

# BLUTOURSYSTEM

## Tracks for interviews and Report on interview

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## Document references

**Project:** BLUTOURSYSTEM “*Knowledge platform, skills and creative synergies for blue tourism ecosystem development*”

**Axis:** BLUE INNOVATION

**Specific Objective:** 1.1 - Enhance the framework conditions for innovation in the relevant sectors of the blue economy within the cooperation area

**Work Package N.:** WP3

**Work Package Name:** Knowledge based tools (KBT) creation CB knowledge networks development

**Activity N.:** 3.2

**Activity Name:** Elaborating a participated analysis of business ecosystems needs, gaps and potentials

**Deliverable N.:** 3.2.2

**Deliverable Name:** Tracks for interviews and Report on interview

## Credits

**Partner in charge:** Region of Istria

**Report elaborated and edited by:** Anica Dobran Černjul, Region of Istria, external expert Kristina Afrić Rakitovac, associate professor, Juraj Dobrila University of Pula, Faculty of Economics and Tourism “Dr. Mijo Mirković”

**Partners involved in the deliverable:** Veneto Region, Puglia Region, LAG 5

**Data elaboration by:** University of Venice Ca Foscari

**Track of interview:** Region of Istria, University of Venice Ca Foscari, University of Spilt

**Checked and reviews by:** QPM

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## Table of Contents

1.	The pilot areas: where new business ecosystem can arise to develop creative and eco-innovative tourism product in the Adriatic destination .....	5
1.1.	Veneto Region .....	5
1.2.	Puglia Region .....	6
1.3.	LAG 5 .....	7
1.4.	Region of Istria .....	8
2.	The consultation process.....	9
3.	Track of interview template.....	10
4.	How stakeholders in pilot areas understand the gaps and needs about the destination “Adriatic” .....	32
Annexes:		
-	Report on interview results in Veneto Region.....	35
-	Report on interview results in Puglia Regione.....	102
-	Report on interview results in Dubrovnik Region.....	164
-	Report on interview results in Istria Region.....	225

## Abstract

The scope of this document is to point out gaps and needs individuated through consultation and interviews of stakeholders in pilot areas identified by the territorial project partners Veneto Region, Puglia Region, LAG 5 and Istria Region.

The track of interview, shared by all the partnership, has been used to involve and consult a panel of stakeholders with the double purpose of (i) improving the SCBDS and (ii) pointing out gaps and needs of the CB area, while disseminating the project.

The reports concerning each pilot area are enclosed territorial.

# 1. The pilot areas: where new business ecosystem can arise to develop creative and eco-innovative tourism product in the Adriatic destination

Pilot areas within this study were territories of the Veneto Region, Puglia Region, LAG 5 and Istria Region.

## 1.1. *Veneto Region*

Between 2016 and 2017 the upturn in tourism consumption in Italy was consolidated. In fact, in 2017 the Italian tourism accommodation recorded 122.3 million arrivals and just shy of 427 million overnights. Approximately 60% of the increase is due to the raise of foreign tourists, and with more than 2.964.951 arrivals, + 5.2% compared to 2016, they reached almost 60 million (59.729.190), a figure never recorded. In the period 2012-2017, total arrivals in Italy increased by + 17.8% and overnights by + 12.1%.

The tourism phenomenon grows thanks to the increase in foreign arrivals + 22.6% and + 17.4% for overnights. In this framework, in 2017 the Veneto region with 19.172.576 arrivals and 69.184.082 overnights was confirmed as the first tourist region in Italy, with a widespread entrepreneurial spirit and an offer that ranges from the sea to the city of art, from summer and winter mountains to the lake, from spas to natural parks.

Furthermore, 15% of foreigners' expenses in Italy are allocated in Veneto. Starting from the macro Veneto pilot-area, 4 pilot sub-areas were identified based on the criteria of the BLUTOURSYSTEM project (creative tourism, ecotourism, innovation) and on the eligible areas. Each area has its own level of development and they are homogeneous territorial systems. In each sub - pilot area a DMO operates in the form of a public - private sharing table. In this respect, only the Venetian lagoon, which is one of the 4 chosen areas, has a different condition. It belongs to two different territorial tourism systems, among those identified by the Veneto Region through its own law: "City of art" and "Sea and beaches".

Five DMOs work over it. However, the focus will be on the Lagoon as a whole, both for criteria of this project and for the characteristics of this unique ecosystem, which presents partially homogeneous needs and features. It is currently represented, among others, by an association of private operators recently founded in the framework of the Interreg Europe Christa project and named OTS. These areas, with variable criteria, will benefit by this project initiatives, developing useful skills to face the current changes, abovementioned.

The identified pilot areas are: Caorle, Laguna veneta – Venetian lagoon, Terme e colli euganei – Euganean Spa and hills, Po e il suo Delta – Po and its Delta.

## 1.2. Puglia Region

The questionnaire in question was administered in October 2018, selecting 10 respondents from: Locorotondo, Ostuni, Polignano a Mare, Fasano, Castellana Grotte, Monopoli, Lecce, Trani, Bari. Respondents they were chosen according to a territorial criterion, trying to maintain the balance between the categories of economic operators and public bodies. One aspect that should be emphasized from the outset is the great willingness of the interviewees to collaborate on the project, grasping its potential and underlining the importance of the commitment to "always doing better". The municipalities that you intend to involve for the administration of the "Blutoursystem" questionnaire are all those municipalities that are territorially influenced by the presence of the truly, from the coast to the valley of Itria, in particular: Castellana Grotte, Fasano, Locorotondo, Monopoli, Ostuni, Polignano a Mare. In addition to these, we decided to involve Lecce and Trani, due to their significant importance in the Apulian tourist context. In this way, it is believed that the homogeneity and relevant size requirements can be sufficiently met by preserving the governability of the STT. In this way it is believed that the homogeneity and relevant size requirements can be sufficiently met. The area of reference involves the provinces of Bari, Bat, Brindisi and Lecce. The area represents in terms of population about 8% of the Apulian population with an approximate total of 300,000 inhabitants (ISTAT data, Census 2018).

From the analysis of the final data of 2017 and the forecast ones of 2018, still incomplete, of the performance of the tourism sector in Puglia, a rising picture emerges which is about 15 million total overnight stays of national and foreign tourists, bringing the region into the top ten overnight stays in Italy.

There remains a marked seasonality in the tourist flows directed towards the region: 59.7% of arrivals and 79.3% of the total presences are concentrated between June and September. The presence of foreign tourists is more evenly distributed during the year, with a concentration in the months of April, June, and September. The presence of Apulian tourists in the same region is significant, with + 19.05% compared to the previous year and tourists from Lombardy + 15.29% and Lazio + 13.12.

The average stay of Italian tourists in Puglia is 4.9 days; in addition, the average stay in the complementary financial years is 8.6 days, far higher than the average stay in hotels of 3.2 days.

### 1.3. LAG 5

The area of LAG 5 belongs to the most southern Croatian county, Dubrovacko – neretvanska. It consists of the island of Korcula, Mljet and Lastovo , the peninsula of Peljesac and the narrow coastal part of Dubrovnik seaside region. It borders with Splitsko – dalmatinska county and the Republic of Bosnia and Hercegovina up in the north and with the City of Dubrovnik in the south. The test pilot area consists of twelve local self – government units; eleven counties and one town (the Town of Korcula) with an area of 5166 km<sup>2</sup> and it is extremely rarely inhabited. With the total number of 25 578 inhabitants it is the least populated part of the Dubrovacko- neretvanska county ( about 22% of the total population of Dubrovacko- neretvanska county or 0.6% of the population of the Republic of Croatia; the density of population is 5,53 inhabitants per square kilometer), with the constantly growing trend of depopulation and people growing old. Negative demographic trends are a huge obstacle to any kind of stimulus to the development in economy or tourism. This trend is the most evident in the county of Mljet and the least in the Town of Korcula, which is one of the most populated units.

Most of the area is on the coast and all the parts have the same or very similar geomorphologic and climate characteristics, the characteristics of biodiversity, economy, social and cultural- historical characteristics. The main characteristics of the area are spatial fragmentation and insufficient traffic connectivity. The sea traffic plays the most important role in the traffic connectivity, which, in order to become more effective, demands faster and more frequent coastal lines, especially in summer season. It is necessary for the sea ports to be reconstructed and modernized. Road traffic; state, county and especially local roads, also demands reconstruction. The area is not connected to the mainland with the airlines apart from the heliports which are used for emergency situations and aids of the local population. The closest international airports are Split and Dubrovnik. The general characteristic of the area is a bad economic situation marked with the low profitability of the small and large – scale enterprises, the low quality of the business environment and the lack of supporting institutions and programmes, the low level of investments in new technologies and innovations, the low motivation and education level of the workforce; structural unemployment and mostly seasonal employment and disproportion between the supply of the workforce and the demand of the economy, as well as the profile of the workforce produced by educational institutions which are needed for the development of the key economies. According to the values of the development index, the area fits into the Croatian average.

#### **1.4. The Region of Istria**

Istria Region is the westernmost county of the Republic of Croatia. It is situated in the largest peninsula of the Adriatic Sea. Its area is 2.820 km<sup>2</sup> (triangle Dragonja, Kamenjak, Učka). According to the population census realized in 2011, Istria has 208.055 inhabitants. The cost length is 445 km. There are three rivers: Mirna, Dragonja and Raša. Istria Region is considered as the largest green oasis of the North Adriatic. The coast and the islands are covered with pine woods and easily recognizable green macchia. The basic characteristic of the climate of the Istrian peninsula is given by the Mediterranean climate. Along the coast, it gradually changes towards the continent and it passes into continental, due to cold air circulating from the mountains and due to the vicinity of the Alps.

The administrative Centre of the region is Pazin, with 8.638 inhabitants, while the largest economic, financial, social, educational and cultural center is Pula – Pola with 57.460 inhabitants. There are 10 towns and 30 municipalities. The Istria Region is the second most developed region in Croatia, after the capital city Zagreb. According to the Croatian Chamber of Commerce, the GDP per c. in 2015 was 13.225 EUR, i.e. 25% above the Croatian average. The most important economic sectors, regarding the number of economic subjects and financial indicators, are manufacturing industry, tourism and trade generating almost 70 % of the total revenues. In the field of industry, the most developed branches are shipbuilding, production of construction material (lime, cement, brick, stone), tobacco products, furniture, electric machines and appliances, parts for the automobile industry, glass, processing metals, plastic, wood, textile, and the production of food. Great attention has been given to the revitalization of agriculture in the previous few years, which marked a significant improvement in wine and olive growing and in the system of organic food production. There are more than 20 entrepreneurial business zones.

Istria is the most visited tourist region in Croatia, realizing about one third of all tourist arrivals and overnights in Croatia. Out of 10 most visited towns in Croatia, 5 are situated in the region (Rovinj, Poreč, Umag, Medulin and Pula). Tourism is considered as one of the most perspective economic sector in the County with significant potential multiplicative impact on the whole economy. In the last few years there were significant investments towards increasing the quality of accommodation (in hotels, apartments, camp, villas, etc.). Many selective forms of tourism are offered, e.g. nautical, sports, congress, cultural, rural, health, gastronomic, etc. promoting Istria as one of the most attractive destination in Croatia. (Croatian Chambers of Commerce, [www.hgk.hr](http://www.hgk.hr))



## 2. The consultation process

Project territorial partners Veneto Region, Puglia Region, LAG 5 and Istria Region conducted interviews with relevant stakeholders within their territory. Results of the interviews were processed and elaborated for each of them in separate document. Track of interview and Analyses of tracks for interviews are annexes of this report.

Track of interview

# TRACK FOR INTERVIEWS

Activity

## 3.2. ELABORATING A PARTICIPATED ANALYSIS OF BUSINESS ECOSYSTEM NEEDS, GAPS AND POTENTIALS

### 3.2.2. Tracks for interviews and Report on interview

<b>DELIVERABLE SUMMARY</b>	
<b>PROJECT INFORMATION</b>	
<b>Project acronym:</b>	BLUTOURSYSTEM
<b>Project title:</b>	Knowledge platform, skills and creative synergies for blue tourism ecosystem development
<b>Project ID:</b>	10042761
<b>Starting date:</b>	01.01.2018.
<b>Ending date:</b>	30.06.2019.
<b>Lead partner organisation:</b>	Ca' Foscari University of Venice – Department of Economics
<b>Name of representative:</b>	Bugliese Michele
<b>Project manager:</b>	Jan Van der Borg
<b>Quality manager</b>	Raffaella Lioce
<b>E-mail:</b>	blutour@unive.it
<b>Telephone number:</b>	+390412348211
<b>DELIVERABLE INFORMATION</b>	
<b>Title of the deliverable:</b>	Track for interviews
<b>WP no. / activity related to the deliverable:</b>	WP3/3.2.2.track for interviews
<b>Type (internal/restricted/public):</b>	Internal
<b>WP leader:</b>	Ca' Foscari University of Venice – Department of Economics
<b>Activity leader:</b>	Region of Istria
<b>Participating partner(s):</b>	All partners
<b>Author:</b>	Region of Istria
<b>E-mail:</b>	anica.cernjul@istra-istria.hr
<b>Telephone number:</b>	+385 (52) 351 530
<b>DELIVERY DEADLINE</b>	
<b>Date of the delivery:</b>	15.09.2018.

The track of interview and report is structured in 5 sessions:

- 1) *SUGGESTIONS FOR THE CALIBRATION OF THE SMART CROSS BORDER DATA SYSTEM (SCBDS) AND THE CREATION OF NEW INDICATORS;*
- 2) *GAPS AND NEEDS IN CAPACITY BUILDING PROCESSES (at CB Area level);*
- 3) *IDENTIFICATION OF THE BUSINESS ECOSYSTEM OF THE CHOSEN PILOT AREA*
- 4) *GAPS AND NEEDS TOWARDS INNOVATION OF THE PILOT AREA'S BUSINESS ECOSYSTEM*
- 5) *POTENTIALS OF THE PILOT AREA'S BUSINESS ECOSYSTEM*

The TRACK represents the deliverable 3.2.2 of the BLUTOURSYSTEM project. It is used to involve and consult a panel of stakeholders with the double purpose of (i) improving the SCBDS and (ii) pointing out gaps and needs of the CB area, while disseminating the

project.

Territorial partners (Veneto Region, Puglia Region, Istria Region and LAG) establish a PANEL of stakeholders with a good knowledge about the tourism in the CB area and in pilot areas particularly.

The outcome of the panel consultation (REPORT ON INTEVIEW) are transferred to Veneto Region who develops the D.3.2.3 and to Universities who elaborate the D.3.3.1.

**DEADLINE FOR PANEL CONSULTATION: 15th October 2018**

**DEADLINE FOR REPORT ON INTERVIEW: 30th October 2018**

## 1. SUGGESTIONS FOR THE CALIBRATION OF THE SMART CROSS BORDER DATA SYSTEM (SCBDS) AND THE CREATION OF NEW INDICATORS

Intro: It is strongly suggested to demonstrate the features of the Smart Integrated Tourism Data System which offers information, scenarios and indicators on competitiveness, attractiveness and sustainability in order to improve the TOURMEDASSETS knowledge framework about the tourism health of MED destinations and, help stakeholders to “shape tourism” in a sustainable way. If questionnaire will be sent via e-mail, it is suggested to send the link to the Shapetourism Observatory (<http://www.shapetourism.eu/main-output/shapetourism-observatory/>) and link to video (<https://www.youtube.com/embed/0I5nSajGW5o>) with explanation of the Observatory Tool.

To which extent you find important information about following indicators: (scale 1-7, 1-not important, 7-extremly important)?

