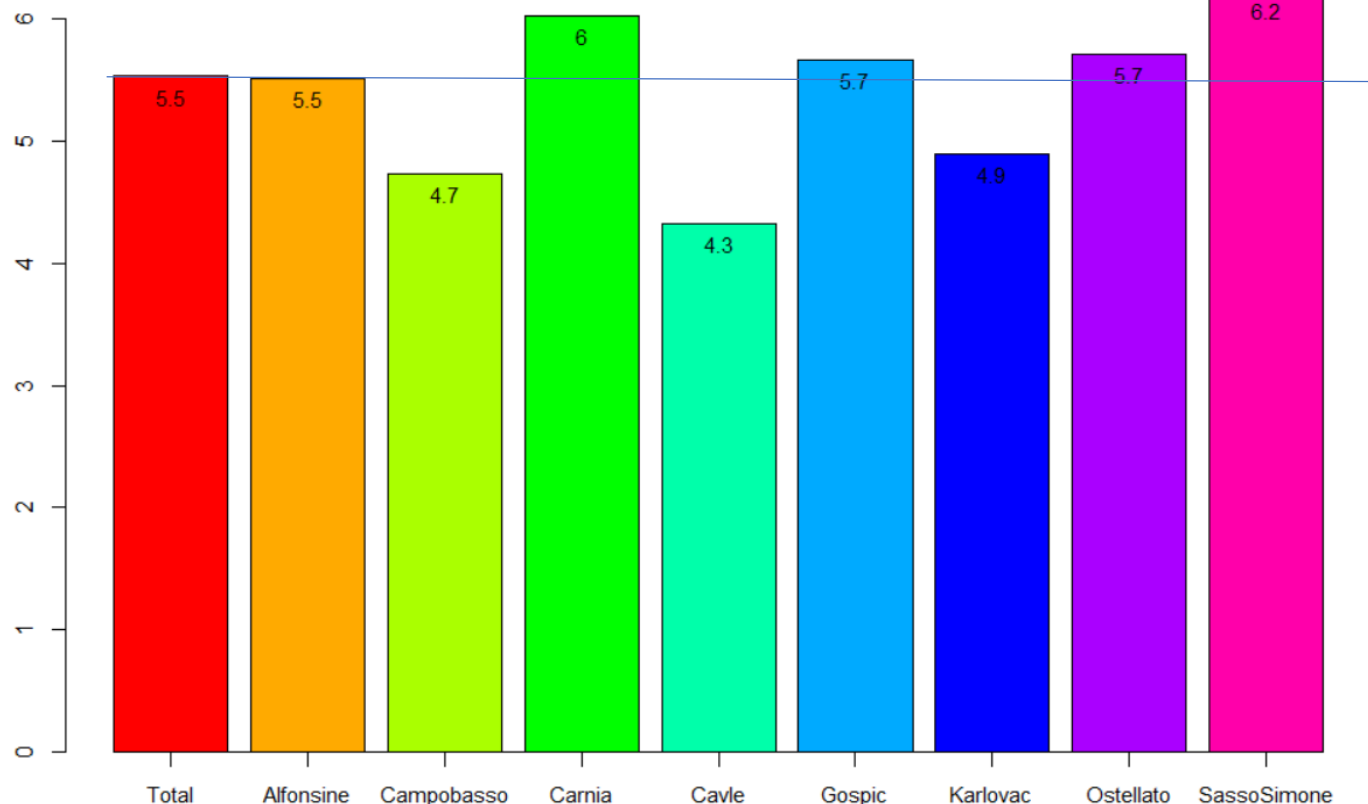
Croatian residents report shopping and entertainment facilities as a weakness most frequently. An opinion in line with that expressed by visitors (only Karlovac gets a good evaluation on shopping_entertain.). In Italy, only the residents of S.Simone and Alfonsine include it among the weaknesses → there is a strong discrepancy between the thinking of the residents and the perception of the visitors
Carnia is an exception as residents are aware of offering good shopping opportunities, primarily food (see next slide)



Cross-border analysis of the local tourism systems

Evaluation of infrastructures (Restauration and Shopping)

Visitors' assessment of
RESTAURATION



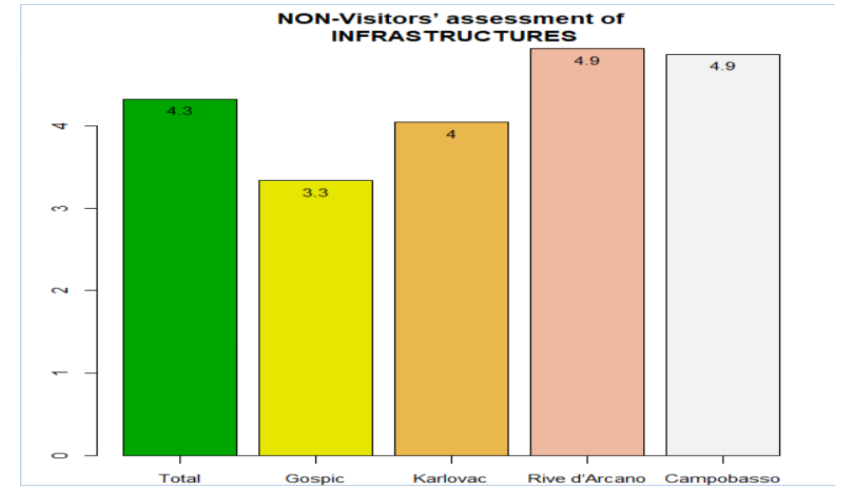
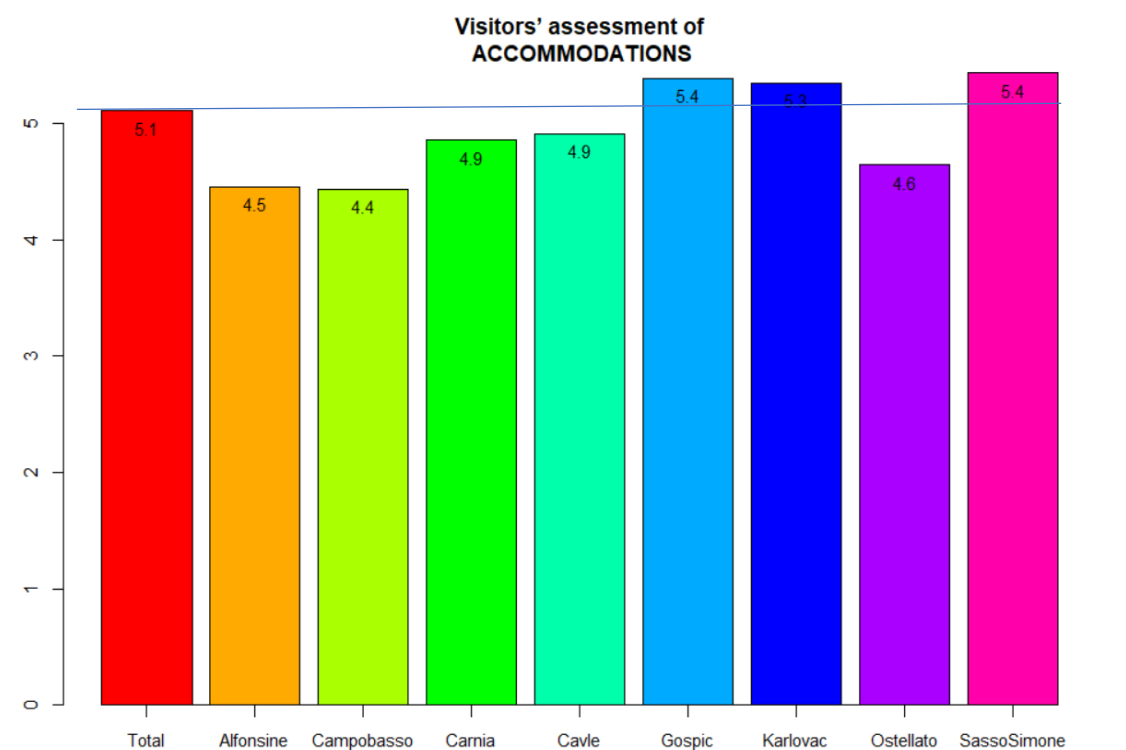
VISITORS vs RESIDENTS

Carnia and S.Simone reaches top evaluations in visitors opinion but in Carnia (as well as in Ostellato and Karlovac) resident do not mention Food and tipical products among strengths.

