



EXPERIENCE, DISCOVER & VALORISE HIDDEN TREASURE TOWNS AND SITES OF THE ADRIATIC AREA

## **EXCOVER – CROSS-BORDER REPORT**

### **SWOT ANALYSIS**

***ALMA MATER STUDIORUM UNIVERSITY OF BOLOGNA***

***CENTER FOR ADVANCED STUDIES ON TOURISM (CAST)***

## OUTLINE

1. EXECUTIVE SUMMARY .....	p. 5
2. ANALYSIS OF THE LOCAL TOURISM SYSTEMS .....	p. 8
2.1 STRENGTHS OF THE LOCAL TOURISM SYSTEMS .....	p. 10
2.2 WEAKNESSES OF THE LOCAL TOURISM SYSTEMS .....	p. 19
2.3 OPPORTUNITIES FOR TOURISM DEVELOPMENT .....	p. 29
2.4 THREATS TO TOURIST DEVELOPMENT .....	p. 31
3. RESIDENTS' WILLINGNESS TO PARTICIPATE .....	p. 34
3.1 THE EXCOVER PARTICIPATION INDEX .....	p. 35
3.2 RESIDENTS' ATTITUDE TOWARDS THE SHARING ECONOMY .....	p. 47
4. CONCLUDING REMARKS .....	p. 57
5. METHODOLOGICAL NOTES .....	p. 62
METHODOLOGICAL NOTE (1) .....	p. 62
METHODOLOGICAL NOTE (2) .....	p. 63
METHODOLOGICAL NOTE (3) .....	p. 64

## LIST OF FIGURES

Figure 1. Visitors' evaluations of products, services, heritage, climate.....	p. 12
Figure 2. Non-visitors' evaluations of products, services, heritage, climate.....	p. 13
Figure 3. Visitors' assessments of natural heritage by destination.....	p. 14
Figure 4. Non-visitors' assessments of natural and cultural heritage by destination.....	p. 15

Figure 5. Visitors’ assessments of cultural heritage by destination..... p. 16

Figure 6. Visitors’ assessments of restauration services by destination..... p. 17

Figure 7. Visitors’ assessments of prices by destination..... p. 17

Figure 8. Non-visitors’ assessments of prices, safety and security by destination..... p. 18

Figure 9. Visitors’ assessments of safety and security by destination..... p. 19

Figure 10. Visitors’ feeling of being welcomed by the local community, by destination..... p. 21

Figure 11. Non-visitors’ feeling of being welcomed by the local community, by destination..... p. 22

Figure 12. Visitors’ assessments of the professionalism of local workers in the tourism sector, by destination..... p. 23

Figure 13. Visitors’ assessments of the effectiveness of marketing and communication by destination  
..... p. 24

Figure 14. Popularity of EXCOVER sites with non-visitors..... p. 25

Figure 15. Non-visitors’ assessments of the effectiveness of marketing and communication, and of Word of Mouth, by destination..... p. 26

Figure 16. Visitors’ assessments of accommodation structures by destination..... p. 28

Figure 17. Visitors’ assessments of shopping and entertainment opportunities by destination. p. 28

Figure 18. EPI by area ..... p. 36

Figure 19. Community participation by area ..... p. 38

Figure 20. Personal contact left by area. ... p. 40

Figure 21. Degree of hospitality of the local community by area ..... p. 42

Figure 22. Interviewees’ engagement by area ..... p. 44

Figure 23. Interviewees’ personal sharing attitude by area ..... p. 46

Figure 24. Interviewees’ availability to share accommodations by area..... p. 49

Figure 25. Interviewees’ availability to engage in home restaurant by area..... p. 50

Figure 26. Interviewees’ availability to share transportations or car rides by area..... p. 52

Figure 27. Interviewees’ availability to share their knowledge of the territory by area..... p. 53

Figure 28. Interviewees’ availability to share their tourism-related skills and knowledge by area  
 ..... p. 55

Figure 29. Example of SWOT Matrix ..... p. 63

**LIST OF TABLES**

Table 1. Strengths classes and frequencies ..... p. 10

Table 2. Weaknesses classes and frequencies ..... p. 20

Table 3. Opportunities classes and frequencies ..... p. 30

Table 4. Threats classes and frequencies ..... p. 21

## 1. EXECUTIVE SUMMARY

In this document, we present a cross-border synthesis of the SWOT and Reputation analyses brought about at the local level by EXCOVER partners, mainly based on the residents' opinions, collected through semi-structured surveys, then discussed, integrated and rated by representatives of the local authorities, businesses, socio-cultural associations, destination management experts and heritage management bodies, integrated with visitors and non-visitors' answers to further sample surveys.

Given its indispensability for sustainable development, a special attention is paid to residents' support to tourism, that is measured through an innovative participation index (EXCOVER 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.

With reference to the analysis of the local tourism systems, we found that protecting and valorizing the natural environment is fundamental to grasp the opportunity constituted by the growth of green tourism. Both visitors and non-visitors agree that the main strength of these areas, is the natural environment, that along with the pleasant climate makes outdoor activities attractive. Except for Cavle, Campobasso and Karlovac, restauration services too are highly evaluated by the demand, confirming the local community's belief that the quality of the local enogastronomic offer can be a main driver of tourism development. Although the cultural heritage reached slightly lower ratings, it can be considered appreciated by visitors, who share the residents' opinion that the local historical and cultural heritage could be an effective lever for tourism development, with the exceptions of Ostellato, Carnia and Cavle.

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. However, the idea that not all the residents are well disposed towards tourists can be found also in some self-representation of the communities themselves. In particular, the locals tend to self-criticize the lack of skills and education, and so the professionalism of people working in the local tourism sector, which visitors confirm to be an important weakness, except for Carnia, Sasso Simone e Simoncello, Gospic and Cavle. On one side, this problem might be overcome through specific education programs, workshops and by introducing tourism-related teaching modules at school. On the other side, once achieved a higher standard of professionalism, it should be valorised also by means of web communication actions addressing mainly potential tourists who do not know the area. This could also favour an improvement of the self-representation the local communities, that may increase their trust in the possibility of becoming successful tourism destinations. Moreover, a better image of local professionals should permit to attract more travellers, especially those interested in slow tourism.

But education about the local history and culture must be combined also with greater efforts to improve the protection of the cultural heritage of the areas involved in EXCOVER, as residents expressed concerns about the state of abandonment of some important museums, monument and ancient buildings. Once ensured the optimal conservation of the cultural heritage, efforts must be put in promoting and communicating it widely, because it lacks visibility, being almost unknown to the general public.

Another very common weakness regards the lack of accommodations and other tourist services and facilities, that might be overcome by means of sharing economy solutions. Not all the local communities show the same availability to recur to such solutions. The residents most willing to share assets with tourists are in Gospic, Prato Carnico and Montefeltro, while the most refractory are in Paularo, Rive d'Arcano, Cavle and Karlovac. However, 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. In Sasso Simone e Simoncello, Gospic and Karlovac, the extant accommodations look satisfying to tourists.

A fundamental weakness to the eyes of visitors, that has not emerged among the most important ones in residents' surveys and capacity building seminars, 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. Moreover, the local businesses should be helped to open temporary markets, shared outlets and further innovative shopping occasions, focusing especially on the typical productions of the territory, including the highly appreciated enogastronomic products. This need was expressed by many representatives of the local businesses in various towns. For example, in Rive d'Arcano locally produced wines are sold in the castle and local entrepreneurs would like to widen the offer of km0 products that tourists can buy in that beautiful historical site.

The impact of the COVID-19 outbreak on consumers' behaviours may be seen as an opportunity for these isolated areas, characterized by wide green spaces, no overcrowding, many outdoor sport possibilities, unpolluted nature and healthy rural lifestyles. Even before the COVID-19 pandemics, 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. In general, visitors do agree that marketing initiatives should be reshaped, except for Carnia and Sasso Simone e Simoncello, where they look quite successful.

In general, visitors' evaluations depict a much more attractive image of these destinations than non-visitors' ones and this means that these sites have important competitive strengths, which are not correctly communicated. Therefore, the last work package of the Project, focused on marketing and communication, is expected to have a great positive effect on tourist inflows and, more in general, on the destinations' popularity and attractiveness, as the scarce visibility of the treasure sites of EXCOVER has emerged as a main obstacle to tourism development.

Developing tourism demand is necessary to favour the local growth, however, increasing the EXCOVER sites' capability of attracting tourists would be useless, if they could not find an adequate supply of accommodations, restaurants, transportations, events and services. Since we aim to develop sustainable tourism with close-to-zero investments, the active participation of the local community, also in providing tourist services first-hand, is crucial. Therefore, we dedicate the second part of this report to its analysis.

We developed a composite index to measure residents' participation (EPI). Analysing the EPI, we find 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. In Italy, the residents' attitude clashes with a regulatory framework that brakes or prevents the possibility to recur to the many sharing economy solutions. Overall, a very satisfying 23% of interviewees left their personal e-mail address or phone number, to be re-contacted to participate in further activities.

However, 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.

## **2. ANALYSIS OF THE LOCAL TOURISM SYSTEM**

### **from the perspective of residents, institutional players, visitors and non-visitors**

Although all the small areas involved in EXCOVER can leverage on some tangible and intangible assets that are potentially attractive for tourists, to boost a sustainable tourism development, the tourism sector and its economic potential is still scarcely unfolded. Whence the need to deeply investigate how the local resources can be effectively employed to attract and create value for visitors, why they are not currently source of economic growth, which opportunities should be caught, also in terms of valorizing underutilized or neglected assets, and which risks may arise. To this aim, a SWOT analysis was conducted in each destination. In this section, we follow the SWOT schema to integrate the results of the local SWOT analyses with the results of the local reputation analyses, based on visitors or non-visitors surveys, or on Google Trends (since not all the project partners retrieved information from all the proposed sources, see below). So we employ results of local Reputation analyses to compare reputational strengths and weaknesses with SWOT factors identified by the local community, for drawing a multi-perspective comprehensive synthesis, able to lead the sustainable development planning in these areas.

A SWOT Analysis consists in the detection and examination of the Strengths an organization can leverage on, the Weaknesses it must overcome, the Opportunities it can exploit and the Threats it must avert (whence the acronym SWOT). It is a tool developed in the sixties by Albert Humphrey at the Stanford University to find out Fortune 500 corporations' planning failed, by investigating their strategic positioning. Although it was born in the field of corporate strategy, it has been usefully applied in many different domains (e.g. education, health, natural resources management), thanks to its simplicity, flexibility and clarity. In the tourism sector, SWOT analysis is a popular tool for strategic diagnosis and planning of tourism development of various kind of territories, to assess the potential of an area to be developed into a tourist destination, to determine internal and external factors that can attract tourists<sup>1</sup>. Clearly, a tourism destination is much more complex than a single company. It configures as a territorial system where many different tourism-related businesses, public authorities, residents' attitudes and behaviors, local traditions, natural and cultural endowments, infrastructures, historical paths, patterns of values and identity factors interact with people (even potentially) interested in the area. Therefore, a SWOT Analysis of a (potential) tourism destination must adopt a holistic, systematic

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<sup>1</sup>Moleong Lexy. (2002). Qualitative Research Methodology. Bandung: PT. teenager Rosdakarya.



and comprehensive perspective, and recognize that both the supply and the demand side are influenced by factors external and internal to the destination<sup>2</sup>.

Strengths, weaknesses, opportunities and threats are clearly specific of each destination, so that a benchmarking exercise would not be of particular help. So, in order to convey an overall idea of findings in a cross-border perspective, below we report a broad classification of SWOT factors, that allows to identify the most common macro-areas of intervention. Moreover, we integrate the supply-side information about the main SWOT factors with the opinions of visitors and potential visitors, collected either through sample surveys or Google Trends, for the local Reputation analyses. In fact, in order to devise an effective strategy to turn EXCOVER small areas into popular tourism destinations, it is necessary to understand why a few travellers do visit them, but also why much people do *not* choose them as destinations for their trips and vacations, and what changes could enhance their tourist attractiveness.

Thus, to investigate the collective judgments of both potential and actual demand about the area partners of EXCOVER as tourism destinations, a demand-based Reputation analysis was carried out by each project partner. The concept of reputation encompasses, to a certain extent, the construct of satisfaction with regard to actual tourists (to be induced to revisit), but it is measurable also with reference to just potential visitors (the main target to be attracted to develop the local tourism sector). Moreover, it has been shown that a favorable reputation can positively influence the image of a destination<sup>3</sup> (that is conveyed to the general public of potential visitors), the perception of its value and the tourists' loyalty<sup>4</sup>.

Based on feasibility considerations specific to the local tourist demand configuration, each area decided which source(s) of information to use, among the following:

- Google Trends,
- Survey interviews to non-visitors, that are visitors of a popular tourism destination close to the area of interest, who have not been in the latter for at least the past two years,
- Survey interviews to visitors of the areas participating in EXCOVER.

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<sup>2</sup> Suratini, N. L., Arnawa, I., & Wiswasta, I. G. N. A. (2019). Beach Development Strategy as Tourism Destination in Tabanan Bali. *International Journal of Contemporary Research and Review*, 10(01), 21219-21228. <https://doi.org/10.15520/ijcr.v10i01.646>.

<sup>3</sup> Marinao, E., Torres, E., Chasco, C. (2012). Trust in tourist destinations. The role of local inhabitants and institutions. *Acad. Rev. Latinoam. Adm.* 51, 27–47.

<sup>4</sup> Christou, E. (2007). Tourist destinations as brands: the impact of destination image and reputation on visitor loyalty. In: Keller, P., Bieger, T. (Eds.), *Productivity in Tourism: Fundamentals and Concepts for Achieving Growth and Competitiveness*. Erich Schmidt Verlag, Berlin, pp. 57–67.

Thus, some local reputation analyses rely on both direct (based on sample surveys) and indirect (web-based) approaches, while others are based on a single source of data.

Detailed local reputation analyses are presented in the Local Reports. While this document adopts a cross-border perspective with the aim of providing comparative references useful to interpret data regarding each single area and to benchmark its reputation with that of all the other destinations.

## 2.1 STRENGTHS OF THE LOCAL TOURISM SYSTEMS

The main types of strengths emerged from the residents' surveys, then discussed, widened, clarified and rated in the capacity building seminars, hold in each area involved in EXCOVER, are reported in Table 1, along with their percentage frequencies. The natural heritage and, more in general, the local environmental qualities constitute important strengths in all the considered destinations, except for Cavle, where most strengths are rather related to the cultural heritage present in the territory. Also in the other towns the local history and culture, including not just monuments, buildings and churches, but also historical paths, local traditions and commemorative events, are expected to play a starring role in the development of sustainable tourism.

Table 1. Strengths classes and frequencies

Destination	STRENGTHS									
	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%
<b>Total</b>	<b>3%</b>	<b>31%</b>	<b>23%</b>	<b>10%</b>	<b>3%</b>	<b>1%</b>	<b>10%</b>	<b>6%</b>	<b>11%</b>	<b>1%</b>

Moreover, very common strengths are represented by the typical enogastronomy, traditional art crafts and local agri-food productions, that can constitute a crucial attraction to develop food & wine tourism, but can also benefit from tourism, as visitors buying these little-known high quality products could become ambassadors of such productions in their region of origin. Thus, if typical products can lead the expansion of tourism demand, tourism could function as a marketing lever to penetrate new markets. The rural lifestyle, characterized by tranquility, wide green spaces with unpolluted air and healthy habits, is a strength present in most of the areas under investigation, that is especially promising in the post-COVID-19 era. In fact, the lack of overcrowding, the possibility to keep large distances from the other people and the contact with nature are expected to become of great interest to travellers searching for security and health protection, when the fear of contagion is still high. Moreover, the rural lifestyle combines perfectly with the natural heritage and outdoor sport, to develop green and active tourism, a very promising market segment. In fact, nowadays ecotourism and, more in general, sustainable and environment-friendly activities are especially fashionable and correspond to the system of value of many travellers.

Overall, the local communities' view of the strengths of their territories is quite consistent with the perceptions of surveyed visitors, as displayed in Figure 1. In general, tourists agree that the main strength of these areas, considered all together, is the natural environment, that along with the pleasant climate makes outdoor activities attractive. Safety and security is the second most satisfactory aspect of the local supply, even before the COVID-19 pandemics, and its importance is expected to rise, thus it might be emphasized in marketing and communication initiatives. Restauration services too are highly evaluated by the demand, confirming the quality of the local enogastronomic offer. Although the cultural heritage reached slightly lower ratings, it can be considered to be appreciated by visitors.

Potential tourists seem to endorse the visitors' assessments almost wholly. The non-visitors survey was brought about by Gospic, Karlovac, Rive d'Arcano and Campobasso. Overall results are shown in Figure 2. Considering together the 4 destinations, the natural environments confirms the main strength also in the imaginary of tourists who visited a nearby more popular destination, but have not been in the EXCOVER areas at least for the past 2 years. The second most highly rated reputational asset is safety and security, confirming that the towns under consideration may become attractive thanks to this characteristic, that is expected to be especially valued by travellers after the COVID-19 outbreak. Comparing the visitors' assessment of prices with non-visitors' expectations about this aspect, we notice that the considered destination are deemed slightly cheaper than they actually are, however, this comparison is biased by the lack of data for many destinations.

Looking at visitors' evaluations by destination, we can compare the relative competitiveness of each EXCOVER areas' main strengths. Figure 3 shows the visitors' mean evaluation of the natural environment and Figure 4, on the left, displays the same distribution based on non-visitors' assessments. Gospic results the most competitive destination with reference to the natural heritage according to both actual and potential tourists. The Google Trend analysis carried out by Gospic experts confirms the

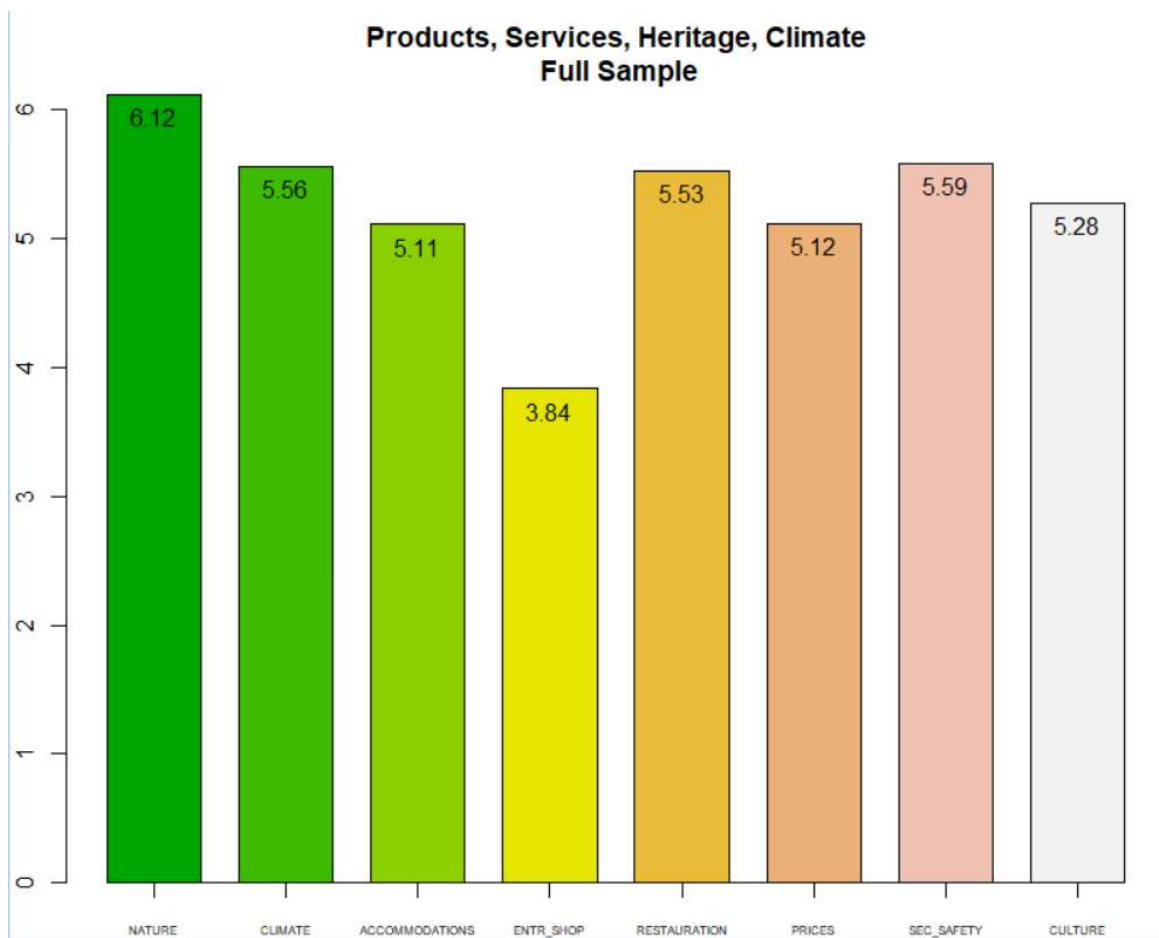


Figure 1. Visitors' evaluations of products, services, heritage, climate. Source: elaboration by UNIBO CAST on EXCOVER survey data.

importance of the local natural environment as a main driver of the reputation of this area with the general public. The natural environment in Ostellato and Sasso Simone too is rated higher than the average by visitors, while the other towns attain quite homogeneous evaluations. Also in the case of Ostellato the Google Trend analysis, brought about by local experts, confirms that the natural heritage is the main strength of this area. Conversely, the natural environment in Karlovac is very popular online, but not as much offline, in facts it reaches the lowest value in the opinions of surveyed non-visitors.