### I. ATTRACTIONS

Cultural assets	Level of importance (1-7)
Number of UNESCO protected historical monuments	
Number of national level protected historical monuments	
Number and type of cultural events	
Average price of the tickets to cultural attractions and events	
Working hours	
Number of visitors to different historical monuments and heritage	
Type of visitors (single tourist, couple, family, group traveller, ...)	
Origin, age, sex of visitors	

Natural assets	Level of importance (1-7)
Number and type of natural heritage under different type of protection	
Average price of the tickets (where available)	
Working hours	
Number of visitors to protected areas (with payed tickets)	
Type of visitors (single tourist, couple, family, group traveller, ...)	
Origin, age, sex of visitors	

Man-made attractions	Level of importance (1-7)

Number and type of different man-made attractions (theme and entertainment parks, thematic routes and tracks, etc.)	
Average price of the tickets	
Working hours	
Number of visitors to man-made attractions (with paid tickets)	
Type of visitors (single tourist, couple, family, group traveller, ...)	
Origin, age, sex of visitors	

## II. ACCESSIBILITY

### External accessibility

Airplane traffic to/from tourist destinations	Level of importance (1-7)
Number of the LCC carriers available through whole year	
Country of origin for flight travellers	
Daily number of flights	
Average flight ticket price (monthly review)	
Type of travellers (single tourist, couple, family, group traveller, ...)	
Average age of flight travellers	
Services used while staying at tourist destination	
Other _____	

Train traffic to/from tourist destination	Level of importance (1-7)
Country of origin for train travellers	
Daily number of trains (monthly review)	
Average train ticket price	
Type of travellers (single tourist, couple, family, group traveller, ...)	
Average age of train travellers	
Services used while staying at tourist destination	
Other _____	

Ship/Ferry traffic from/to tourist destination	Level of importance (1-7)
Country of origin for ship/ferry travellers	
Daily number of traveller ships/ferries (monthly review)	
Average ship/ferry ticket price	
Type of travellers (single tourist, couple, family, group traveller, ...)	
Average age of travellers	
Services used while staying at tourist destination	

Country of origin for ship/ferry travellers	
Other _____	

#### Internal accessibility (smart solutions)

Indicator	Level of importance (1-7)
Available parking lots	
Information service providers- availability of parking places (smart parking)	
Availability of passenger and road user information service provider in a destination	
Smart hub spots availability (for cars, bikes etc.) in the destination	
Accessibility of the open platform services (UBER taxi)	
Accessibility of smart infrastructural and other solutions for disabled people	
Other _____	

#### III. AMENITIES (ACCOMMODATION/CATERING)

Indicator	Level of importance (1-7)
Distribution of accommodation supply (centre, peripheral area)	
Quality (measured in awarded stars, guest reviews and eco labels)	
Quantity (measured in number of beds)	
Accommodation type (hotels, holiday houses, camps, apartments, ...)	
Number and type of catering facilities (including those awarded with Michelin stars)	
Working hours of restaurants, bars and entertainment places	
Other _____	

#### IV. ANCILLARY SERVICES

Indicator	Level of importance (1-7)
Sport rental equipment (bikes, kayaks, boats, ...)	
Car rental companies	
Working hours of banks and shops	
Number and distribution of ATMs	
Other _____	

#### V. AVAILABLE PACKAGES

Indicator	Level of importance (1-7)
Availability of tour guidance	
Supply of one day trips	
Other _____	

## VI. ACTIVITIES

Number and type of special (creative) activities for tourists	Level of importance (1-7)
Language schools	
Culinary workshops	
Traditional crafts' workshops	
Wine and food tastings	
Treasure hunts	
Outdoor sport activities	
Sailing and water tours	
Sights and landmark sightseeing	
Nature and wildlife activities	
Other _____	

## VII. *Source of destination information*

Destination information from	Level of importance (1-7)
Instagram	
Google analytics (dmo website)	
Facebook analytics (dmo page)	
Google trends (words, country)	
Google search (top 20 results)	
Other _____	



## 2. GAPS AND NEEDS IN CAPACITY BUILDING PROCESSES (at CB Area level)

According to the stakeholder's activity/operative field and considering this operative field in the whole CB area, which are the main gaps and needs in capacity building processes? This means, what are the topics in which the stakeholders feel themselves more lacking and unprepared/incompetent and thus in which they feel to need more training?

Digital competences	Level of importance (1-7)
Social media use and its management	
Social media monitoring	
Website implementation	
E-commerce	
Internet of things	
Geospatial technologies	
Other _____	

Company's internal communication quality	Level of importance (1-7)
At senior management level	
At middle management level	
At lower management level	
Among staff in sales department	
Among staff in catering department	
Among staff in supply department	
Other _____	

Knowledge of foreign languages	Level of importance (1-7)
At senior management level	
At middle management level	
At lower management level	
Among staff in sales department	
Among staff in catering department	
Among staff in supply department	
Other _____	

Company's internal organisation	Level of importance (1-7)
Human resources department	
Long life learning policy	

Strategic management/planning competences	
Operational competences	
Other _____	

Personalisation of the service according to tourist targets	Level of importance (1-7)
Special needs tourists - physical obstacles, food intolerances, food preferences (vegetarian, vegan, etc.), allergies, religious groups' food requirements (kosher, halal...)	
Specific target groups according to age, culture, sexual orientation, single-couple-group-family	
Other _____	

Creation of relationships with	Level of importance (1-7)
Complementary business activities	
Universities/research centres	
Job agencies (e.g. keeping in contact with recently graduated students)	
Local community (community engagement, participatory planning, conflict management partnership)	
Other _____	

### 3. IDENTIFICATION OF THE BUSINESS ECOSYSTEM OF THE CHOSEN PILOT AREA

3.1. Which are the most important tourism stakeholders involved in creation of products/activities within eco-tourism and creative tourism activities in the testing area? Please rate their importance according to influence towards eco-tourism and creative tourism (Order the answers from 1 to 7 where 1 is not important and 7 is extremely important)

**Creative Tourism** is a kind of tourism which offers visitors the opportunity to develop their creative potential through active participation in courses and learning experiences, which are characteristic of the holiday destination where they are taken.

**Ecotourism** is a kind of tourism involving visiting fragile, pristine, and relatively undisturbed natural areas, intended as a low-impact and often small scale alternative to standard commercial mass tourism. It means responsible travel to natural areas conserving the environment and improving the well-being of the local people.

#### Administration

Activities	Eco tourism			
	Level			
	Local	Regional	National	International
Creation/enhancement of products/activities				
Promotion /branding of products/activities				
Distribution/selling of products/activities				
Price creation of products/activities				
Monitoring the process of a product creation and implementation				
Tourism labour knowledge enhancement				
Creative tourism				
Level				
Activities	Local	Regional	National	International
Creation/enhancement of products/activities				
Promotion /branding of products/activities				
Distribution/selling of products/activities				
Price creation of products/activities				
Monitoring the process of a product creation				

and implementation				
Tourism labour knowledge enhancement				

### Destination management organisations

Activities	Eco tourism			
	Level			
	Local	Regional	National	International
Creation/enhancement of products/activities				
Promotion /branding of products/activities				
Distribution/selling of products/activities				
Price creation of products/activities				
Monitoring the process of a product creation and implementation				
Tourism labour knowledge enhancement				
Activities	Creative tourism			
	Level			
	Local	Regional	National	International
Creation/enhancement of products/activities				
Promotion /branding of products/activities				
Distribution/selling of products/activities				
Price creation of products/activities				
Monitoring the process of a product creation and implementation				
Tourism labour knowledge enhancement				

### Private stakeholders

Activities	Eco tourism			
	Level			
	Local	Regional	National	International
Creation/enhancement of products/activities				
Promotion /branding of products/activities				
Distribution/selling of products/activities				

Price creation of products/activities				
Monitoring the process of a product creation and implementation				
Tourism labour knowledge enhancement				
	<b>Creative tourism</b>			
	Level			
<b>Activities</b>	Local	Regional	National	International
Creation/enhancement of products/activities				
Promotion /branding of products/activities				
Distribution/selling of products/activities				
Price creation of products/activities				
Monitoring the process of a product creation and implementation				
Tourism labour knowledge enhancement				

### Tourists

	<b>Eco tourism</b>			
	Level			
<b>Activities</b>	Local	Regional	National	International
Creation/enhancement of products/activities				
Promotion /branding of products/activities				
Distribution/selling of products/activities				
Price creation of products/activities				
Monitoring the process of a product creation and implementation				
Tourism labour knowledge enhancement				
	<b>Creative tourism</b>			
	Level			

Activities	Local	Regional	National	International
Creation/enhancement of products/activities				
Promotion /branding of products/activities				
Distribution/selling of products/activities				
Price creation of products/activities				
Monitoring the process of a product creation and implementation				
Tourism labour knowledge enhancement				

### Residents

Activities	Eco tourism			
	Level			
	Local	Regional	National	International
Creation/enhancement of products/activities				
Promotion /branding of products/activities				
Distribution/selling of products/activities				
Price creation of products/activities				
Monitoring the process of a product creation and implementation				
Tourism labour knowledge enhancement				
Activities	Creative tourism			
	Level			
	Local	Regional	National	International
Creation/enhancement of products/activities				
Promotion /branding of products/activities				
Distribution/selling of products/activities				
Price creation of products/activities				

Monitoring the process of a product creation and implementation				
Tourism labour knowledge enhancement				

**Civil sector**

Activities	Eco tourism			
	Level			
	Local	Regional	National	International
Creation/enhancement of products/activities				
Promotion /branding of products/activities				
Distribution/selling of products/activities				
Price creation of products/activities				
Monitoring the process of a product creation and implementation				
Tourism labour knowledge enhancement				
Activities	Creative tourism			
	Level			
	Local	Regional	National	International
Creation/enhancement of products/activities				
Promotion /branding of products/activities				
Distribution/selling of products/activities				
Price creation of products/activities				
Monitoring the process of a product creation and implementation				
Tourism labour knowledge enhancement				



**Associations/organizations related to cultural and natural heritage of the area**

Activities	Eco tourism			
	Level			
	Local	Regional	National	International
Creation/enhancement of products/activities				
Promotion /branding of products/activities				
Distribution/selling of products/activities				
Price creation of products/activities				
Monitoring the process of a product creation and implementation				
Tourism labour knowledge enhancement				
Creative tourism				
Level				
Activities	Local	Regional	National	International
Creation/enhancement of products/activities				
Promotion /branding of products/activities				
Distribution/selling of products/activities				
Price creation of products/activities				
Monitoring the process of a product creation and implementation				
Tourism labour knowledge enhancement				

*3.2. Please evaluate the level of impact of every aforementioned stakeholder according to following topics (from 1 to 7 where 1 means no impact at all and 7 means the highest impact)*

Impact of public institutions at different levels:	Level of impact						
	1	2	3	4	5	6	7
Destination's attractiveness (refers to how destination's assets satisfy the visitors' needs)							
Destination's supply							

<b>competitiveness</b> (refers to how efficient is destination in relation to their competitors?)							
<b>Destination's sustainability</b> (refers to the optimal development of a destination from the business, society and eco systems points of view)							
<b>Destination's online reputation</b> (refers to online public opinions using various forms of social media)							
Creation of smart /ICT solutions in a destination							
Price formulation in a destination							
Creation of physical infrastructure in a destination							

DMO's impact on:	Level of impact						
	1	2	3	4	5	6	7
<b>Destination's attractiveness</b> (refers to an extent destination's assets satisfy the visitors' needs)							
<b>Destination's supply competitiveness</b> (refers to how efficient is destination in relation to their competitors)							
<b>Destination's sustainability</b> (refers to the optimal development of a destination from the business, society and eco systems points of view)							
<b>Destination's online reputation</b> (refers to online public opinions using various forms of social media)							

Creation of smart /ICT solutions in a destination							
Price formulation in a destination							
Creation of physical infrastructure in a destination							

Private stakeholders' impact on:	Level of impact						
	1	2	3	4	5	6	7
<b>Destination's attractiveness</b> (refers to how destination's assets satisfy the visitors' needs)							
<b>Destination's supply competitiveness</b> (refers to how efficient is destination in relation to their competitors?)							
<b>Destination's sustainability</b> (refers to the optimal development of a destination from the business, society and eco systems points of view)							
<b>Destination's online reputation</b> (refers to online public opinions using various forms of social media)							
Creation of smart /ICT solutions in a destination							
Price formulation in a destination							
Creation of physical infrastructure in a destination							

Tourists' impact on:	Level of impact						
	1	2	3	4	5	6	7
<b>Destination's attractiveness</b> (refers to how destination's assets satisfy the visitors' needs)							
<b>Destination's supply competitiveness</b> (refers to how efficient is destination in relation to their competitors?)							
<b>Destination's sustainability</b> (refers to the optimal development of a destination from the business, society and eco systems points of view)							
<b>Destination's online reputation</b> (refers to online public opinions using various forms of social media)							
Creation of smart /ICT solutions in a destination							
Price formulation in a destination							
Creation of physical infrastructure in a destination							

**3.3. If applicable, circle out what forms of collaborative actions exists in your destination (Please use Yes/No- Multiple answers):**

Are there any forms of collaborative actions among stakeholders?	Yes	No
Formal networks		
Clusters		
Alliances		
Local action groups		
Franchising and management contracts		
Informal networks		
Other, name what _____		

Who are the most common partners in the formal types of collaborative activities in your destination?	Yes	No
Local administration and other public institutions and DMO		
Private entities		
Public entities		
Civil sector entities		
Public sector and local community actors		
Other, name what _____		

What types of activities are most commonly shared between different stakeholders?	Yes	No
Creation/enhancement of the products/activities		
Promotion /branding of products/activities/destination		
Distribution/selling of products/activities		
Price creation of products/activities		
Monitoring the process of a product/service creation and implementation		
Tourist labour knowledge enhancement		
Adapting and developing Destination Management Plans		
ICT dissemination and implementation		
All of the above		
None of the above		
Other, name what _____		

Assets analysis- please rate importance of each asset for you region/pilot area:

Assets	Level of importance						
	1	2	3	4	5	6	7
<b>Antropic capital</b>							
Cultural attractions and sites							
Accommodation							
Transport and accessibility							
<b>Economic capital</b>							
Labour quality							
Entrepreneurship development							
<b>Environmental capital</b>							
Natural resources and landscape							
Climate							
<b>Institutional capital</b>							
Efficiency of public administration							
<b>Social capital</b>							
Cooperation							
Participation in co- creation, decions making							



#### 4. GAPS AND NEEDS TOWARDS INNOVATION OF THE PILOT AREA'S BUSINESS ECOSYSTEM

4.1. Which are the main gaps and needs in the pilot area's business ecosystem?

In other terms: what, at the moment, prevent the sector to reach a good level of innovation which can be translated into a major competitiveness, attractiveness and sustainability of tourism in the area?

Main gaps and needs in the pilot area's business ecosystem	Level of impact						
	1	2	3	4	5	6	7
Low level of knowledge							
Poor empowerment processes							
Apathy							
Asymmetric information							
Low level of cooperation							
Other							

4.2. In particular, which are the main gaps and needs in the field of innovation in tourism?

Main gaps and needs of the pilot area in the field of innovation in tourism	Level of impact						
	1	2	3	4	5	6	7
Low level of knowledge							
Poor empowerment processes							
Apathy							
Asymmetric information							
Low level of cooperation							
Other							

## 5. POTENTIALS OF THE PILOT AREA'S BUSINESS ECOSYSTEM

5.1. *Which are the tourism sector development potentials, which can be exploited in the pilot area?*

---

5.2. *In particular, are there potentials in developing eco-tourism? If yes, please give some examples*

---

5.3. *In particular, are there potentials in developing creative tourism? If yes, please give some examples*

---

## 4. *How stakeholders in pilot areas understand the gaps and needs about the destination "Adriatic"*

Gaps and needs perceived by the actors of the cross - border area have been highlighted through the "BLUTOURSYSTEM" questionnaires administered in the second half of 2018. Gaps and needs perceived by the actors of the target destinations have been highlighted both through the "BLUTOURSYSTEM" questionnaires administered in the second half of 2018 and by comparing the latter with the results of meetings organised by the Veneto Region during the months of May and June 2018, involving tourism stakeholders for the definition of the Strategic Tourism Plan of the Veneto region. We will list some figures emerged through the interviews and questionnaires administered at transnational level.

With reference to accessibility, it can be noted that the data on the services used to reach the destination and locally, and also the ancillary services related to the various types of transport, are considered particularly interesting for the interviewed territorial actors.

The results show differences between Italian and Croatian stakeholders just according to the kind of transportation (train, flight, ship etc.) and their level of maintenance, but in general, the accessibility data are considered important. Particular attention is paid to smart solutions adopted for the mobility in the destination. The need for training is felt crucial for all levels, lower, middle and senior management levels, with a slight preference on senior level. It is important for transnational stakeholders to maximise the capability to transform destination resources into tourism product even taking into account a diversification of them tailored on specific needs and services.



Networking, creation of relationship, skills as defining and planning shared strategies are felt as pivotal. With reference to digital competences and innovation, stakeholders feel this is a challenging factor for which they need more training. In general, the data show that actors feel more influenced by local and regional level organizations and less by national or international level both in relation to public institutions and for tourism organisations.

But even if local and regional level are perceived more than other levels, LAG5 highlighted that regional DMOs have limited capabilities both at financial and organizational level, which seems to be in line with the abovementioned necessity to improve the capability of creation of relationships, designing and planning strategies. Among stakeholders addressed, creative and eco-tourism are not differentiated. From the joint reading of the answers concerning the evaluation of the impact and the influence of the main public and private stakeholders, the impact of public institutions is mainly perceived on sustainability policies even at a transnational level, on infrastructure management with a slight difference from the south Adriatic area.