Others local community's belief that the quality of the local enogastronomic offer can be a main driver of tourism development but (from the demand side) restauration services are "criticized" in Cavle, Campobasso and Karlovac.

Cross-border analysis of the local tourism systems

Evaluation of infrastructures (accommodation)



VISITORS vs NON VISITORS vs RESIDENTS

Croatian destinations reports higher visitors' evaluation and/but the "highest" gap with non-visitors expectations. The most striking case is Gospic: last in non-visitors' assessments, first in those of visitors and with residents who do not report weakness in the tourist infrastructure

Marketing opportunity?

VISITORS vs RESIDENTS

Accommodation is seen as a weakness especially by Croatian residents (except for Gospic). In Italy only residents in Ostellato and Carnia do not report it as a weakness.

Visitors' opinion do not confirm the results of the SWOT to the residents: 3 Italian destinations Alfonsine, Campobasso and Ostellato close the ranking → predominance of daily "tourism"?

Cross-border analysis of the local tourism system

Destination	Opportunities (% distributions of those classified as most important (see local report))											
	Green tourism	Development Projects, EU funds	Marketing potentials	Involvement of the community	Cultural tourism	Partnerships	Food & Wine tourism	Education	Sport & Wellness	Security	School, University	Slow-Niche tourism
Ostellato	29%	0%	0%	0%	14%	29%	0%	0%	14%	0%	14%	0%
Sasso Simone	17%	0%	17%	0%	0%	0%	0%	0%	33%	17%	0%	17%
Alfonsine	29%	0%	0%	0%	29%	0%	14%	0%	0%	0%	14%	14%
Carnia	14%	0%	14%	0%	0%	14%	0%	0%	14%	0%	0%	43%
Rive d'Arcano	14%	14%	0%	14%	14%	14%	0%	0%	14%	0%	0%	14%
Montefeltro	14%	14%	0%	0%	0%	29%	0%	14%	0%	0%	0%	29%
Campobasso	14%	14%	14%	14%	0%	0%	0%	0%	0%	14%	14%	14%
Gospic	14%	29%	14%	14%	14%	0%	0%	0%	0%	0%	0%	14%
Cavle	14%	14%	0%	0%	43%	14%	0%	0%	14%	0%	0%	0%
Karlovac	17%	17%	0%	17%	17%	0%	0%	17%	17%	0%	0%	0%
Characterize Italy/Croatia	IT	HR	IT	HR	HR	IT	IT	HR	IT	IT	IT	IT
Total	18%	10%	6%	6%	13%	10%	1%	3%	10%	3%	4%	15%

Cross-border analysis of the local tourism systems

Destination	Threats (% distributions of those classified as most important (see local report))								
	Environmental	Security issues	Institutional	Community, related	Nearby destinations, related	Infrastructures, facilities	Financial	Lack of visibility, promotion, information	Market, related
Ostellato	43%	0%	29%	14%	14%	0%	0%	0%	0%
Sasso Simone	0%	0%	14%	29%	29%	29%	0%	0%	0%
Alfonsine	17%	17%	17%	0%	33%	0%	17%	0%	0%
Carnia	0%	0%	29%	14%	0%	0%	14%	14%	29%
Rive d'Arcano	14%	0%	43%	0%	14%	0%	0%	14%	14%
Montefeltro	0%	0%	17%	50%	0%	0%	0%	0%	33%
Campobasso	13%	0%	38%	25%	13%	0%	13%	0%	0%
Gospic	0%	14%	43%	14%	0%	14%	0%	0%	14%
Cavle	17%	17%	67%	0%	0%	0%	0%	0%	0%
Karlovac	14%	14%	14%	14%	0%	0%	29%	0%	14%
Characterize Italy/Croatia	IT	HR	HR	IT	IT	HR	HR	IT	IT
Total	12%	6%	31%	16%	10%	4%	7%	3%	10%

Partecipazione index

Given the focus on sustainable development, a special attention is payed to **residents' support to tourism**, that is measured through an innovative **participation index**, built based on **5 dimensions**:

- Welcoming community
- Community participation in tourism development
- Respondents' (personal) engagement in tourism development
- Mail left
- **Availability of the host communities to share**

Cross-border analysis of residents' support to tourism

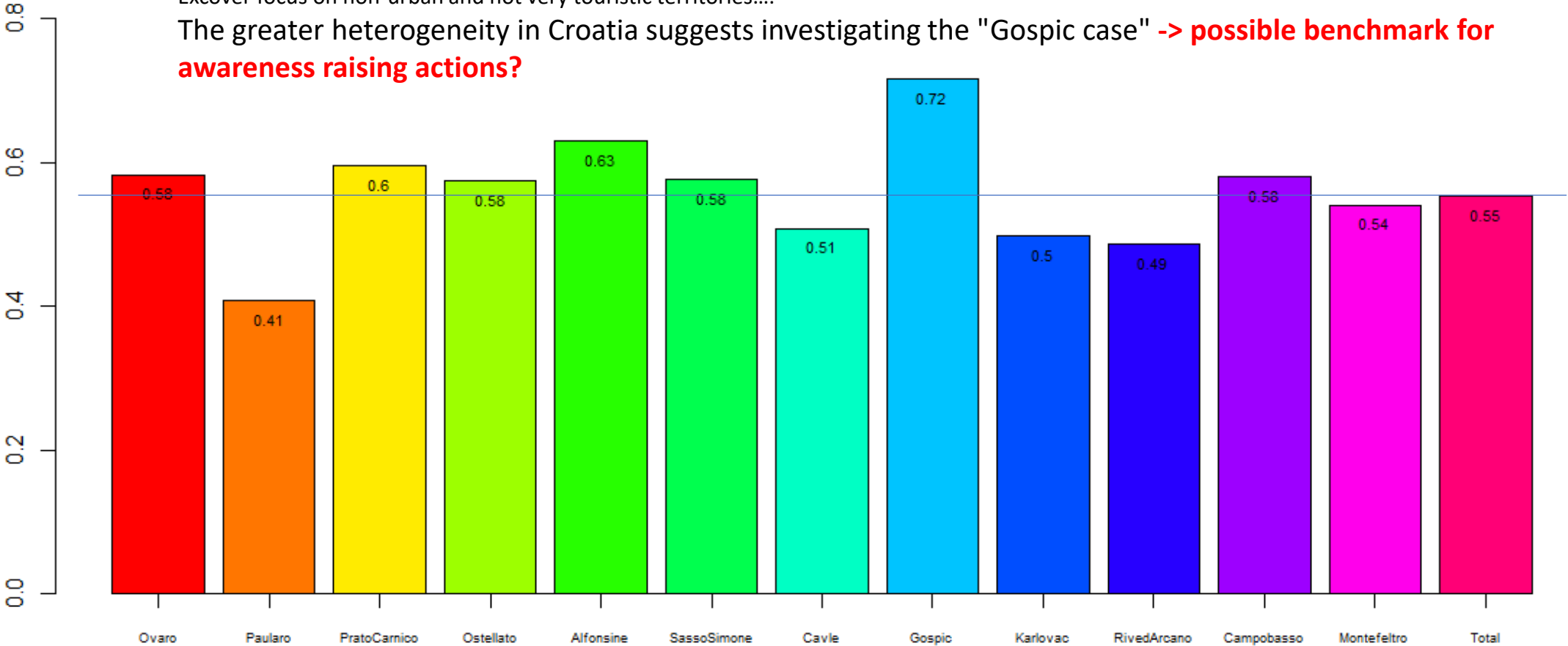
The overall summary

PARTICIPATION INDEX

Excluding Gospic and Paularo who open and close the ranking) **no particular differences are reported**

Excoveer focus on non-urban and not very touristic territories....