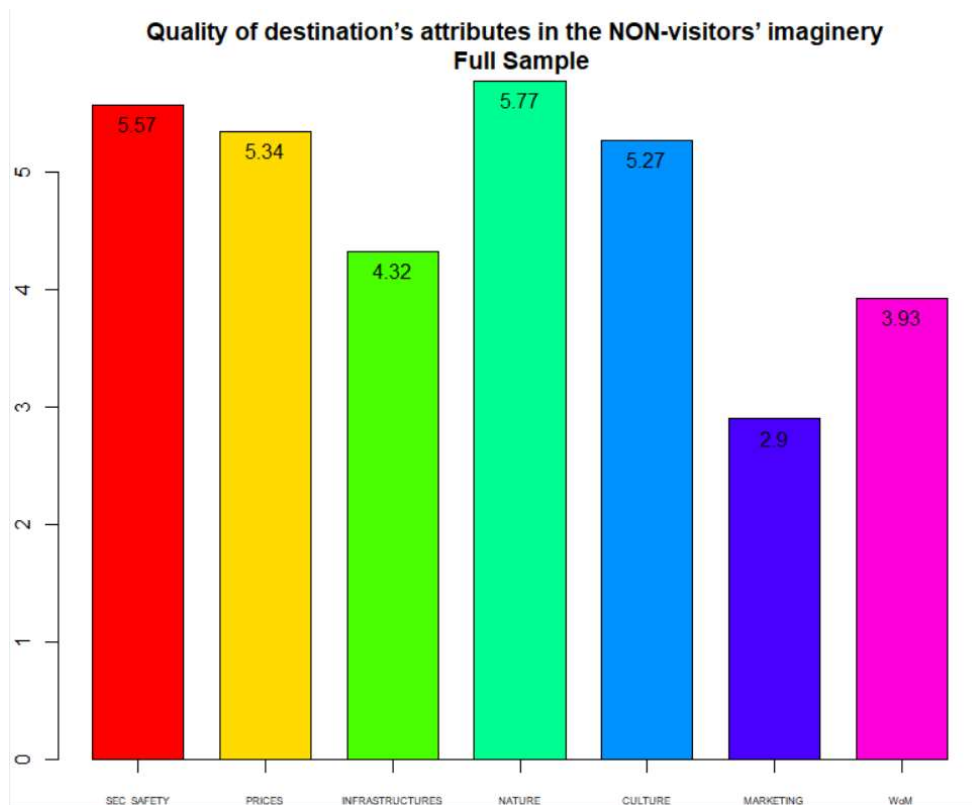


Figure 2. Non-visitors' evaluations of products, services, heritage, climate. Source: elaboration by UNIBO CAST on EXCOVER survey data.

Turning to the cultural heritage, Figure 4, on the right, shows the mean rating obtained by each destination in the non-visitors survey and Figure 5 reports the same information but with reference to the visitors' opinions. The cultural heritage in Gospic attains the highest average score by visitors, while it is assessed average by non-visitors and is not popular at all on the web. Although Gospic is the

birthplace of the vary famous scientist Nikola Tesla, the name of this great character is not associated with that of Gospic in the imaginary of the general public. Therefore, marketing and communication initiatives should lever the popularity of Tesla in Gospic branding. The cultural heritage of Campobasso is top rated by non-visitors, while its appreciation by visitors is slightly above the average. On the web, just a few components of its huge historical and cultural heritage is well known, namely: the Misteri, spectacular sacred representations embodying an ancient local tradition of worship, Monforte Castle and Villa De Capoa.

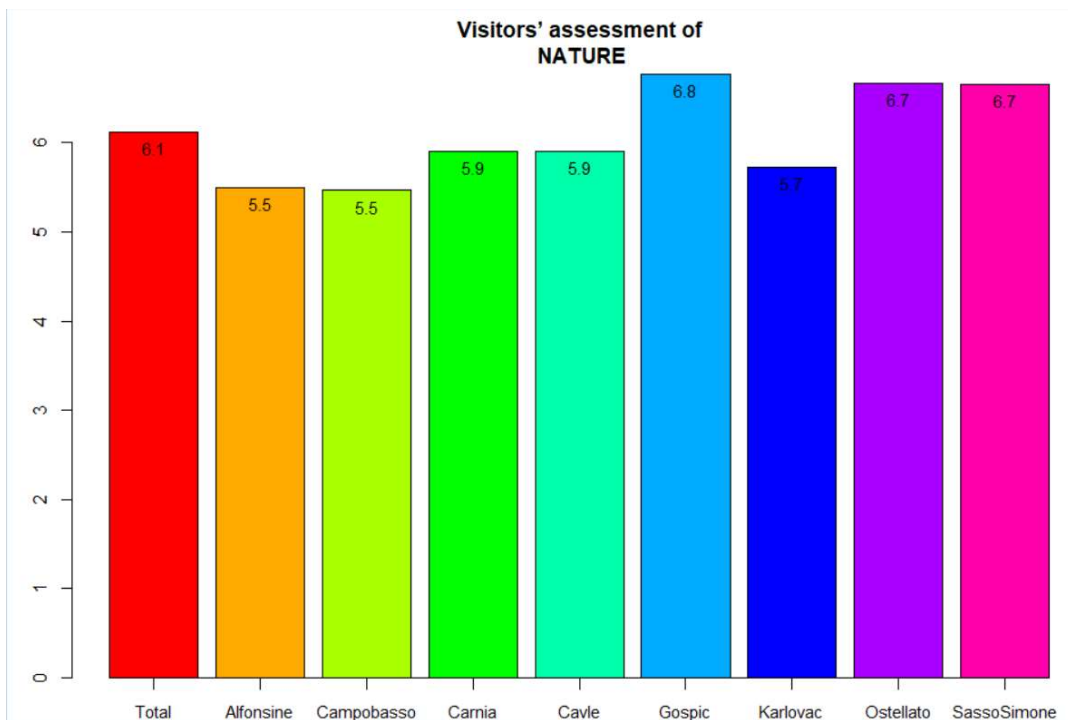


Figure 3. Visitors' assessments of natural heritage by destination. Source: elaboration by UNIBO CAST on EXCOVER survey data.

Indeed, confronting the Google Trends analyses carried out for Alfonsine, Ostellato, Rive d'Arcano, Campobasso, Cavle, Gospic, Karlovac and Montefeltro, it emerges that the historical and cultural heritage of these areas is largely unknown to internet users. On one hand, this evidence could reflect a market trend, where the interest might be shifting from historical and cultural products to green and active tourism, in general. On the other hand, the lack of searches for the local cultural and historical

attractions could be due to the low popularity of these particular hidden treasures, so that effective marketing and communication campaigns should be able to rise the interest of potential visitors and increase tourist inflows. Moreover, cultural tourism could help de-seasonalize tourist flows in these areas, where the prevalence of active and green tourism makes demand heavily dependent on the weather conditions. The objective potential to develop cultural tourism is proven by the visitors' assessments (shown in Figure 5), that are especially high also for Sasso Simone e Simoncello, Karlovac and Alfonsine.

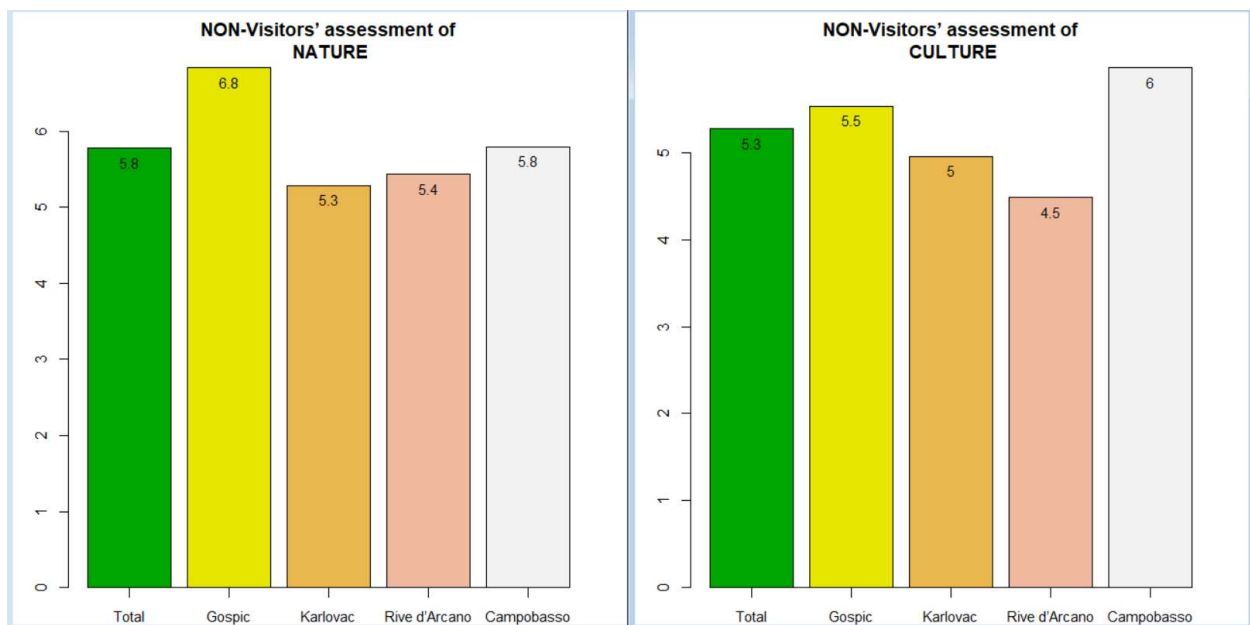


Figure 4. Non-visitors' assessments of natural and cultural heritage by destination. Source: elaboration by UNIBO CAST on EXCOVER survey data.

A top strength of Sasso Simone e Simoncello, identified by the host community and remarked by local experts, is the typical enogastronomy. Visitors' assessments of restauration services, shown in Figure 6, confirm the top quality of food and wine they tasted in this area. Carnia records the second highest average score for restauration services, which were not identified among the top-7 strengths by the locals, who may be underestimating the attractiveness of their local cuisine. Also Gospic, Ostellato and

Alfonsine attain high evaluations for their restauration offer and also Ostellato’s residents may be overlooking the importance of this strength, to the aim of sustainable tourism development.

Although, according to the locals, low prices appear among the top-7 strengths only for Montefeltro, the cheapness of the local offer is appreciated by visitors, especially in Ostellato, Sasso Simone e Simoncello and Carnia, as shown in Figure 7. Figure 8, on the left, displays the non-visitors’ expectations about price levels in the 4 destinations that brought about the corresponding survey.

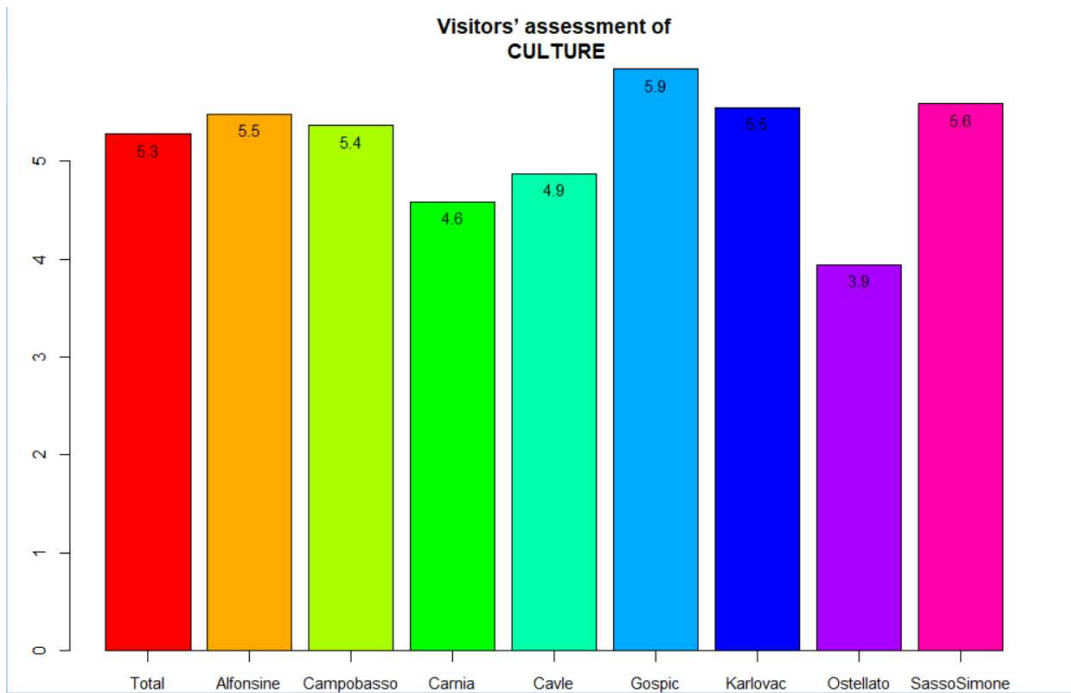


Figure 5. Visitors’ assessments of cultural heritage by destination. Source: elaboration by UNIBO CAST on EXCOVER survey data.



The comparison of visitors and non-visitors’ perceptions about these areas is interesting. Non-visitors expect almost invariably low prices everywhere, possibly in view of the scarce popularity and attractiveness of the destinations, while visitors rate the local cheapness about 1/7 less and give more diversified scores. This evidence may suggest that low prices are not attractive to travellers, as they might be perceived as a signal of low quality.

The safety and security of the EXCOVER treasure sites has not emerged as a top-7 strength in the perception of the local communities, although in the visitors survey it turned out to be the second most highly appreciated characteristic of the EXCOVER areas (considered together) and is becoming a crucial driver of destination competitiveness after the COVID-19 outbreak. Visitors’ average ratings of the safety

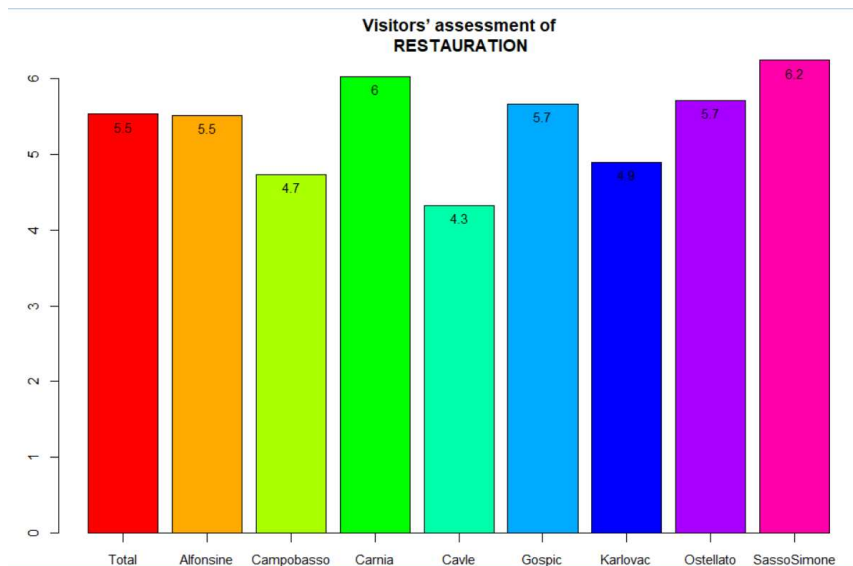


Figure 6. Visitors’ assessments of restauration services by destination. Source: elaboration by UNIBO CAST on EXCOVER survey data.

Gospic appears the most safe and secure destination according to tourists who visited the place, while in non-visitors’ imaginary it is outperformed by Campobasso, the top-ranked destination in this regard. But the safety and security levels in Campobasso are below the average according to visitors, therefore that this area can count on a strong reputation in this respect, but this is a double-edged sword inasmuch as it creates high expectations that risk not to be met, producing dissatisfaction and negative behavioural intentions including bad word-of-mouth, if actual security levels are not improved.

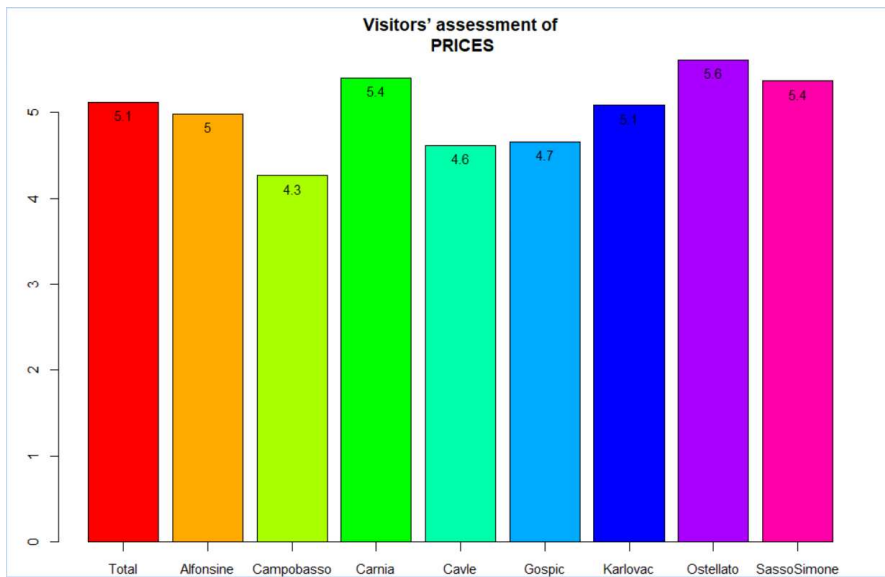


Figure 7. Visitors' assessments of prices by destination (high values mean highly affordable, low values mean too expensive). Source: elaboration by UNIBO CAST on EXCOVER survey data.

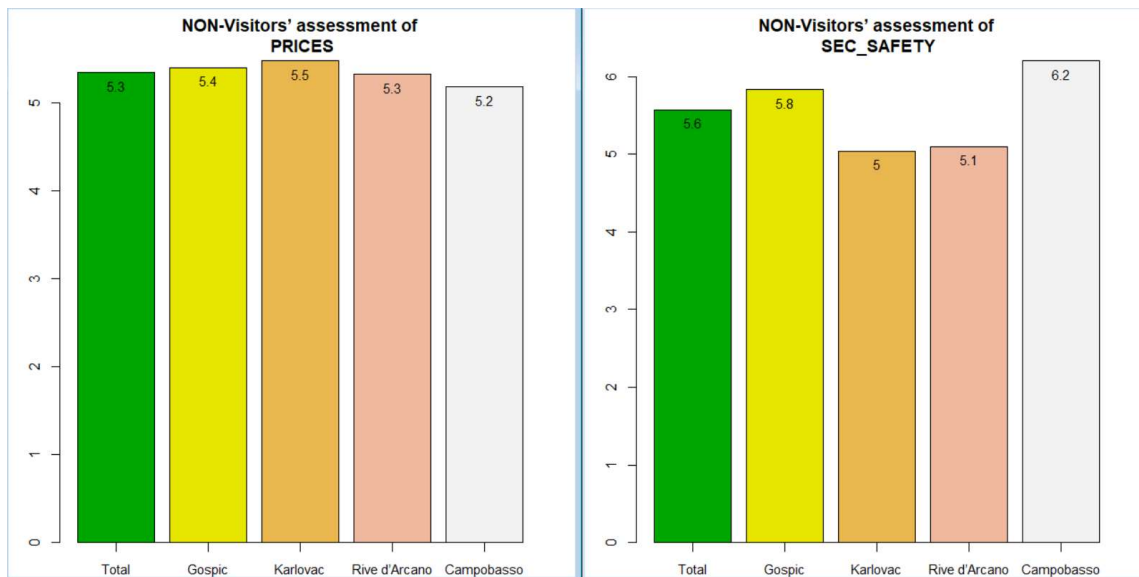


Figure 8. Non-visitors' assessments of prices (high values mean highly affordable, low values mean too expensive), safety and security by destination. Source: elaboration by UNIBO CAST on EXCOVER survey data.