The DMOs play an important role, according to the responses, mainly on attractiveness, competitiveness, sustainability and reputation, while the other indicators such as ICT solution, price formulation and creation of physical infrastructure show quite different results. Concerning the Private stakeholders' groups, looking at the data, they are felt as influential on attractiveness and competitiveness on Italian side, but less on the Croatian area; their impact on price formulation and reputation are felt quite high and similar at cross-border level. Tourists are co-responsible for reputation. In general, the need for controlling and monitoring is considered important: on the one hand for training and improving competences and on the other hand for the perceived necessity of cooperation and sharing the process. The attitude of cooperation is commonly perceived in relation to the fields of Destination Management, creation and promotion of products, while it is less perceived with regard to marketing policies, pricing policies and monitoring process.

## Annexes

- Report on interview results in Veneto Region
- Report on interview results in Puglia Regione
- Report on interview results in Dubrovnik Region
- Report on interview results in Istria Region



# BLUTOURSYSTEM

Veneto Region – Report on interview results

rev. 1 – 29<sup>nd</sup> November 2018

## Document references

deliverable: **3.2.2 Tracks for interviews and Report on interview**

## Credits

edited by: Partner n. 1 – Veneto Region Tourism Department

elaborated by: Project manager

checked and reviews by: QPM

approved by: Steering Committee

## Scope:

BLUTOURSYSTEM provides tourism operators with tools and skills to develop new business ecosystems. Capitalizing the knowledge gained with TourMedAssets, the project steers decision makers to rethink tourism, reduce gaps and design eco-innovative scenarios thus to promote sustainable growth.

The project aims to stimulate competitiveness, innovation and creative enhancement of the tourism offer.

The main aim is to enrich the analytical skills of stakeholders in order to improve the sustainable and creative tourism sector, while developing new knowledge based on advanced tools and services.

For this reason, coaching sessions will be activated in some pilot areas in the eligible areas of the program and other dissemination and formative activities, for local actors.

Specific information about gaps and needs have been thus collected through interviews submitted to 10 stakeholders, who represent both public and private sector in the tourism field.

The scope is understanding which topics are perceived as pivotal by the operators for an optimal management, which areas need training sessions or which ones are already covered. This should help to calibrate the analysis and tourism measurement tools and the capacity building activities.

## Targets

Specific information about gaps and needs have been thus collected through interviews submitted to 10 stakeholders, who represent both public and private sector in the tourism field.

Respondents were chosen according to a territorial criterion, trying to maintain the balance between the categories of economic operators and public bodies.

For public dissemination: Yes

## Table of contents

Pilot area description .....	37
Panel of stakeholders interviewed .....	47
Stakeholders addressed .....	48
Outcomes from the interviews.....	48
<b>Conclusion: Gaps and needs TO BE DONE WITH UNIVE</b> .....	101

## Pilot area description

### Definition of the context

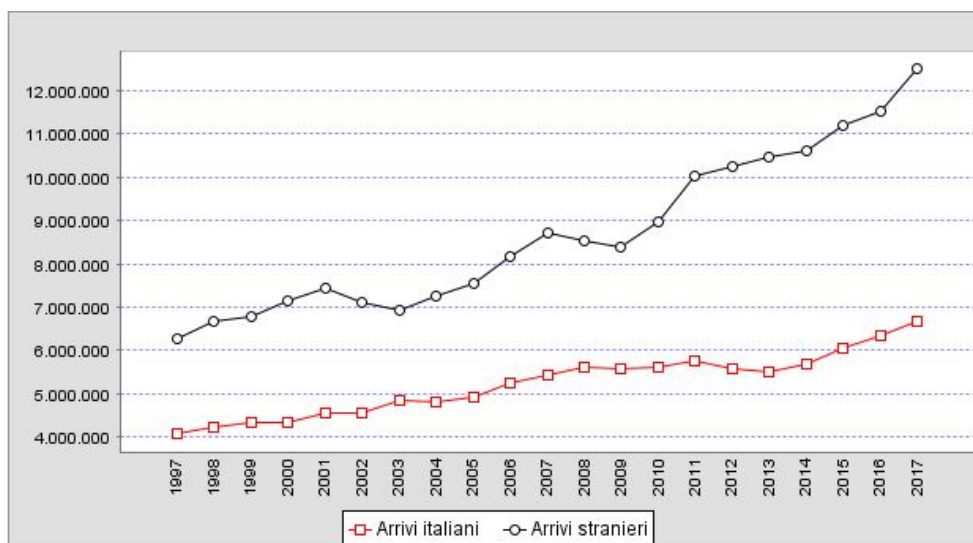
Between 2016 and 2017 the upturn in tourism consumption in Italy was consolidated. In fact, in 2017 the Italian tourism accommodation recorded 122.3 million arrivals and just shy of 427 million overnights.

Approximately 60% of the increase is due to the raise of foreign tourists, and with more than 2.964.951 arrivals, + 5.2% compared to 2016, they reached almost 60 million (59.729.190), a figure never recorded.

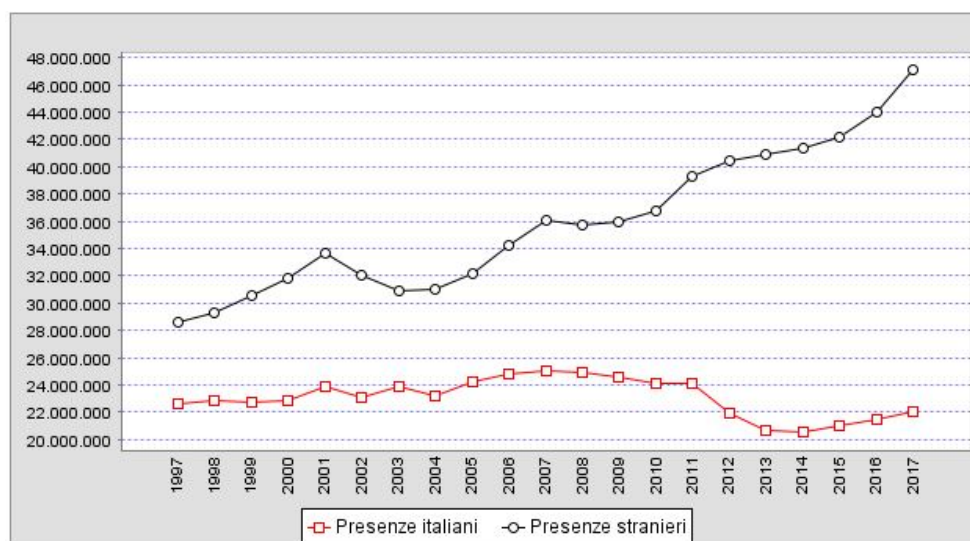
In the period 2012-2017, total arrivals in Italy increased by + 17.8% and overnights by + 12.1%. The tourism phenomenon grew thanks to the increase in foreign arrivals + 22.6% and + 17.4% for overnights..

In this framework, in 2017 the Veneto region with 19.172.576 arrivals and 69.184.082 overnights was confirmed as the first tourist region in Italy, with a widespread entrepreneurial spirit and an offer that ranges from the sea to the city of art, from summer and winter mountains to the lake, from spas to natural parks. Furthermore, 15% of foreigners' expenses in Italy are allocated in Veneto.

## Tourist arrivals in Veneto region



## Tourist overnights in Veneto region



Veneto is known for its destinations, Venice and other cities of art, Verona, Padova, Vicenza, and also for the Dolomites and Cortina, Bibione, Jesolo, Cavallino, Caorle and all the beaches of the upper Adriatic, the Lake of Garda, the Po Delta, the Lagoon, the Euganean Spas of Abano and Montegrotto, Treviso and its local products, the walled cities, the historical centers and the many other places that are at the base of its tourist success.

**Today, however, it may not be enough:** the huge changes that have characterized the tourism market have made inappropriate the methods of spontaneistic management of the tourism

offer supported by both local authorities and private sector. The ability to adapt to changes is the key factor to fully preserve their previous successful positions.

Tourism should contribute to the growth of the economic, social and sustainable well-being: this is one of the objectives of the Veneto Strategic Tourism Plan, that was presented to the public on 24 October 2018. Therefore, the innovation of the generation process to develop new products and to support the design of new routes is crucial for the current and future destinations.

## BLUTOUSYSTEM AND THE PILOT AREAS IN THE VENETO REGION

Starting from the macro Veneto pilot-area, 4 pilot sub-areas were identified based on the criteria of the BLUTOUSYSTEM project (creative tourism, ecotourism, innovation) and on the eligible areas. Each area has its own level of development and they are homogeneous territorial systems. In each sub - pilot area a DMO operates in the form of a public - private sharing table. In this respect, only the Venetian lagoon, which is one of the 4 chosen areas, has a different condition. It belongs to two different territorial tourism systems, among those identified by the Veneto Region through its own law: "City of art" and "Sea and beaches".

Five DMOs work over it. However, the focus will be on the Lagoon as a whole, both for criteria of this project and for the characteristics of this unique ecosystem, which presents partially homogeneous needs and features. It is currently represented, among others, by an association of private operators recently founded in the framework of the Interreg Europe Christa project and named OTS.

These areas, with variable criteria, will benefit by this project initiatives, developing useful skills to face the current changes, abovementioned.

The identified pilot areas are:

- *Caorle*
- *Laguna veneta – Venetian lagoon*
- *Terme e colli euganei – Euganean Spa and hills*
- *Po e il suo Delta – Po and its Delta*





## CAORLE

Destination Management System: DMO Caorle

Municipalities involved: Caorle and Concordia Sagittaria.

Caorle is a city of about 11,000 inhabitants offering hospitality with over 250 small and medium-sized hotels, numerous apartments, tourist villages and campsites. The services for seaside tourism are excellent.

Since 1992, its beaches have received the "blue flag" award, with more than 18 kilometers of beach divided into two equipped beaches (Levante and Ponente) as well as Porto Santa Margherita, Duna Verde, Lido Altanea and the Valle Vecchia nature reserve.

According to regional statistics, in 2016 622,039 tourists arrived in the area, divided between 59,7% foreigners and 40,3% Italians for a total of 4,291,891 overnights.

Figures that made Caorle the fifth tourist destination in the Veneto region.

However, the comparison with the data of the last five years shows that the trend in overnights is negative: - 1.0% compared to 2013. The average stay is 6.8 days.

### Data about the Area of this Tourism Destination

	Year 2011	Year 2012	Year 2013	Year 2014	Year 2015	Year 2016
Arrivals	619,141	621,421	606,519	620,841	634,784	622,039
Overnights	4,494,368	4,476,939	4,316,325	4,281,596	4,290,120	4,291,891
Percentage italian arrivals	37.9	36.3	35.7	35.9	38.1	36.6
Percentage foreign arrivals (EU)	58.9	60.3	60.3	60.3	58.3	59.7
Percentage foreign arrivals (extra EU)	3.2	3.4	3.9	3.8	3.6	3.7
Overnights percentage from June to September	93.8	91.9	91	93.8	91.7	91.5
Accommodation	5,462	5,309	5,709	5,045	4,890	4,766
Beds	59,734	59,162	60,982	57,368	56,497	55,814

In the European tourism scenario, Caorle ties its name to that of the Upper Adriatic coast, contributing significantly to give life to one of the most important tourist regions of the Mediterranean basin. Unlike the nearby seaside resorts, Caorle is differentiated by its initial vocation, developing the tourist destination around a historic center where there is still a typically

Venetian atmosphere. This historical heritage is similar to the one of nearby Concordia Sagittaria, whose Roman origins emerge in the relevant archaeological area adjacent to the cathedral.

However, the tourist phenomenon has had a tumultuous development since the fifties of the twentieth century and it developed almost exclusively by the seaside, involving Caorle. In the same historical period, the primary sector, favored by extensive twentieth century reclamation, was central for the development of Concordia Sagittaria, whose residents subsequently found their business in the craft, services and industry in the inner Portogruaro.

The recent evolution of tourism demand calls for Caorle a change in the tourism management. This means that the tourist is more and more demanding and asks for sophisticated products where the experiential component is enhanced. These dynamics lead to an adaptation of bathing services, a rethinking of the tourist season and of the tourism offer.



## TERME E COLLI EUGANEI – EUGANEAN SPA AND HILLS

Destination Management System: DMO Terme e Colli Euganei

Municipalities involved: Montegrotto Terme, Abano Terme, Arquà Petrarca, Baone, Battaglia Terme, Cervarese Santa Croce, Cinto Euganeo, Due Carrare, Galzignano Terme, Este, Lozzo Atestino, Monselice, Rovolon, Teolo, Torreglia, Vò.

The "Terme e Colli Euganei" destination was officially announced last August 2016.

It comprises the area of the Euganean Thermal Basin and the Euganean hills, together with a common mission, linked to a holistic approach of the well-being.

If we go back in the past and look for its original meaning from a social, cultural and economic point of view, we find that tourism in this territory is ancestral, thanks to the thermal water and to its mud. These natural resources are widespread throughout the area in the foothill and are particularly abundant in the towns of Abano, Montegrotto, Battaglia, Galzignano and Teolo, where the tourism industry has given life to the largest thermal basin in Europe.

During the second half of the twentieth century, the tourist success was determined by a tourism product guaranteed by about 100 spas integrated into the hotels and managed with typically corporate dynamics.

It was a choice that was winning for that period and which led to a star-brand location in the European market. However, the modern evolution in the tourism product perspective, towards more sophisticated tourist experiences, has required a change in the approach to tourism and to the tourist management.

The necessity for injecting new life and a rethinking of the strategic objectives of the destination have led to an evolution towards a holistic concept of well-being: not only medical care, but also nature, culture, food and wine, active holidays. In this context the hilly area has well-represented this added value and the whole area is an excellence and represents the largest preventive health area in Europe.

Taking a look at the statistical data, in 2016 805,200 tourists arrived in the area, divided between 32.6% foreigners and 67.4% Italians. The arrivals and overnights have increase in comparison with 2015, respectively by more than 6% and more than 4%, accounting for a total of 3,187,734 total overnights in 2016. The average stay is 3.9 days.

### Data about the Area of the Tourism Destination

	Year 2011	Year 2012	Year 2013	Year 2014	Year 2015	Year 2016
Arrivals	652,854	651,201	669,548	716,115	759,373	805,200
Overnights	3,036,334	2,915,102	2,916,444	3,009,667	3,062,886	3,187,734
Percentage italian arrivals	65.6	64.4	64.2	65.4	65.4	67.4
Percentage foreign arrivals (EU)	25.3	24.9	23.9	22.9	21.2	20.5
Percentage foreign arrivals (extra EU)	9.1	10.8	11.8	11.8	13.4	12.1
Accommodation	497	501	480	446	453	473
Beds	22,242	22,353	22,393	21,668	21,412	21,667



## PO E IL SUO DELTA – PO AND ITS DELTA

Destination Management System: DMO Po e il suo Delta

Municipalities involved: Adria, Ariano nel Polesine, Porto Viro, Porto Tolle, Corbola, Taglio di Po, Rosolina, Gaiba, Polesella, Stienta, Bergantino, Castelmasa.



Highlighting the area potential to the full should be pivotal for the area, and the Destination Management Plan Po and its Delta has identified the main themes on which operators could develop tourism products:

- Culture - landscape – archeology
- Sea beaches - beaches of the park of the delta del po
- Environment and nature
- Sport - wellness – gastronomy
- Unesco - Biosfera MAB reserve

In this scenario, actions are planned planning into general objectives, linked to the following transversal aims:

- development of the loyalty of the previously identified new markets through targeted activities towards generating destinations and diversification of the products;
- Qualification of the destination image on the Italian and foreign markets in relation to the territorial features;

- Coordination of the activities of public and private entities to rationalize information, promotion and communication activities by developing the most appropriate operational synergies;
- Acquisition of cognitive elements for the definition and implementation of promotional actions to consolidate the tourist offer in traditional markets and developing new markets' arrivals;
- Fostering the development of territorial areas, such as fishing valleys, lagoons of the Po Delta, and UNESCO Biosphere Reserve MAB which could be able to offer new and niche products in order to increase the economic tourism levels.

In this context, supporting the enrichment of the management skills and the abilities in analysing flows data is crucial to well-manage a destination in order to achieve the aforementioned objectives.

Taking a look at the statistical data, in 2016 235,681 tourists arrived in the area, divided between 44% foreigners and 56% Italians for a total of 4,291,891 overnights. The average stay was 5.9, with a slight increase compared to the year before.