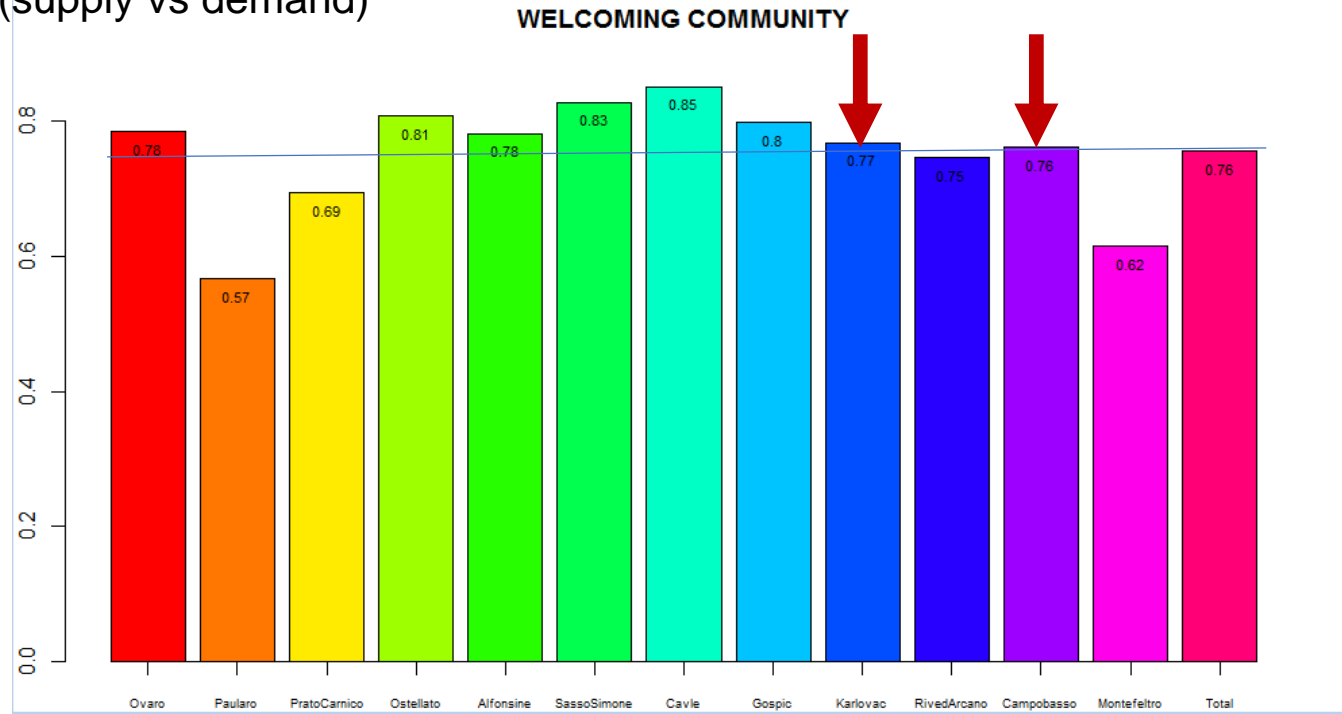
The greater heterogeneity in Croatia suggests investigating the "Gospic case" -> **possible benchmark for awareness raising actions?**



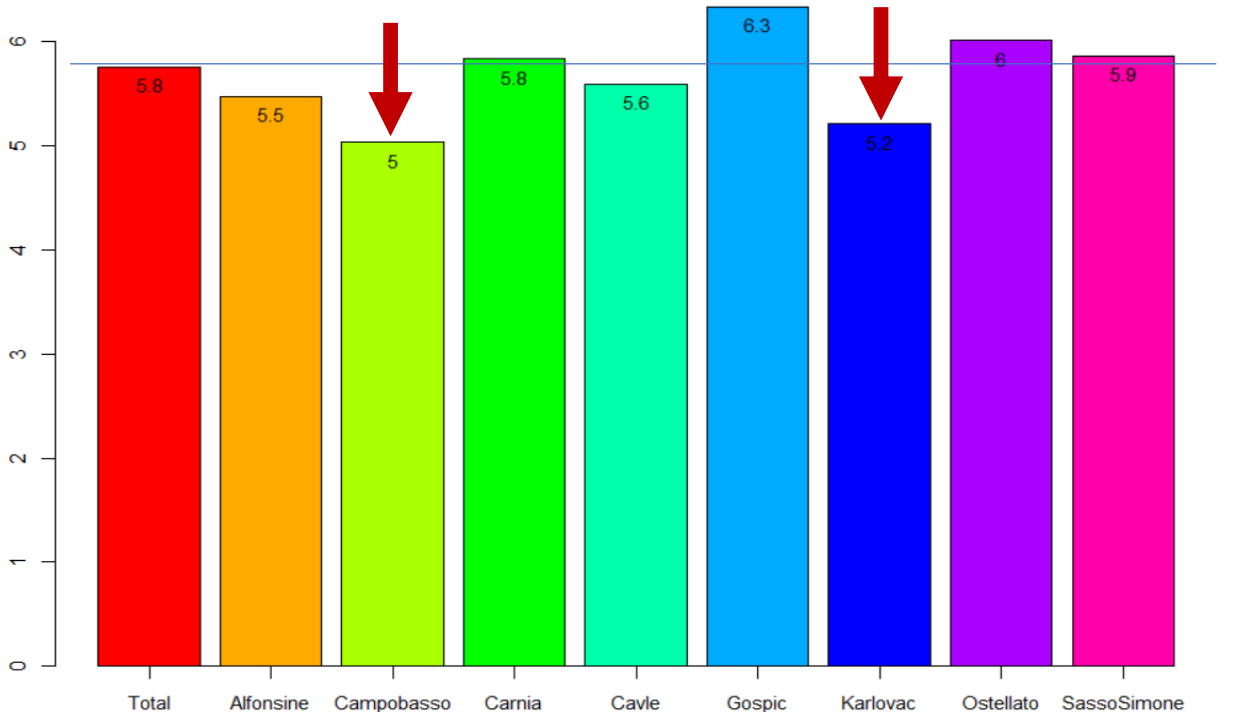
Cross-border analysis of welcoming attitude

Welcoming attitude: Residents vs Visitors (supply vs demand)

Paularo and Montefeltro the municipalities where resident portray themselves as less welcoming



