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In depth interpretation of DSS result and enhanced identification of CB

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Table of Contents

Interpretation of SCBDS output in the perspective of the Italian tourism socio-economic context with a focus on specific territorial assets and human capital features

In order to deliver tools able to support both CB networks and business ecosystem development in the blue tourism sector, it is important to analyse the nature and status of existing business ecosystems shedding light on how destination can be enhanced by a joint policy. With this aim the tourism development state of the art of Italian coastal area, being one of the CB blue tourism partners, is to be elaborated in the following chapters.

Italy's position with regard to the global competitiveness index and with regard to the travel and tourism competitiveness index

In order to obtain insights into importance of Italian economy and tourism at the global scale, a short analysis of two indexes, Global Competitiveness Index (GCI) and Travel & Tourism Index (TTCI), is presented in this section together with a comparison between indices for Italy and Croatia as CB partners. Italy is highly ranked in terms of GCI (Global Competitiveness Index 4.0) , and it is highly ranked also according to TTCI: Italy is 8th and Croatia is 32nd.

Italy's position with regard to the global competitiveness index

GCI is composed of 12 pillars grouped in four themes: Enabling environment, Human Capital, Markets and Innovation Ecosystem, which are presented in the following table. Each pillar is composed of several indices. According to GCI Croatia and Italy where in ranked in 2018 as 68th and 31st out of 137 countries respectively.

Table 1: Global Competitiveness Index (GCI) for Italy 2015-16 and 2018

	Pillar		Italy in 2015-16	Italy in 2018	Croatia in 2018
Enabling environment	1	Institutions	106	56	74
	2	Infrastructure	26	21	36
	3	ICT adoption	37	52	53
	4	Macroeconomic stability	111	58	106
Human Capital	5	Health	26	6	51
	6	Skills	45	40	65
Markets	7	Product market	71	30	71
	8	Labour market	126	79	96
	9	Financial system	117	49	62
	10	Market size	12	12	78
Innovation	11	Business	24	42	81

Ecosystem		dynamism			
	12	Innovation capability	32	22	63

Sources: World Economic Forum (2018) and (2015a)

Market size is the best ranked pillar for Italy. More closely, Italy in terms of transport infrastructure is ranked 18th in 2018, but it is interesting to see that for the roads is ranked only 36th (whilst Croatia is 29th), for the roads connectivity index Italy is ranked 22 (Croatia 52th) and in particular it has a poor ranking in terms of quality of roads (only 54th, whilst Croatia is 17th). Two pillars, macroeconomic stability and labour market, are the worst ranking for Italy in 2018. Nevertheless Italy has improved its position in the last years thanks to the good results of the plan "Industry 4.0" of the former two governments, the same World Economic Forum points out that the weak points for Italy are the competences for the innovation.

On the other side, Italy is highly ranked for airport and liner shipping connectivity, as well as for railroad density. Furthermore, Croatia lags in relative terms behind Italy in health and market size while ICT adoption is closely ranked in two countries.
Croatian position in GCI ranking shows stable and positive trend demonstrated in the following table.

Table 2 : Global Competitiveness Index and ranking for Italy

year	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18
rank/number of countries	42/144	49/148	49/144	43/140	44/138	43/137

Source: World Economic Forum (2018)

Italy's position with regard to the travel and tourism competitiveness index

TTCI is composed of 14 pillars grouped also in four different themes: Enabling Environment, Travel and Tourism Policy and Enabling Conditions, Infrastructure and Natural and Cultural Resources. Croatia is ranked 32nd, while Italy is ranked 8th out of 136 countries in 2017. Since modified methodology was applied since 2015, performance from 2017 was compared to 2015 when Italy was ranked as 8th out of 141 countries. Tourism plays a vital role in Italy's economy: it contributes to 11,8% of GDP and has 12,8% of employment of the active labour force (data of 2017).

Italy has this high ranking of TTCI due the outstanding cultural (5th) and natural resources (12th) and world class tourism infrastructure (11th) which continue to attract international tourists. Other virtuous rankings and significant improvements of Italy compared to the previous TTCI report of 2015 is the ground infrastructure (22nd, up 10 places). A relevant improvement has been in the sector of Human resources that are more qualified and easier to manage (67th, up 8) as well as the prices that are more competitive (124th, up 9 places). There are several *punctum dolens* in which Italy has regressed its rankings: the prioritization of the T&T sectors has dipped (75th, down 10 places), due to the lower commitment from the government (74th) and weaker brand strategy (75th). The worldwide asymmetric threat of terrorism and the consequent geo-political instability in the Mediterranean has contributed to decrease Italy's ranking in terms of safety and security (70th, down 22 places), driven also by the lower perception of the reliability of the police and the phenomena of petty crime and robbery. Also the current fiscal pressure, taxations and the existent businesses legal frameworks in Italy contributes negatively to a weak business environment (121st), with no significant progress on the long-lasting administrative procedures regarding construction permits (114th), the inefficient legal framework (134th) and business taxation (125th)

Table 3: The Global Travel & Tourism Index (TTCI) for Italy 2015 and 2017

Pillar			Italy in 2015	Italy in 2017	Croatia in 2017
Enabling environment	1	Business Environment	127	121	114
	2	Safety and Security	48	70	24
	3	Health and Hygiene	20	30	19
	4	Human Resources and Labour Market	75	67	85
	5	ICT readiness	35	37	47
Travel and Tourism Policy and Enabling Conditions	6	Prioritization of Travel and Tourism	65	75	77
	7	International Openness	24	29	26
	8	Price Competitiveness	133	124	100
	9	Environmental Sustainability	47	37	21
Infrastructure	10	Air Transport Infrastructure	26	23	52
	11	Ground and Port Infrastructure	32	22	46
	12	Tourism Service Infrastructure	3	11	5
Natural and Cultural Resources	13	Natural Resources	13	12	20
	14	Cultural Resources	3	5	39

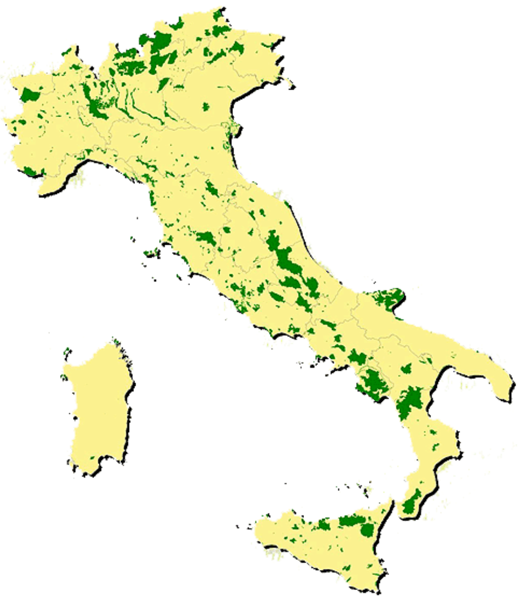
World Economic Forum (2017) and (2015b)

Finally, in comparison to Italy, Croatia is better ranked in terms of safety and security, health and hygiene and environmental sustainability while Italy outperforms Croatia in terms of air transport and ground and port infrastructure, and natural and cultural resources.