In Carnia and Sasso Simone safety and security standards are highly appreciated by visitors, while they appear rather as a weakness in the opinions of both actual and potential tourists in Karlovac.

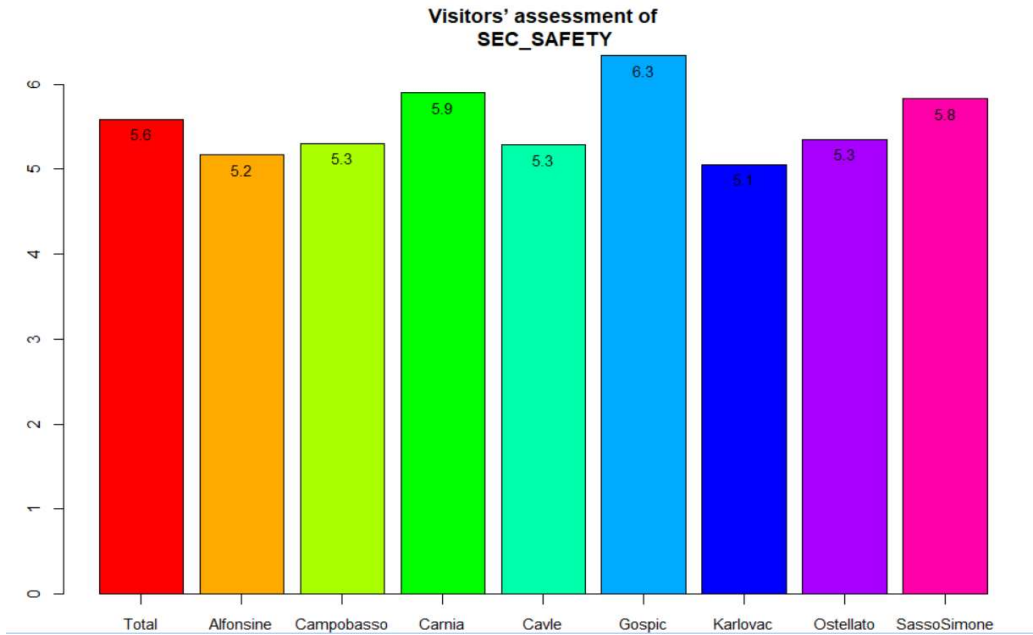


Figure 9. Visitors' assessments of safety and security by destination. Source: elaboration by UNIBO CAST on EXCOVER survey data.

## 2.2 WEAKNESSES OF THE LOCAL TOURISM SYSTEMS

Table 2 shows a broad classification of the most important weaknesses derived from the residents' surveys, then discussed, widened, clarified and rated in the capacity building seminars, hold in each town involved in the Project.

Table 2. Weaknesses classes and frequencies

Destination	WEAKNESSES									
	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%
Total	6%	1%	34%	6%	10%	10%	6%	9%	12%	6%

Sustainable tourism development looks hindered mainly by issues related to the local community everywhere. In particular, the closed-mindedness of residents, their distrust in their territory's potential to attract tourist flows, disinterest in the tourism sector, lack of tourism-related skills and education, parochialism and unavailability to coordinate and work together to development actions and to create synergies between different industries. Thus, the prosecution of EXCOVER might take this datum into account and provide for activities involving the local communities in the discovery of the many advantages of sustainable tourism, especially for young people and for giving a future to little villages which otherwise could remain uninhabited and die.

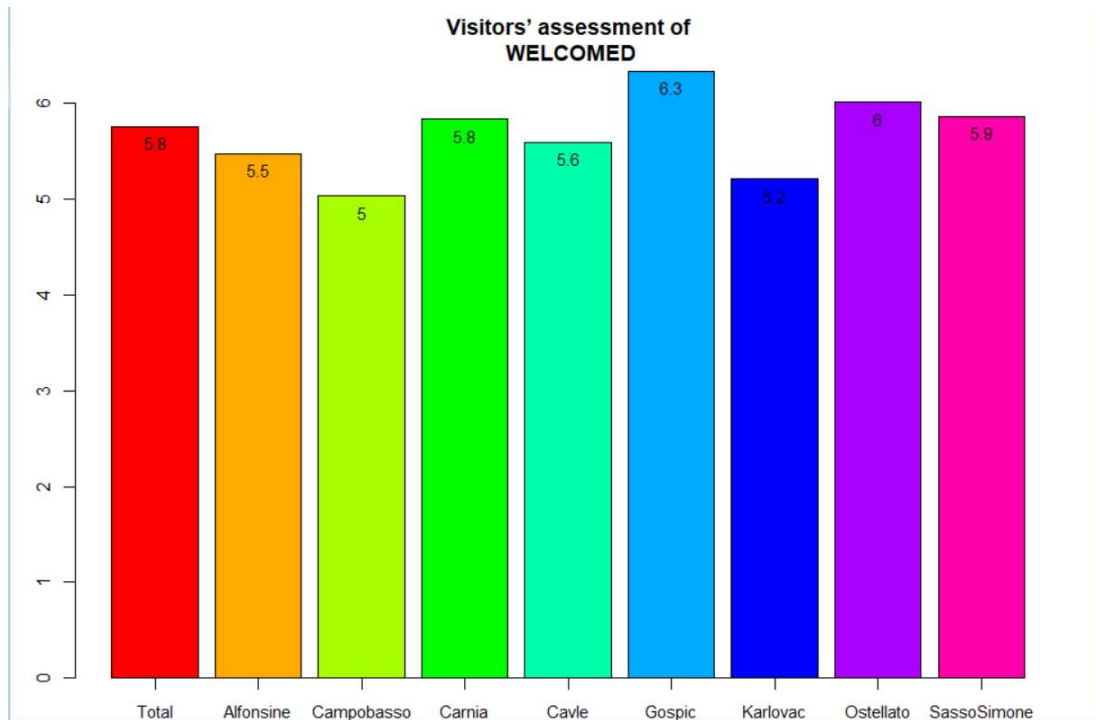


Figure 10. Visitors' feeling of being welcomed by the local community, by destination. Source: elaboration by UNIBO CAST on EXCOVER survey data.

However, based on the visitors' opinions, the host communities in the EXCOVER treasure sites are very welcoming of tourists and foreign people in general, as shown in Figure 10. This looks especially true in Gospic and Ostellato, however all the destinations attained very high evaluations of residents' hospitality from tourists who experienced it. Conversely, in the imaginary of travellers who have not visited the 4 areas for which the non-visitors survey was carried out, the host communities are deemed to be pretty unwelcoming, particularly in Karlovac, the residents of which seem to have a bad reputation concerning this fundamental aspect of tourism, as displayed in Figure 11. In fact, the quality of the resident-tourist interaction is the pillar of the co-creation substantiating the tourism experience, that exerts a great impact on tourist satisfaction and behavioural intentions, including willingness to recommend the destination to others. Therefore, it is fundamental to investigate the causes of this biased reputational weakness: why are the local communities in Gospic, Karlovac, Rive d'Arcano and Campobasso known as inhospitable by potential tourists, while they are acknowledged as very welcoming by actual visitors? What is the basis of this false belief? Once answered these questions, the

last part of the Project should strive to communicate a faithful and positive image of the locals' hospitality to the general public, because this might be a crucial factor keeping tourists away.

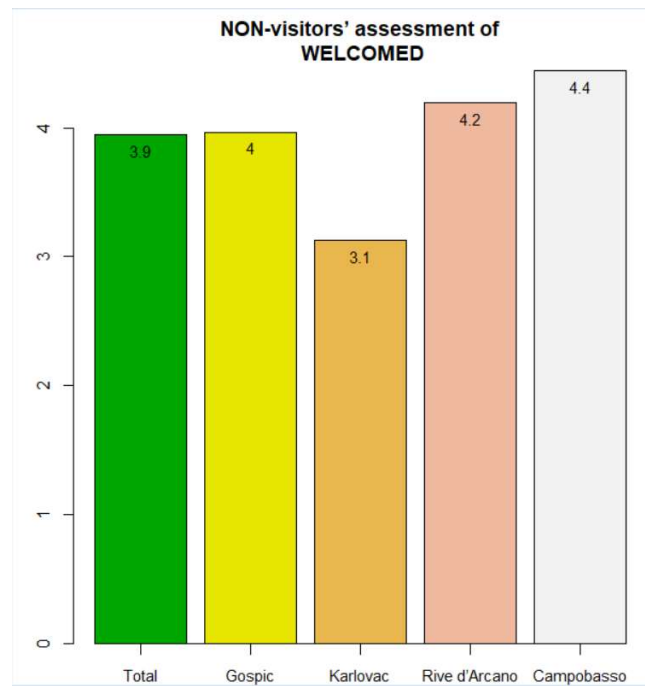


Figure 11. Non-visitors' feeling of being welcomed by the local community, by destination. Source: elaboration by UNIBO CAST on EXCOVER survey data.

With reference to the skills and education of people working in the local tourism sector, and so their professionalism, surveyed visitors confirm it to be an important weakness in Alfonsine, Ostellato, Campobasso and Karlovac. This problem might be overcome through specific education programs, workshops and by introducing tourism-related teaching modules at school. Preparing young people to work in the tourism sector would be very important to bring them closer to this sector, that can offer a variety of different occupational opportunities and entice them to stay in their homeplace, instead of moving in big cities.

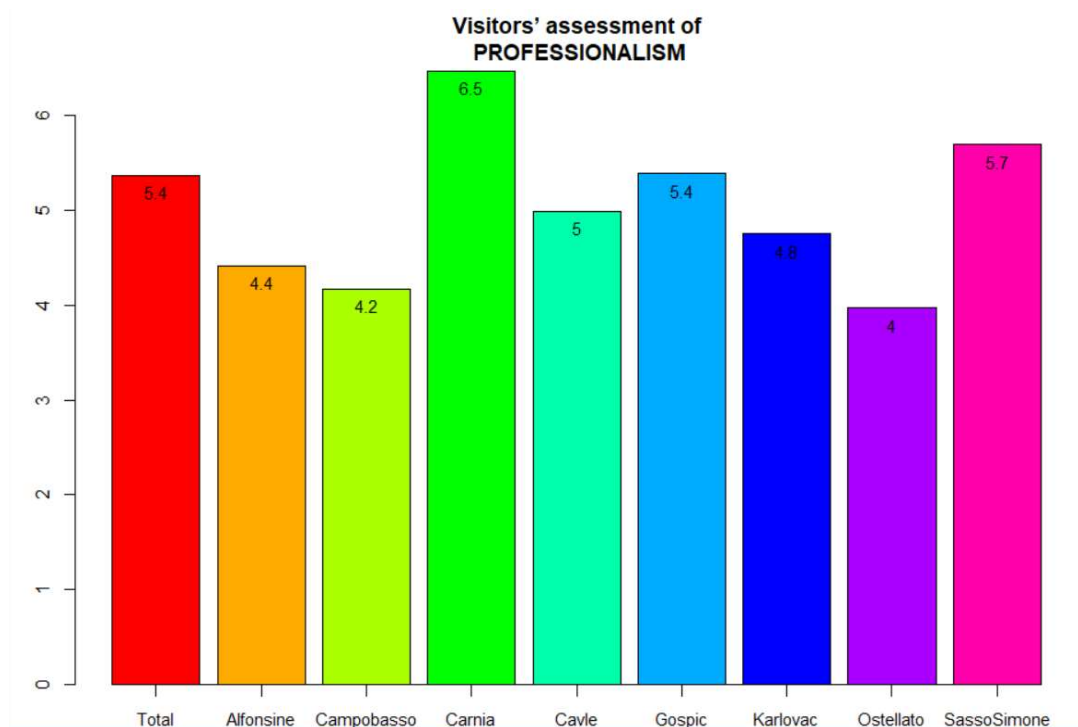


Figure 12. Visitors' assessments of the professionalism of local workers in the tourism sector, by destination. Source: elaboration by UNIBO CAST on EXCOVER survey data.

According to residents and representatives of the local organizations and institutions, the lack of effective initiatives of marketing, communication and promotion is another main weakness, very common among the areas participating in this project (see Table 2), that can be removed in the last phase of EXCOVER. Visitors do agree that marketing initiatives should be reshaped, except for Carnia and Sasso Simone e Simoncello, where they look successful. Campobasso, Cavle, Gospic and Karlovac appear to be the least effectively promoted destinations, although in the Google Trend analyses Campobasso and Gospic turned out to be relatively popular worldwide, compared to the others. As shown in Figure 14, the non-visitors surveys confirm the highly satisfactory popularity of these 2 sites, known respectively to the 91% and 86% of tourists who visited a nearby destination, but have not been in Campobasso and Gospic at least for the past 2 years. However, as highlighted by the local experts in the local reputation analysis reports, these 2 towns are not popular as proper tourism destinations, but Campobasso is popular for being the regional capital of Molise and homeplace of many migrants, who moved all over the world, while Gospic is famous for its natural reserves, that promise a successful

sustainable tourism development, but to date they are seen prevalently under the aspect of environmental protection and restrictions to socio-economic use of the local natural resources.

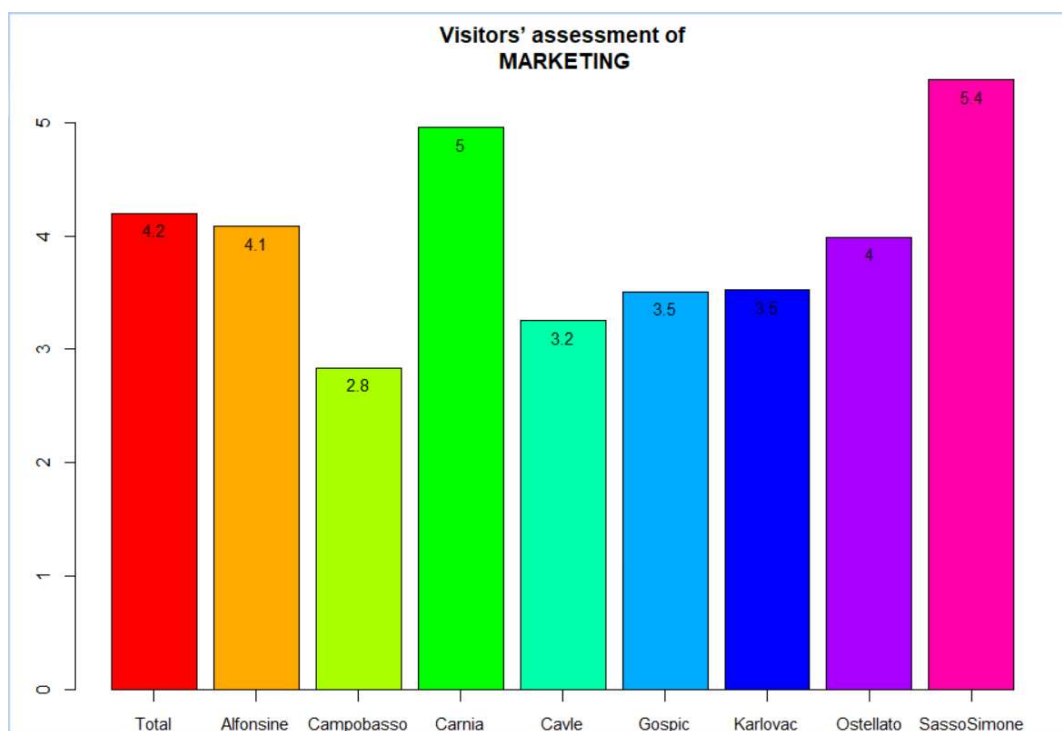


Figure 13. Visitors' assessments of the effectiveness of marketing and communication by destination. Source: elaboration by UNIBO CAST on EXCOVER survey data.

Although Karlovac and Rive d'Arcano are much less popular with non-visitors than Gospic and Campobasso (see Figure 14), more than half of interviewees declared to know them. However, popularity is a double-edged sword, as it can amplify both a good and a bad reputation. When the destination reputation is negative, as with respect to the host communities' welcoming attitude, a high popularity implies that many potential tourists are dissuaded from visiting the areas. Therefore, the perception of destination quality conveyed by marketing and communication initiatives, as well as Word of Mouth (WoM), is crucial to the aim of increasing the local tourism demand. Therefore, it is quite concerning that the interviewed non-visitors rated marketing and communication initiatives concerning



Gospic, Karlovac and Campobasso very low, as displayed in Figure 15, on the left. Gospic and Karlovac appear the least effectively promoted destinations, from the eyes of non-visitors, while marketing actions regarding Rive d’Arcano turn out to be more adequate qualitatively, but with a too narrow coverage, as signaled by the very low popularity of this town also online, as highlighted by the local expert in the Google Trends analysis. This evidence looks supported by the non-visitors’ average assessments of the WoM concerning the 4 destinations for which this survey was carried out, shown in Figure 15, on the right. With the exception of Rive d’Arcano, the WoM is very poor and threatens the possibility to attract new tourists.

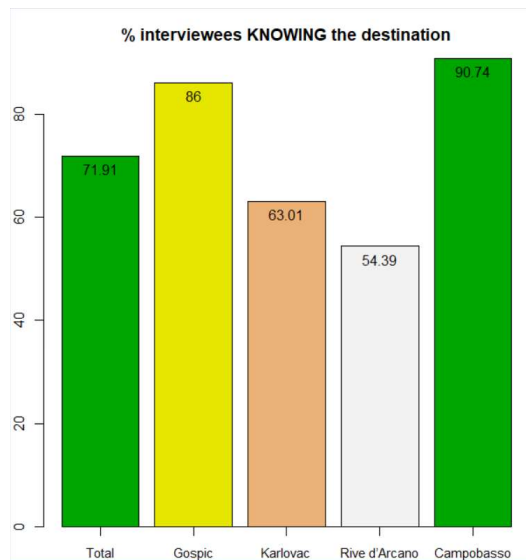


Figure 14. Popularity of EXCOVER sites with non-visitors. Source: elaboration by UNIBO CAST on EXCOVER survey data

The potentially devastating effect of a negative WoM and, more in general of a bad reputation, may be mitigated by carefully designed smart marketing actions. Thus, web marketing, umbrella marketing and the involvement of travel bloggers, provided for in the last phase of EXCOVER, should place emphasis on the strengths of each area and contrast reputational weaknesses with the evidences of high-quality tourism experiences. In fact, visitors’ evaluations depict a much more attractive image of these destinations than non-visitors’ ones and this means that these sites have important competitive strengths, which are not correctly communicated. Although poor WoM derives from the personal

communication of past dissatisfying experiences of some visitors to potential tourists, the results of our visitors surveys suggest that in this case it should be due to a great circulation of a few negative opinions, or to the great importance, to travellers, of the local weaknesses (compared to the importance of strengths). Therefore, wherever possible, destinations' aspects that represent weaknesses from the eyes of visitors, should be overcome to ensure a reputational improvement and a successful tourism development. Otherwise, the risk is that marketing and promotion efforts are jeopardized by negative WoM.

More in general, beyond what emerged for the 4 destinations dealt with above, the last work package of the Project, focused on marketing and communication, is expected to have a great positive effect on tourist inflows and, more in general, on the destinations' popularity and attractiveness, as the scarce visibility of the treasure sites of EXCOVER has emerged as a main obstacle to tourism development. However, turning back to Table 2, in this class of weaknesses we put also the lack of circulation of information between associations, local businesses, local authorities and destination management agencies, claimed especially by entrepreneurs during capacity building seminars. Fortunately, the representatives of the municipal administration, present at the seminars, showed sensitivity about this issue and availability to take charge of implementing a more effective system of information spreading.