Visitors' assessment of WELCOMED

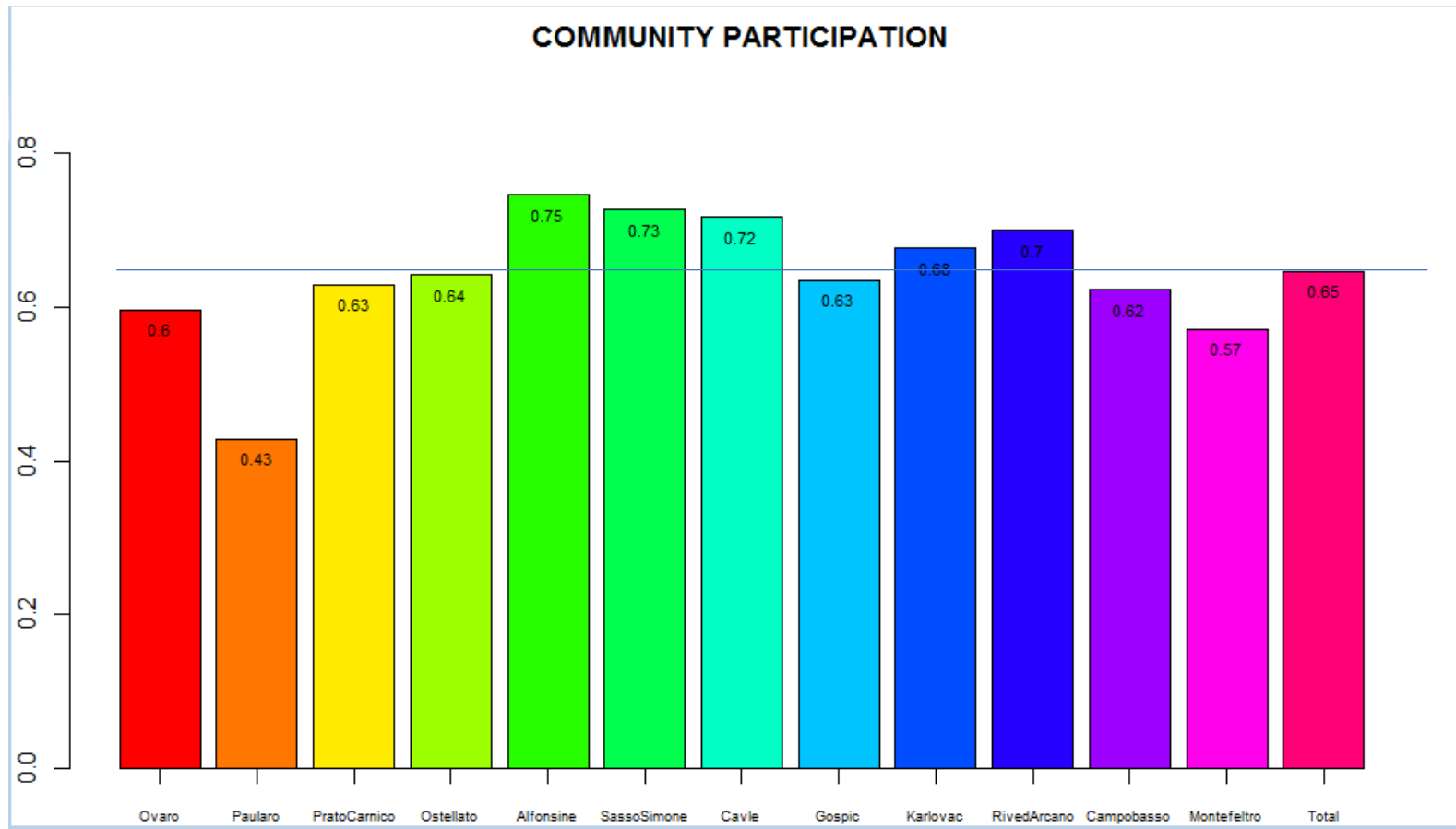


*Campobasso and Karlovac the places where visitors give more severe judgments
In both cases, there is a perception gap between resident and visitors*



Cross-border analysis of residents' support to tourism

Perception of how respondent's community would participate in tourism development is high almost everywhere. Carnia (Paularo) and Montefeltro are important exception



ALMA MATER STUDIORUM
UNIVERSITÀ DI BOLOGNA

Cross-border analysis of residents' support to tourism

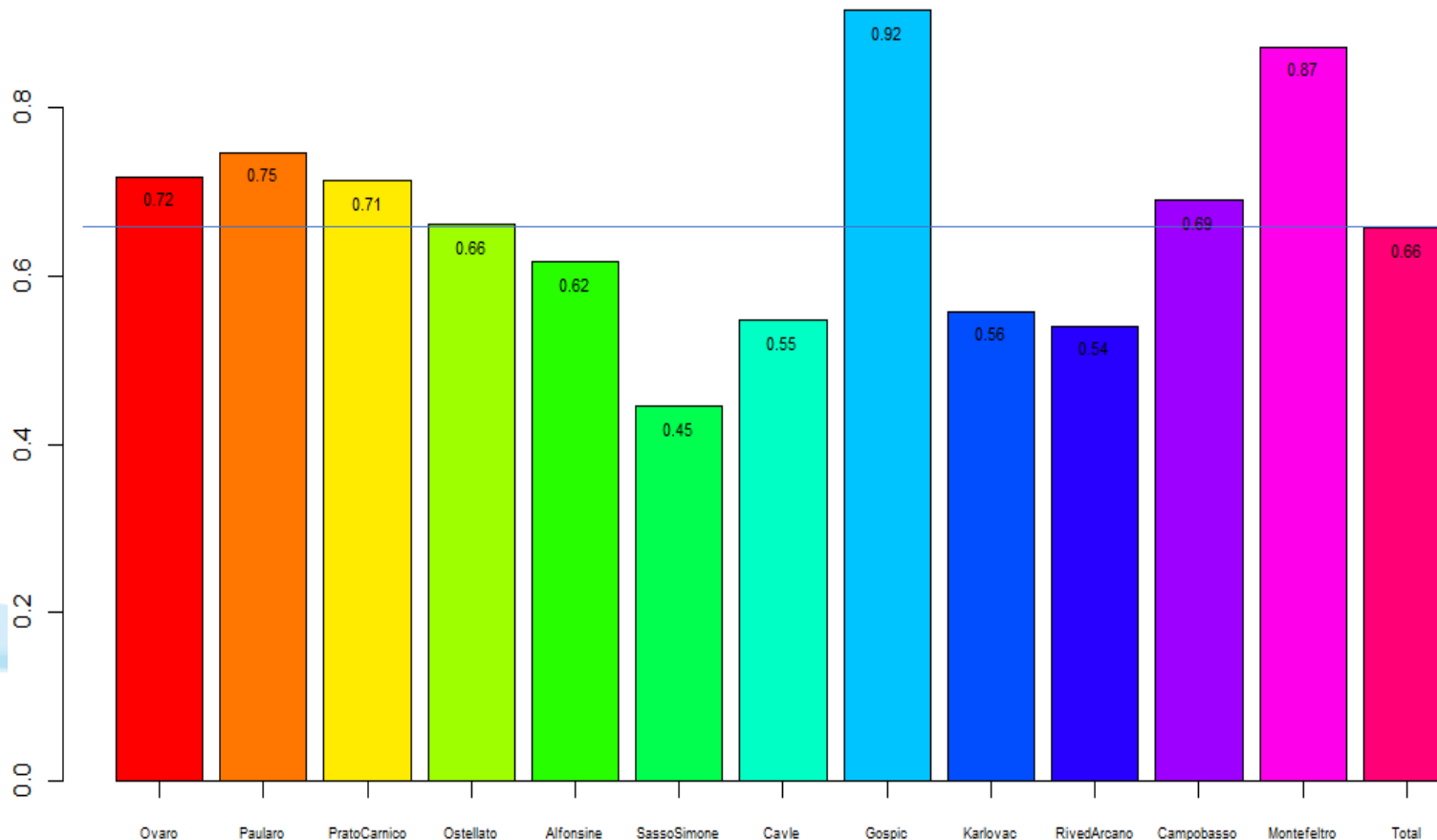
Respondent's personal engagement

"I am different from my community":

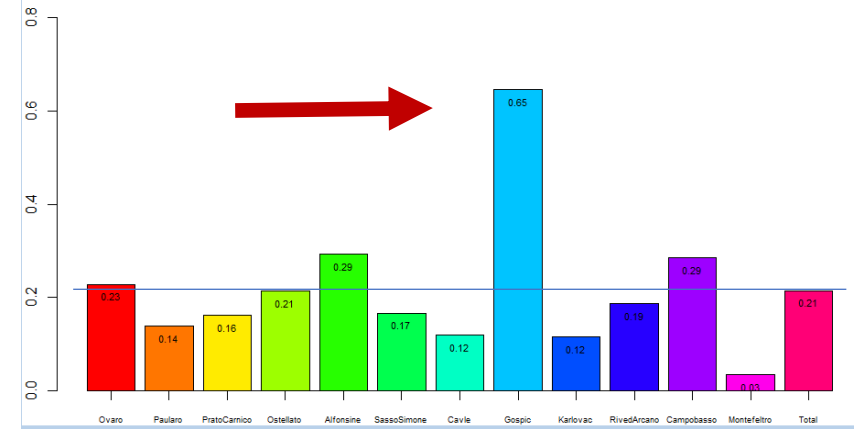
Italy: I am interested, the community much less; Alfonsine Rive d'A. and S. Simone are the exceptions.

Croatia: Others are interested I am not: Gospic is the exception (see also mail left)