Italian most important natural assets

Italy has an extraordinary and unique diversification of natural heritage sites, which makes Italy ranking in the second place for the environmental tourism according to the World Economic Forum (2015).

Due to this extraordinary environmental diversity of the territory, Italy has developed specialized excellencies of environmental tourism. Let's have a concise overview.
Starting from the so-called "eco-tourism" with underlines a specific sustainable and responsible tourism exploitation of the environmental heritage, we have to highlight the uniqueness of the Italian parks that represents one of the mail tourism environmental hotspots, hosting in its territory 26% of the tourism service infrastructure and 30% of total beds available.
In Italy there are 24 National parks and 147 regional parks, the latter ones mainly distributed in Lombardia region (17% of total), Piedmont region (15%), Emilia Romagna region (10%) and Lazio (9%). In terms of tourism service infrastructures in the 147 regional parks, the majority of them are located in Lazio region (21%), Trentino -Alto Adige region (15%) and Veneto region (14%). Lazio region has the highest number of beds available (19%) of the total of regional parks.
Among the 24 National Parks, the highest number of tourism service infrastructures is in the Park of Stelvio (18%), Park of Cilento , Vallo of Diano and Alburni (12%) and in the Park of Gargano (10%). The environmental sustainability of tourism in the parks is highlighted from the number of parks that have achieved the European Chart for Sustainable Tourism (C.E.T.S.): 11 National parks and 17 Regional Parks.
In Italy the system of the protected areas covers an extension of 9.474.343 hectares, covering 21% of the terrestrial surface and 19,1% of the national maritime surface. In a generalized trend of tourism growth in Italy, also the naturalistic tourism has a positive trend: in 2014 the presence linked to this typology of tourism were 30,5 million in Italy (source Osservatorio Nazionale delle Filiere del Turismo – data Unioncamamere Sicamera, February 2015 – National Observatory of the Tourism Supply Chain). According to the Ecotour data (13th Ecotour report on environmental tourism, by Osservatorio Permanente sul Turismo Natura - the Permanent Observatory on Environment Tourism), in 2015 the revenues of environment tourism is estimated to have exceeded the amount of 12 billion of euro.



Natural protected areas in Italy. Source: http://www.difesambiente.it/aree_protette/

In the Italian Strategic Plan of the Tourism 2017-2022 (Piano Strategico del Turismo 2017-2022) of the Ministry of the Cultural Assets and Activities and of the Tourism, it is clearly pointed out that the sustainable and quality tourism it is a tool of policy for the social and economic welfare, of which its attractiveness potentiality in terms of environment, landscape and cultural has still to be developed and to be acquainted with.

Agritourism plays also a relevant role in the Italian economy. Agritourism are the agricultural firms that have received a specific authorization and has transformed its facilities for tourism purpose, with a positive consequence of mitigate the tourism infrastructures burden in the landscape and in terms of biodiversity.
The agritourism sector has witnessed a continuous growth trend in the last years, both in terms of facilities, in terms of tourist presence and for its economic value. In 2017 there were 23.406 authorized firms, with an increasing of 745 units compared to 2016 (+3,3%), taking into account the balance between the new 2.121 authorizations and the 1.376 dismissed agritourism. In 2017 the agri-tourism sector in Italy had 12,7 million of clients, with a significant increase of 5.3% compared to 2016. In economical terms, the revenue of the agricultural sector in 2017 was 1.36 billion of euro, witnessing a significant growth of 6,7% compared to 2016. There is a specific pattern to differentiate the typology of the agritourism activities with integrated package offers: 8.225 firms offers both accommodation and food services, 10.757 in addition to the accommodation they offer also other agritourism activities and 1.987 offers both four agritourism activities (accommodation, food services, food tasting and other services. A significant percentage of agritourism with accommodation are located in the centre and south regions of Italy (60,5%), 56,3% the agritourism firms with food tasting and 63,9% with other activities. In terms of locations, 31,4% of the agritourism firms are located in the mountains, 52,8 % in the hills and 15,8% in plain areas. The growth of the number of agritourism is higher in the centre of Italy (6,3%) in comparison to the South (3,9 %) and the North (0,8%). Significant clusters are in the Autonomous province of Bolzano and in Toscana region, with a respectively number of 3.187 and 4.568 specialized firms, with an high percentage of presence of tourists and a considerable economical value of the sector. A further positive consequence of this trend is also an increasing number of firms that produced certified quality food products (DOP- Denominazione di Origine Protetta – Denomination of Protected Origin and IGP- Indicazione Geografica Protetta – Protected Geographic Origin) that has increased in terms of units from 791 to 2.533 units. All the above mentioned data are provided by the Italian National Institute of Statics – ISTAT – Istituto Nazionale di Statistica.

Another specific sector of the environmental tourism is the sport tourism, which includes also the so-called "experience" tourism. The sport tourism is the organized tourism to perform sport activities, partecipating either as organizer, as practitioner or as spectator. This market segment has an increasing positive trend considering the new attitude and interest towards wellness activities. Beside the winter skiing tourism, in Italy it is significantly growing the golf tourism with a significant nation wide 47% of structures present in the Northern Italy, in the Regions of Piemonte (Piedmont), Lombardia, Veneto and Emilia Romagna.