	Year 2011	Year 2012	Year 2013	Year 2014	Year 2015	Year 2016
Arrivals	220,052	217,460	212,162	217,712	234,076	235,681
Overnights	1,602,086	1,557,759	1,347,686	1,361,065	1,365,088	1,412,513
Percentage italian arrivals	56.2	54.4	51.8	52.8	53.6	56
Percentage foreign arrivals (EU)	36.7	36.8	33.6	34.9	33	32.9
Percentage foreign arrivals (extra EU)	7.1	8.8	14.6	12.4	13.3	11.1
Overnights percentage from June to September	91.8	89.7	88.1	90.2	87.6	87.8
Accommodation	2,385	2,296	2,101	1,936	1,919	2,609
Beds	27,503	27,356	27,069	26,389	26,070	29,036

## LAGUNA VENETA – VENETIAN LAGOON

The Venice Lagoon is a unique world ecosystem that, extending for about 550 km<sup>2</sup>, is the largest wetland in the Mediterranean. Its territory today belongs to the following 9 municipalities: Venice, Chioggia, Codevigo, Campagna Lupia, Mira, Quarto d'Altino, Musile di Piave, Jesolo and Cavallino-Treporti, which are part of the two provinces of Venice and Padua. The largest section belongs to the province of Venice.

Within these area, five DMOs operate, namely:

- Chioggia

- Riviera del Brenta e Terra dei Tiepolo
- Venezia
- Cavallino-Treporti
- Jesolo-Eraclea



Due to its peculiarities and the abovementioned management characteristics, the Lagoon is mentioned in each of 5 Destination Management Plans.

Each of them highlight the lagoon as a strategic element for the enrichment of the offer and as an opportunity for development and differentiation of tourism, underlining the importance of nature thematism.

In particular, the strategical plans aim to support tourist activities by enhancing the tourism lagoon, and raising sustainable awareness and developing communication campaigns, rediscovering agricultural traditions of the mainland and islands. They also want to promote and enhance local products by encouraging their consumption, even in collaboration with local associations.

Another important theme is the promotion of local crafts: the importance of specific actions such as training is emphasized in the above mentioned plans, with a focus on the Venetian rowing boats sector and on the initiatives related to great events during the rowing season.

The destination knows its potential and it needs to build and better convey its offer.



## Panel of stakeholders interviewed

Pilot Area	Name	Typology	Contact person
PO E IL SUO DELTA/PO AND ITS DELTA	Parco Delta del Po/repres for DMO	General public	Marco Gottardi
PO E IL SUO DELTA/PO AND ITS DELTA	Rosolina Municipality	Public Authority	Daniele Grossato
PO E IL SUO DELTA/PO AND ITS DELTA	Portotolle Municipality	Public Authority	Raffaele Crepaldi
PO E IL SUO DELTA/PO AND ITS DELTA	Tourism Consortium of Po e il suo Delta	Enterprise	Michele Ghezzi
TERME E COLLI/TERME AND HILLS	Tourism Consortium of Euganean spa	Enterprise	Umberto Carraro
TERME E COLLI/TERME AND HILLS	Spa and hills DMO	General public	Riccardo Mortandello
LAGUNA DI VENEZIA/VENICE LAGOON	OTS	Association	Roberta Manzi
LAGUNA DI VENEZIA/VENICE LAGOON	Venice Municipality/repr DMO	General public	Elisabetta Piccin
CAORLE	OGD Caorle	General public	Mattia Munerotto
CAORLE	Tourism Consortium Caorle	Enterprise	Raffaele Furlanis

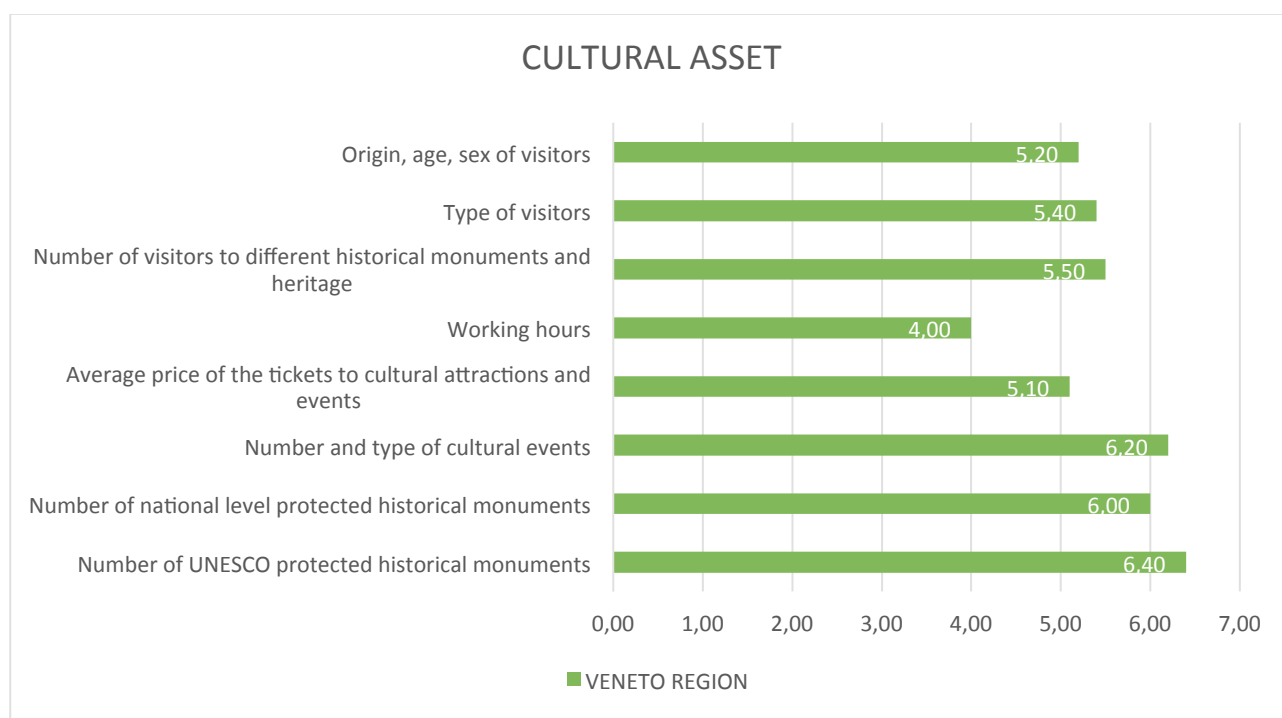
## Stakeholders addressed

Public sector operator, such as local municipalities, both on the administrative and political side, economical operators, Destination Management Organizations, citizens and all the actors who are active or interested in the management of a tourism destination.

## Outcomes from the interviews

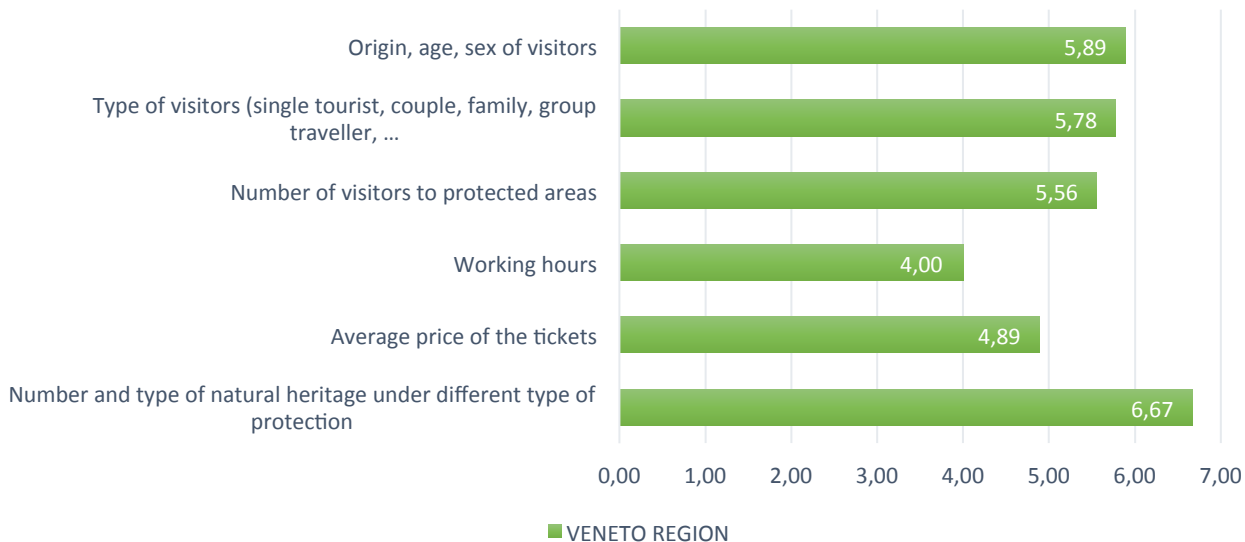
### a. *SUGGESTIONS FOR THE CALIBRATION OF THE SMART CROSS BORDER DATA SYSTEM (SCBDS) AND THE CREATION OF NEW INDICATORS*

- *Attractions*

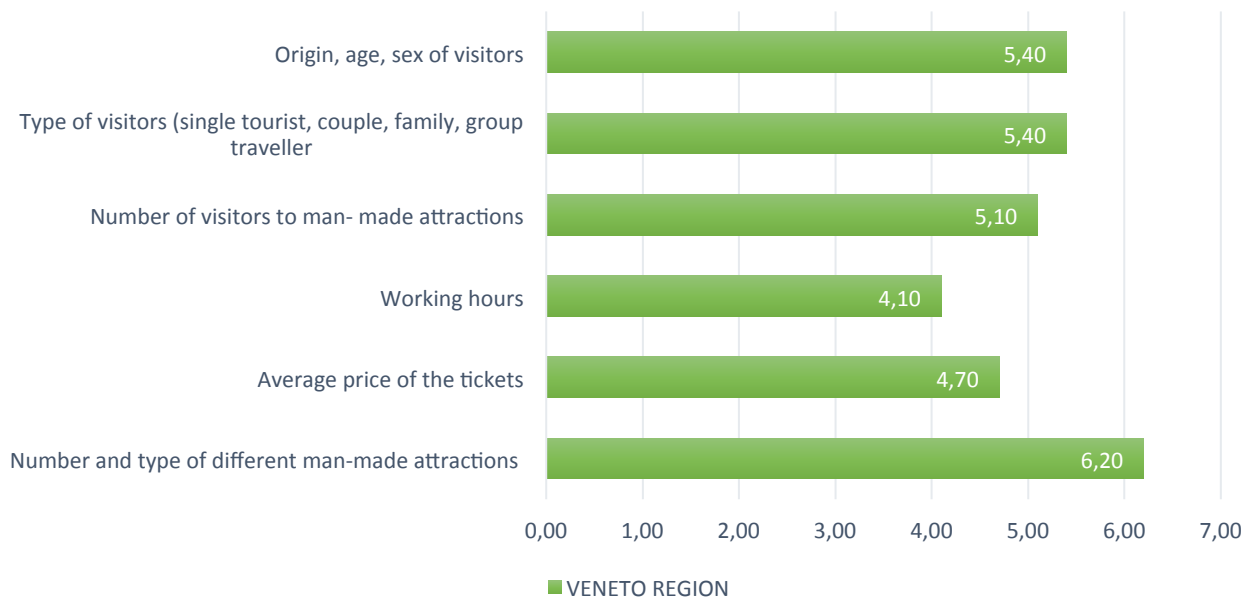




## Natural assets



## Man-made attractions



- *Accessibility*

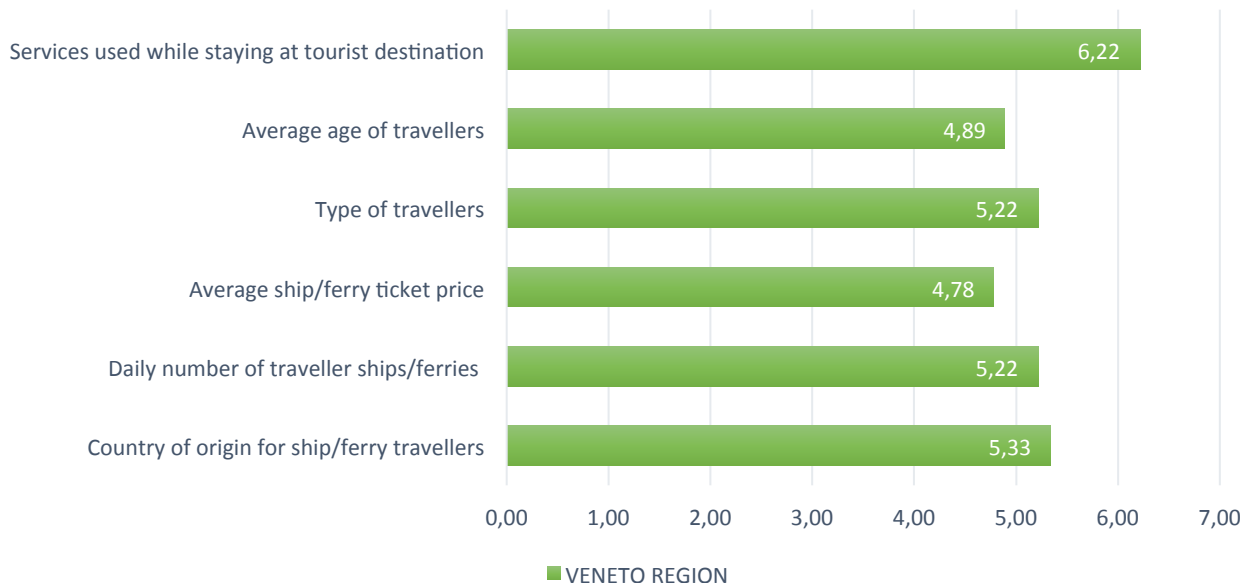
### EXTERNAL ACCESSIBILITY - FLIGHT



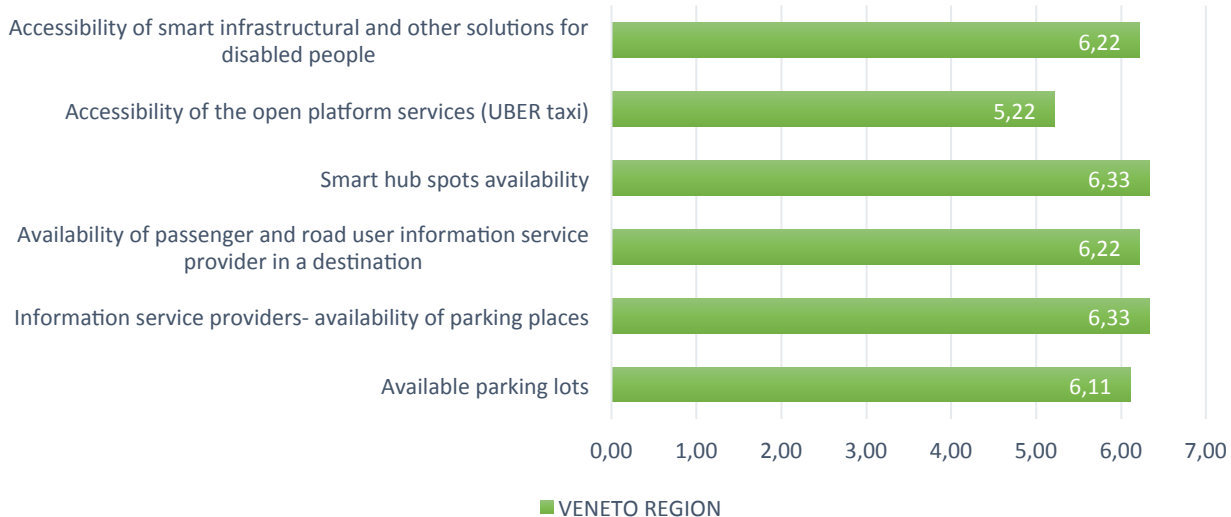
### EXTERNA ACCESSIBILITY - TRAIN



### EXTERNAL ACCESSIBILITY - SHIP



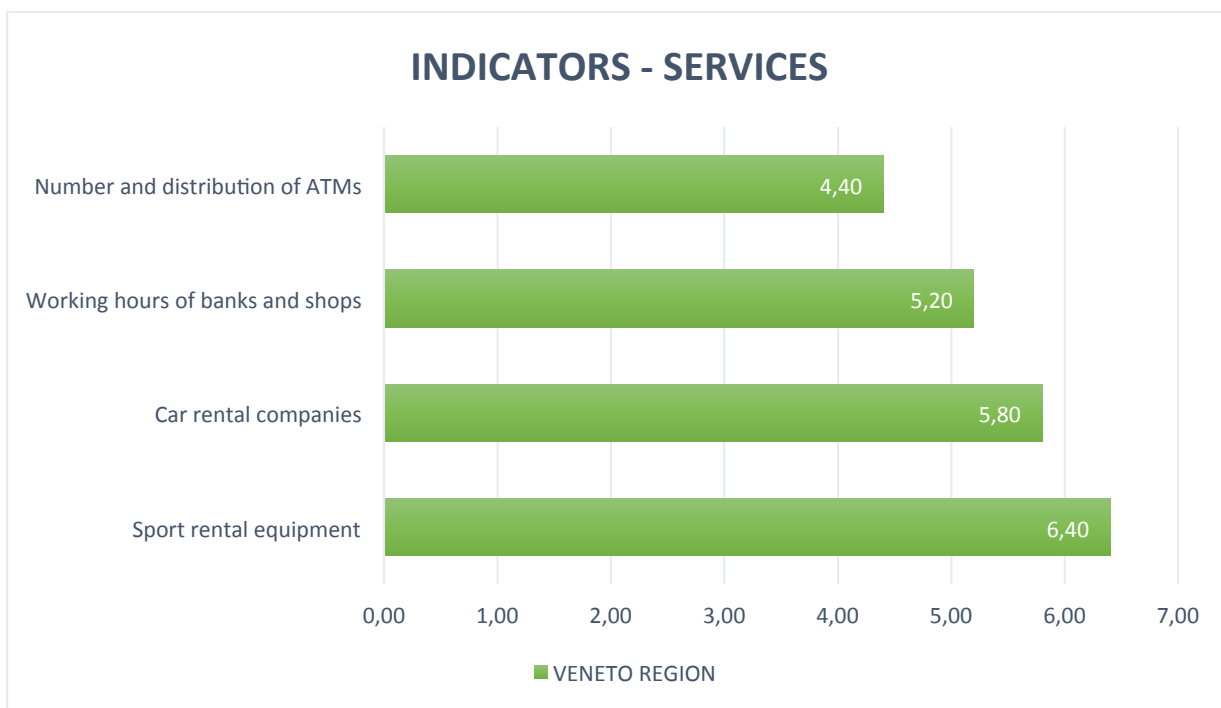
### INTERNAL ACCESSIBILITY - SMART SOLUTION