RESPONDENT ENGAGEMENT



MAIL LEFT



Sharing attitude an in-depth study

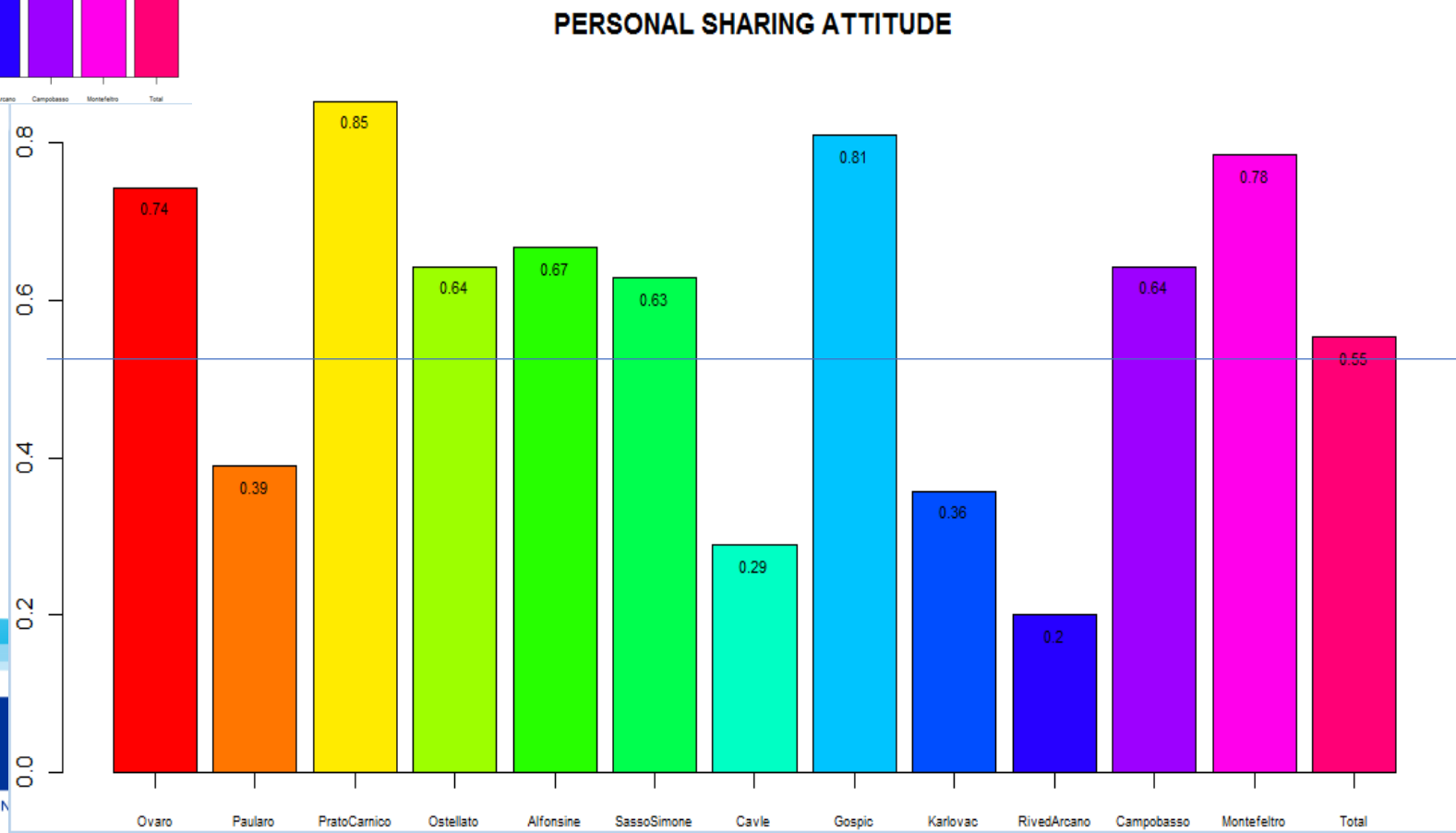
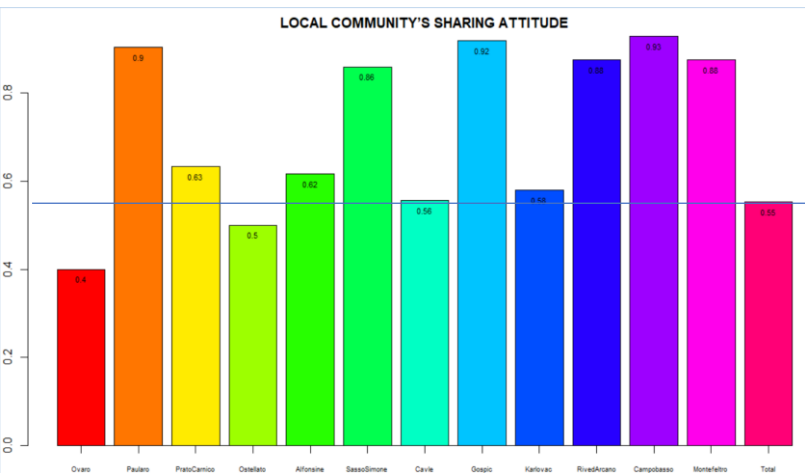
Cross-border analysis of residents' support to tourism

Personal and local community's sharing attitude

The highest personal attitude to share are in Carnia (exception Paularo), Montefeltro and Gospic.

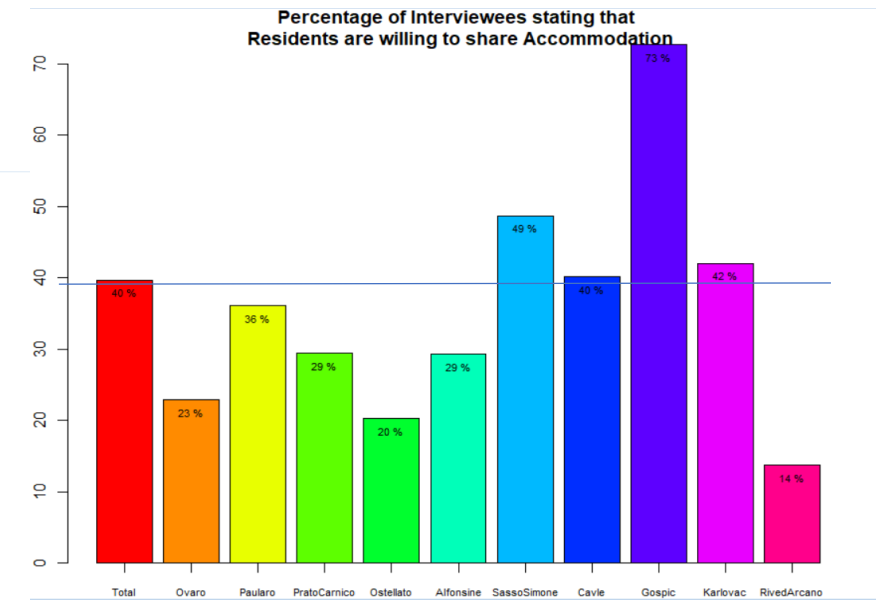
Comparing the personal attitude to share with respondent's evaluation regarding the sharing attitude of the community, the biggest gaps are found in Paularo and Rive d'D.

Personal engagement generally correlates with low personal attitude for sharing. Relevant exception in Paularo: Respondents are more engaged (respect to their community) but engagement doesn't mean "share"



Cross-border analysis of residents' support to tourism

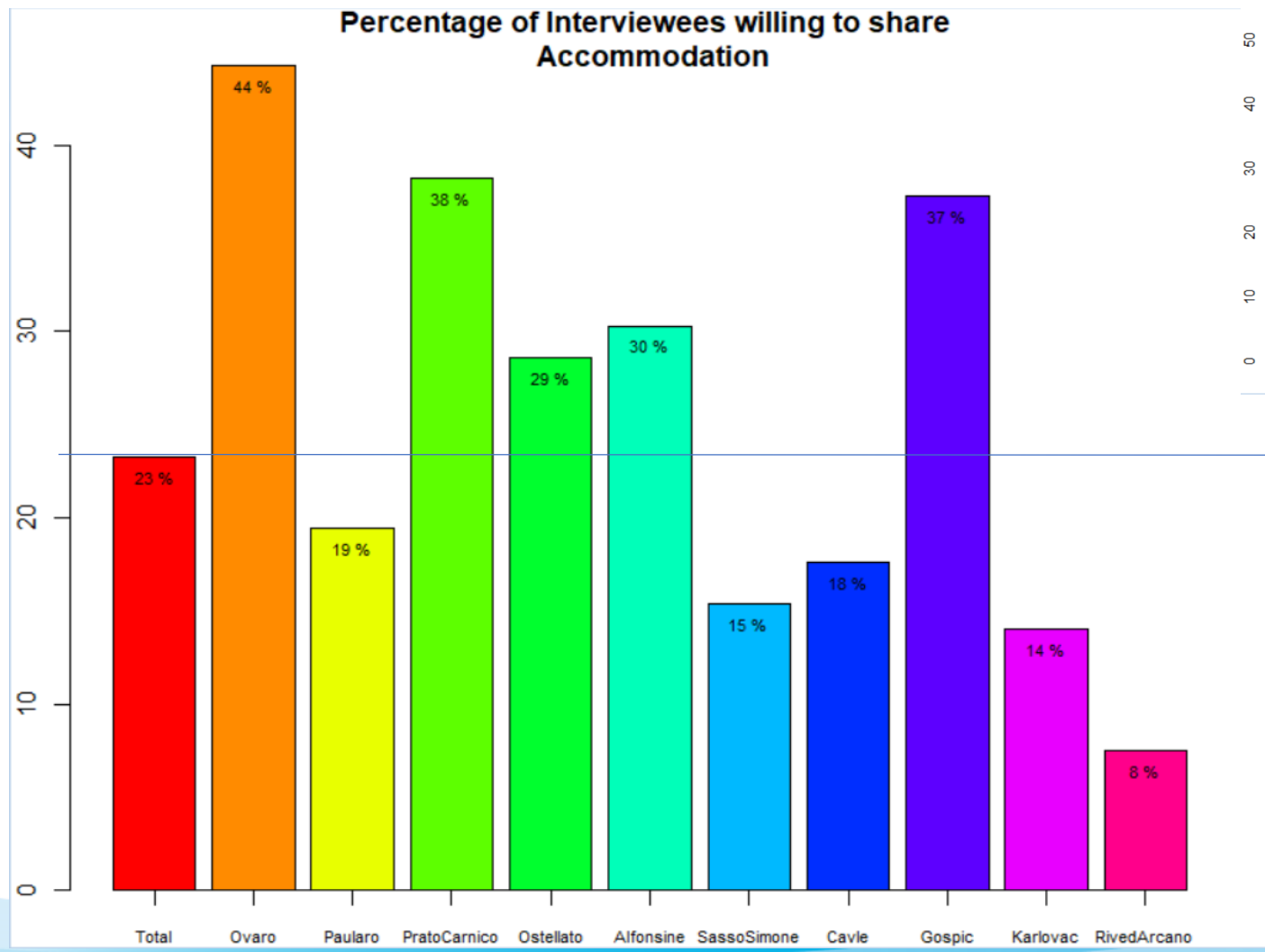
Personal and local community's sharing attitude (accommodations)