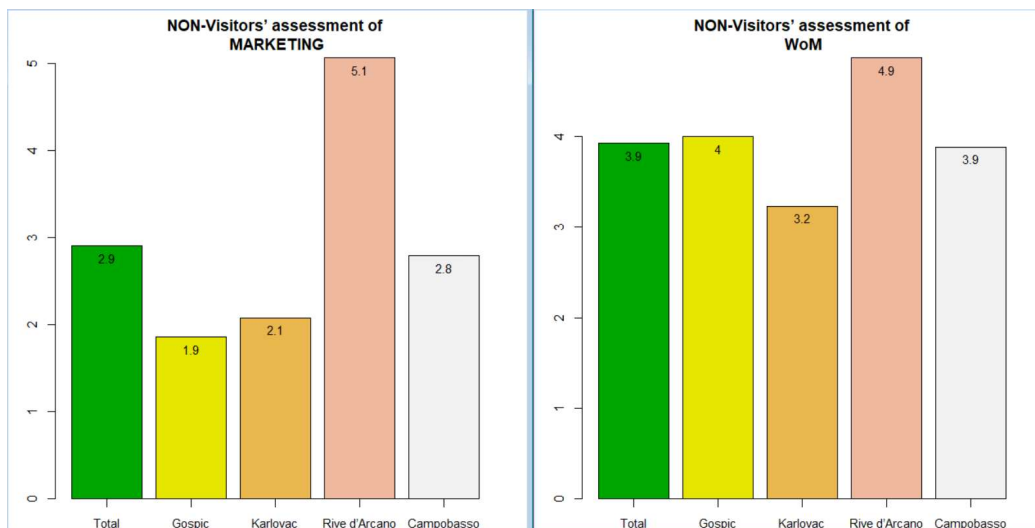


Figure 15. Non-visitors' assessments of the effectiveness of marketing and communication, and of Word of Mouth, by destination. Source: elaboration by UNIBO CAST on EXCOVER survey data.

According to the interviewed residents and to the participants in the capacity building seminars, another major weakness, very common in the EXCOVER areas, is the lack of tourist services and facilities, in particular accommodation structures and, to a smaller extent, restaurants. According to the visitors' opinions, restauration services represent a weakness only for Cavle, Campobasso and Karlovac (see Figure 6 above), while they are satisfying in the other destinations and in general received higher ratings compared to accommodations structures. The average visitors' assessments of the latter are shown in figure 16. Tourists tend to perceive accommodations as a weakness in Campobasso, Alfonsine and Ostellato, and, to a smaller extent, also in Carnia and Cavle. Conversely, they are considered adequate by visitors of Sasso Simone e Simoncello, Gospic and Karlovac.

The lack of tourist services and facilities might be relatively simple to be filled, through the sharing economy. Although we are concerned that the good sharing attitudes shown by residents in most towns (see the last section of this report) changed negatively after the COVID-19 crisis break out, sharing economy platform offer great opportunities to produce new tourist services with close-to-zero or definitely zero investment, by exploiting the locals' unused assets, time, skills and knowledge. Since the most dramatic consequences of the pandemic should be economic in nature, the host communities might become urgently needy of additional income sources, especially in peripheral rural areas where the scarcity of employment occasions is already an issue. Thus, once overcome the fear of contagion, residents may become interested in earning opportunities like those supplied by the sharing economy.

Conversely, weaknesses related to institutional issues, that are very common in the area under investigation, look more difficult to address. They are about the excess of municipal bureaucracy, especially in Italy, the inadequacy of the local political class, lack of collaboration between municipal authorities and local businesses and associations, lack of support to entrepreneurs and trade, lack of effective strategic planning and wrong public investments. Although there is no room for EXCOVER to address such problems, we hope that having highlighted them in front of the local administrations, during capacity building seminars, can help spread awareness of the fundamental policy changes required to favour growth and development.

A fundamental weakness to the eyes of visitors, that has not emerged among the most important ones in residents' surveys and capacity building seminars, is the low quality and variety of shopping and entertainment opportunities. This obstacle to tourism development is common to all the EXCOVER areas, although these tourist attractions can be considered sufficient in Sasso Simone e Simoncello, Carnia and Karlovac. While they appear to be a great problem in Ostellato and Gospic, however the survey results are concerning also for Cavle, Campobasso and Alfonsine.

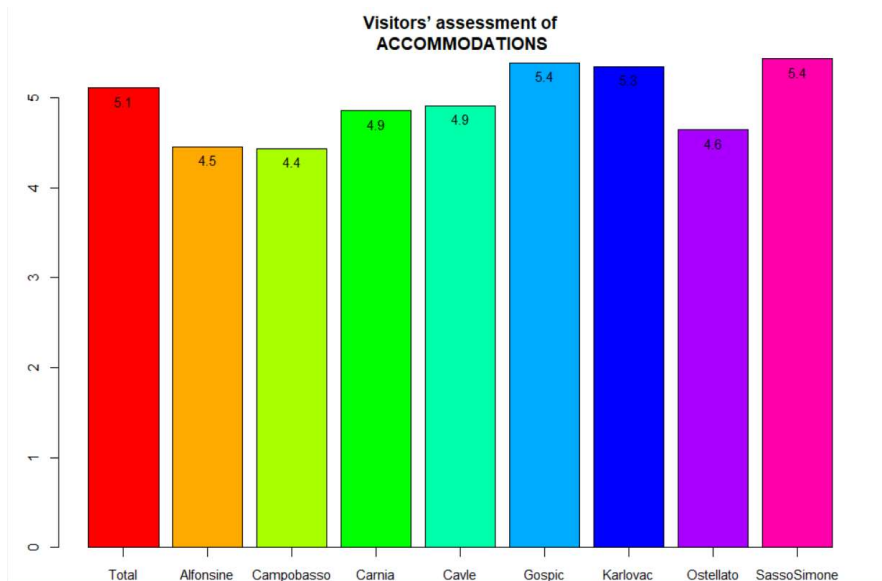


Figure 16. Visitors' assessments of accommodation structures by destination. Source: elaboration by UNIBO CAST on EXCOVER survey data.

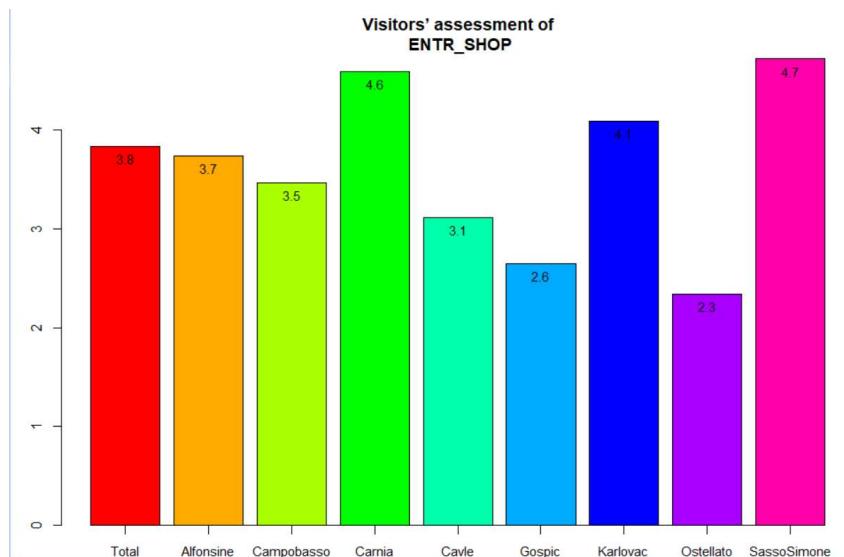


Figure 17. Visitors' assessments of shopping and entertainment opportunities by destination. Source: elaboration by UNIBO CAST on EXCOVER survey data.

Therefore, it is crucial to involve the local communities in the creation of new attractive events, especially for young people, children and families. Although the COVID-19 pandemic imposed many restrictions on the possibility to hold festivals, concerts, spectacles and any event implying people gathering, the wide green spaces available in our treasure sites represent a great occasion to create new attractions in complete safety. Moreover, the local businesses should be helped to open temporary markets, shared outlets and further innovative shopping occasions, focusing especially on the typical productions of the territory, including the highly appreciated enogastronomic products. High quality and large variety of shopping and entertainment occasions are crucial to develop sustainable tourism, to de-seasonalize tourist inflows and to penetrate new market segment, in particular that of the young travellers, who may find the current tourism offer boring.

### **2.3 OPPORTUNITIES FOR TOURISM DEVELOPMENT**

The key kinds of opportunities highlighted by residents, then refined and rated in the capacity building seminars, are reported in Table 3, along with their percentage frequencies. The expansion of tourist demand for green tourism constitutes a very important opportunity for all the considered areas, most of which include one or more natural reserve and a pristine environment. Thus, there is a perfect match between the most common strength and the most favourable opportunity to develop sustainable tourism, that is an especially good news. In fact, this implies that the measures to protect the natural environment should be considered means to the economic growth and wellbeing of the local community, because they make the territory more attractive to tourists, rather than being perceived as restrictions to the freedom of residents to exploit the natural resources for their needs. Therefore, valorizing and protecting the natural environment result priorities for the sustainable development of almost all the treasure sites of EXCOVER.

Another very promising opportunity for the development of tourism in most of the areas under investigation is the emerging market segment of slow tourism and niche tourism. The latter can be developed by leveraging on the peculiar accommodation possibilities present in some towns, like altitude huts, rural houses and Albergo Diffuso (Scattered Hotels), as well as on the local history, traditions, and related festivals and events. While slow tourism requires also many occasions of high-quality resident-tourist interactions, because this market segment is interested not only in diving into

traditional lifestyle, but also in feeling part of the host community, by sharing life experiences and tasting community life. Therefore, in order to grasp the great opportunity represented by slow tourism, it is fundamental that community-related weaknesses are removed, or at least mitigated. This is a good news too, as EXCOVER activities, especially WP 4.1, can actually improve the residents' attitude towards tourists and the development of the local tourism supply first-hand, through awareness-rising, information and education initiatives. This way, a main weakness will be eliminated and the local community will become more capable of benefitting from the opportunities growing in the tourist market.

Table 3. Opportunities classes and frequencies

Destination	Opportunities											
	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%
<b>Total</b>	<b>18%</b>	<b>10%</b>	<b>6%</b>	<b>6%</b>	<b>13%</b>	<b>10%</b>	<b>1%</b>	<b>3%</b>	<b>10%</b>	<b>3%</b>	<b>4%</b>	<b>15%</b>

Cultural tourism is another market-related opportunity on which many considered areas can base the local development of sustainable tourism, as they are endowed by valuable cultural heritage. Historical buildings, centenary traditions, illustrious citizens who became top scientists or poets, museums, medieval villages, ancient churches, fortifications and castles, archaeological sites shall be very attractive and charming to cultural tourists. However, they might be restored and carefully conserved, as well as promoted on international stages, because they are unknown, some even at the national or regional level. Therefore, the last work package of EXCOVER, dedicated to the implementation of

effective web marketing and communication actions, might be very impactful if it is able to disclose the cultural treasures, hidden in the areas participating in the Project, to a wide audience of potential visitors, interested in cultural tourism. However, it is worthy of note that, among the community-related weaknesses, quite common issue of the loss of place identity is the lack of awareness and knowledge in residents themselves, especially in young people, of the cultural treasures present in their own territory. Thus, education initiatives aimed at filling this gap could contribute to build and spread an adequate reputation of the considered areas as cultural destinations, through communication actions brought about by the local first-hand, especially at the regional level by means of personal contacts, but also with a wider scope on social media.

Further opportunities, noteworthy for their relevance in multiple destinations, are constituted by the market segment related to sport and wellness, development projects and EU funds, possible partnerships between public and private actors, between neighboring destinations, between local businesses and non-profit organizations. With reference to the former, all the considered areas are endowed with suggestive paths where to go hiking, trekking or biking. Alfonsine and Ostellato offer also unique possibilities for phishing, surrounded by charming landscapes. While Carnia supplies paragliding and winter sport opportunities. These levers to develop outdoor sport tourism are expected to become even more attractive after the COVID-19 crisis, when travellers pay more and more attention to health and healthy activities, far from mass tourism destinations, privileging contact with nature. According to what emerged in capacity building seminars, about all the sites involved in EXCOVER have great potential to develop partnerships, but the main obstacle lies in the mindset of the local community. Therefore, to grasp this opportunity too it will be important to work on residents' attitudes and awareness. Finally, as EXCOVER project partners, we are all responsible for the success of this development project and so for making the best out of this European Regional Development Fund project, that is recognized by the local communities as an important opportunity.

## **2.4 THREATS TO TOURIST DEVELOPMENT**

Table 4 shows a broad categorization of the most relevant threats emerged from the residents' surveys, then integrated, refined and rated in the capacity building seminars, hold in each destination participating in EXCOVER. Sustainable tourism development in all the considered areas is threatened by institutional factors, like inappropriate national politics, poor allocation of regional funds, excess of bureaucracy and taxation decided at the national and regional levels. If doing business in Croatia and even more in Italy is hindered by such institutional brakes, a viable way to develop the local tourism supply sustainably is represented by sharing economy platforms, that are subject to lighter fiscal and

administrative duties. Therefore, it is important that, in the prosecution of the Project, we check for the negative changes in the residents' attitudes towards the sharing economy, possibly intervened as a consequence of the COVID-19 outbreak and verify the feasibility of measures imposed to avoid contagion in the peculiar context of our treasure sites of the Adriatic. Moreover, with reference to towns where the local community showed scarce availability to share unused assets with tourists (see the next section), it is fundamental to understand the extent to which this depends on the lack of such assets or on the psychological attitude of the locals.

Destination	Threats								
	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%
Total	12%	6%	31%	16%	10%	4%	7%	3%	10%

Further external factors that might hinder sustainable tourism development in multiple areas are related to the local community. They are very similar to community-related weaknesses, but related to elements not directly linked to tourism development, like conservatism and refractoriness to innovation, scarce entrepreneurial spirit, but first and foremost depopulation and aging population. Depopulation, implying loss of human capital and workforce, as well as of place identity, is a recurring theme. Immigration could represent a current and viable solution to this problem, so that a successful tourism development will generate new jobs, entrepreneurial opportunities and social vitality, that should motivate young people to stay in their birthplace, instead than moving in the big cities. Therefore, this threat to tourism development could be fought exactly through tourism development itself.



Environmental threats are also a big concern in many towns. In fact, climate change, pollution, poaching and illegal fishing can jeopardize the local biodiversity if urgent protection measures are not enforced. Once lost the characteristic biodiversity of the places, the pristine natural resources, also the opportunity of developing green tourism and sport tourism would be lost. Thus, it is fundamental to strengthen the environmental responsibility of the local authorities and of all the host communities, favouring the rise of the awareness of the value of the natural heritage for the improvement of the local conditions and of the tourist attractiveness of these destinations.

### 3. RESIDENTS' WILLINGNESS TO PARTICIPATE

All the project partners joined the EXCOVER Project aiming to improve the local communities' life and economic conditions, while preserving the cultural identity and environmental resources of these territories, through the development of sustainable tourism. To reach this goal, the participation of residents in the tourism development planning and implementation phases is fundamental, in fact it is one of the essential requirements of tourism development processes to be sustainable. Thus, to deepen our understanding of this crucial construct, the willingness to participate in the local tourism development of the interviewees is investigated by means of a participation index (the EXCOVER participation index, hereafter EPI), an informative tool developed to meet specifically the needs of EXCOVER, to benchmark and assess the extent to which policy-makers and destination managers can count on the locals to achieve a sustainable tourism development, with minimum investment.

The EPI is an innovative composite index, conceived properly for the EXCOVER informative needs and new in the literature about sustainable tourism. In fact, the many extant studies about residents' support to tourism lack the comparative approach we adopt in this report, thus no similar measurement tool was introduced before, to the best of our knowledge. The EPI is built with information of different kind, both direct (retrieved from the answers to specific survey questions) and indirect (making use of response rates to open-ended questions), collected during through face-to-face interviews, brought about by professional interviewers throughout the territories under investigation. The index is a weighted average of 5 components:

- "1\_COMMUNITY PARTICIPATION": the evaluation of the extent to which the interviewee's community is willing to participate in the local tourist development (directly asked in the questionnaire and measured with the reported level of agreement, in the range [1, 7]);
- "2\_MAIL LEFT": the actual willingness to be more involved and active in the tourism development planning (estimated indirectly with the rate of interviewees who left their personal e-mail address or mobile phone number to be contacted in the near future to provide further information about their town);
- "3\_PERSONAL SHARING ATTITUDE": the self-reported willingness of the interviewee to make use of sharing economy platforms to share something of his own with visitors (directly asked in the questionnaire);
- "4\_WELCOMING COMMUNITY": the assessment of the extent to which tourists and people with different cultures are welcomed by the interviewee's local community (directly asked in the questionnaire and measured with the reported level of agreement, in the range [1, 7]);

- "5\_INTERVIEWEE ENGAGEMENT": the manifested intention to participate in the local tourism development by providing information (indirectly retrieved from the average response rate to the SWOT open-ended questions, that require a considerable involvement and effort, compared to closed-ended ones).

### 3.1 THE EXCOVER PARTICIPATION INDEX

In the 12 areas object of analysis, the EPI and its 5 components, described above, take the values shown in Figure 18. Overall, the EPI for the whole sample of interviewees lies slightly above the central value of the scale, scoring 0.55, that theoretically can be considered sufficient, for the goal of EXCOVER.

However, as already mentioned, a comparative interpretation of the index levels is needed to get realistic and fair indications. The most supportive host community, with an index value of 0.72, is that of Gospic, mainly thanks to the astonishing interviewees' engagement (see Figure 22) and to the very high share of interviewees who left their personal contact to be involved in further tourism development activities, as shown in Figure 20. Share of residents who left their e-mail or phone contact reaches a remarkable 65%: more than double compared to the second highest percentage, 29%, achieved by both Alfonsine and Campobasso tied.

Not less noticeable, in Gospic, the average response rate to the 7 open-ended questions of the SWOT survey is 92% (see Figure 22), a very important result, because it represents the actual effort and commitment already lavished by the locals. Moreover, such a high response rate implies that the tourism development planning phase is being truly informed by the residents' needs, values and knowledge of the territory, consistently with their vision of the future, so that perceived costs of tourism can be minimized while benefits maximized. Possibly, such an amazing participation and collaboration of the host community in Gospic may be explained by the desire to meet people from other countries and to open up to cultural exchanges, a (positive) side effect of tourism development, that was not allowed for long during the communist regime in Croatia.

Perhaps, the reason why the EPI does not take such top values in Cavle and Karlovac (see Figure 18) consists in the relatively more advanced (even though early in general) stage of tourism development of Gospic, which might have already experienced some benefits deriving from a dynamic tourism economy.

Conversely, residents in Cavle and Karlovac have hardly experienced any benefit arising from tourism development yet and may also lack trust in the possibility of their territories to attract tourists, that in

Croatia are normally concentrated in the islands and cities on the coast. However, this tourist concentration itself could become a competitive disadvantage for overcrowded beach areas, after the

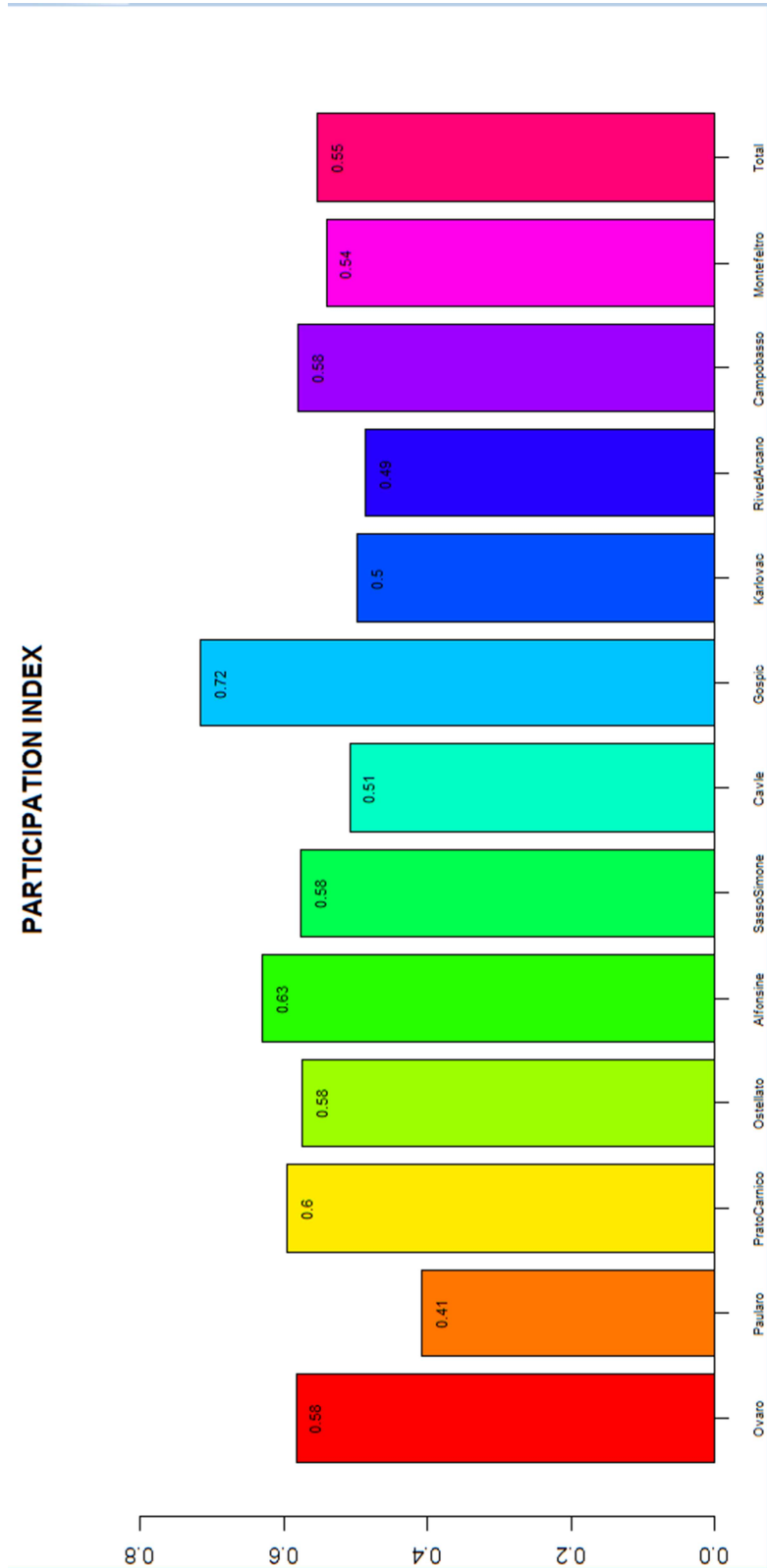


Figure 18. EPI by area. Source: elaboration by UNIBO CAST on EXCOVER survey data.