The length of the Italian coasts are more than 8.000 km, its geomorphologic diversity is the richness and the attractive added value: it ranges from lower and sandy coasts, high and rocky coasts, jagged coasts, steep coasts, linear and straight coasts, small and bigger islands, promontories, coves and gulfs are in succession in an infinitive variety of landscapes and scenarios. Tourism incomes play a key role in the economy of the coastal areas. The evolution of the tourism activities has lead to the diffusion of new segments of tourism, starting as niche phenomenon, that starting from leisure boating, the cruise travelling, to the fishing-tourism, to the snorkelling and diving.
The vicinity to the sea is a relevant feature for the development of the tourism and for its contribution to the local economies and to the littoral areas. Despite the coastal municipalities are less of 15% of total number of municipalities in Italy (7.983 in 2017) and hosts 34,2% of the Italian population, they offer 56,4% of (tourism) beds and they contribute to a 53,1 % of total tourism presences recorded in 2017. Seasonal tourism affects the coastal territories: 70,8% of the presences in concentrated in the summer period (June-September) in comparison to the 49,4% of the presences reported in the same period in the other Italian municipalities.

Available beds and tourism presences according to the typology of municipality of destination

Typology Municipality	Number Municipalities	% Municipalities	% Population	Number beds	Presences	% Presences	Presence per inhabitant
Coastal	1.146	14,4	34,2	2.843.154	223.449.255	53,1	10,8
Non coastal	6.837	85,6	65,8	2.194.644	197.179.900	46,0	4,9
Total Italy	**7.983**	**100,0**	**100,0**	**5.037.798**	**420.629.155**	**100**	**6,9**

Source: ISTAT – Istituto Nazionale di Statistica – National Institute of Statistics

Presence in the hosting facilities for typology of municipality of destination and seasons

Typology of Municipality	% presences in the summer period	% presences in the rest of the year	Total presences
Coastal	70,4	29,2	100,0
Non coastal	49,4	50,6	100,0
Total Italy	**60,8**	**39,2**	**100,0**

Source: ISTAT – Istituto Nazionale di Statistica – National Institute of Statistics

Italian most important cultural assets

Italy is world wide known for its unique and diversified cultural heritage that is widespread in each of its 7.983 municipalities. The country is famous not only for its artistic, cultural and landscape heritage, but also for its eno-gastronomic, handicraft tangible and intangible heritage. Italy is one of the 165 countries in the world that hosts UNESCO's World Heritage sites. Italy is the country with the highest number of World Heritage Sites, with a total number of 54 sites, of which 49 are cultural sites and 5 are natural sites.

Map of UNESCO Sites in Italy.

A survey carried out in 2018 by the Italian Confederation of Enterprises (Confimprese) and Nielsen on "Mobility, welcoming, culture and appeal" points out that 59% of the foreign tourists choose Italy as travel destination for the art and the monuments and 37% for the food, that is considered as integral part of the Italian cultural heritage and of the branding image of the territory in the world. This trend shows us that the binomial historic-artistic heritage and eno-gastronomy represent two key elements of the so called *Made in Italy.*

More in detail, in 2017 the main motivation of visiting Italy is art and culture: 43,1% of the foreign tourist arrivals and 27,9% of the Italian tourists decide to stay during their holiday in cities of historic-cultural relevance. Regardless of the reason of the travel, 79% of the foreign tourists visit at least one cultural site and 86% of the Italian visitors believe that their cultural heritage is relevant for them and for the local community.

The Italian cultural offer has the above-mentioned UNESCO's World Heritage sites, (49 cultural and 5 environmental) as well as 472 museums, monuments, and state-owned archaeological sites. According to the data of the Italian Ministry of Culture, state-owned cultural sites have attracted more than 50 million visitors (an increase of 10% in comparison to 2016) that has generated almost 200 million of euro of income (an increase of 12% in comparison to 2016).

The economic relevance of this specific sector has to be assessed taking also into account the average daily expenditure of the cultural tourist, that according to the data of Bank of Italy is 137 euro compared to the 112,90 euro of the generic tourist. In 2017 the foreign cultural tourist have spent 15,5 billion of euro , to an equal extent of 59,6 of the total expenditure of the tourists in Italy.

We have to point out that the increasing interest towards the Italian cultural heritage is linked also to the use of the new technologies, that are assuming a strategic role both for the safeguard, as well as for the valorization. The utilisation of innovative technologies, acts on the level of involvement and on the grade of immersive attitude of the visitor in order to increase the attractiveness of the experience, facilitating the accessibility in order to make the cultural resource accessible for everyone, proposing alternative itineraries to the traditional visit. An example of this excellence is the Galata Maritime Museum in Genova that combines historical evidences of maritime heritage with augmented reality experiences and 4D simulations of storms onboard a lifeboat.

An increasing importance in the Italian landscape of cultural tourism economy is surely the eno-gastronomy, in its widest meaning of cultural experience. In this case, the tourist experience is not only on the tasting of typical food amenities, but it represents the research of a multiplicity of thematic experiences, that enable the tourist to satisfy different needs: sociality, cultural knowledge and research of new emotions. The excellence of the eno-gastronomic experience in Italy has become the opportunity to create a direct relation between the site and the population. It also provide the opportunity of tourism attraction by minor cultural sites that are not in the mainstream of the major tourism flows. For this reason, for example the tourism of wine is qualified as tourism as tourism of the cultural landscape, meant as a form of cultural tourism, of which interest is extended to the single attractors, to the environmental, socio-economic and identity characteristics that features a specific site. According to UNWTO in 2017, the eno-gastronomic tourism is among the tourism sectors with the highest potentialities in terms of growth and dynamism: it is estimated that al least 93% of the tourist has participated to at least one eno-gastronomic experience during its holiday. Italy is among the most desired eno-gastronomic tourism destination in the world: it is estimated that at least 1% of the foreign tourists and 6% of the Italian tourists has a prevailing reason of their vacation the eno-gastronomic component. Estimated daily expenditures is 120,00 euro fir the foreign tourists and 110,00 euro for the Italians. As a last element of the eno-gastronomic offer, Italy has the major number of DOP and IGP certified products recognized at European level.