Croatian believe that "the community" is more willing share accommodation than individuals. The largest gaps are reported In Italy the opposite ("I want to share housing more than my community does"). S. Simone the exception.

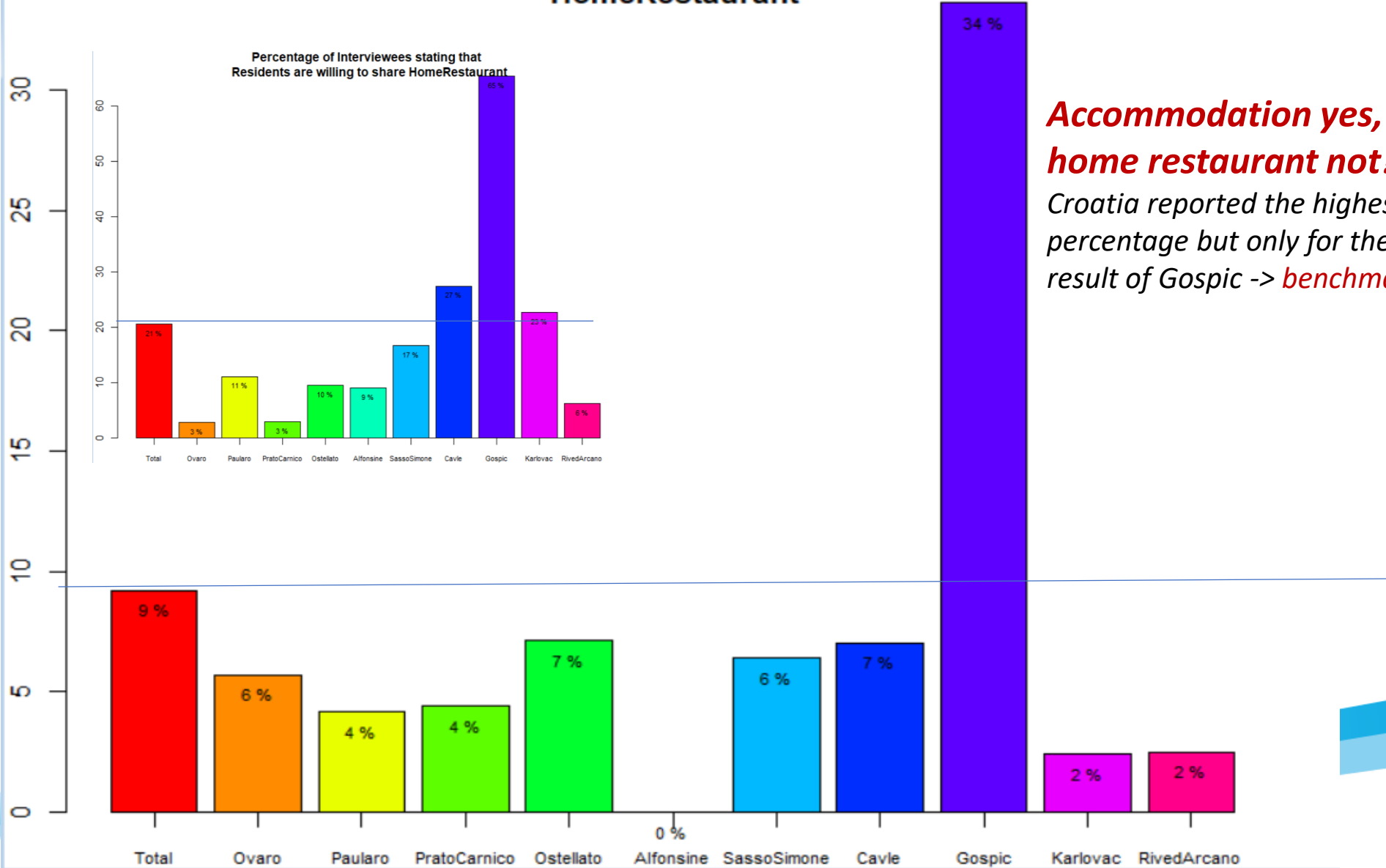
Accommodation yes!

Percentage of Interviewees willing to share Accommodation



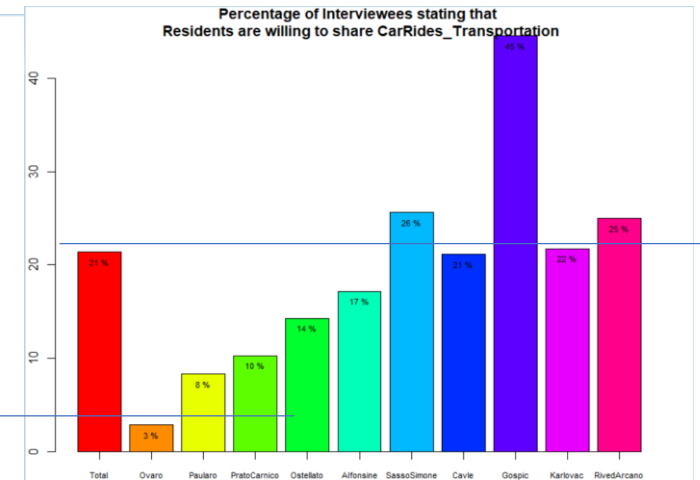
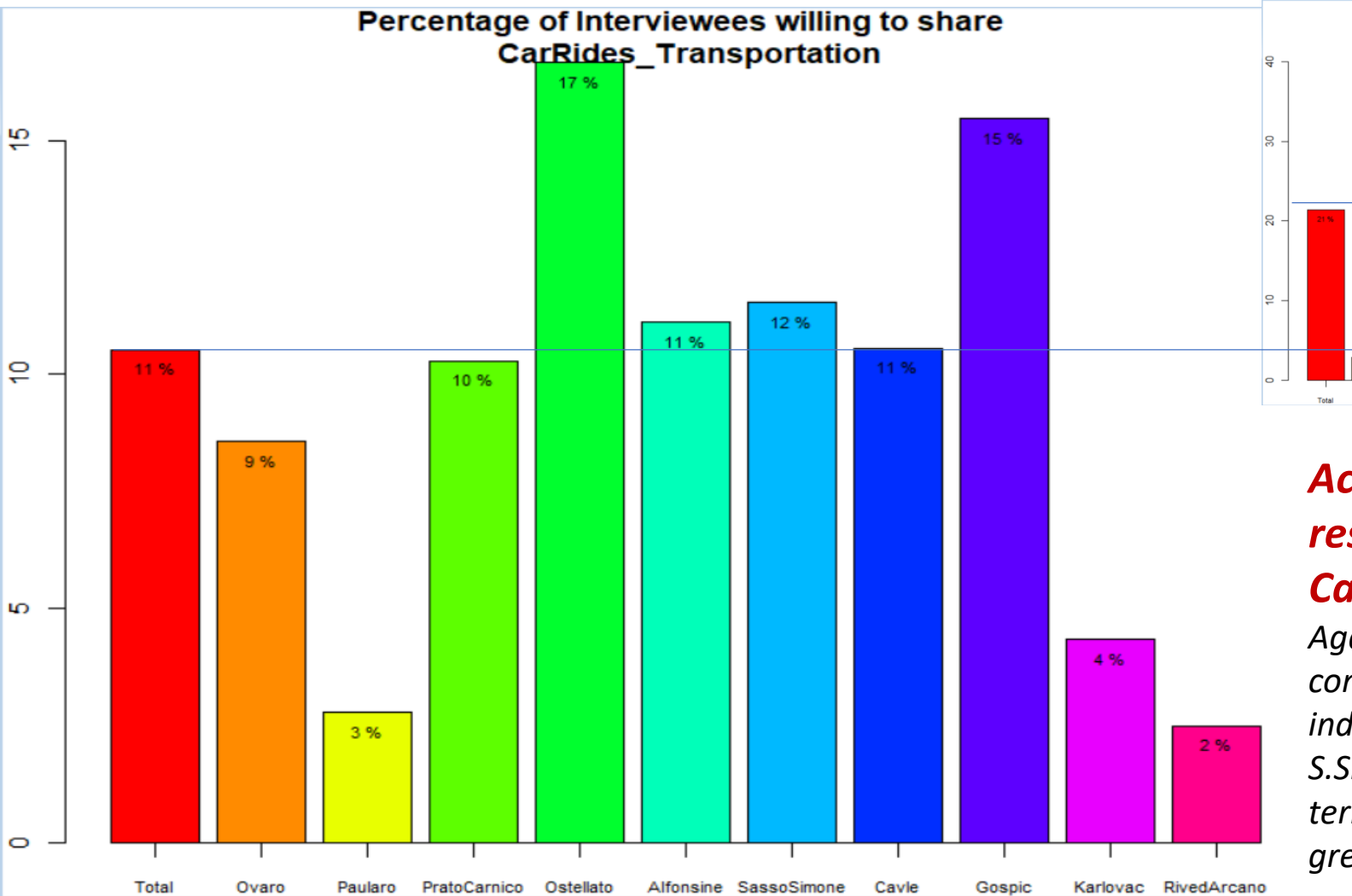
Cross-border analysis of residents' support to tourism