COVID-19 crisis. In fact, due to the fear of contagion, the preferences of tourists might change, to some extent, shifting from see & sun mass tourism to quieter trips in the hinterland, more in contact with nature and less with other visitors. According to this hypothesis, Gospic might be proposed as an example of how happy tourists can make happy residents and viceversa, in a virtuous circle. Nonetheless, as shown in Figure 21, Cavle records the highest score for the extent to which tourists and people with different cultures are welcomed by the interviewee's local community, although from the visitors survey it resulted slightly below the average (see Figure 10). Thus, the residents' perception of their fellow villagers' hospitality looks upward biased in Cavle. Also the value of community participation, as assessed by a sample of its members, is very high in this destination (see Figure 19). This evidence may suggest that the self-representation of the host population as tourist-oriented host community could be over-optimistic and this could create some resistance towards the EXCOVER activities aimed at developing a marked attitude to hospitality. Therefore, we suggest to proceed carefully and consistently with the local sentiment, with a completely bottom-up approach.

In Karlovac too the self-evaluation of both the willingness to engage in the local tourism development (see Figure 19) and the hospitality of residents (see Figure 21) are very high compared to the others components of our EPI, but visitors ranked the welcoming attitude of the local community as the second worse (see Figure 10). Thus, the same considerations apply in this respect. Both the personal sharing attitude (see Figure 23) and the percentage of interviewees who left their e-mail address (see Figure 20) are especially low in Karlovac as well as in Cavle. This might threaten the possibility to integrate the local tourism supply with services and facilities provided by residents first hand and to improve the interviewees' attitude and collaboration levels through face-to-face meetings and other project initiatives. On the light of this, we suggest to devise new ways to make the local communities in Cavle and Karlovac desire to be involved in the implementation of the next EXCOVER work packages, by communicating, in enticing fashion, all the benefits for residents that will arise from tourism development and by reassuring on the sustainability of the process, that means that the costs for the community will be minimized. Moreover, it might be useful to emphasize that the costs that we aim to actually minimize are those perceived by the population itself as most onerous and exactly to this goal we are asking for their participation.

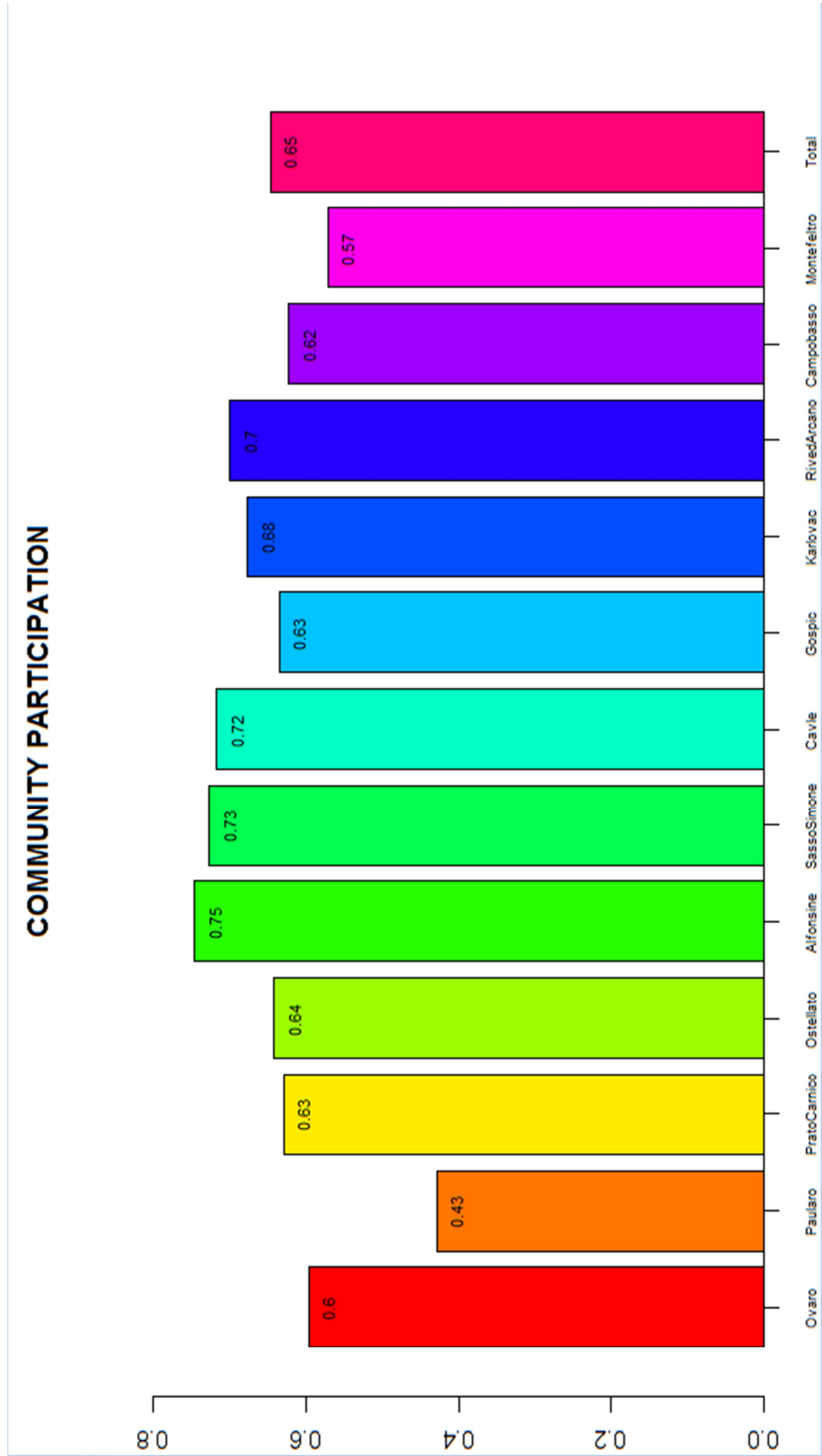


Figure 19. Community participation by area. Source: elaboration by UNIBO CAST on EXCOVER survey data.

Alfonsine records the second highest value of the EPI (see Figure 18), mainly thanks to the widest community participation, as assessed by surveyed locals themselves (see Figure 19). The self-representation of the host community's willingness to be collectively involved in tourism development actions looks consistent with the individual behaviour shown in occasion of the interview. In fact, about 1 interviewee over 3 left his personal contact (see Figure 20), with the intention to support the EXCOVER project more practically and proactively.

The very close municipality of Ostellato reaches an overall participation score lower than that of Alfonsine (see Figure 18), although it displays a slightly higher consideration of the welcoming attitude of the host community (see Figure 21), that is confirmed by visitors' opinions (see Figure 10), as well as a more intense interviewees' engagement in providing information and ideas useful for tourism development planning (see Figure 22), by answering to 66% of open-ended questions, on average. The support level of residents in these 2 destinations, both including portions of the Po river's Delta natural reserve, appears globally homogeneous, as expected, even if the 2 municipalities belong to different provinces. A very important *trait d'union* between these destinations is constituted by the very active Delta 2000 consortium, that works consistently to the development of sustainable tourism, also by boosting both the residents' participation to the many projects it manages, and the coordination between local tourism-related businesses and policy-makers.

Conversely, the 3 towns belonging to the Carnic area (Ovaro, Paularo and Prato Carnico) show an important heterogeneity, with reference to the willingness of the respective host communities to collaborate to tourism development first hand. While the EPI level is slightly above the average in both Ovaro and Prato Carnico, in Paularo it takes the lowest value of all the 12 areas under investigation: 0.41 (see Figure 18). Nonetheless, the interviewees' engagement in Paularo is the greatest among the Carnic destinations and ranked third overall (see Figure 22). However, while interviewees in Paularo were very available to provide information and indications about local priority interventions, strengths, weaknesses, opportunities and threats (see Figure 22), and the percentage of them who left their own e-mail address or phone number is quite in line with those of Ovaro and Prato Carnico (see Figure 20), their attitude towards the sharing economy is very negative, compared to that of the other Carnic destinations (see Figure 23). Moreover, in Paularo, the residents' representation of both the hospitality (see Figure 21) and the degree of availability to participate in the tourism development of their own community (see Figure 19) is the worst of the sample. Although based on the visitors survey results the locals in the Carnic destinations display an average welcoming attitude (see Figure 10), the data above considered together suggest that, in the context of EXCOVER, for developing the tourism economy in

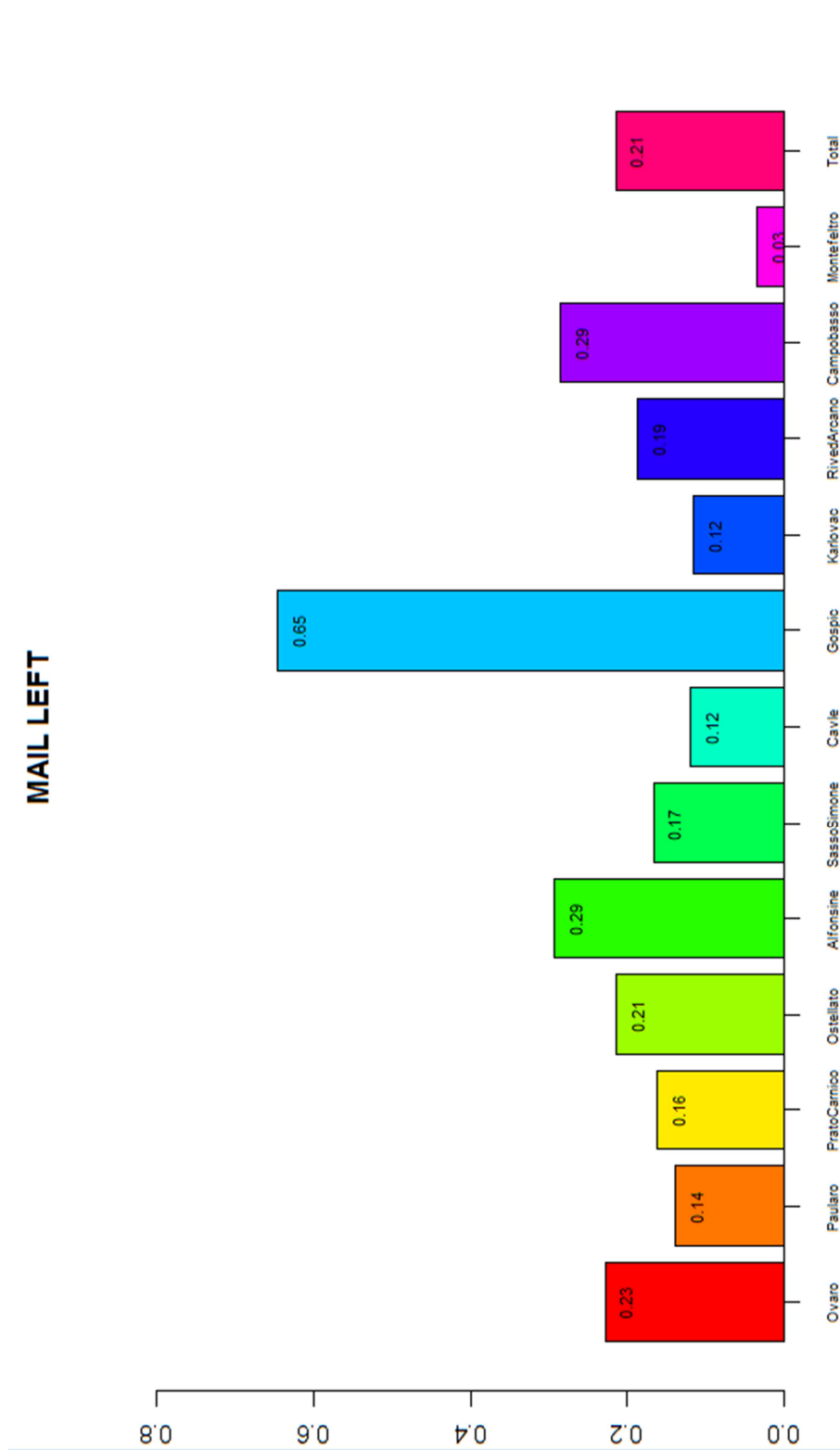


Figure 20. Personal contact left by area. Source: elaboration by UNIBO CAST on EXCOVER survey data.



this town we can count on the residents' willingness to share their ideas, to converse about tourism and provide hints, rather than to share their unused assets, knowledge and skills, to provide services and a warm welcome to tourists. Furthermore, we foresee no difficulty in involving the population of Paularo in the identification of the of the hidden cultural heritage and in the elaboration of a community map.

The scarce availability of the host community in Paularo to make use of sharing economy platforms to integrate the local tourism supply (see Figure 23) should not be of concern for the success of the Project, as residents in the other 2 close Carnic locations look enthusiast to exploit the occasions of intercultural meetings and earnings offered by such ITC-based tools. In fact, Prato Carnico records the far most positive attitude of the local community towards the sharing economy, which is very good also in Ovaro, although not so outstanding (see Figure 23). Analytical details about this measure of residents' support to tourism development, crucial for the achievement of the goal of EXCOVER, are provided in the next section.

The differences between Ovaro and Prato Carnico in the degree of participation of the respective local communities are smaller (see Figure 19), but still relevant and unexpected, considering that Carnia is a quite homogeneous area in terms of natural and economic resources, traditions and policies. Moreover, the destination management of all the towns belonging to this mountain area is brought about by the same body: the Union of Carnic Municipalities. The main element of differentiation of the 3 destinations is constituted by the presence, in Prato Carnico, of Pesariis: the clocks' village, birthplace of the famous clock factory Solari. This magic place, hidden in the heart of the Eastern Alps, is disseminated with gorgeous sundials and charming clock mechanisms, and hosts an interesting museum showing the evolution of this craft tradition, of which the locals are pretty proud. They might also be more used to interact with tourists, which conversely lack in the surroundings. Possibly, the fact that residents in Prato Carnico have already experienced some benefits brought by a seminal tourism development (similarly to Gospich, but to a smaller extent), can explain their much more positive attitude towards the sharing economy and the slightly higher values of both the composite index and the community participation.

Nonetheless, the highest percentage of Carnic interviewees who left their personal contact to continue collaborating with the Project is found in Ovaro (see Figure 20), the residents of which tend also to describe their own fellow villagers as more welcoming of foreigners and visitors (see Figure 21). Therefore, we are confident to find a proactive and collaborative host community, ready to participate in the next steps of EXCOVER, also in Ovaro. There, as shown in Figure 23, the personal sharing attitude is very high (though far from that of interviewees from Prato Carnico), so the lack of tourism facilities should be quite easily filled thanks to the goodwill and the availability of assets of the locals. Interestingly, the personal sharing attitude is the EPI' s component that varies the most between the 3 Carnic areas. This

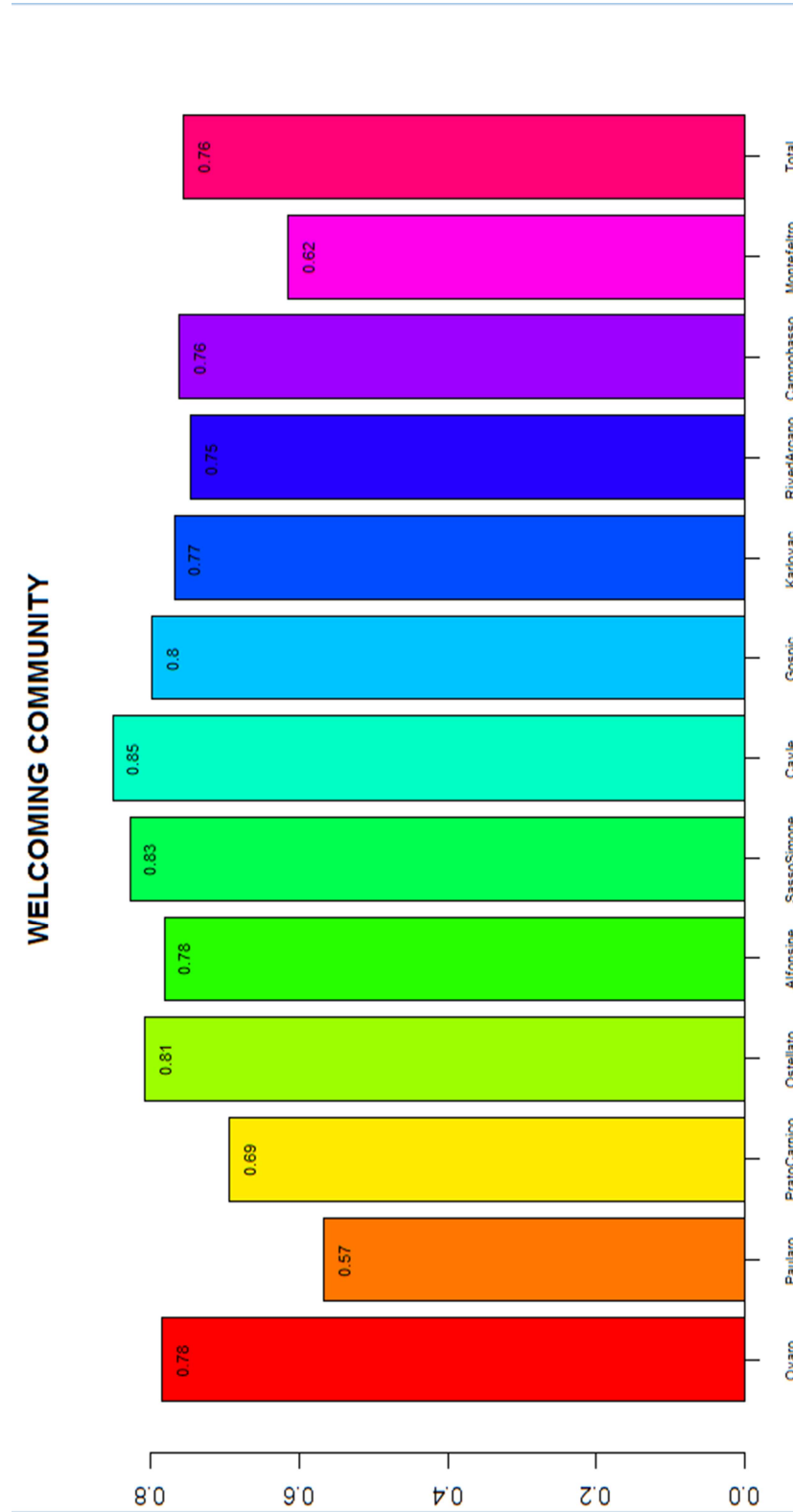


Figure 21. Degree of hospitality of the local community by area. Source: elaboration by UNIBO CAST on EXCOVER survey data.

might be due either to a different endowment of sharable resources (apartments, time, skills, knowledge), or to a diverse perception of the costs and benefits deriving from the sharing economy, possibly tied to a different composition of the population in terms of occupation, age, education. In fact, elder resident, basically less acquainted to information and communication technologies, and less open to innovations, are expected to be less driven to enter this kind of business.