Elaboration of the tourism supply state of the art

Transport infrastructure

The accessibility is an essential driver of the competitiveness of the national tourism systems; it represents the most relevant point of intersection between the industry of the tourism and the industry of transportation. If is true that the tourism destinations have more visitors when they are more easily accessible by the traveller, it is pivotal that the definition of strategies for the tourism mobility starts from the analysis of the tourism offer in terms of accessibility in its different meanings. The physical accessibility is directly connected to the adequacy of the transport infrastructures and to the efficiency and to capillarity of the mobility services.
Nowadays also the physical accessibility plays a significant role: it is in fact an element of visibility and preference of the destination during the decision-making and planning phase of the travel, in addition of improving the total fruition of the touristic experience.
Resuming, we have:

1) Physical Accessibility
    - Airports: proximity to airports, daily average regularity of national and international flights, last mile connections airport-city;
    - Railways: proximity to the stations that are covered by national connections (high speed trains and intercity), daily average of the connections;
    - Maritime: proximity to ports and marinas, offers of services of connection for the different typologies of traffic (ferries, cruise, private), intermodal connections;
    - Road: proximity of highway junctions, offer of bus services, bus stations for touristic buses.
2) Digital Accessibility
    - Channels of access to services. Presence of web site, level of information provided by web, existence of ad hoc apps ;
    - Social: official channels Twitter, Facebook, Instagram, You Tube, level of interaction with tourists;
    - Model of fruition of the services: possibility to purchase the entrance ticket on-line or to book a visit, audio-guide on digital support, info-mobility, augmented reality;
    - Digitalization of physical infrastructures: presence of free Wi-Fi, sensors.

In 2015 Banca d'Italia (Bank of Italy – the national bank) and ISTAT (the Italian National Institute of Statistics) had estimated that the foreign tourists arrive in Italy with the following means of transportation: road transportation (cars and buses) in 62% of the cases, by plane (35%), by ship (2%) and by train (1%).

Italy has 39 airports, three of which are considered strategic airports (Milano Malpensa, Rome Fiumicino and Venice) and 36 as Airports of national interests. In 2018 the 39 airports had a total of 185.681.351 passengers, with an increase of 5,9% compared to 2017 (data of ASSAEROPORTI – Associazione italiana Gestori Aeroporti – Italian Association of Airports Managing Authorities).

The international traffic has surpassed the number of 121 million of passengers, with an increase of 7,2% compared to 2017. Within this segment there is a growth of 5,6% of the EU traffic and of 13,2 % of the extra-EU traffic. In terms of number of passengers among the first 5 national airports, we have: 1) Rome Fiumicino with 42.995.119 passengers, Milano Malpensa with 24.725.490 passengers, Bergamo with 12.938.572 passengers, Venice with 11.184.608 passengers and Catania with 9.933.318 passengers – data of 2017.

UNWTO assess that the most used mean of transportation by the international tourists is the plane: in 2016 about 55% of the international tourists has reached the main touristic destination through air transportation.
The increasing number of passengers of the last years is due to the growth of *Low-Cost Carriers*, that has enabled new segments of population to utilize this mean of transportation, with a determinant improvement of the accessibility of several destinations. The Italian flagship airliner company has lost his leadership in Italy in favour of Ryanair.
The Italian airport system, in comparison to the main European airports with similar characteristics, it is featured by a lower average dimension and with an higher number of small and medium size; this latter aspect compensates for certain aspects, the infrastructural deficit imputable to the lack of alternative efficient means of transportation and, at the same time it ensure to have a territorial continuity with the islands (Sardinia and Sicily).

The Italian railway system has 16.777km of tracks. Only 896 km are high speed tracks with allows speed of 250 km/h or even higher. It is estimated that in 2016 about 30 millions of passengers have travelled by train, but there is a decreasing trend due to a minor offer of intercity trains (less expensive), replaced by more high speed trains.
The boom of very competitive transportation by bus such as Flixbus or by mini-vans such as Go-Opti has changed the tourist's preference of travelling.
The railway's accessibility to the most relevant cultural/environmental sites considering the 54 UNESCO's World Heritage Sites and the 17 European Destination of Excellence (EDEN) and capitals of culture is taken into account to the closeness of the sites to the railway stations of high-speed trains, reaching the final destination with road transportation. 60% of the UNESCO sites are reachable from the closest high-speed train within one hour, 19 sites are reachable within 30 min. In Italy, the problem of railways accessibility is due to a not uniform distribution of infrastructures in the country, being most of them located in the North and in the Centre regions.

Cruise ship has increased significantly in the last years, it has Mediterranean Sea. Italy, with its barycentric position in the Mediterranean, plays a key role. In terms of number of passengers and number of visit of ships in 2017 among the first 10 ports in the Mediterranean, 5 are Italian ports:

	Traffic 2017		**Variation % to 2016**	
Port	**Number Passengers**	**N. visit of Ships**	**Number Passengers**	**N. visit of ships**
Barcelona	2.712.247	778	1,1 %	2,6 %
Civitavecchia	**2.200.328**	**728**	**- 6,0 %**	**- 12,6 %**
Palma de Mallorca	1.673.210	538	2,6 %.	4,7 %
Marseille	1.487.313	444	- 6,9 %.	- 9,4 %
Venice	**1.427.812**	**466**	**- 11,1 %**	**- 11,9 %**
Pireus	1.055.559	576	- 3,5 %	- 7,8 %
Naples	**927.458**	**336**	**- 29,0 %.**	**- 31,8 %**
Genova	**925.188**	**212**	**- 9,1 %.**	**- 14,9 %**
Savona	**854.443**	**187**	**- 6,1 %**	**- 12,2 %**
Malta	778.596	342	14,0 %	7,9 %
Total	**14.042.154**	**4.607**	**-5,6 %.**	**– 8,2 %**

Source Risposte Turismo (2018), data provided by each respective Port Authority

The port of Civitavecchia is the second port in the Mediterranean in terms of number of passengers and also in terms of visit of ship. This excellent result is also due to its vicinity to the airport of Rome Fiumicino (67 km well connected with highway junction just outside the airport) which is the most important Italian airport for number of passengers with almost 43 million of passengers in 2017.
All the Italian ports destinations have registered in 2017 a decrease of number of passengers and visits of ships, in the wider context of the contingent contraction of the cruise market in the Mediterranean sea.

Accommodation facilities

In 2017 Italy's accommodation facilities had a total number of 32.988 hotel facilities for a total number of 2.239.446 beds divided as follows: 5 and 4 stars hotels 6.335 with 859.621 beds, 3 stars hotels 18.116 with 1.133.452 beds and 1 and 2 stars hotels 8.537 with 246.373 beds.

Therefore we have a total 32.988 hotels with 2.239.446 beds. According to the data of resident population on 1st January 2017, there is a national ratio of 37 beds every 1.000 inhabitants.