Percentage of Interviewees willing to share HomeRestaurant



**Accommodation yes,
home restaurant not!**
Croatia reported the highest percentage but only for the good result of Gospic -> benchmark?

Cross-border analysis of residents' support to tourism



Accommodation yes, home restaurant not!

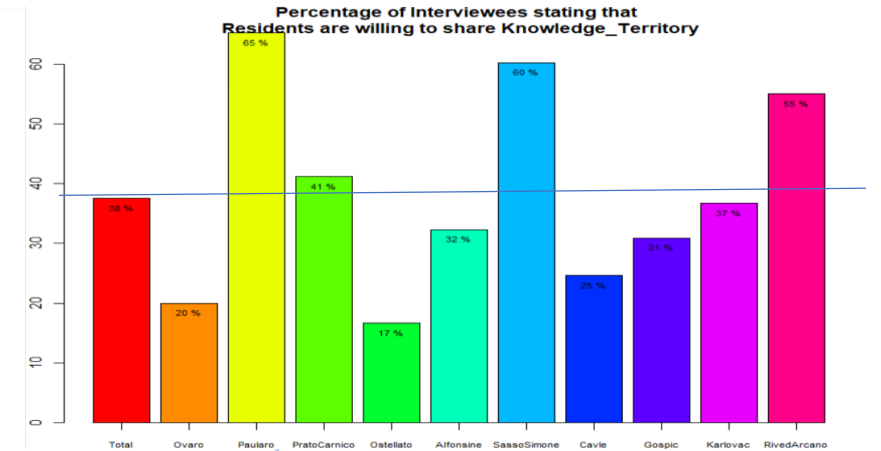
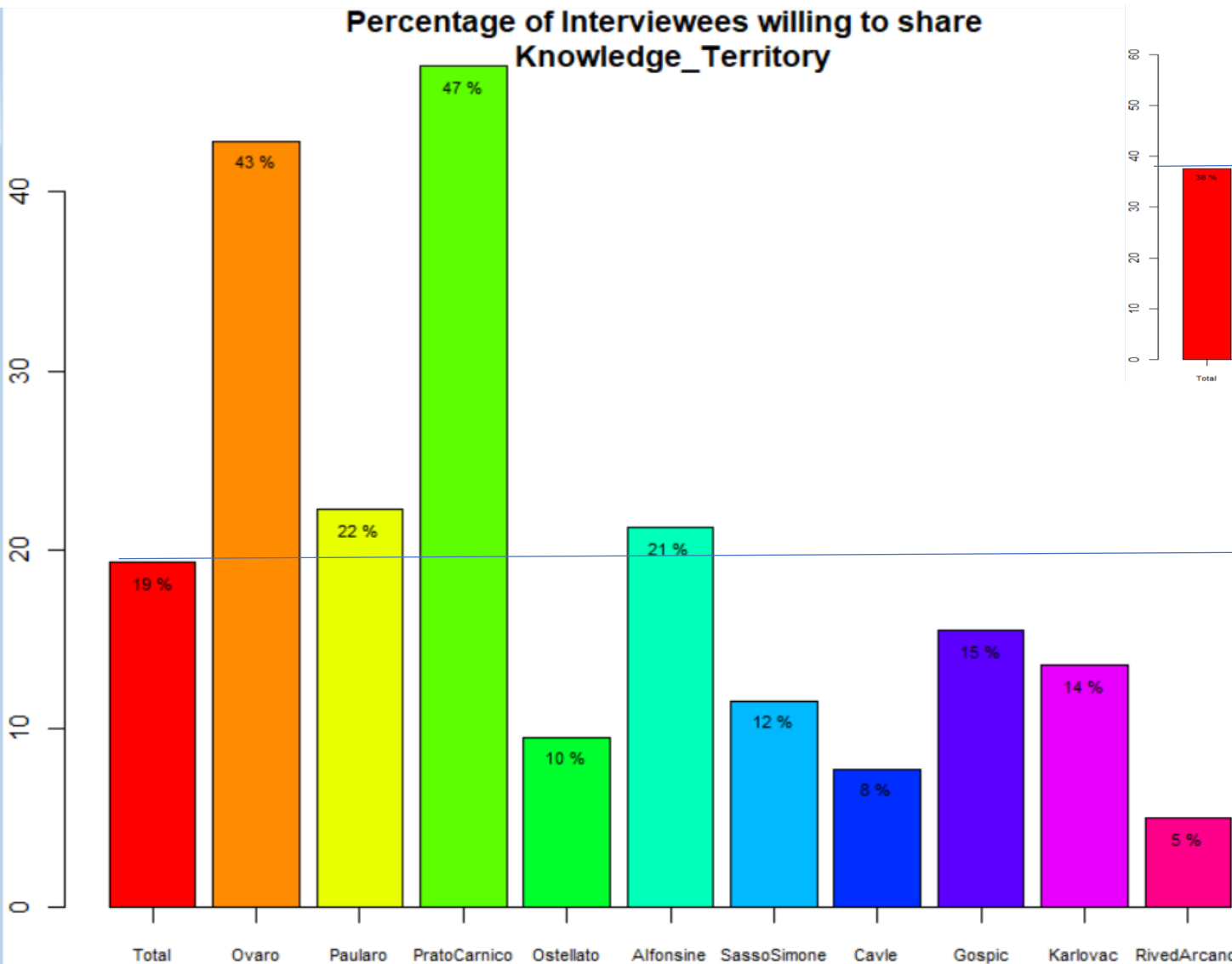
Car Rides sometimes...

Again Croatian believe that "the community" is more willing share than individuals.