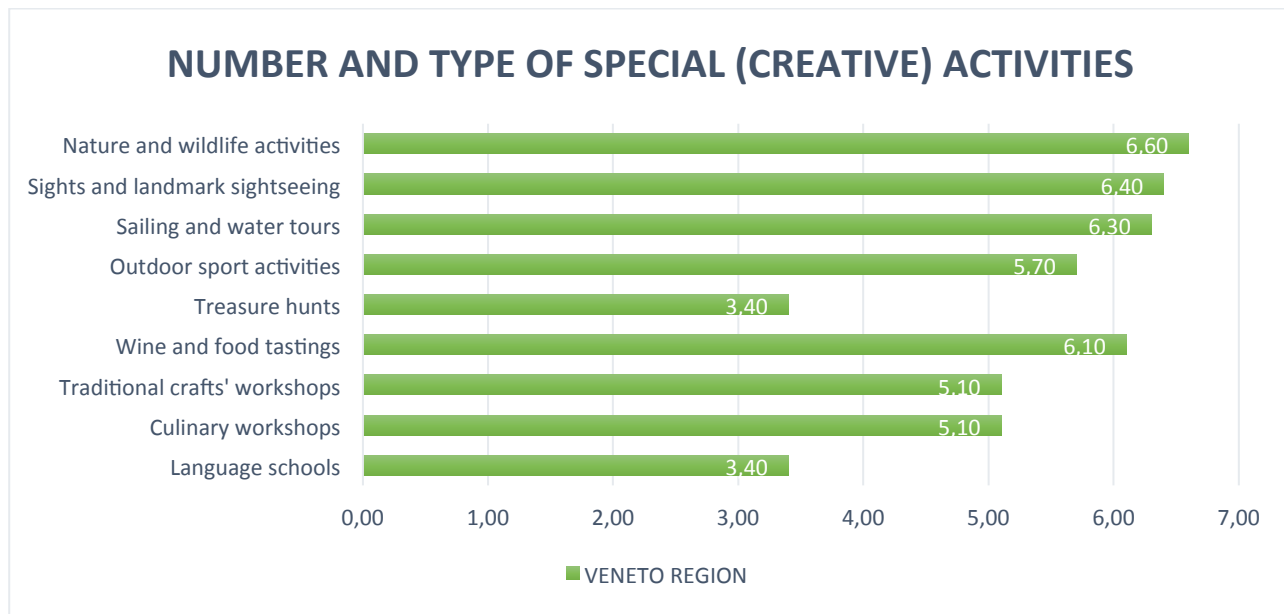
- *Amenities*



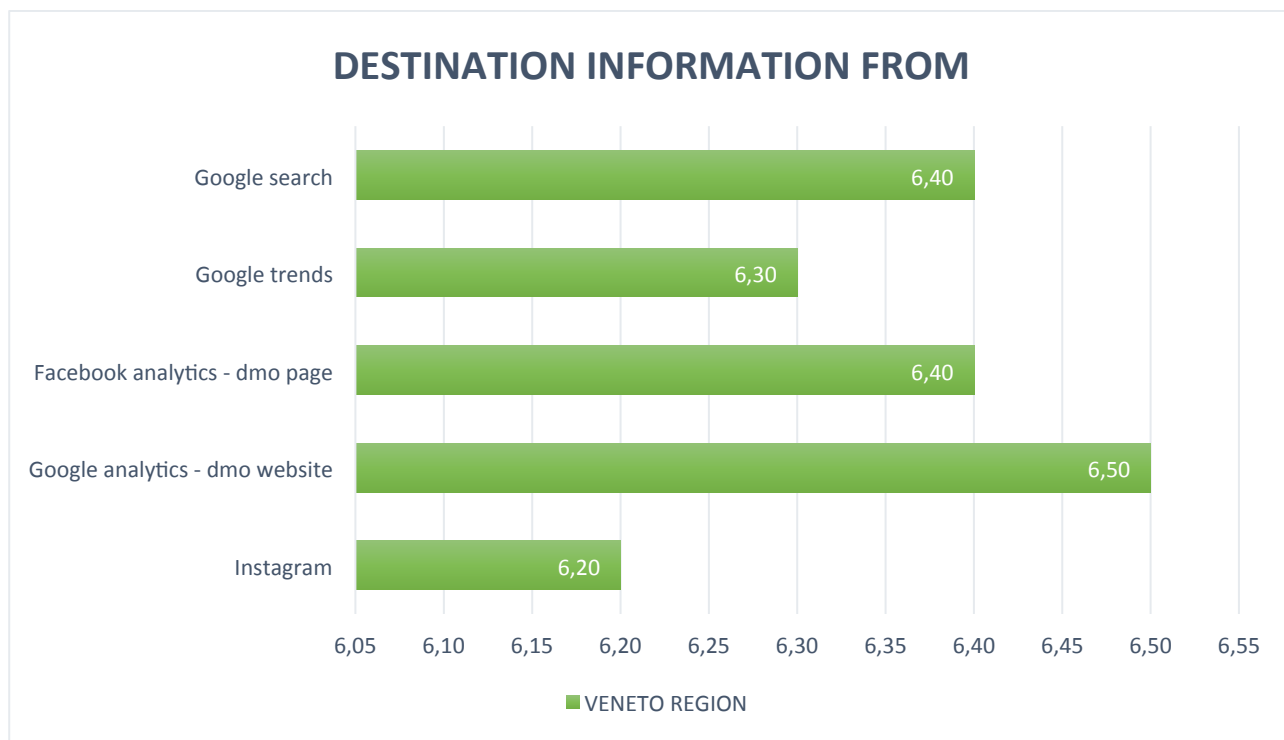
- Ancillary services*



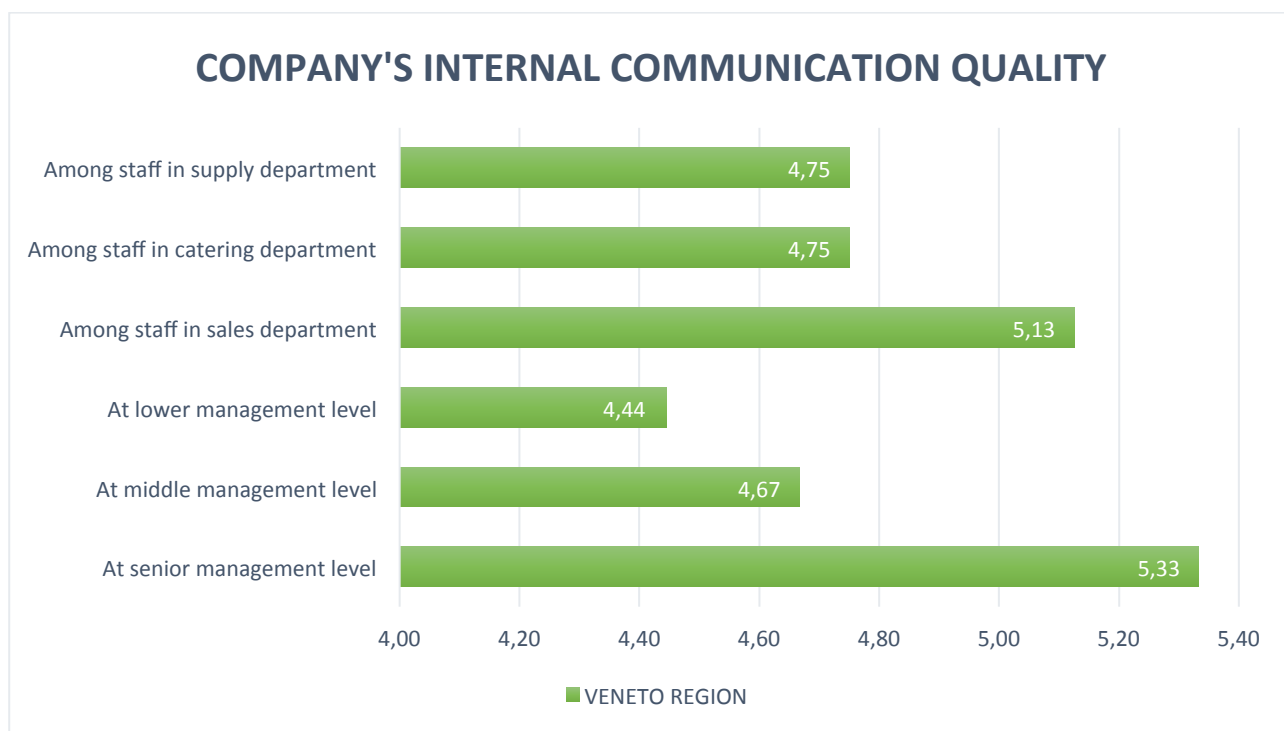
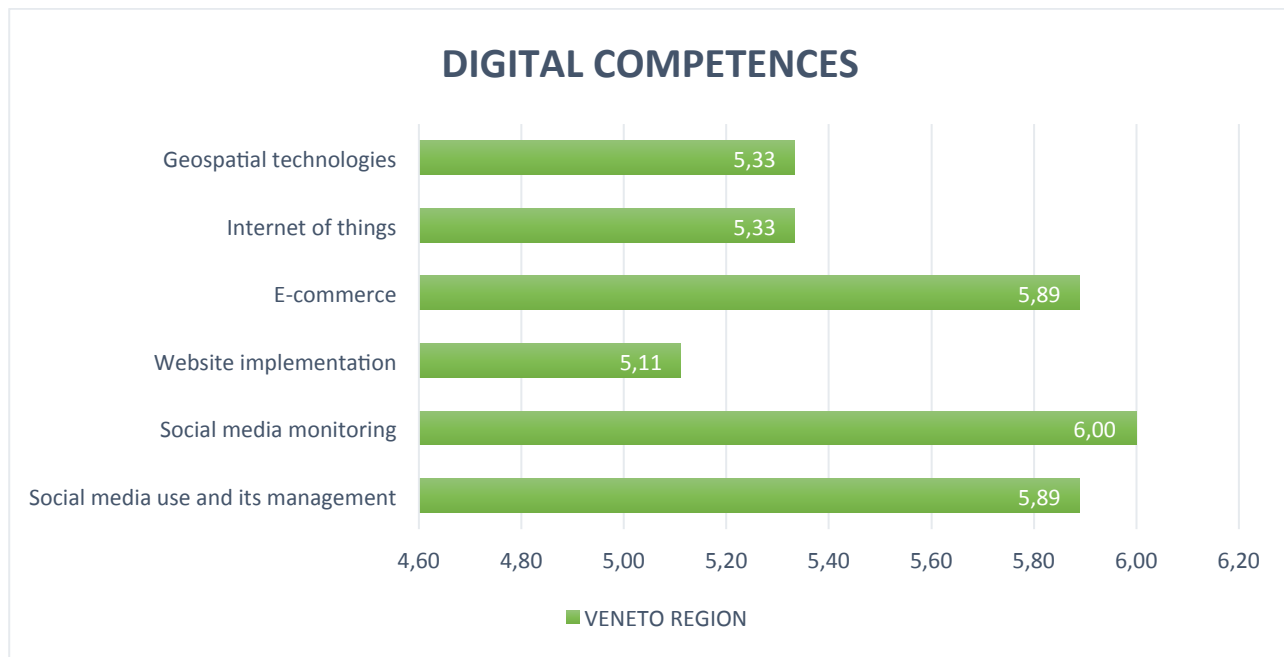
- Activities*



- Source of destination information*



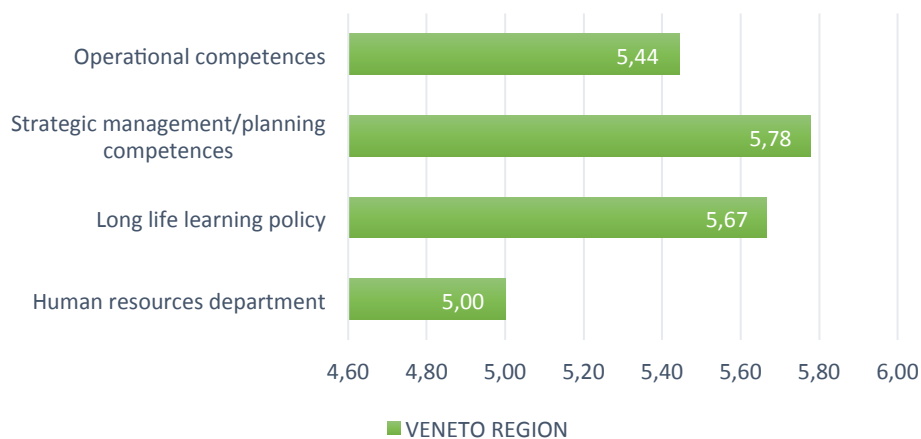
*b. GAPS AND NEEDS IN CAPACITY BUILDING PROCESSES (at CB Area level)*

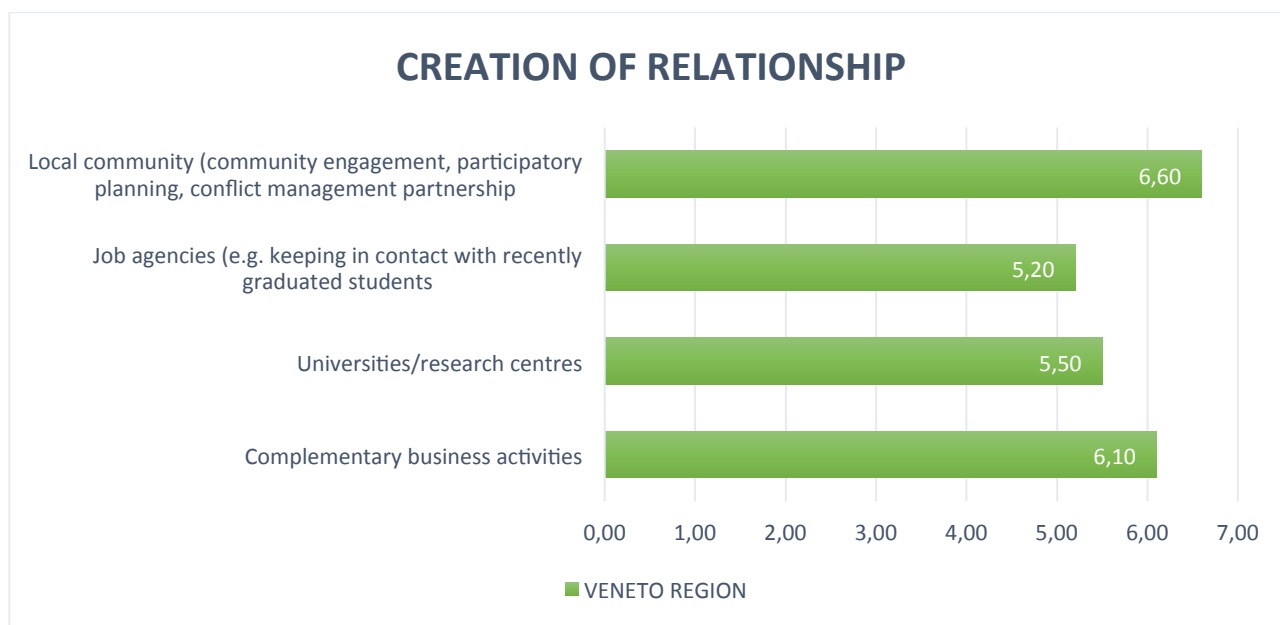
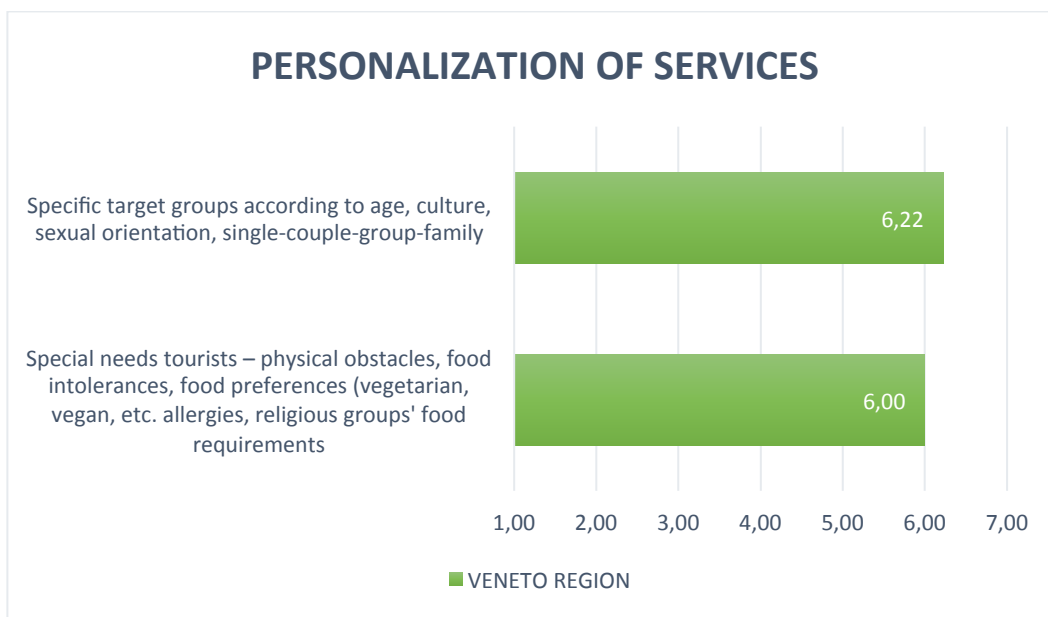