In terms of other typologies of accommodations in Italy (extra-hotels) there are 2.643 camping and tourist villages for a total number of 1.353.895 beds, 104.661 rental apartments managed in a entrepreneur way with 755.631 beds, 18.771 agritourism with 256.533 beds, and 11.638 other sleeping facilities such as youth hostels, houses for holidays, mountain refuges with 254.469 beds and 34.202 B&B with 177.824 beds. If we sum all the different typologies of accommodation we have a total of 171.915 units with 2.798.352 beds. According to the data of resident population on 1st January 2017, there is a national ratio of 46,2 beds every 1.000 inhabitants.

The total sum of beds offered in Italy in 2017 are 5.037.798 beds: we have an availability of 44,45 % beds from hotel facilities and 55,55% by other typologies of tourist accommodation different from hotels.

Italy's accommodation capacities

Year	No. Of bed places	Hotels (in %)				Campgrounds (in %)	Vacation rentals (in %)	Other types of accommodation (in %)
		Total	5* 4*	3*	2*1*			
2013	4.728.180	33.316	18	54	28	28	12	13
2014	4.849.432	33.290	18	54	28	29	12	13
2015	4.879.333	33.199	18	55	27	28	13	13
2016	4.942.187	33.163	19	55	26	27	13	14
2017	5.037.798	32.988	19	55	26	27	15	15

* = star rating
Sources: ISTAT – Istituto Nazionale di Statistica - National Institute of Statistics (2018).

As we can see from the above table, there is a slight increasing of beds available between 2013 and 2018, but at the same time there is a decrease of hotels available.

Other facilities

Cycle-tourism has still un-revealed potentialities in Italy. Italy has 94.174 km of cycle paths.
According to a survey of Confindustria (General Confederation of Italian Industry) and ANCMA (National Association Cycle, Motorcycle and accessories) reported on the main Italian Economics newspaper "Il Sole 24 Ore", the only cyclo-tourism in Italy generates an income of 2 billion of euro, which may reach the amount of 3,2 billion of euro. One of the best practice of this typology of tourism is in Lignano Sabbiadoro, that has invested in cycle-tourism infrastructures in order to attract a slow, sustainable tourism, integrating cycle-paths and boat connections, there will be a new cycle path between Lignano and Bibione, crossing the river Tagliamento, through different itineraries and connections for 240 km, it will be possible to reach also Venice, connecting also the town of Grado to Salisburg in Austria with the cycle-path Alpe-Adria. A spectacular cycle-path will be also in the lake of

Garda, with over 95 km that will connect three regions: Lombardia, Veneto and the Autonomous province of Trento. Some significant cycle-paths are: cycle path Francigena, following the famous pilgrimage routes, cycle-path of Arno River, cycle-path of walled towns, cycle-paths of Trento, cycle-path of Green Adriatic Corridor.

In the yachting segment, according to the Ministry of Infrastructures and of Transports, Italy in 2017 has a total number of 158.548 wet berths, of which 104.974 for boats until 10 meters of length, 49.574 for boats of length between 10 and 24 meters and 4.000 for boats over 24 meters. Since 2013, the number of berths are increased of of 10.744 units, confirming also a trend of leisure nautical activities in Italy.

Basic tourism results in Italy

Tourism demand

According to the data of the Italian National Statistics Institute collected in the accommodating structures for tourists between the years 2000 and 2017, the total number of arrivals of tourists, Italian and foreigners increased in a percentage of 53,9 %, surpassing 123 million; whilst the number of presences (the number of nights stayed in the tourist facilities), that have surpassed the amount of 420 million of units, are increased in a minor percentage (24,1%) due to the progressive reduction of the number of overnight stay for each single travel.

The diminution of the average duration of the overnight stays is a generalized phenomena of the majority of the European tourist destination, that is affected by an increasing frequency of the movements and of the changes in the typology of the vacations. In fact, nowadays we witness an increasing number of short travels during the weekends, encouraged by the low fares of transportation (low-cost airlines) and reduced time to reach the final destination.

In 2017 the geographical distribution of overnights stay in Italy was as follows: North-West 27,6 %, North East 30,9% , Centre 27,5% and South and Islands (Sardinia and Sicily) 14,1%.
In terms of travellers the percentage are as follows: North West 24,3%, North East 28,8%, Centre 28,9% and South 18%.

The average duration of the travel for foreigners in Italy in 2017 it was 4,1 days with the following geographical distribution: North West 2,6 days, North East 3,4 days, Centre 6,1 days and South and Islands 8,55 days.

Tourism spending impact on GDP

According to the data of Banca d'Italia (Bank of Italy), the average daily spending is 81 euro for the Italian tourists and 100 euro for foreign tourists. Considering an average duration of the travels for the Italian is 8,7 days and for the foreigners is 6,3%, we have respectively an averege expenditure of 629 € for the foreigners and 701 for the Italians.

Overnight travellers - Composition % of the expenditures for reasons of the travel - 2017		
Origin of tourists	**Italians**	**Foreigners**
Work	**32,0%**	**13,7%**
Study, courses	**5,8%**	**2,5%**
Vacation	**43,5%**	**69,9%**
Visit to parents, friends	**9,9%**	**10,1%**
Other personal reasons	**8,8%**	**3,7%**

Source – Banca d'Italia – Bank of Italy

From the above table we can see that the main reason of the overnight travels for both Italians and foreigners it is the vacation, but this percentage is considerable lower for Italian which have a considerable percentage (32,0%) of business travels.

Overnight travellers - Composition % of the expenditures for reasons of the vacation -2017		
Origin of tourists	**Italians**	**Foreigners**
Art cities	**42,9%**	**59,9%**
Sea	**40,6 %**	**21,0%**
Mountain	**3,7%**	**12,5%**
Other	**12,8%**	**6,5%**

Source – Banca d'Italia – Bank of Italy

This last table reveals that cultural tourism in Italy is still the most predominant both for Italian and foreigners. For the Italian tourists the expeditures for art cities are almost similar for the sun-and beach-sea vacation, whilst the mountains are more appreciated by the foreigners.

According to Bank of Italy, in 2016 the tourism income of Italy represented 2,2% of its GDP and the total of 40% of export of services.