Except for the share of interviewees who left their personal contact (see Figure 20), the values of the EPI and of its components are quite homogenous in the 4 destinations belonging to Emilia Romagna (indeed, Sasso Simone e Simoncello is an Interregional Park, spanning part of Emilia Romagna and part of Marche; Montefeltro is an historical region including territories in Emilia Romagna, Marche, Tuscany and also in the Republic of San Marino). Among these, Alfonsine stands out for community participation (see Figure 19), mail left (see Figure 20), as well as to the composite index as a whole (see Figure 18), though to a smaller extent. Based on what emerged in the capacity building seminar, this evidence can be explained by the fact that most of the current visitors of this town are business travellers, heading the local factories, that threat environmental quality, fish stocks and the attractiveness of Alfonsine as an ecotourism destination. The local community would prefer to develop sustainable (leisure) tourism and to protect the marshy ecosystem, rather than seeing the expansion of the industry. Whence the importance of actively participating in this sustainable development project, in the perception of residents. Similar considerations hold for Ostellato, where the host community's level of engagement for tourism development is very close to that in Alfonsine (see Figure 19), after all, the two areas are very close also geographically. Residents in Ostellato represent themselves collectively as a very welcoming community, achieving the third best value overall with reference to this index component (see Figure 21), consistently with the tourists' assessments, collected in the visitors survey (see Figure 10).

In Sasso Simone e Simoncello it lives the most welcoming community among the 3, based on the responses of interviewees depicted in Figure 21, but not according with visitors, who rate the hospitality in Ostellato slightly higher (see Figure 10). Both scores are high and could have been expected, given the fame of the hospitality of Romagnola people. Residents in the near Alfonsine display the most favourable personal sharing attitude (see Figure 23) and the highest level of interviewees' engagement (see Figure 22), among the 4 destinations (partially) belonging to Emilia Romagna, respectively the third and second best ranked overall. The strong support to tourism development in both Sasso Simone e Simoncello and Montefeltro (see Figure 18) might be explained by the consideration of the great economic growth of the Romagnola coastal destinations bordering with these areas, especially Rimini, brought by (mass) tourism development in the sixties, that led to the provision of high-quality healthcare and other public services. The local communities in Sasso Simone e

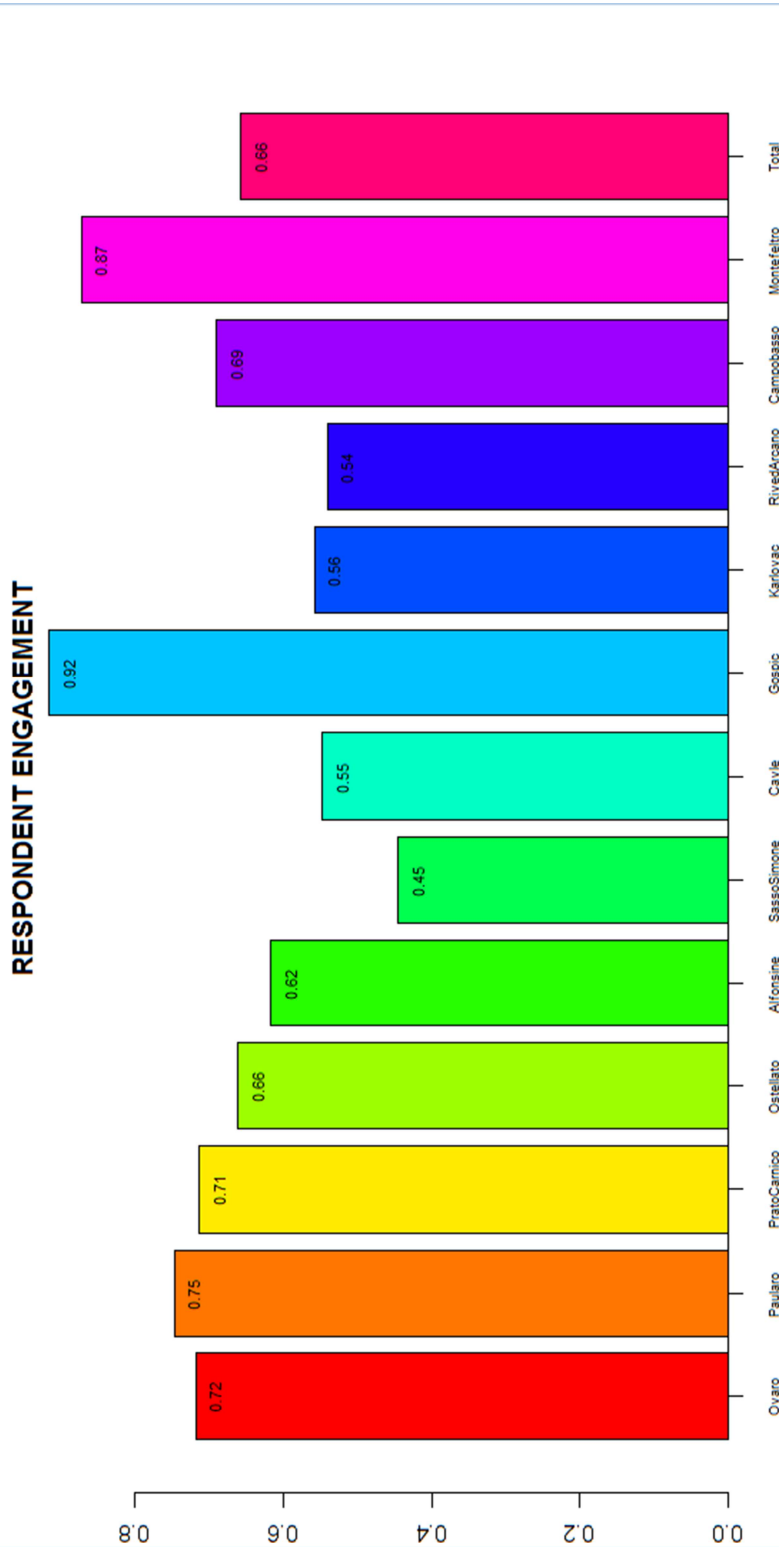


Figure 22. Interviewees' engagement by area. Source: elaboration by UNIBO CAST on EXCOVER survey data.

Simoncello and Montefeltro lack comparable services and may think of tourism development as an opportunity to grow and reach the desired standard of welfare, as it happened on the coast. Therefore, we might expect to get helpful support for the prosecution of the Project from the inhabitants of these areas.

With reference to Campobasso, the value of the EPI (see Figure 18), as well as those of its components are average, except for the interviewees' willingness to share unused assets to the aim of providing tourist services (see Figure 23) and for the share of interviewees who left their contact to be further involved in the project (see Figure 20), that are higher than the average. The latter, an especially important criterion to the goals of EXCOVER, is ranked second overall and reassures about the possibility of counting on the proactive participation of the local community to sustainable tourism development.

Rive d'Arcano records the second lowest index level (see Figure 18), mainly due to the low response rates to the open-ended questions of the survey questionnaire (see Figure 22) and to the most unfavorable personal attitude towards the sharing economy as a tool to integrate the local tourism supply (see Figure 23). Even though the host community represents itself as strongly willing to participate in the local tourism development (see Figure 19), the scarcity of private assets ready to be shared, due to the lack of unused resources or to the residents' unwillingness to use them to exploit the new opportunities offered by sharing economy platforms, could be an issue in this area, that lacks accommodation structures, restaurants and other tourist facilities. Therefore, the reasons of this seemingly mistrust in the sharing economy might be investigated, possibly through a qualitative research, able to go deeper in the residents' motivations. Whether the causes of this apparent unavailability are attitudinal in nature, possibly attributable to a lack of familiarity with internet and web services of the aging population, during the first phase of WP4 it will be important to provide residents with detailed information about the sharing economy mechanisms, and the safety and functioning of the main platforms.

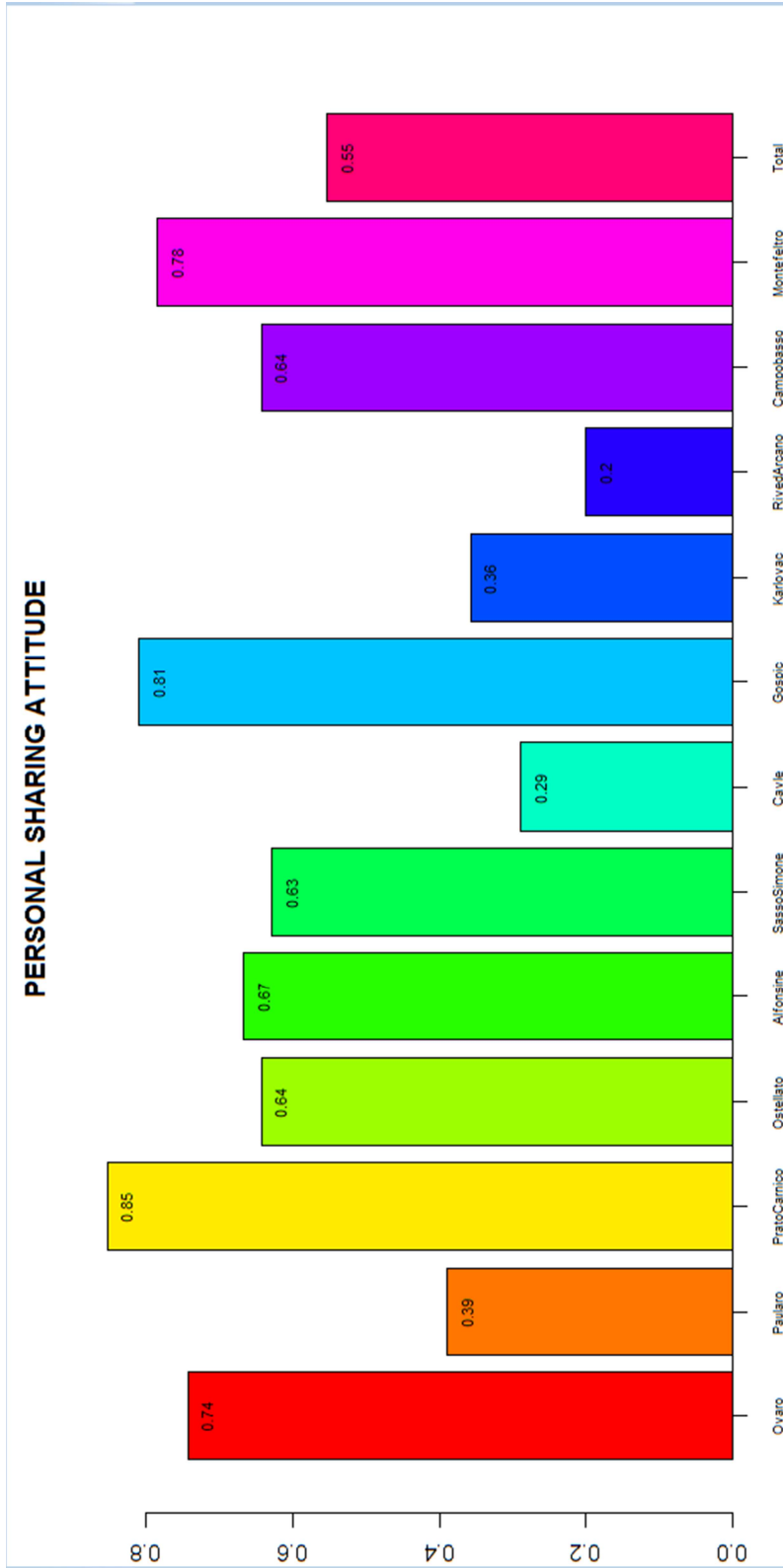


Figure 23. Interviewees' personal sharing attitude by area. Source: elaboration by UNIBO CAST on EXCOVER survey data.

### 3.2 RESIDENTS' ATTITUDE TOWARDS THE SHARING ECONOMY

Since EXCOVER aims to develop sustainable tourism in Adriatic areas, where the local natural and cultural heritage constitute potential tourist attractions, but many tourist services and facilities are missing, a crucial phase of the project is dedicated to the construction or strengthening of the local supply chain. But the EXCOVER budget does allow to make big investments for building accommodation structures, restaurants, transportation services and the like. Therefore, a pivotal idea of the project is to invite the local community to put into play their unused assets to deliver tourist services, by exploiting the new opportunities offered by the sharing economy. 'Sharing economy' means sharing something of a private's own with another person temporarily, in exchange for some money, through the web. Then, for the prosecution of the project, it is essential to understand on which private unused assets the construction of the supply chain can rely. To this aim, the SWOT questionnaire included 2 specific questions:

- In your opinion, what may your fellow villagers be willing to share?
- What would you share?

From the analysis of the interviewees' answers, it emerges a remarkable variability in the residents' attitude towards the sharing economy, in the 10 areas considered. Ovaro records the largest availability of accommodations to be offered to tourists, followed by Prato Carnico and Gospic, as shown in Figure 24. This evidence is very encouraging, as rooms and apartments constitute a main asset to ensure that the efforts that will be made to promote the territories and attract tourists will not go to waste. In fact, increased tourist inflows, that we aim to obtain through EXCOVER activities, will require a higher receptive capacity. Moreover, a typical mountain accommodation could be an attraction itself, that may contribute to increase the length of the sojourn, or, at least, tourists will not be forced to spend the night in another area due to the lack of rooms. In fact, from both the open-ended questions to the residents surveys and the visitors' answers, we identified the lack of accommodation structures as a very common weakness of nearly all the town involved. Therefore, it is important that more than 10% of the interviewees declared their willingness to make unused rooms and apartments available to tourists by exploiting both the new opportunities offered by sharing economy platforms and the new regulation of short-term real estate rentals, in all the considered towns except for Rive d'Arcano. Indeed, 8% of interviewees in this area are willing to share accommodation, so this datum is not that concerning, especially considering the small dimension of this municipality. In fact, it must be recognized that a low availability to share assets may depend on the resident's lack of trust in or willingness to engage with the sharing economy, but also on his lack of assets to share. However, in general, the scarcity of receptive capacity can be promisingly addressed through the sharing economy solutions.

What is actually concerning is rather the impact of the COVID-19 pandemic on the residents' availability to host a stranger in their own spaces. In fact, the fear of contagion is likely to lower the local community's willingness to have contact with people coming from outside. Moreover, prevention measures might constitute too high costs (for disinfections, more space per person etc.) for a private citizen trying to round up the salary. Therefore, we must read the residents' survey results carefully, expecting them to be much lower after February 2020. Nonetheless, these findings give an idea of the residents' attitudes relative to similar areas, so they are still helpful for benchmarking and detecting which areas will be, to a lesser extent, able to make up for the lack of accommodations through the sharing economy and in which areas this solution will be basically unfeasible.

The same consideration, with reference to the effects of the COVID-19 on the residents' willingness to host tourists, hold for the other asset that may be made available on sharing economy platforms. Sharing cars, food at home, guiding tourists around, involving them in laboratories of typical art crafts, but also simply interacting with people coming from outside the community might become of great concern for residents, especially of the Italian areas. While Croatia opened up without restrictions to tourists since summer 2020, in Italy more severe measures, including closing borders to travellers coming from countries where the contagion is more spread, have been announced that will be kept for long and the fear is still very high among the population. Moreover, Italy made a complete lockdown for very longer than Croatia, thus residents, especially of small isolated rural areas where the virus hardly arriver, fear that tourists may bring the contagion and that this will force them to stop working and staying at home for long again. Therefore, we expect that all the values shown in this report (including those of the EPI and its components, especially the welcoming attitude of the local community) for the Italian destinations are largely overestimated, for the post-COVID-19 era, conversely, the values recorded for the Croatian areas should not change as much, thus they could be deemed to be more reliable.



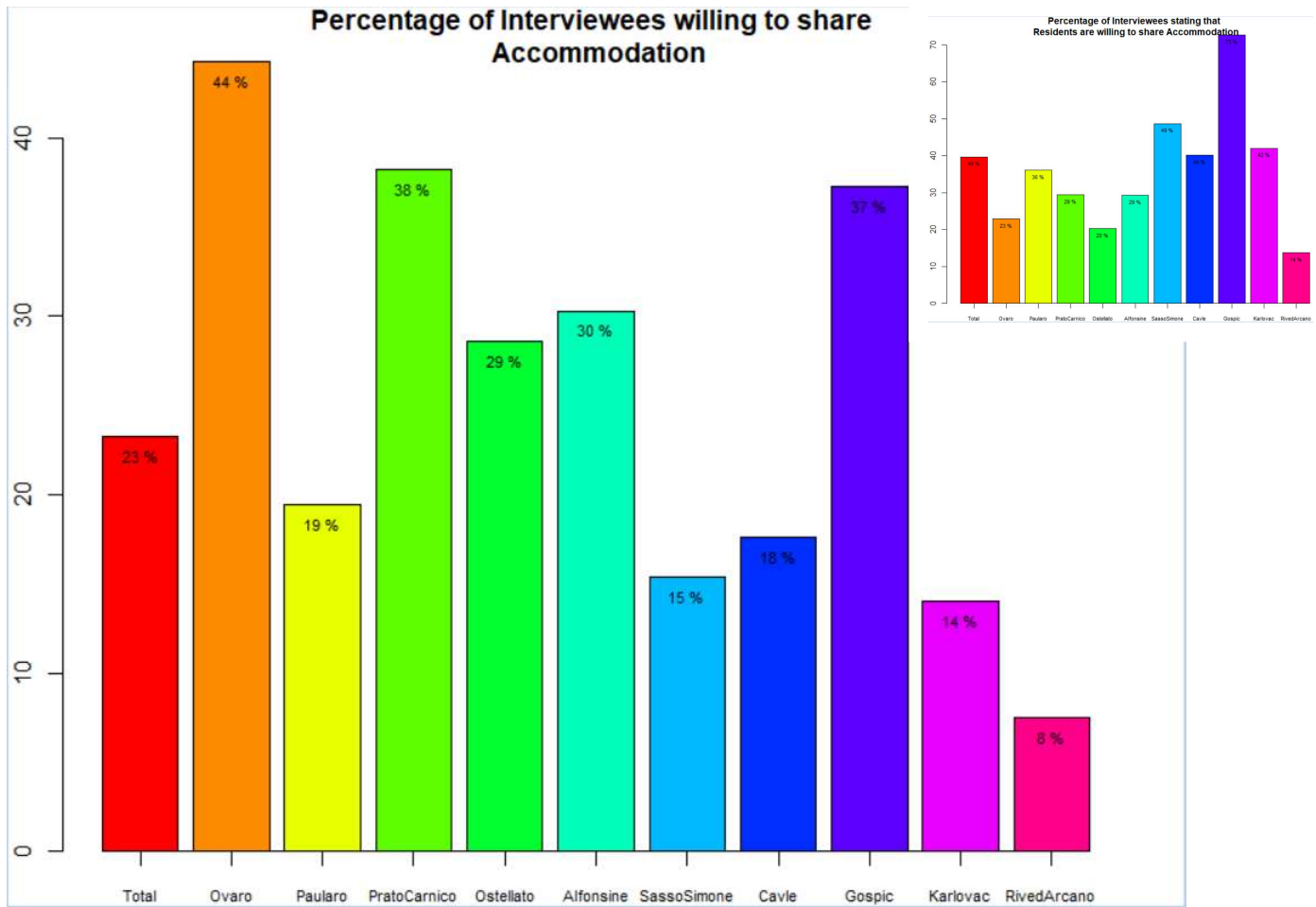


Figure 24. Interviewees’ availability to share accommodations by area. Source: elaboration by UNIBO CAST on EXCOVER survey data.

In the small box on the top-right of Figure 24 are shown the percentages of interviewees who guess that their own local community is willing to share accommodations with tourists. From the comparison of these with the answers regarding the respondents’ own availability to share rooms or apartments, it emerges the tendency of some communities to over/underestimate the overall sharing attitude in the reference area. Overall, people tend to be too optimistic about their community’s availability to provide accommodation services through sharing economy platform. But in Ovaro and, to a smaller extent, in Prato Carnico we notice the opposite tendency, i.e. this attitude is very underestimated. This perceptual

bias, either upward or downward, could be explained by the hypothesis that the sharing economy constitutes a new opportunity not already completely experienced nor discussed among fellow villagers in the areas considered. Therefore, it suggests that the following phases of the Project should include education and information initiatives about the mechanisms, benefits and risks of this new way of providing services through specialized websites.