S.Simone, Ostellato and Alfonsine the territories where people declare the greatest availability (in Italy)

Cross-border analysis of residents' support to tourism

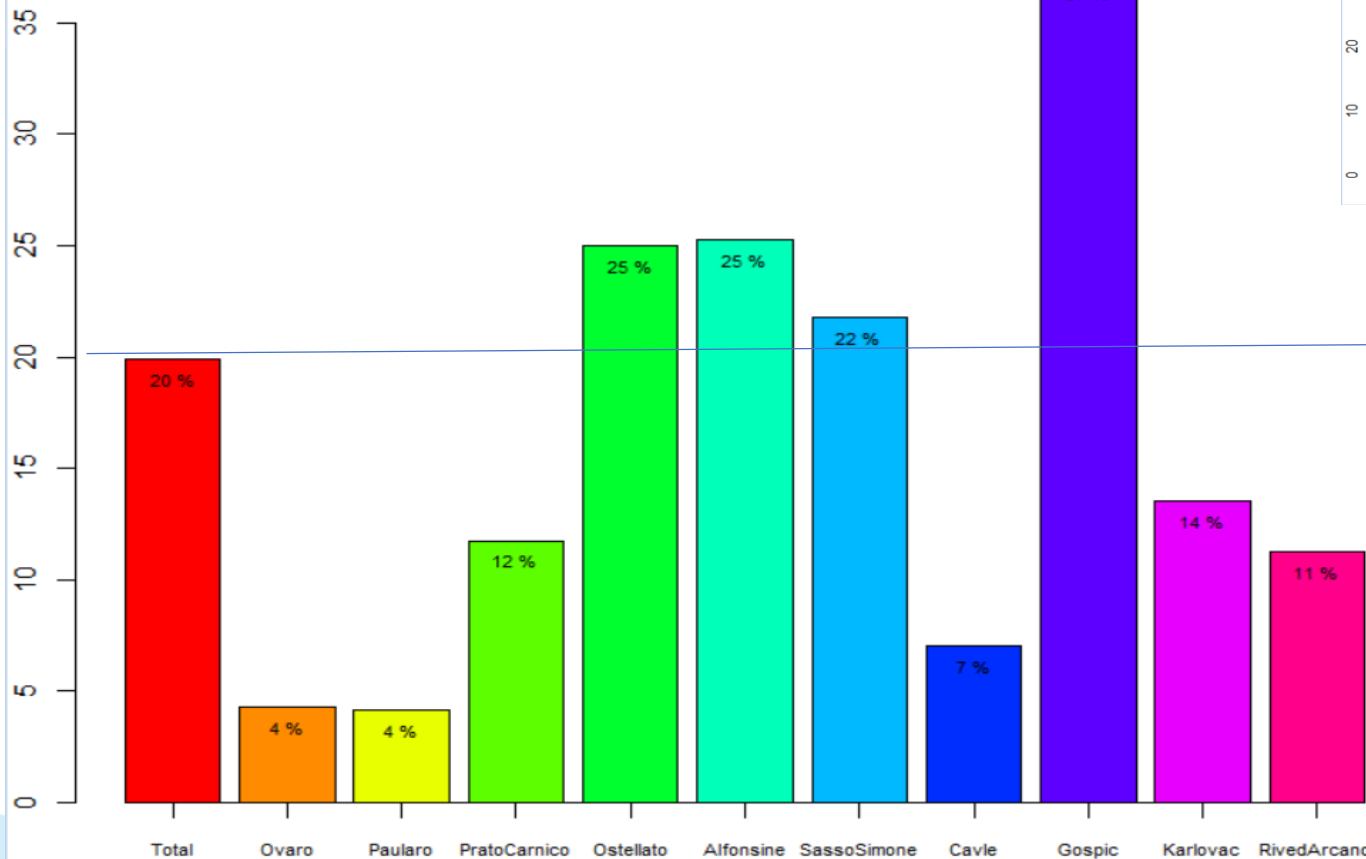
(9)



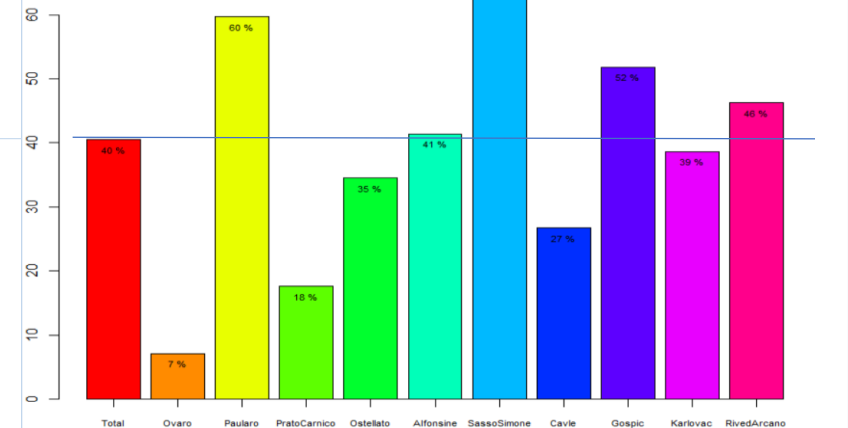
Accommodation yes, home restaurant not!
Car Rides sometimes...
Knowledge of the territory yes (less in Croatia)
Respondent believe that "the community" is more willing "tell stories" about territory.
The greatest potential in Italy

Cross-border analysis of residents' support to tourism

Percentage of Interviewees willing to share Skills_Knowledge



Percentage of Interviewees stating that Residents are willing to share Skills_Knowledge



Accommodation yes, home restaurant not, Car Rides sometime, knowledge of the territory yes (less in Croatia), skill-knowledge yes.

Respondent believe that "the community" is more willing share. The greatest potential in Paularo

CONCLUDING REMARKS – analysis of the local tourism systems (1)

- In all the considered areas, protecting and valorizing the **natural environment** is fundamental to grasp the opportunity constituted by the growth of **green tourism** market, as both visitors and non-visitors agree that the main strength of these areas, is the natural heritage, that along with the pleasant climate makes outdoor activities attractive.
- The COVID-19 outbreak may be seen as an opportunity for these isolated areas, characterized by wide green spaces, no overcrowding, unpolluted nature and healthy rural lifestyles. Even before COVID-19, **safety and security** is the second most highly rated aspect of the local supply, according to both visitors and non-visitors, thus **it might be emphasized in marketing and communication** initiatives.

CONCLUDING REMARKS – analysis of the local tourism systems

- A fundamental weakness to the eyes of visitors, is the **low quality and variety of shopping and entertainment opportunities**. Therefore, it appears crucial to involve the local communities in the creation of new attractive events, especially for young people, children and families.
- Events should be communicated → Visitors depict a much more attractive image of these destinations than non-visitors, hinting that these sites have important competitive **strengths, not correctly communicated**. In fact, visitors do agree that **marketing initiatives should be reshaped**, except for Carnia and Sasso Simone e Simoncello, where they look quite successful.
- Based on the visitors' opinions, residents in the EXCOVER areas are very welcoming, especially in Gospic and Ostellato. Conversely, in the imaginary of non-visitors they are “inhospitable”. Therefore, it is more appropriate than ever to implement **communication initiatives able to convey the hospitality of the host communities**.

CONCLUDING REMARKS – residents' support to tourism development

- The EXCOVER participation index detected **good levels of willingness to be actively involved** in the sustainable tourism development for all the host communities and quite positive attitudes towards the opportunities offered by the sharing economy, especially in Croatia.
- The residents most willing to share assets with tourists are in **Gospic, Prato Carnico and Montefeltro**, the most refractory are in **Paularo, Rive d'Arcano, Cavle and Karlovac**.
- Currently **in Italy regulatory constraints** prevent citizens from sharing transportation services and make it very difficult to do home restaurant and non-professional tourist guide. Conversely, with reference to accommodations, sharing economy solutions might also mitigate some threats related to institutional issues.

CONCLUDING REMARKS – final note

- Most interviews were accomplished before COVID-19 outbreak, thus **we expect the residents' attitudes towards both sharing economy and participation in tourism development to be worsened, due to the fear of contagion.**
- More important, we expect that medium-term consequences of the pandemics will be different for the various host communities, therefore we underline the **necessity to monitor the residents' feeling and attitudes in the prosecution of EXCOVER.**

THANKS FOR THE ATTENTION

University of Bologna - CAST
Andrea Guizzardi

-  Department of Statistical Sciences
"Paolo Fortunati"
Via Belle Arti 41, Bologna
-  Center for Advanced Studies on Tourism
Via Angherà 22, Rimini
-  andrea.guizzardi@unibo.it
-  +39 051 209 8221
-  +39 0541 434 122
-  www.italy-croatia.eu/acronym