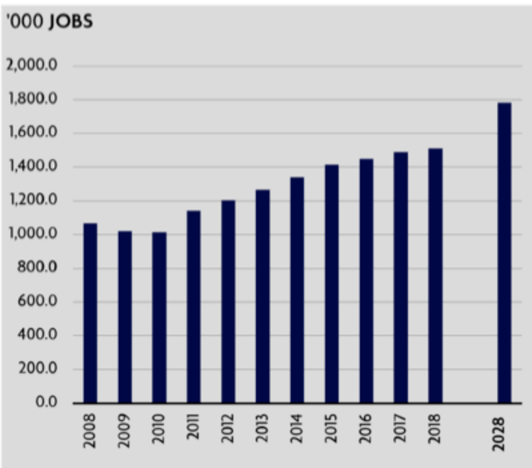
Tourists have spent 39,155 million € in 2017 in Italy. 41.252 million € of incomes produced counting both the sectorial interactions, as well as the Keynes multiplicator (almost + 6,5% real) – Italian real GDP: +1,5; +2,1% in the industry and 1,5% in the services).

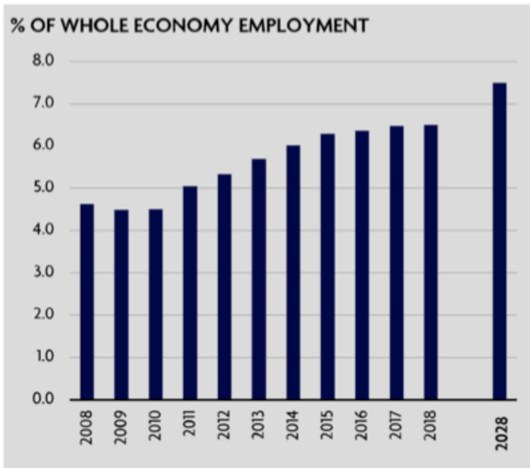
The growth of the tourism industry incomes in Italy (3,6 % average every year in the period 2010-16) has been determined in particular by the increase of the arrivals (3,0%), besides also the average daily pro-capita expenditure (1,8%), facing nevertheless a decrease of the average duration of the travels (-1,1%) that reflects a widespread trend at international level, as it has been mentioned above.

Tourism employment

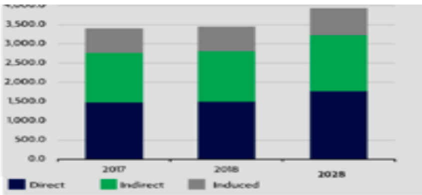
Tourism is one of the key sectors of the Italian economy. According to the National Observatory of the Tourism, analysing the data of WTTC, the tourism industry in Italy in 2017 employs directly or indirectly 3.394.500 workers, for a percentage of 14,7% of the total labour force. According to WTTC provisions, in 2018 the number of workers in this sector should increase 1,4% (3.443.500 jobs) and in long term provisions it is estimated that there will be employed 3.924.000 workers in 2028 (16,5% of the total labour force). In 2017. In 2017 the tourism sector directly supported 1.490.500 jobs (6,5% of total employment). This is expected to rise by 1,3% in 2018 and to rise by 1,7% pa to 268,8 billion €. This includes employment by hotels, travel agents, airlines and other passenger transportation services (excluding commuter services). The data includes also restaurant's activities as well as also the leisure industries directly supported by tourists

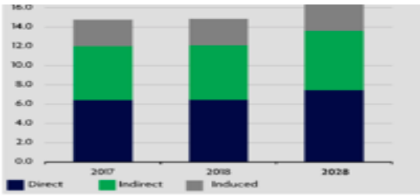
Italy: direct contribution of travel & tourism to employment :





Italy: total contribution of travel & tourism to employment





Identification of the challenges related to the use of cultural, natural and other assets in Croatia

Main challenges related to natural assets

Despite tremendous efforts to preserve its bio, geo and landscape diversity, Croatia still faces significant threats and loss. This negative trend is recorded on international level too. Officially, Croatia records more than a 40.000 species and subspecies (according to some estimates this number increases up to 100.000) out of which 3% are endemic (NN 72/2017). According to IUCN, more than a 3.000 species in Croatia are endangered, out of which 42, 3% are estimated to face high risk of extinction. Furthermore, the lack of research for 22% of all species and subspecies stipulate the estimation of their endangerment. Consequently, to resolve these challenges, last few years Ministry of Environment and Energy did significant effort to conduct first analysis, i.e. estimate “state zero” in order to be able to track changes in future. The future revisions of the state of the species should be the top priority.
The loss of the geo and landscape diversity is mostly induced by:

1. Loss and fragmentation of habitats as a result of intensive farming and infrastructural development,
2. Invasive species,
3. Pollution,
4. Urbanization especially in the coastal part of Croatia, and
5. Climate change (NN 72/2017).

According to Strategy and action plan of protection of nature in Croatia (NN 72/2017), almost 62% of all negative impacts on natural resources are anthropogenic. Furthermore, geo and landscape diversity are also threatened by building new roads, water pollution with sewage and wastewater, pesticides, impacts on groundwater and large hydro-technical investments. The geo-diversity is mostly influenced by human actions, i.e. exploitation of mineral resources, water pollution, the illegal landfills for construction waste, illegal construction works and urbanization.

According to the Strategy, five key environmental priorities for Croatia until 2025 are following:

1. To increase efficiency of nature protection,
    a. Develop legislation and institutional framework
    b. Analyse the effectiveness of legislation and institutional framework for nature protection

c. To estimate the protected areas following IUCN guidelines
d. Define aims and actions to protect nature and conduct zoning following the Natura 2000
e. Indicate the actors involved in process and strategic documents that are required