### KNOWLEDGE OF FOREIGN LANGUAGES



### COMPANY'S INTERNAL ORGANISATION





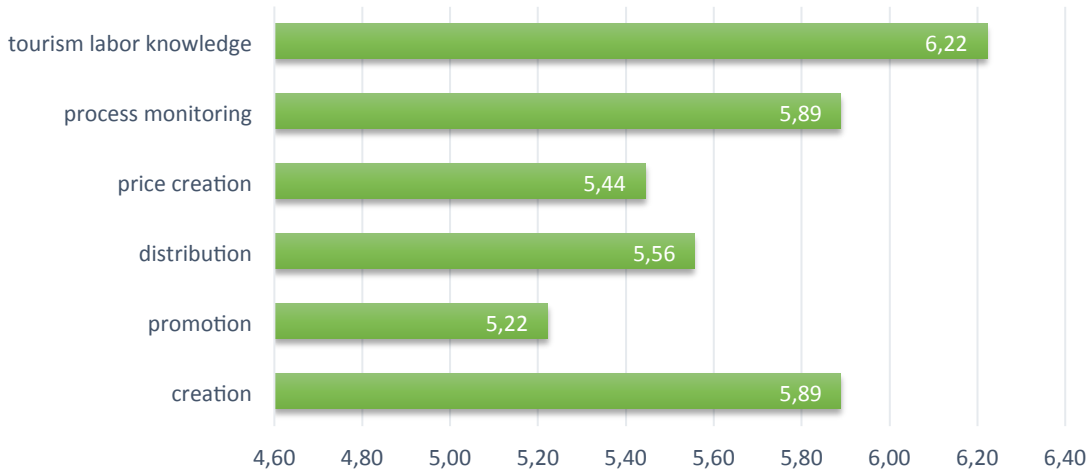
**c. IDENTIFICATION OF THE BUSINESS ECOSYSTEM OF THE CHOSEN PILOT AREA**

- *Creative tourism*

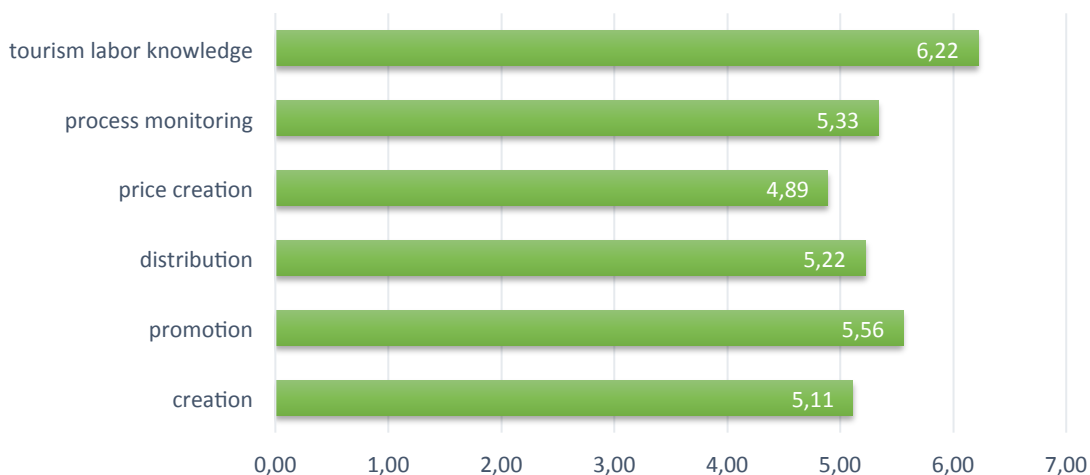
**ADMINISTRATION**



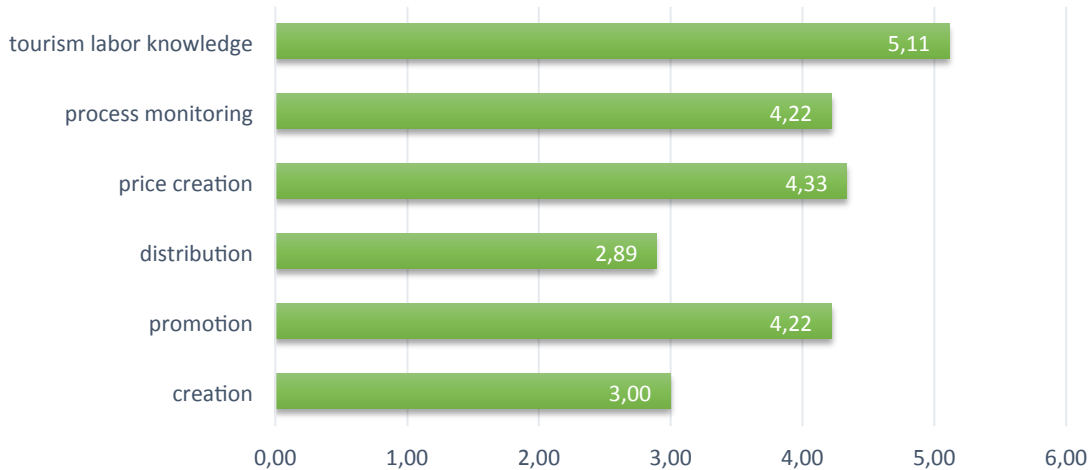
### CREATIVE TOURISM ADMINISTRATION LOCAL



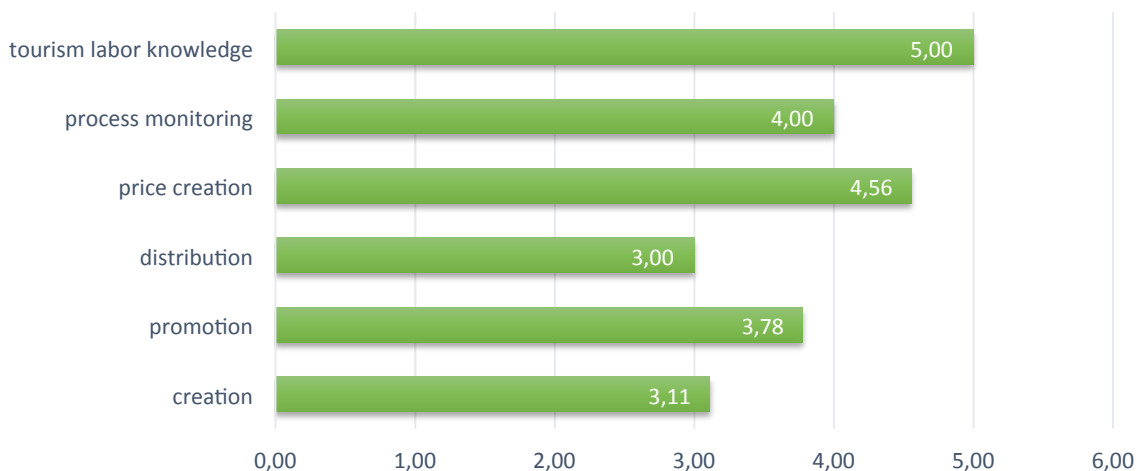
### CREATIVE TOURISM ADMINISTRATION REGIONAL



### CREATIVE TOURISM ADMINISTRATION NATIONAL



### CREATIVE TOURISM ADMINISTRATION INTERNATIONAL

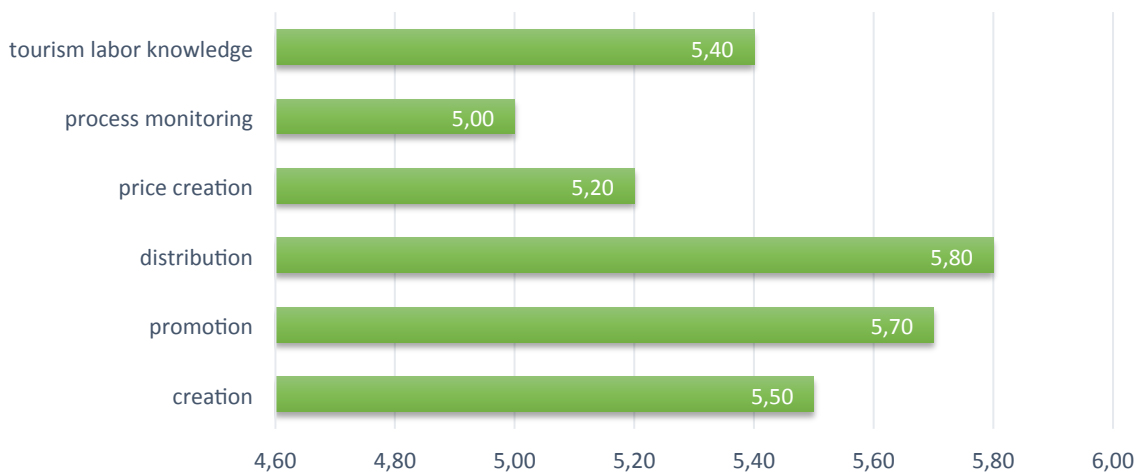


## DESTINATION MANAGEMENT ORGANISATIONS

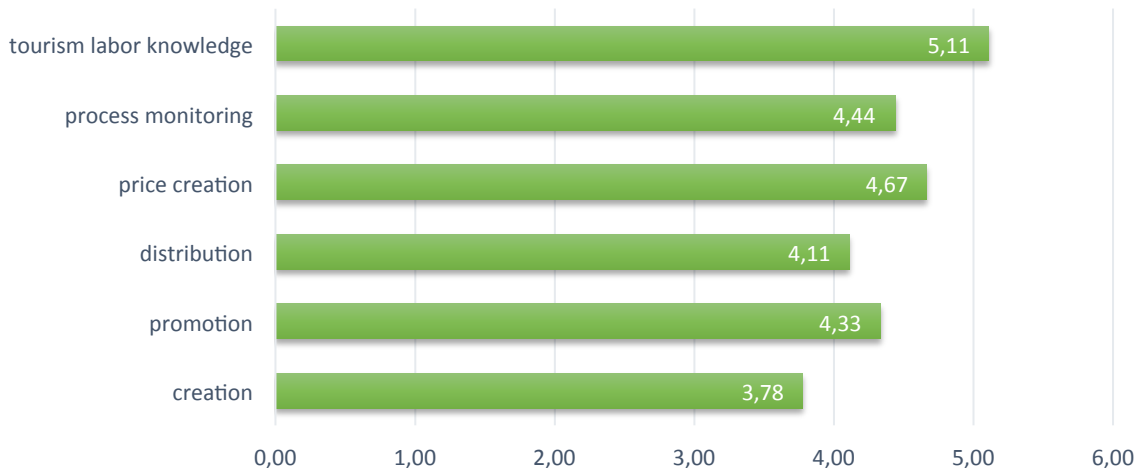
### CREATIVE TOURISM DMO LOCAL



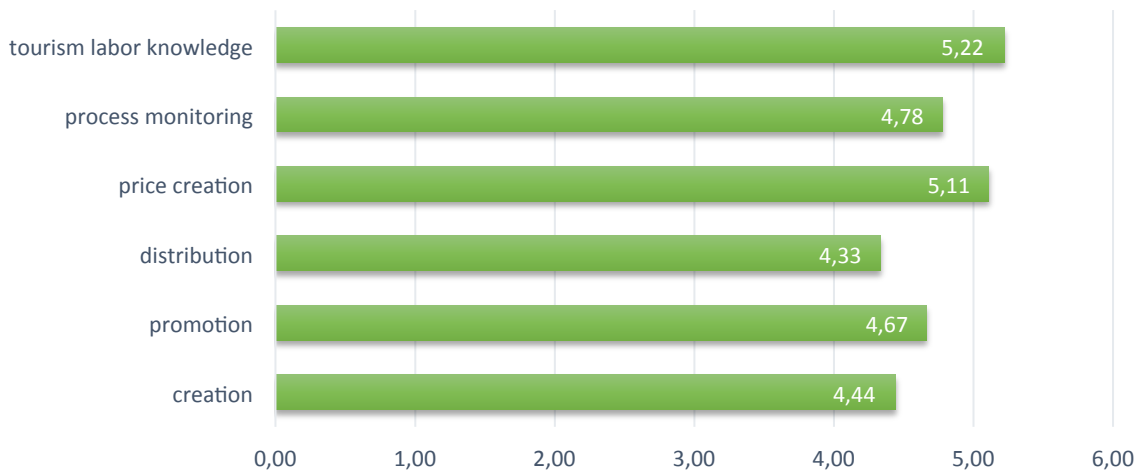
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### CREATIVE TOURISM DMO NATIONAL