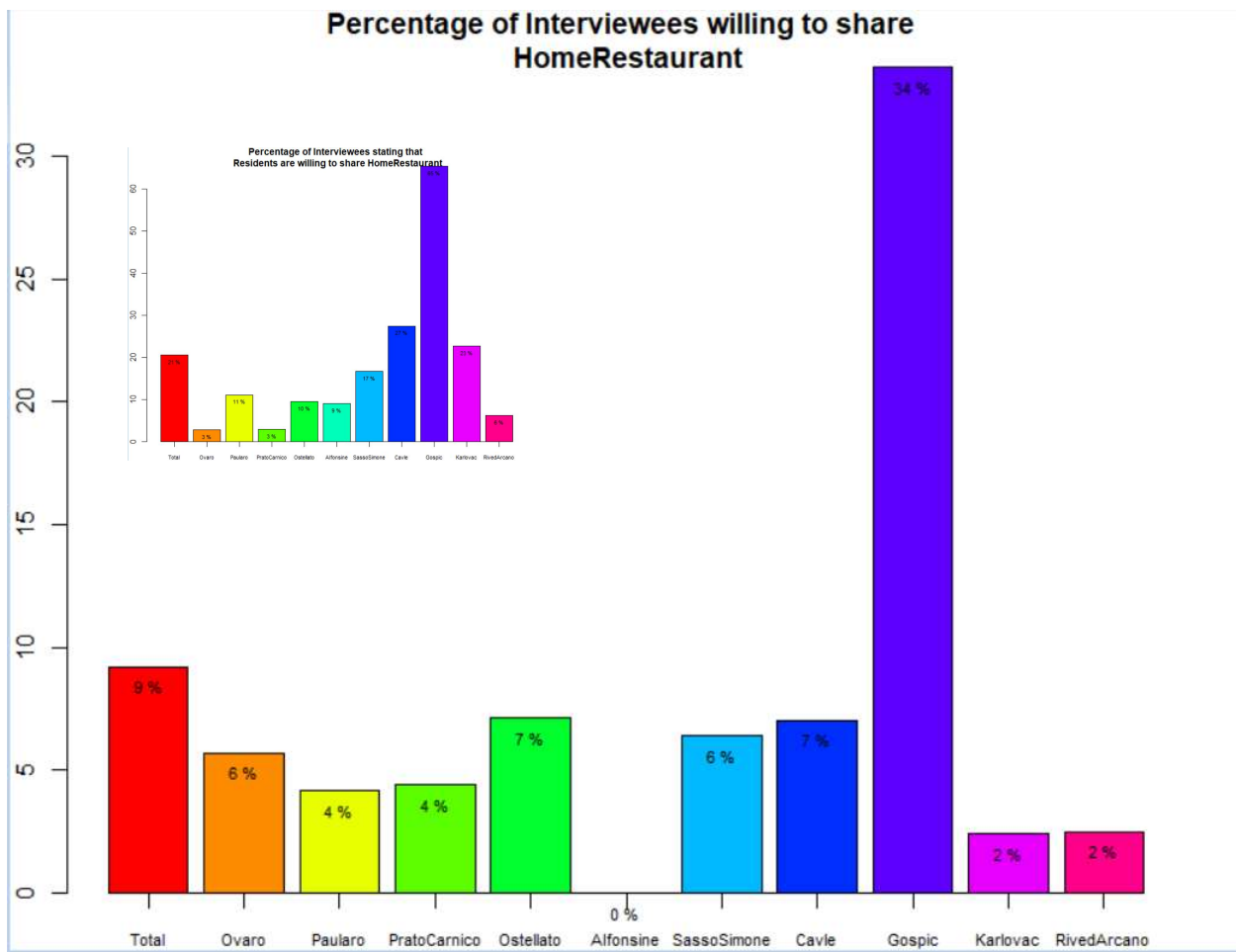


Figure 25. Interviewees’ availability to engage in home restaurant by area. Source: elaboration by UNIBO CAST on EXCOVER survey data.

As displayed in Figure 25, the percentage of interviewees willing to engage in home restaurant activities is much lower, compared to that of residents available to share accommodations, except in Gospic, where a noticeable 34% of interviewees declared to be ready to provide this service. According to the opinions of experts, destination managers and policy-makers, collected during the capacity building seminars, with reference to the Italian towns, this low availability to invite tourists for lunch or dinner at home can be simply explained by the very strict national rules about hygienic standards required for any restauration activity. In fact, in Italy controls by the local health authorities are very stringent and frequent, fines imposed for infringements are very expensive and the legal responsibility for any poisoning or other accidents is serious. Nonetheless, from the open-ended answers to the surveys it emerges the willingness to teach tourist how to cook typical dishes and to put the residents' culinary skills and knowledge to the service of sustainable tourism development in events organized by the local associations. Although there are already enogastronomic manifestations in most of the areas involved, food & wine tourism experiences are very appreciated, especially in Italy, a country famous all over the world for its great cuisine. However, as explained above, we expect that the recorded availability will diminish a lot, among the Italian communities, in the post-COVID-19 era. Moreover, the current anti-COVID-19 restrictions in Italy do not allow for people gatherings, therefore no festival or event that could attract visitors is allowed.

The comparison of the interviewees' declared attitude towards the possibility of engaging in home restaurant activities with that of their local community, according to their opinions, confirms the overall tendency to depict the latter with extra optimism, except in the very pessimistic case of Ovaro and, to a smaller extent, of Prato Carnico. This consistency seems to point to a sort of 'local character' of residents in these two Carnic destinations, oriented to the underestimation of the local community's potentials. Therefore, it would be important that, in the following of EXCOVER, the two host communities are helped to reach a greater awareness of the resources present locally and valuable for the local economic growth through sustainable tourism development, in order to convey the trust in the possibility of a truly bottom-up approach to the local development that will not upset their territories (for example through the construction of large hotels and shopping malls), but rely on the existing structures and on the involvement of residents first hand. In fact, in the capacity building seminars held in these towns, it emerged that many locals are concerned about the negative impacts of tourism development on their rural landscape and quiet lifestyle. But such concern is based on the traditional development model based on mass tourism, that is not just undesirable, but also unfeasible in these areas, due to both the small dimensions and the need to protect the environment, especially protected areas. While a sustainable model of tourism development would valorise, instead of threatening, their rural landscape and lifestyle. Therefore, it looks important that, in the prosecution of EXCOVER, the host communities in Ovaro and Prato Carnico are better informed about sustainable tourism, green tourism,

slow tourism and the very good match between this kind of tourism product consumers and their values, resources and lifestyle.

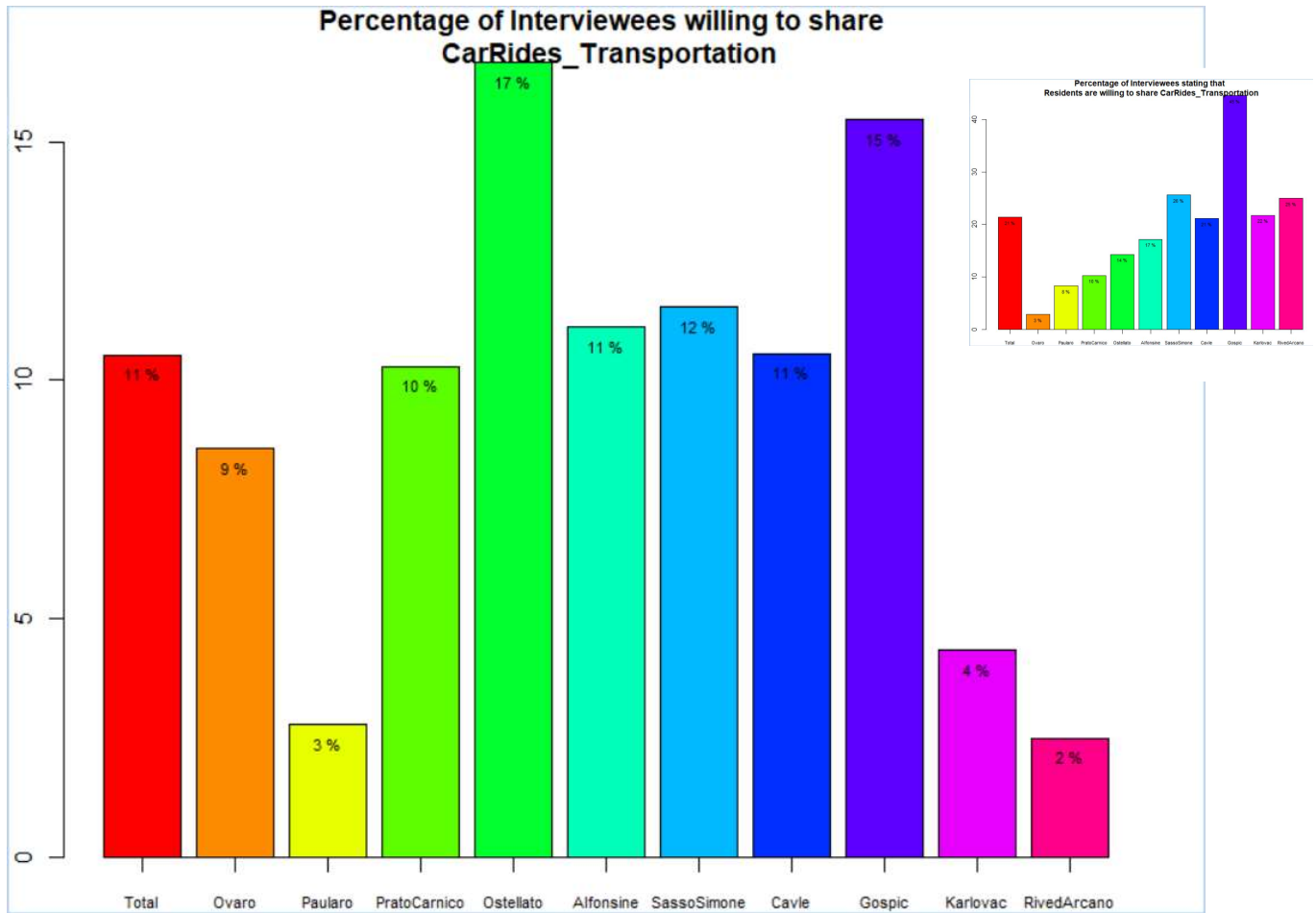


Figure 26. Interviewees’ availability to share transportations or car rides by area. Source: elaboration by UNIBO CAST on EXCOVER survey data.

As shown in Figure 26, the largest availability of car rides and transportations to be shared with tourists is in Ostellato, followed by Gospic. The percentage of interviewees willing to provide this service through sharing economy platforms is about 10% in all the other areas, except for Rive d’Arcano, Paularo and

Karlovac, recording a positive sharing attitude with reference to car rides or transportations in the 2%, 3% and 4% of the surveyed residents. In Croatia sharing economy platforms delivering this kind of service are already active, while in Italy the current law does not permit this activity. Therefore, high values for the Italian areas may reflect the hope that such a regulation changes soon, to start this activity, while low percentages could represent the distrust in this possibility, not only an unfavorable attitude towards this opportunity offered by sharing economy platform.

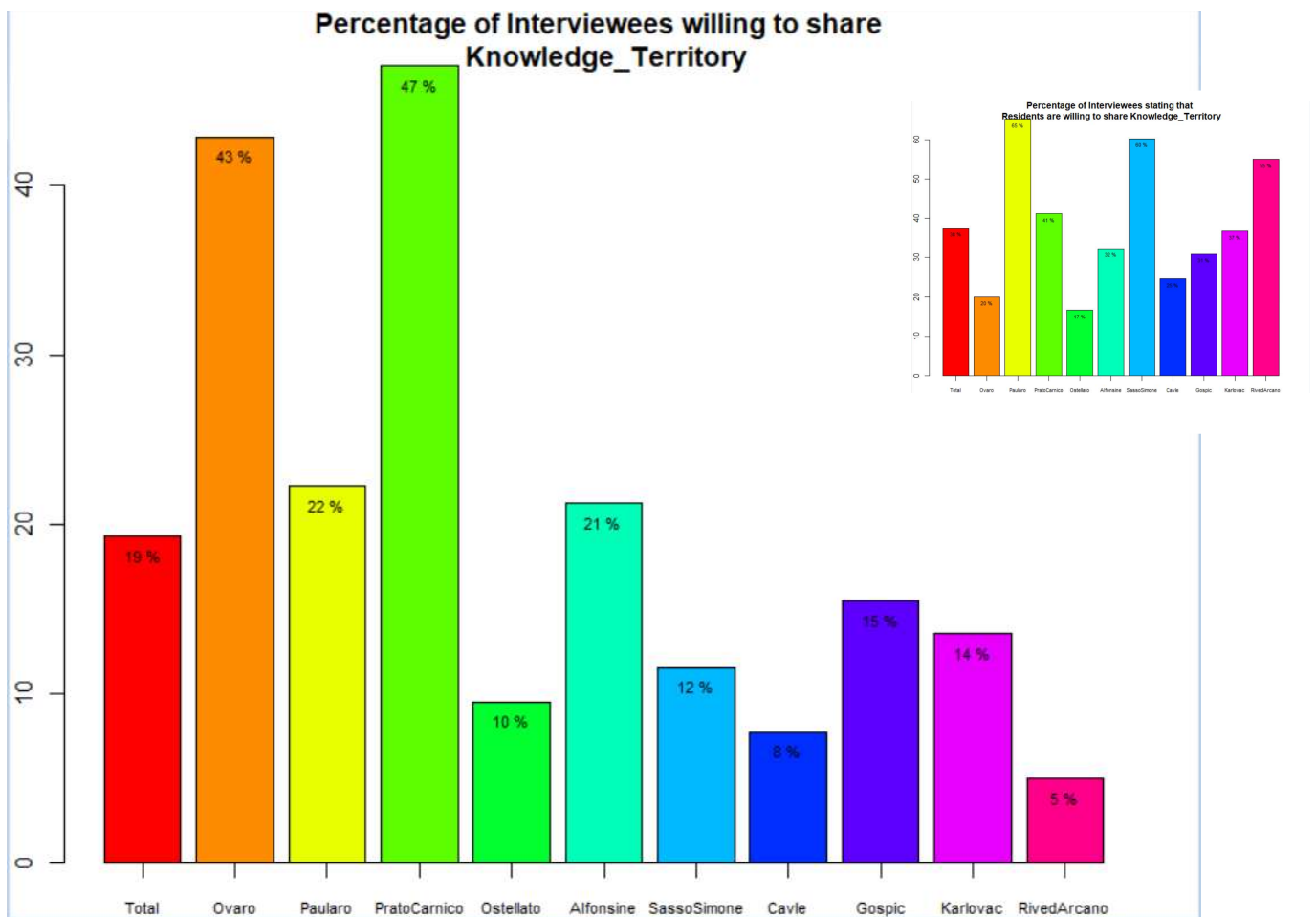


Figure 27. Interviewees' availability to share their knowledge of the territory by area. Source: elaboration by UNIBO CAST on EXCOVER survey data.

On the other hand, along with the actual willingness to provide visitors with car rides or other transportation means (see Figure 26), high values of this indicator for the Croatian destinations is likely to indicate many benefits from car rides and transportations sharing experiences perceived by the locals, who have already used related platforms. Thus, Croatian host communities could improve local accessibility and mobility by spreading the awareness of the benefits of car and transportations sharing services, while in Italy, unfortunately, the regulatory constraints do not seem easily surmountable in the short-term.

Looking at the percentages of interviewees who guessed that their fellow villagers might be available to share car rides and transportation (top-right box of Figure 26), we find confirmation of the pessimistic self-representation of the local community's sharing attitude in Ovaro, while the evaluation of the interviewees from the other Italian areas are more realistic, not far from the personal sharing attitude, as portrayed by respondents. This datum seems to corroborate the awareness that the issue in Italy is regulation, rather than actual residents' attitudes, because the interviewees' representation of their community, regarding this aspect, is so adherent to the reality depicted by self-related statements, that it should be based on the knowledge of an objective factor to which all the residents are subject, as a regulatory framework.

As shown in Figure 27, overall, about 1 interviewee over 5 declared to be available to share his knowledge of the territory, in particular of the local cultural and natural resources, to guide tourists along the area. Prato Carnico records the higher percentage of citizens enthusiast about this opportunity: a remarkable 47%, possibly thanks to successful experiences of locals guiding tourists already in place. In particular, in Pesariis, the village of clocks: a very suggestive fraction of Prato Carnico, birthplace of the family that initiated a long-lasting tradition of clocks production, that the local community is proud to show tourists. The nearby Ovaro reaches a similar percentage of interviewees willing to guide tourists around the small mountain villages and woods. Conversely, the not-far Rive d'Arcano records an apparent disinterest of residents non just in this kind of activity, but in the possibilities offered by sharing economy tools in general. In fact, the interviewees' availability to share unused assets and skills with tourists is always the lowest or among the lowest, between the areas involved in this project, with reference to any type of sharable asset. Thus, it is important to deepen the motivations of this negative attitude of residents in Prato Carnico, in particular to understand whether unused accommodation structures, territory-related knowledge and skills are actually missing, or if they are present, but the locals do not want to share them. Indeed, in the capacity building seminar, seniors and professors highlighted the lack of education about the history, geography, culture and traditions of Rive d'Arcano, especially in young people, and the need to activate initiatives to favour a larger

awareness of the place identity of this treasure site in students and families. This looks a promising idea, possibly also able to brake depopulation.

Croatian destinations are much more homogeneous with reference to the personal sharing attitude regarding the knowledge of the territory, than with reference to the other unused assets that can be shared with visitors. In fact, this time Gospić does not stand out as much as usual, even if its host community always records the most positive sharing attitude, between the Croatian areas, which are all below the average.

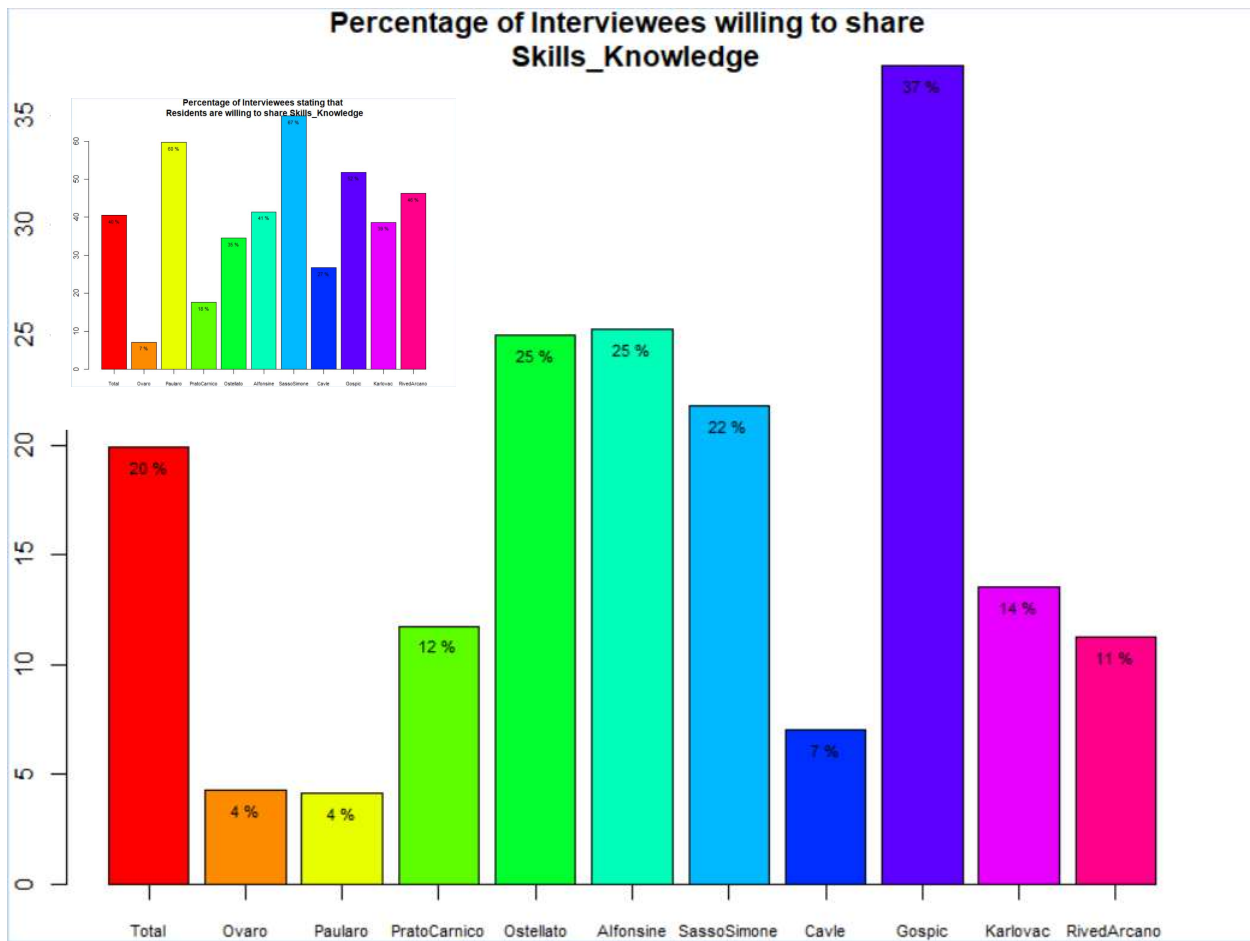


Figure 28. Interviewees' availability to share their tourism-related skills and knowledge by area. Source: elaboration by UNIBO CAST on EXCOVER survey data.