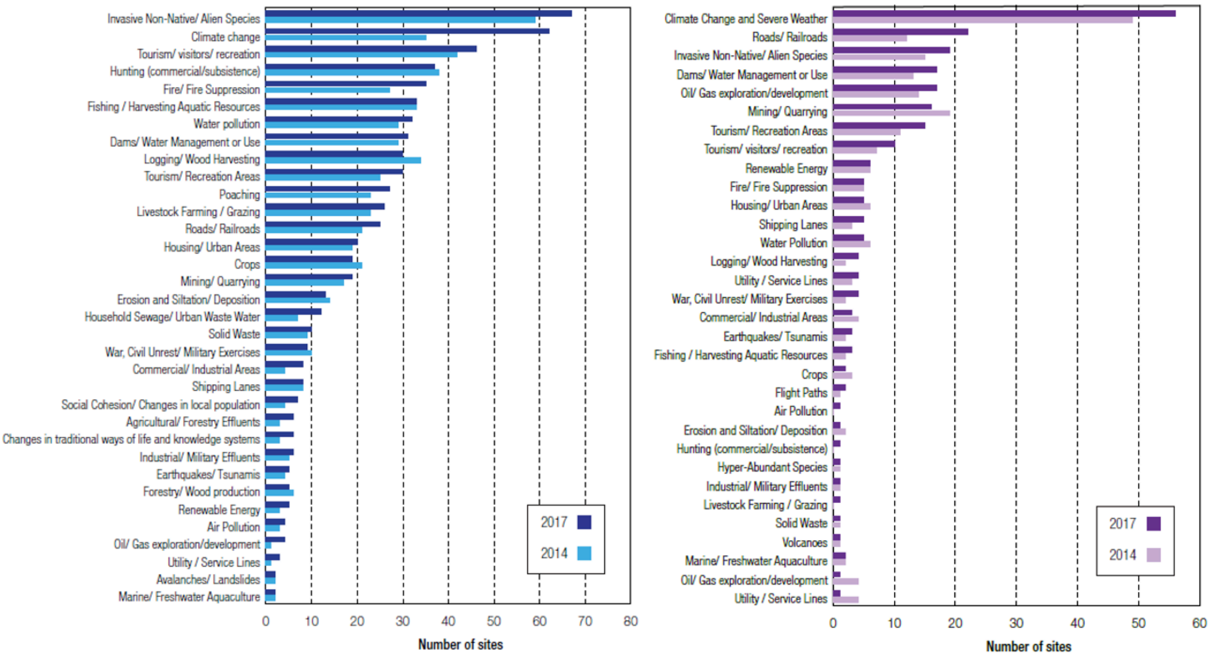
2. To decrease direct pressures on nature and foster its sustainable use,
    a. Ensure sustainable use throughout sectoral strategic documents
    b. Increase effectiveness regarding nature protection
    c. Increase inspections and control over the implementation of strategic actions
    d. Foster acceptance and introduction of biodiversity protection measures
    e. Ensure effective introduction of measure for nature protection in yearly plans for water protection
    f. Identify species and habitats that are fragile and affected by climate change
3. To foster capacity for nature protection,
    a. Foster the institutional development
    b. Communicate with other relevant sectors to improve legislations and regulations
    c. Decentralisation of governance and responsibility for nature protection
    d. Estimate current and required institutional capacity for nature protection
    e. Estimate public institutions potentials and capacities
    f. Initiate monitoring of the human potentials and their effectiveness
    g. Set up the obligation for employees in public institutions to educate continuously
    h. Initiate the process of the professionalization of the nature protection regarding the competences of the employees
4. To increase knowledge and availability of data about nature,
    a. Estimate the species and their territorial distribution
    b. Standardize the collection of the data
    c. Map the alien species
    d. Establish the monitoring
    e. Conduct the research and collect and share the data
    f. Foster the communication, improve the legislation and scientific research on natural resources
5. To increase the level of knowledge, understanding and public support for protection of nature,
    a. Foster the importance and understanding of nature protection and environmental services
    b. Define terms regarding nature protection and include them in curriculums
    c. Develop textbooks
    d. Analyse current curriculums and identify gaps.

These all priorities are aligned with the EU Biodiversity strategy to 2020. The IUCN World Heritage Outlook identifies and evaluates current and potential threats affecting natural World Heritage sites.
Current threats reflect to activities or occurrences that have an immediately apparent impact affecting sites values, while potential threats refer to planned activities or evolving trends that could have a future impact if they materialise (Osipova, 2017). The Outlook results indicate invasive species, climate change and tourism to be three major current threats for natural World heritage (Figure 11). Furthermore, while its impacts are becoming increasingly visible in many natural areas,

climate change is also the most widespread significant potential threat, followed by road construction, alien species, and water management and use.

According to World Wildlife Found (WWF) full diversity of Earth habitats and species in not properly protected, which can be seen from problems with current protected areas, i.e. (1) poor representation of habitats, (2) lack of connectivity between protected natural areas, (3) lack of funds, (4) poor management, (5) human activities.

Figure 11 Current and potential threats assessed as high or very high in 2014 and 2017



Source: IUCN World Heritage Outlook 2

With regard to the Croatian national assets, especially those in coastal part, urbanization, tourism and recreation, pollution, and climate change appear to be four- potentially most important threats.

Growing urbanization in Croatian coastal areas is strongly related with both, economic (people are attracted to cities due to economic development) and demographic (economic development of the city is induced by increased number of residents) trends (Šimunović, 2007).

The internal migration of the population, as most obvious and widely accepted indicator of urbanization, indicate continuously urbanization of Croatian territory, characterized with migrations between towns within the same county and between counties (DZS, 2017). According to Croatian Bureau of Statistics (2017), most popular "destinations" for internal migrations were Zagreb as the capital of Croatia, and coastal counties, from Istria down to Dubrovnik-Neretva county. At the same time rural and poorly economically developed areas face continuous depopulation. The economic development in coastal Croatia is mostly related to tourism development. Moreover, 96. 5% of overall accommodation capacities are situated in coastal regions (Ministry of tourism, 2017).

The pronounced urbanization, along with highly seasonal and propulsive tourism development threatens fragile natural resources. At the same time, nature and nature based activities are primer and most important motive for arrival in Croatia for majority of tourists (TOMAS, 2017).

Source: Author's presentation

Various types of pollution have been recognized as the major threat influencing overall future development. Following the European Union development strategy, Europe 2020 (European Commission, 2010), has recognized sustainable growth, and resource based, green and competitive economy as top priority. The core of this strategy is sustainable transition from linear to circular economy, an economic model that will foster sustainable use of resources and reuse of materials and products. The aim is to minimise all kind of pollution and wais. This transition requires not only the transformation of overall value chain and development of new products and markets, but also the way people, i.e. residents and visitors act and think.

Finally, climate change has tremendous impact on both humans and ecosystem (IPCC, 2013). According to the World meteorological organization (WMO), 2016 was the warmest year since the establishment of temperature measuring system. Due to its climate and positions, Croatia is recognized as one of the counties that is and will be seriously affected by climate change in the future. Consequently, it is possible to expect significant sea level rise, change in animal migration patterns, negative impacts on hydrogeology, water resources, forests, agriculture, biodiversity and human health. Following, it is crucial not just to reduce the emissions but also to start developing mitigation plans for assessment and reduction of negative impacts.