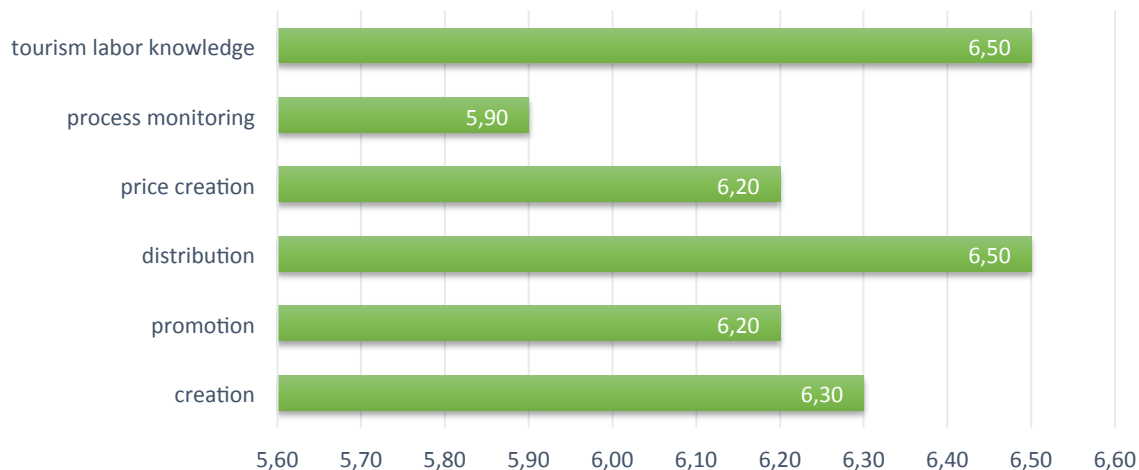


### CREATIVE TOURISM DMO INTERNATIONAL

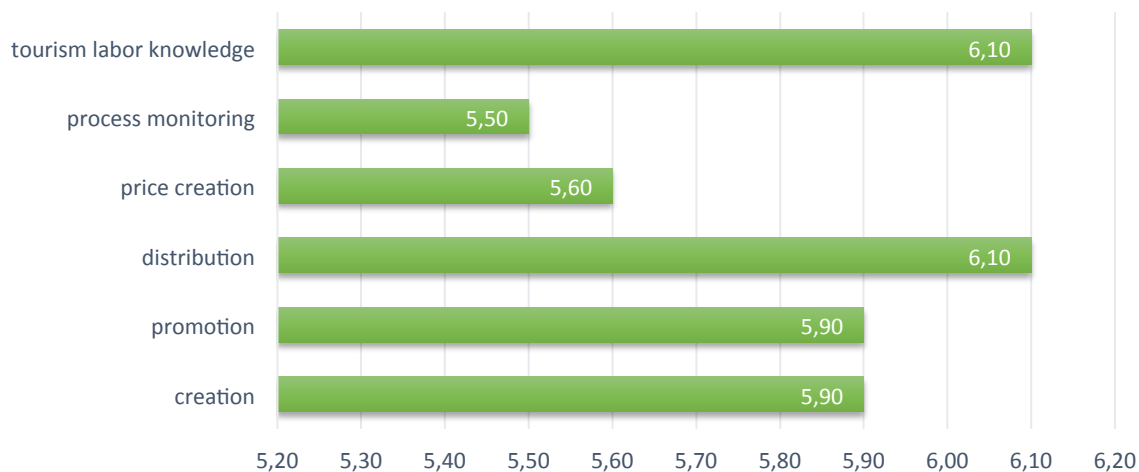


## PRIVATE STAKEHOLDERS

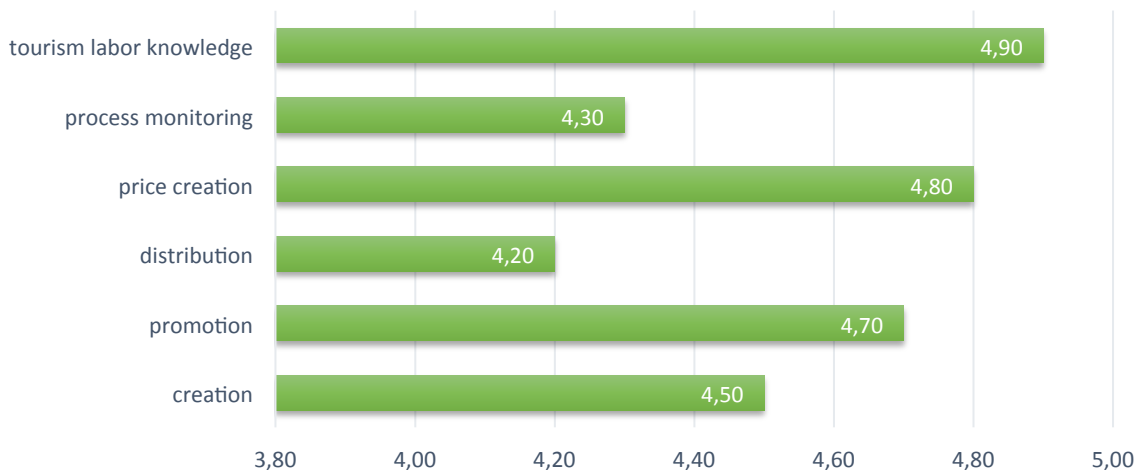
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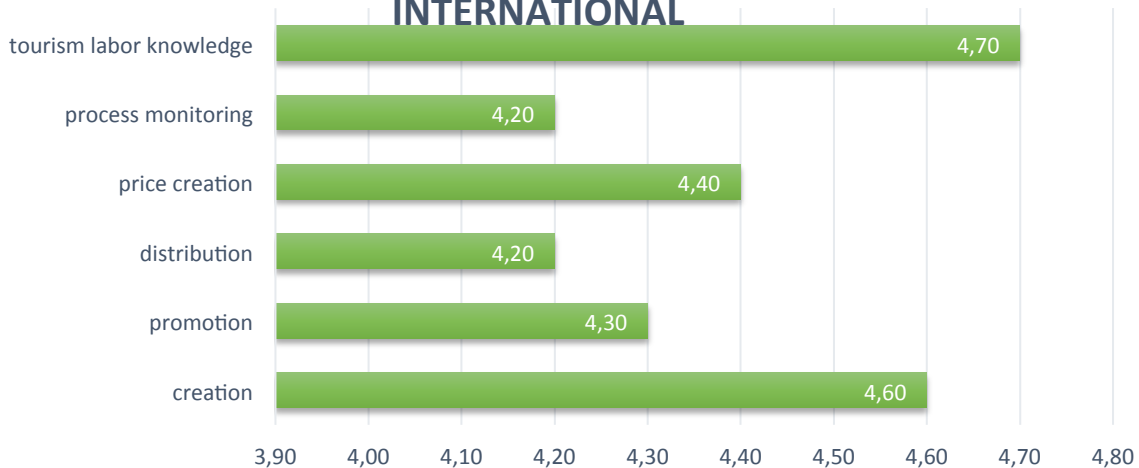
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### CREATIVE TOURISM PRIVATE STAKEHOLDERS NATIONAL

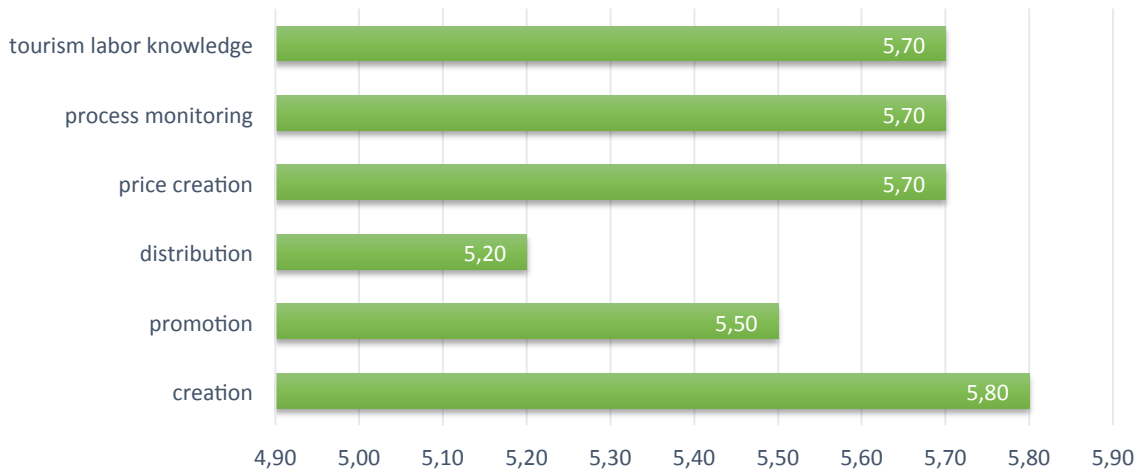


### CREATIVE TOURISM PRIVATE STAKEHOLDERS INTERNATIONAL

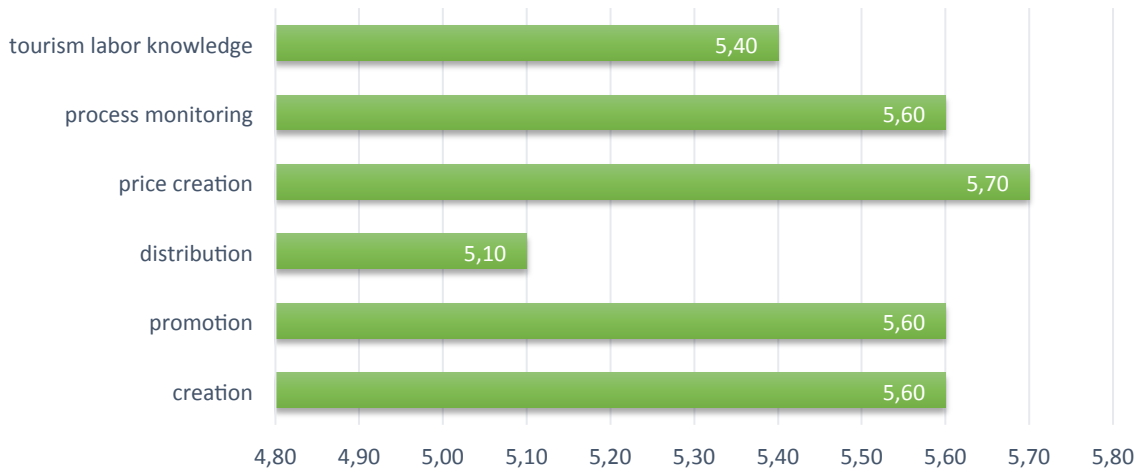


## TOURISTS

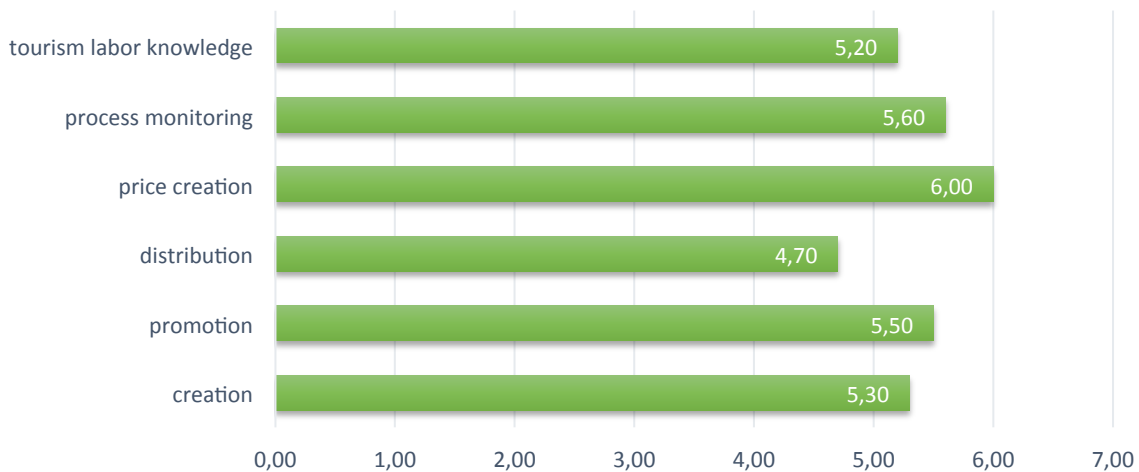
### CREATIVE TOURISM TOURISTS LOCAL



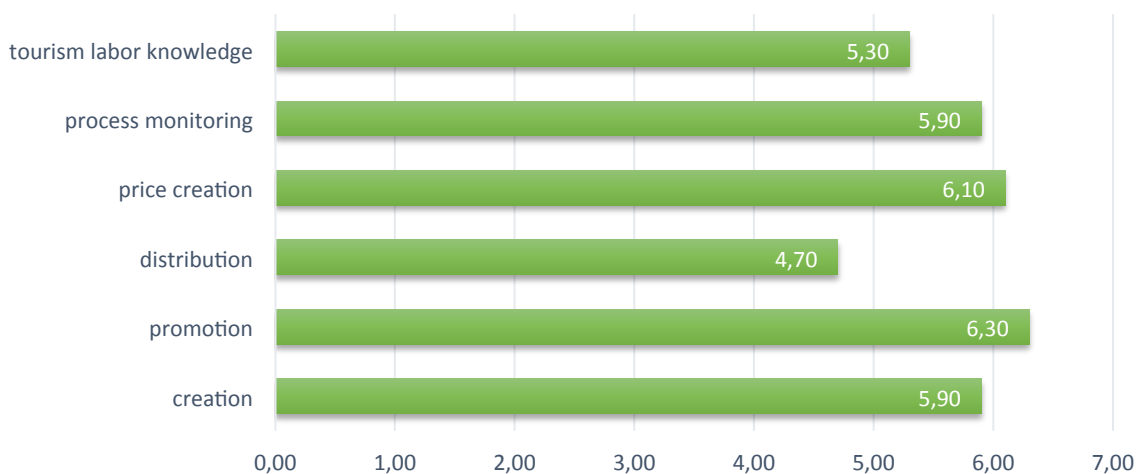
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### CREATIVE TOURISM TOURISTS NATIONAL



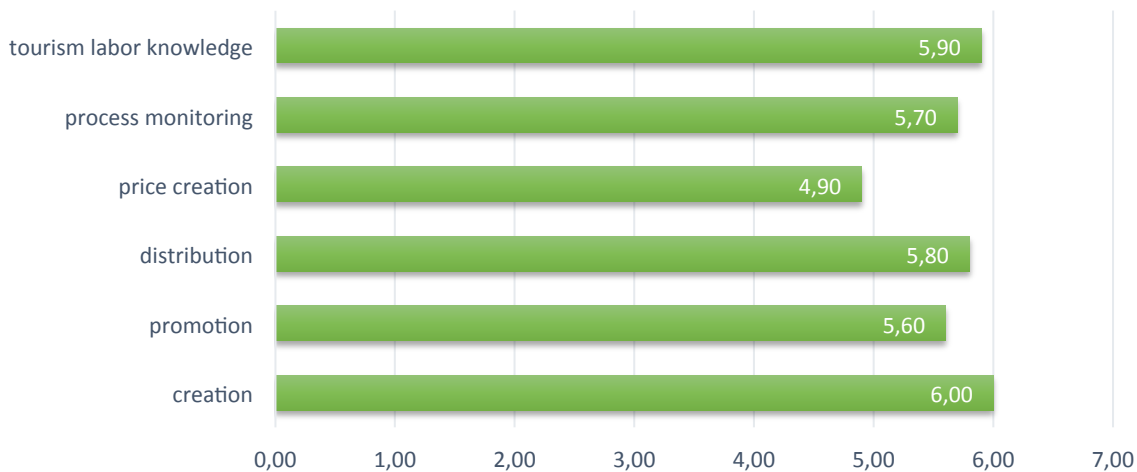
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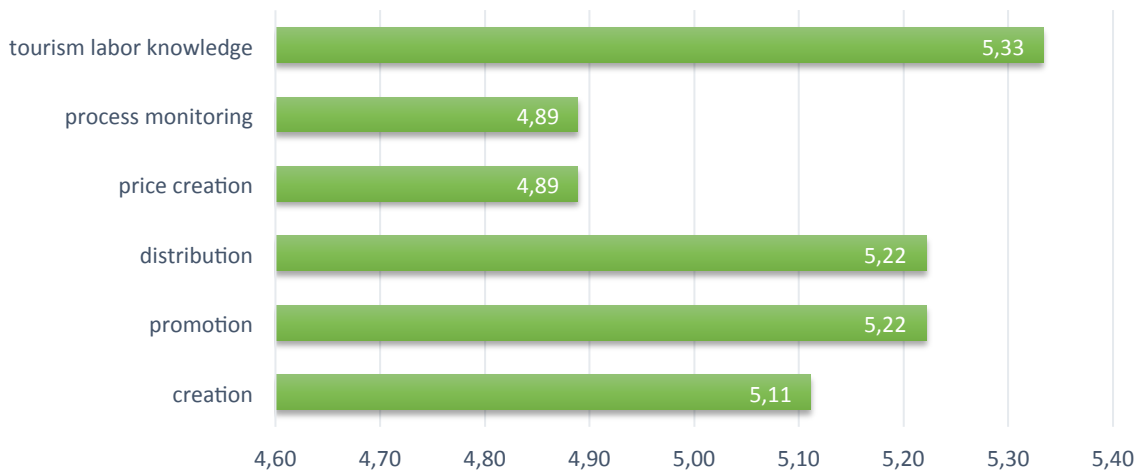
## RESIDENTS