Possibly, unavailability to guide tourists can be due to the high amount of time required, compared to giving a ride or renting a room, that are activities more convenient for working people. In Sasso Simone e Simoncello, as well as in Ostellato, the relatively low percentage of interviewees willing to share their knowledge of the territory with tourists could be due to the presence of official tourist guides and naturalistic guides, who have a licence to bring about this activity in the Delta park and in Sasso Simone e Simoncello Interregional park, that are wider and better organized than the naturalistic areas in other territories.

The comparison of the attitude of the local community emerging from survey self-statements with its representation given by interviewees (see the small box on the top right of Figure 27) confirms the overall tendency to overestimate the community's sharing attitude except for the downward biased assessment regarding Ovaro also in the case of the willingness to guide tourists. Conversely, residents in Karlovac, Sasso Simone e Simoncello and Paularo show great upward biases.

As it appears from Figure 28, Gospic records the highest percentage of interviewees available to share their tourism-related skills and knowledge to supply tourist services. In general, the willingness of this host community to actively participate in the sustainable tourism development of the county is remarkable and, given the relatively advanced stage of tourism development in this area, it could depend on the benefits, deriving from tourism, already experienced by citizens. While residents in Cavle and Karlovac could be still less aware of the advantages of developing tourism, just because they have still to be developed in actual tourism destination and to find out the related benefits. Ovaro and Paularo appear unable to integrate their tourism offer with new events led by the local community, like laboratories of typical cuisine or traditional art crafts, or historical manifestations. So, it is important to investigate the motivations preventing citizens to share such abilities with tourists: possibly they lack time, or the will to interact with visitors, or these abilities themselves.

Curiously, in this case, interviewers from all the considered areas overestimate the availability of sharable tourism-related skills and knowledge, even Ovaro, although to a very small extent. For sure, also the personal sharing attitude is upward biased, in general, because of the impact of the COVID-19 pandemics on the residents' perception of tourists. Especially in Italy, the fear of contagion is likely to lower drastically the local community's willingness to interact closely with strangers. Moreover, COVID-19 prevention measures in Italy make it very difficult to hold public events where residents could share their skills and knowledge of interest to tourists. However, new entertainments and events valorising the human capital of the areas participating in EXCOVER could be bring about with small groups of visitors, in wide open spaces, that are largely available in these destinations. This could attract travellers interested in slow tourism, so especially willing to get a personal relation with residents and to share



their lifestyle and traditions, in green tourism and safety. In fact, the wide green open spaces, the low density and the geographic isolation of the considered areas looks especially appropriate to ensure safety and security in this moment of high health alarm.

#### 4. CONCLUDING REMARKS

In conclusion, as the preparatory phase of EXCOVER, aimed at collecting information useful to develop the areas participating in the Project into successful sustainable tourism destinations, we brought about a SWOT analysis, based on the residents' opinions, collected through semi-structured surveys, then discussed, integrated and rated by representatives of the local authorities, businesses, socio-cultural associations, destination management experts and heritage management bodies. For each area, findings are discussed in detail in the local reports. While the aim of this document was to benchmark results obtained in every site, to facilitate interpretation and detect possible communalities, and to integrate the view of the host community, including institutional players, with the results of local reputation analyses. Destination reputation encompasses, to a certain extent, the construct of satisfaction with regard to actual tourists (to be induced to revisit), but it is measurable also with reference to just potential visitors (the main target to be attracted to develop the local tourism sector). Moreover, it has been shown that a favorable reputation can positively influence the image of a destination (that is conveyed to the general public of potential visitors), the perception of its value and the tourists' loyalty. Thus, based on feasibility considerations specific to the local tourist demand configuration, each project partner decided which source(s) of information to use, among the following:

- Google Trends,
- Survey interviews to non-visitors, that are visitors of a popular tourism destination close to the area of interest, who have not been in the latter for at least the past two years,
- Survey interviews to visitors of the areas participating in EXCOVER.

Thus, some local reputation analyses rely on both direct (based on sample surveys) and indirect (web-based) approaches, while others are based on a single source of data. Detailed local reputation analyses are presented in the Local Reports. While this document confronts the resulting reputational strengths and weaknesses with those emerged from the residents survey and the capacity building seminars.

On the light of the importance of the host community's support to sustainable tourism development, especially in the context of EXCOVER, where budget constraints require residents' commitment to widen the local tourism supply with close-to-zero investments, we measured this

fundamental aspect through a composite index (the EXCOVER participation index, EPI), built based on the specific informative needs emerged in preliminary meetings and discussions with all the project partners. Finally, we deepen the investigation of the availability of the host communities to share their unused accommodations, time, knowledge and skills with visitors, to integrate the local tourism offer with new tourist services and facilities.

With reference to the SWOT analyses, resulting from the discussion of the residents' surveys' answers with policy-makers, experts and representatives of the main local businesses and associations in capacity building seminars, strengths, weaknesses, opportunities and threats are clearly specific of each destination. Thus, the SWOT analysis for each area is detailed in the correspondent Local Report. In this document, from a cross-border perspective, we grouped the most important factors in broad classes and showed how frequently they appeared for each treasure site of EXCOVER. Then, we integrated the resulting picture with the visitors and non-visitors' opinion, as well as with the findings emerged from the local Google Trends analyses. Overall, we found that protecting and valorizing the natural environment is fundamental to grasp the opportunity constituted by the growth of green tourism. Moreover, Thus, by addressing the community-related weaknesses, through awareness rising actions, education initiatives and appropriate information campaigns, it shall be possible to attract travellers interested in slow tourism, that represent a very promising market segment. Education about the local history and culture could also help cultural tourism development. However, the cultural heritage of the areas involved in EXCOVER must be promoted and communicated, because it lacks visibility, but it should also be conserved more carefully, consistently with the sustainable tourism paradigm. A very common weaknesses regards the lack of accommodations and other tourist services and facilities, that might be overcome by means of sharing economy solutions, which might also mitigate some threats related to institutional issues.

Overall, the local communities' view of the strengths of their territories is quite consistent with the perceptions of surveyed visitors. In general, tourists agree that the main strength of these areas, considered all together, is the natural environment, that along with the pleasant climate makes outdoor activities attractive. Safety and security is the second most satisfactory aspect of the local supply, even before the COVID-19 pandemics, and its importance is expected to rise, thus it might be emphasized in marketing and communication initiatives. Restauration services too are highly evaluated by the demand, confirming the quality of the local enogastronomic offer. Although the cultural heritage reached slightly lower ratings, it can be considered to be appreciated by visitors.

Potential tourists seem to endorse the visitors' assessments almost wholly. The non-visitors survey was brought about by Gospic, Karlovac, Rive d'Arcano and Campobasso. Considering together

the 4 destinations, the natural environments confirms the main strength also in the imaginary of tourists who visited a nearby more popular destination, but have not been in the EXCOVER areas at least for the past 2 years. The second most highly rated reputational asset is safety and security, confirming that the towns under consideration may become attractive thanks to this characteristic, that is expected to be especially valued by travellers after the COVID-19 outbreak. Comparing the visitors' assessment of prices with non-visitors' expectations about this aspect, we notice that the considered destination are deemed slightly cheaper than they actually are, however, this comparison is biased by the lack of data for many destinations.

Based on the visitors' opinions, the host communities in the EXCOVER treasure sites are very welcoming of tourists and foreign people in general. Conversely, in the imaginary of travellers who have not visited the 4 areas for which the non-visitors survey was carried out, the host communities are deemed to be pretty unwelcoming. Since the quality of the resident-tourist interaction is the pillar of the co-creation substantiating the tourism experience, that exerts a great impact on tourist satisfaction and behavioural intentions, including willingness to recommend the destination to others. Therefore, it is fundamental to investigate the causes of this biased reputational weakness. With reference to the skills and education of people working in the local tourism sector, and so their professionalism, surveyed visitors confirm it to be an important weakness. This problem might be overcome through specific education programs, workshops and by introducing tourism-related teaching modules at school.

Visitors do agree that marketing initiatives should be reshaped, except for Carnia and Sasso Simone e Simoncello, where they look successful. Thus, web marketing, umbrella marketing and the involvement of travel bloggers, provided for in the last phase of EXCOVER, should place emphasis on the strengths of each area and contrast reputational weaknesses with the evidences of high-quality tourism experiences. In fact, visitors' evaluations depict a much more attractive image of these destinations than non-visitors' ones and this means that these sites have important competitive strengths, which are not correctly communicated. Therefore, the last work package of the Project, focused on marketing and communication, is expected to have a great positive effect on tourist inflows and, more in general, on the destinations' popularity and attractiveness, as the scarce visibility of the treasure sites of EXCOVER has emerged as a main obstacle to tourism development.

A fundamental weakness to the eyes of visitors, that has not emerged among the most important ones in residents' surveys and capacity building seminars, is the low quality and variety of shopping and entertainment opportunities. Therefore, it is crucial to involve the local communities in the creation of new attractive events, especially for young people, children and families. Although the COVID-19 pandemic imposed many restrictions on the possibility to hold festivals, concerts, spectacles

and any event implying people gathering, the wide green spaces available in our treasure sites represent a great occasion to create new attractions in complete safety. Moreover, the local businesses should be helped to open temporary markets, shared outlets and further innovative shopping occasions, focusing especially on the typical productions of the territory, including the highly appreciated enogastronomic products. High quality and large variety of shopping and entertainment occasions are crucial to develop sustainable tourism, to de-seasonalize tourist inflows and to penetrate new market segment, in particular that of the young travellers

The impact of the COVID-19 outbreak on consumers' behaviours may be seen as an opportunity for these isolated areas, characterized by wide green spaces, no overcrowding, many outdoor sport possibilities, unpolluted nature and healthy rural lifestyles. In fact, travellers are expected to value more the safety and security they can find in these sites, due to the fear of contagion, that could divert tourists from mass tourism destination and pour them into rural areas. Therefore, we are confident in the possibility of the local communities of the treasure sites of EXCOVER to successfully develop sustainable tourism based on their natural and cultural heritage, by addressing community-related weaknesses and recurring to sharing economy solutions.

Turning to the analysis of the EPI, through the cross-sectional comparison of data, we found good levels of willingness to be actively involved in the sustainable tourism development in their town for all the host communities, although with different orientations when looking at the details of this overall attitude. Residents in Gospić appear the most enthusiastic, while those in Paularo seem to need to be better informed about the benefits that could derive from sustainable tourism and especially from the participation of the local community to designing a flourishing future for their territory, consistent with their own values. Overall, 23% of interviewees left their personal e-mail address or phone number, to be re-contacted to participate in further activities of EXCOVER and in other initiatives aimed at developing sustainable tourism. This is a very important and encouraging datum, although provisional in nature, because it refers to the pre-COVID-19 situation. After the COVID-19 outbreak we expect the residents' attitude towards a sector of the economy that implies temporary migration of people from outside the territory and a close resident-tourist interaction changed negatively due to the fear of contagion. Therefore, during the activities of WP 4.1 it might be fundamental to verify the extent to which the results reported in both the local reports and this cross-border report are still representative of the current reality. If residents' willingness to participate in the sustainable tourism development has decreased significantly, then it will be necessary to verify the feasibility of the planned development under the anti-COVID-19 restrictions and to communicate residents how the goals of EXCOVER can still be safely achieved, by pursuing both health security and economic growth.

The residents' surveys' results highlighted quite positive attitudes towards the opportunities offered by the sharing economy to create new tourist services with close-to zero investments, by making use of the locals' spare time, assets, knowledge and skill. The overall percentage of respondents who declared to be willing to share an own asset functional to tourism development ranges between 23% for accommodation and 9% for home restaurant. The large availability of rooms and apartments to be rented by visitors is a crucial evidence, inasmuch as one of the most common factors hindering tourism development in the concerned areas is exactly the lack of sufficient receptive capacity. However, also this datum expected to have decreased after the COVID-19 pandemic. In fact, the fear of contagion might have made residents unwilling to share their own spaces with strangers, possible carriers of virus. So, a close monitoring of the feelings and attitudes of the host communities is needed also to verify the extent to which we can count on sharing economy solutions to address the lack of accommodations affecting many areas participating in EXCOVER. The low ratio of respondents willing to engage in home restaurant activities already before the beginning of the COVID-19 crisis is very likely due to the very strict hygienic regulations, especially in Italy, that brake private citizens initiatives. Similarly, car (and other means of transport) sharing is not allowed in Italian areas, currently. Thus, in Italy there are institutional obstacles to the exploitation of the new opportunities offered by the sharing economy that look unlikely to be removed in the short term. While Croatia has a more advanced legislation and might benefit a lot from sharing economy solutions. Residents in Gospić look aware of such advantages and eager to grasp them, while in Cavle their willingness to share assets other than transportations with tourists is very low. There, it will be important to understand if unused assets to be shared are missing, or if the local community is unfamiliar with information communication technologies and needs some education to use sharing economy platform, or if the issue is psychological in nature and how it could be fixed. In general, it is interesting to notice that, by comparing the residents' attitudes as depicted by the surveys' respondents' self-statements with their representation of their own host community's attitudes, we detected an overall tendency to overestimate the latter except for Ovaro, where interviewees provided an over-pessimistic view of the availability of the local community to share assets with tourists. This evidence mitigates the poor level of residents' participation measured through our index, because its components included also the evaluation of the community's welcoming attitude and willingness to participate in the tourism development, that are likely underestimated for this area, on the light of this datum.

## 5. METHODOLOGICAL NOTES

### METHODOLOGICAL NOTE (1)

The SWOT factors were identified through a semi-structured survey on the opinions of residents, as the involvement of the locals is crucial to co-construct a tourism development consistent with their vision of the future of their own territory. The face to face survey interviews were carried out in different times in the various destinations, throughout the territory, with a special focus on the city center and sites of tourist attractions. The resulting SWOT matrix (exemplified in Figure 29) was discussed with policy makers, destination managers, experts, representatives of the local businesses, associations, cultural and heritage management bodies, during capacity building seminars. The latter were brought about making use of a modified Nominal Group Technique, aimed at: (1) disambiguate the nature of factors appearing as both positive and negative (e.g. the same element being mentioned by some survey respondents as strength and by others as weakness); (2) add further factors, not mentioned by residents; (3) assign a relative importance score to each SWOT factor, so that the subsequent strategic interventions can be effectively prioritized and financial resources can be efficiently allocated. Unibo-CAST prepared the questionnaire, trained interviewers, made desk research, provided the methodology to be applied in capacity building seminars, and moderated some of them. Finally, local experts discussed results on the light of a detailed knowledge of each territory. Therefore, through this mixed methodology, we applied the Quintuple Helix framework of knowledge economy-based development, that provides for the involvement of the education system, the economic system, the natural environment, the media-based and culture-based public and the political system. For each area, the resulting SWOT matrix, displaying the seven most important factors for each category, is shown and commented in the Local Report.

	Factors that facilitate the tourism development of the destination	Factors that hinder the tourism development of the destination
<p><b>Internal factors</b> i.e. pertaining to the destination: they can be changed / managed at the destination level</p> <p><b>Focusing, among others, on factors linked to:</b> natural and cultural resources, residents' willingness to participate in tourism development, resources that residents can share to welcome tourists and provide them with a tourist experience in the area (free time, rooms, cars, skills, etc)</p>	<b>S</b>	<b>W</b>
<p><b>External factors</b> i.e. pertaining a wider area (Region, Nation, World...): they are not governable / manageable at the destination level</p> <p><b>Consider, among others, factors linked to:</b> Infrastructures (accessibility) Regulations Economics / Markets</p>	<b>O</b>	<b>T</b>

Figure 29. Example of SWOT Matrix. Source: elaboration by UNIBO CAST.

With reference to survey data, the mean values are reported in figures, if not otherwise specified. Destination aspects that attained an average rating higher than the overall average are considered reputational strengths, those scored below the global average are interpreted as reputational weaknesses.

#### METHODOLOGICAL NOTE (2)

The residents sample shares shown in this section were computed using the total number of interviewees (instead of respondents) as denominator. This methodological choice is based on the assumption that non-respondents are unwilling (or however less willing than respondents) to participate in the local tourism development, inasmuch as they did not contribute to the analysis of the local supply

and so to the development planning process, by refusing to provide the information required in the survey. In fact, interviewees were instructed to ask residents, who could not be interviewed when approached, if they could go back and submit the questionnaire in a second moment, more convenient to them. Therefore, we can realistically assume that indeed non-respondents did not want to provide information, rather than not being able to do it. From the methodological point of view, using the number of interviewees as denominator introduces a sample bias in results, but it mitigates the misleading effect, on the cross-border comparisons, of the high variability in response rates between destinations. Another consequence of this methodological choice is that the values displayed in this report differ from those reported in the local reports with positive non-response rates (the higher the non-response rate, the higher the absolute difference).

As the first 2 components of the index are expressed on a scale ranging between 1 and 7 (while the other components are ratios taking values in the interval  $[0, 1]$ ), they are normalized by dividing the average level of agreement, expressed by interviewees, by the maximum value possible (that is 7), to facilitate comparisons. The 5 components are weighted based on the subjective estimate of their relative importance and usefulness in the context of EXCOVER, especially in view of the forthcoming activities of the next working packages:

- weight of 1\_COMMUNITY PARTICIPATION = 0.4,
- weight of 2\_MAIL LEFT = 0.2,
- weight of 3\_PERSONAL SHARING ATTITUDE= 0.2,
- weight of 4\_WELCOMING COMMUNITY= 0.1,
- weight of 5\_INTERVIEWEE ENGAGEMENT = 0.1.

By construction, the minimum value of the EPI is 0, the maximum is 1. However, such extremes are just theoretical: it is highly unlikely that any actual host community can reach an index value of 1 or 0. Thus, in order to interpret and evaluate the participation level of residents in each destination involved in the Project fairly, the cross-border perspective is crucial, because it allows to confront each community's participation with that of all the others, which are homogeneous with reference to the stage of tourism development, objectives and resources, and so comparable.

### METHODOLOGICAL NOTE (3)



The sample shares shown in this section were computed using the total number of interviewees (instead of respondents) as denominator. This methodological choice is based on the assumption that non-respondents are unwilling (or however less willing than respondents) to participate in the local tourism development also by sharing unused assets with visitors, inasmuch as they did not put their time and effort in answering the survey. In fact, interviewees were instructed to ask residents, who could not be interviewed when approached, if they could go back and submit the questionnaire in a second moment, more convenient to them. However, although we can realistically assume that indeed non-respondents did not want to provide information, the hypothesis that they have also a negative attitude towards making use of sharing economy platform should be taken very carefully. In fact, renting own assets to tourists produces an income for the renter, thus the possibility of earning money could induce people to use of such platforms even if they were unavailable to participate in the local tourism development. Nonetheless, sharing platforms themselves cannot produce income, if visitors lack, so the development of a more attractive tourism destination image and the consequent desirable increase in tourist inflows is fundamental for these earning opportunities to become concrete, and the participation of residents is necessary to attain this goal. This is the ratio of the choice of using the total number of interviewees as denominator in this section, which introduces a sample bias in results, but it mitigates the misleading effect, on the cross-border comparisons, of the high variability in response rates between destinations. Another consequence of this methodological choice is that the values displayed in this report differ from those reported in the local reports with positive non-response rates (the higher the non-response rate, the higher the absolute difference).