Main challenges related to cultural assets

The status of material heritage is influenced by many factors such as climate, global pollution, unresolved proprietary status, changes in the economic systems and in the treatment of ownership, economic crises, liberalization of real estate market, disregard of the spatial planning documentation and legal framework. Despite continuous investments into the renovation and maintenance of cultural goods, due to all previously mentioned considerations, the present condition of certain types of cultural goods is unsatisfactory (Ministry of Construction and Physical Planning of the Republic of Croatia, 2017).

The following **key issues** may be singled out in the areas of:

- *Urban management and planning* from the aspect of cultural tourism development position, in particular with respect to the following issues: *spatial planning* and further urban devastation of the coastal area*, spatial concentration of cultural resources* in the area of their relations to the general and tourist infrastructure; *illegal or inadequate construction* (spaces of exceptional importance and contact areas are compromised), *the influence of tourist development on the spatial, economic and social carrying capacities* of historical urban centres (where excessive commercialization and development of tourist monoculture and gentrification are evident), and *management of the development of various tourist products* from the aspect of their mutual compatibility;

- *Ownership and authority over particular parts of public resources*, especially in the case of localities under national or international (UNESCO) protection;

- *Unstructured approach to the revitalisation of monumental heritage* – continuing the dominant approach aimed at protection and restoration without an adequate interpretation;

- *Availability* of culture and cultural heritage affected by poor road accessibility of numerous heritage resources, physical accessibility for the physically disabled persons, information availability considering the non-existence of official information on numerous resources on web sites of relevant cultural and/or tourist organisations, and the market availability reflected in the missing online booking and purchase of tickets for the same;

- *Marketing presentation* of culture and cultural heritage: modern ways of interpretation and presentation are rarely and insufficiently deployed. As a consequence, the presentation of cultural assets and resources is predominantly static, exhibitional in character, offering no interaction with the visitor;

- *Insufficient (horizontal and vertical) connections and collaboration between key development stakeholders in the sphere of culture, economy and public sector*, resulting in the lack of mutual understanding of needs and ways of acting of various entities from different interest groups;

- *Insufficient knowledge on the possibilities of economic/tourist valorisation of cultural heritage*, consequently leading to the low level of development of entrepreneurship based on cultural resources.

- *Imbalance between the needs of the local population and the interest of visitors* and tourists in the creation of cultural offer

Main challenges related to other assets

As far as other assets of supply are concerned, Croatia's most serious challenges relate to public infrastructure, both traffic and communal, being as follows:

- Some local roads are poorly maintained or in poor condition;
- Urban public transportation is mostly of low quality;

- There is a major lack of parking spaces in urban destinations;
- There is a high number of traffic accidents;
- Railroad network is in bleak state and train traffic is slow;
- There is an insufficient quality of harbour port and stevedoring services;
- The number of connections between islands by boat is unsatisfactory;
- Cities face a shortage of dedicated and signposted bicycle trails;
- Both traffic signage and tourism signage are of a low quality;
- The system of fresh water supply along the coastal cities is in poor shape;
- Sewage network and treatment are substandard;
- Treatment of municipal solid waste is inadequate;
- Renewable energy sources are still not sufficiently used.

As far as accommodation supply is concerned, mayor challenges stem from the fact that:
- There is still a high seasonality of operations;
- There is a lack of internationally recognizable /branded lodging facilities;
- The ratio of vacation rentals in total accommodation capacity is too high in relation to hotel capacities that must be generators of a destination's quality;
- Generally speaking, tourist superstructure (e.g. conference centres, wellness/spa centres, etc.) is insufficiently developed;
- There is a limited supply of special interest tourism products (Klarić et al, 2012).

Elaboration of the most important national tourism strategic documents, and tourism products proposed by them

The most relevant tourism strategic document in Italy is the "Piano Strategico di Sviluppo del Turismo 2017-2022" – PST 2017-2022 (Strategic Plan of Development of the Tourism finalized by the Italian Ministry of the Cultural Assets and Activities and of the Tourism that has a double goal: enhance Italy as a country of the art and of the culture and rule the development of the tourism field , in a context of global growth.

The vision of PST is to re-design the planning in the field of the economy of tourism, re-locating it at the centre of the national policies, proving operational means to the strategic policy to create an homogeneous vision in the theme of tourism and culture.

Key pillars of PST are:

1) Territory and Heritage: durable valorisation and management;
2) The tourist at the centre: adhere to the requests and to expectations of the tourist;
3) Competitiveness and work: competitiveness, added value, quantity and quality of the tourism employment;
4) Integration and Inter-operationality: Inter-operationality, sharing with institutions and operators.

PST has PST has 4 general goals, 13 specific goals and 52 lines of intervention. The plan has been finalized through an open and inclusive collaborative process. The plan is in evolution with an active involvement of the partners, of the stakeholders, of the tourism operators and of the local communities. The annual outputs are constantly monitored in order to verify the status of its implementation and its consequences, in order to adapt the programme to changes and to the challenges of the global scenarios, trouble-shooting all the criticalities.

PSP has as transversal principles the sustainability, the innovation and the accessibility that are implemented in the 4 general goals:

1) **Innovate, specialize and integrate the national offer**: gate of Italy: big hubs of the country, Atlas of the Italian Destinations, Experimental system of the management of the tourism flows, Foundation Italian Railways – Historical Trains, 2016 year of the walks, 2017 year of the historic villages ;
2) **Increase the competitiveness of the touristic system:** The National Gallery Museum green, European Chart for the Sustainable Tourism in the Protected Areas - CETS;
3) **Develop an effective and innovative marketing**; Maritime routes of the Silk (Project UN-UNWTO and EU), 2018 year of the Italian food in the world;
4) **Finalize and efficient and participated governance in the process of elaboration and definition of the Plan and of the tourist Policies**: Global Forum on Tourism Statistics, New ISTAT Protocol (Italian National Institute of Statistics), adoption of specific system of monitoring.

PST 2017-2022 has as milestone the sustainability as element of competitiveness. In fact, the sustainability is not seen only in the environmental perspective, but also with reference cto the economic development and to the social dimension.
This enlarged vision of territorial and touristic development aims to enhance:

1) The distribution of opportunities among big attractors and widespread heritage cof the country, bringing employment also in that Italy still to be discovered, that still preserves a widespread heritage of great value and attractiveness;
2) The activation of a virtuous cycle between the qualification of tourism flows in the direction of the sustainability, the recovery of the environment and of the landscape and the attraction of a new and more diversifies tourism demand.

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