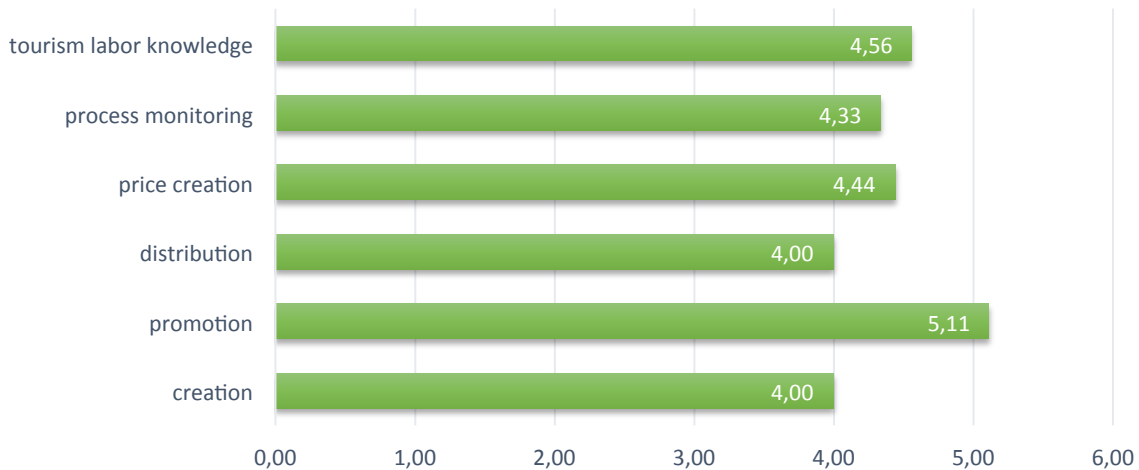
### CREATIVE TOURISM RESIDENTS LOCAL



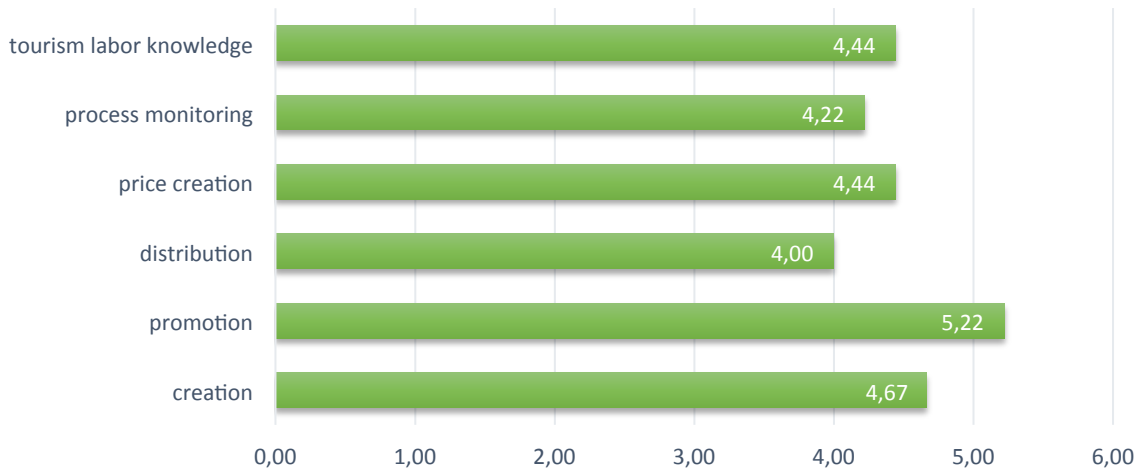
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### CREATIVE TOURISM RESIDENTS NATIONAL

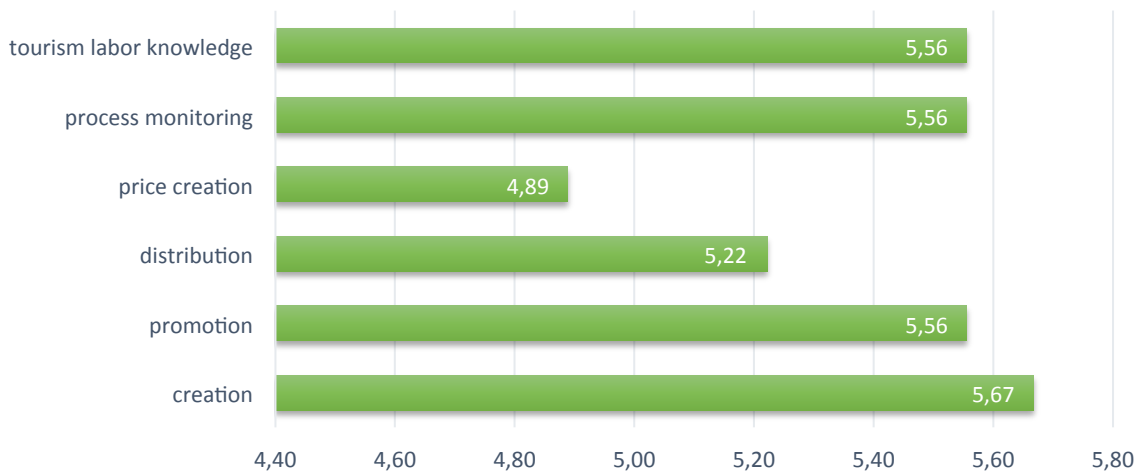


### CREATIVE TOURISM RESIDENTS INTERNATIONAL

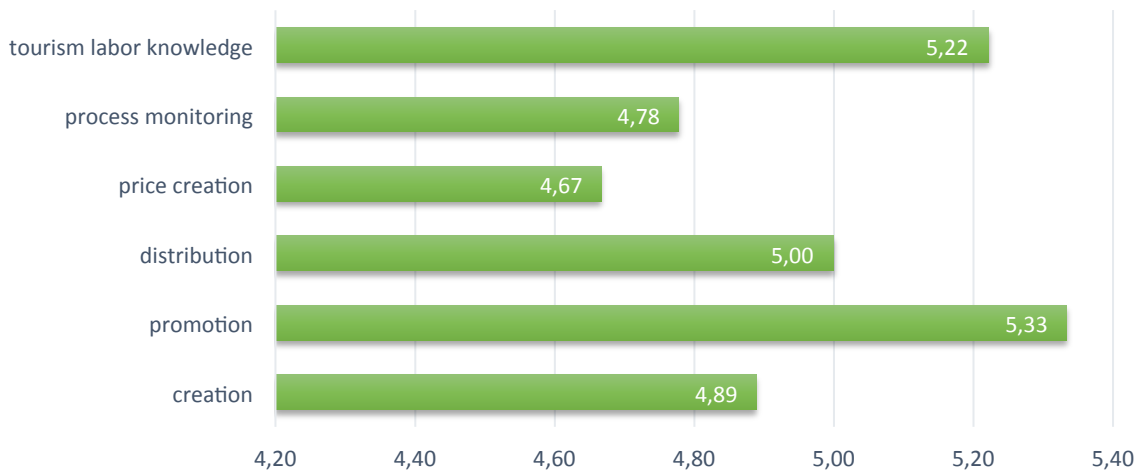


## CIVIL SECTOR

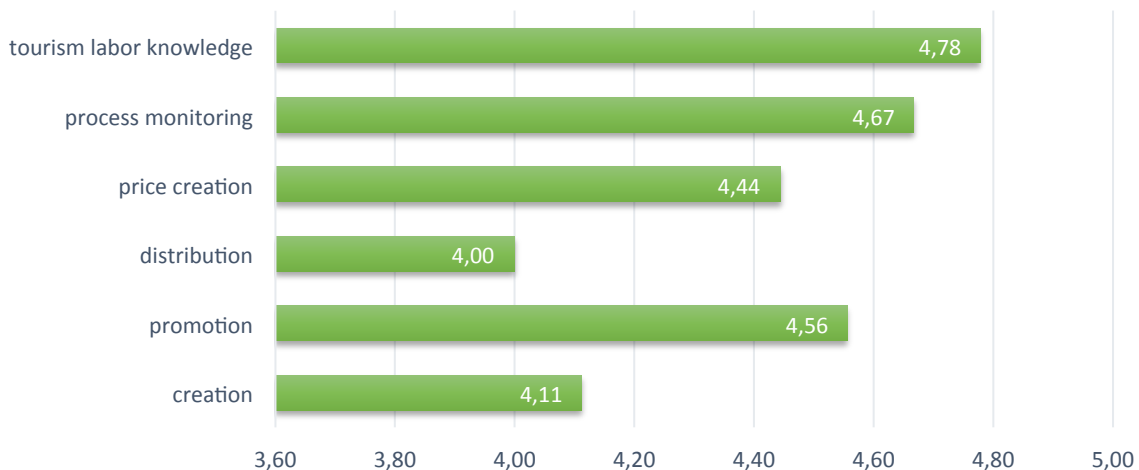
### CREATIVE TOURISM CIVIL SECTOR LOCAL



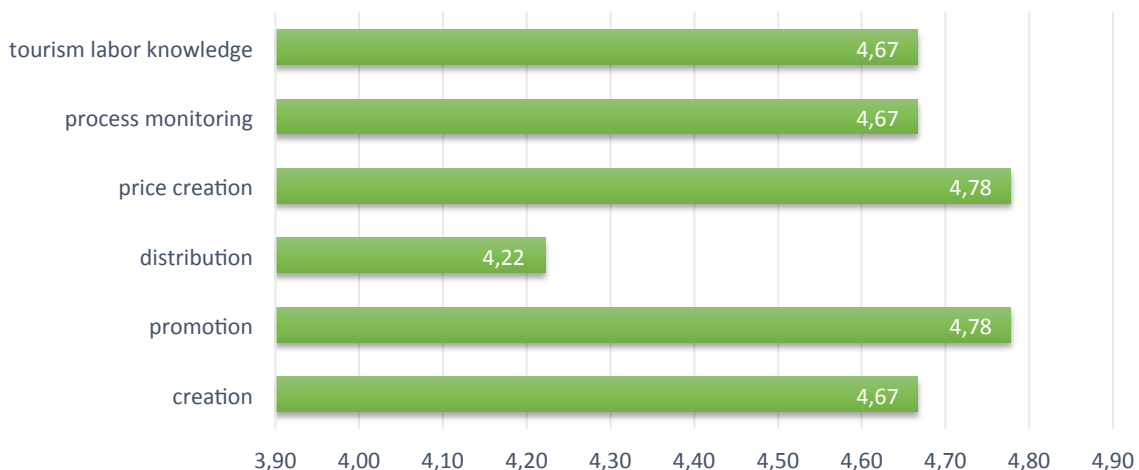
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### CREATIVE TOURISM CIVIL SECTOR NATIONAL

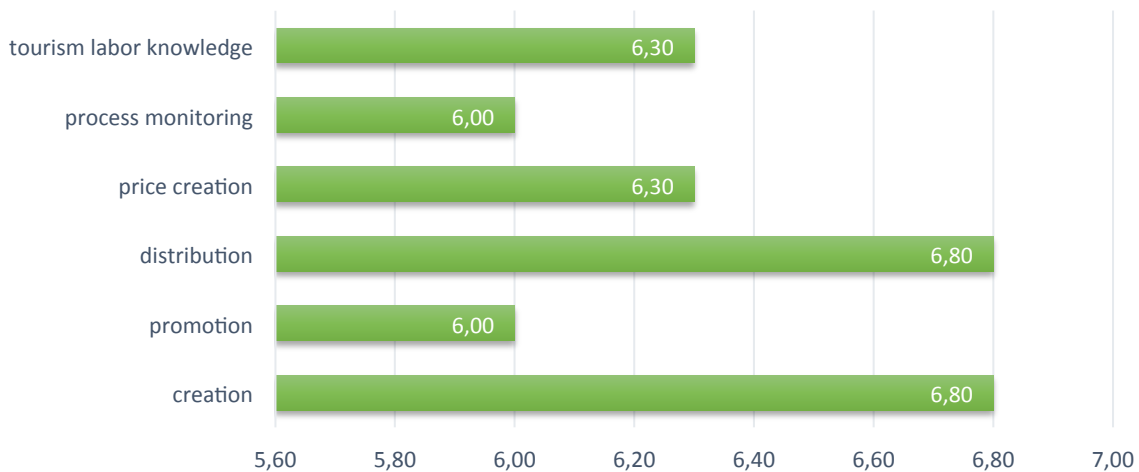


### CREATIVE TOURISM CIVIL SECTOR INTERNATIONAL

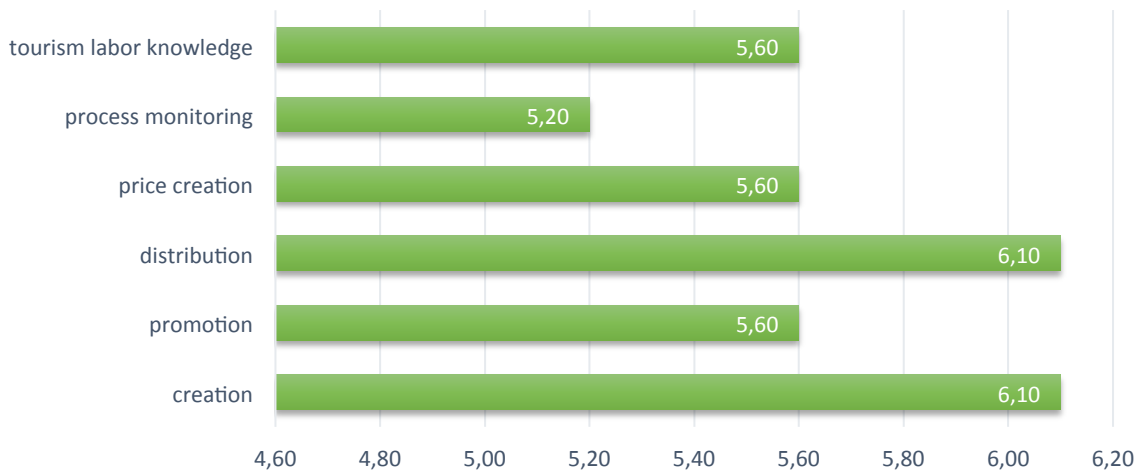


## ASSOCIATIONS/ORGANIZATIONS RELATED TO CULTURAL AND NATURAL HERITAGE OF THE AREA

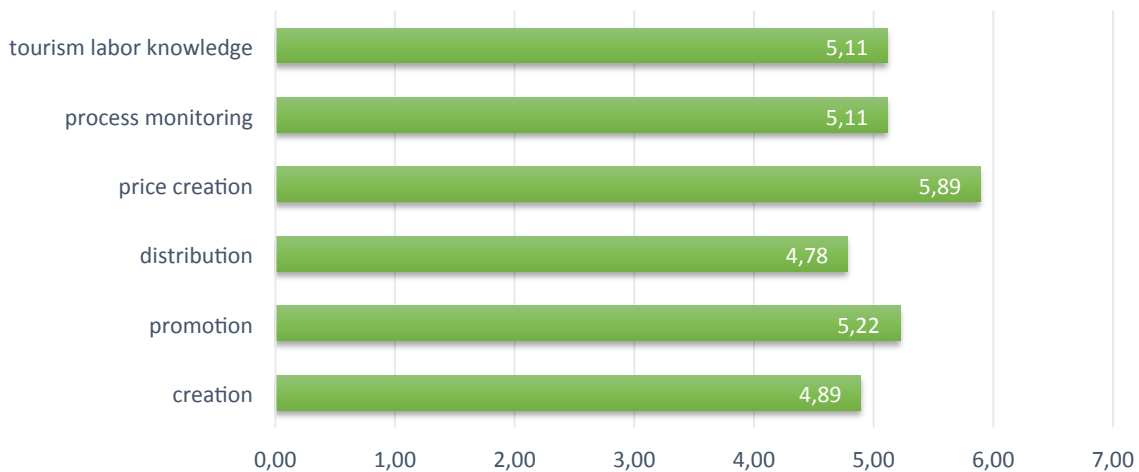
### CREATIVE TOURISM ASSOCIATIONS LOCAL



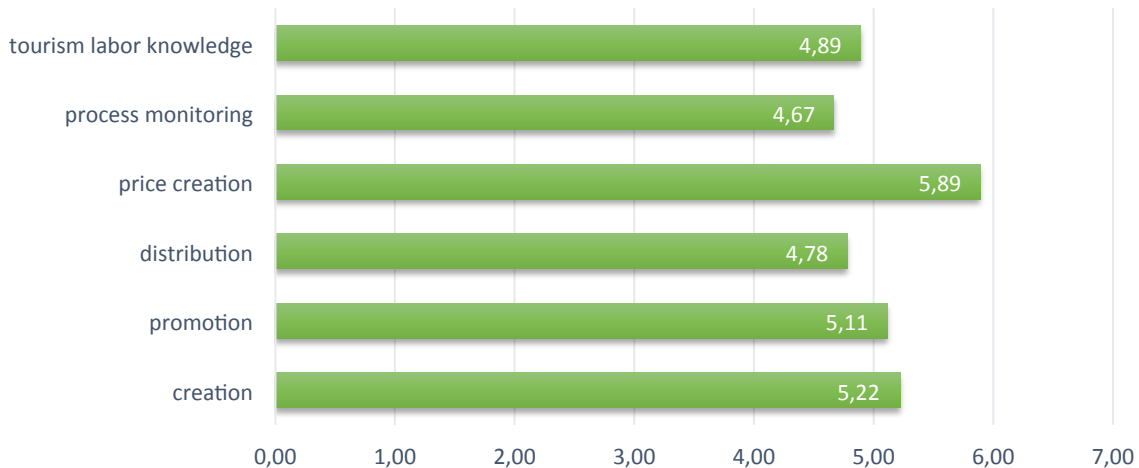
### CREATIVE TOURISM ASSOCIATIONS REGIONAL



### CREATIVE TOURISM ASSOCIATIONS NATIONAL



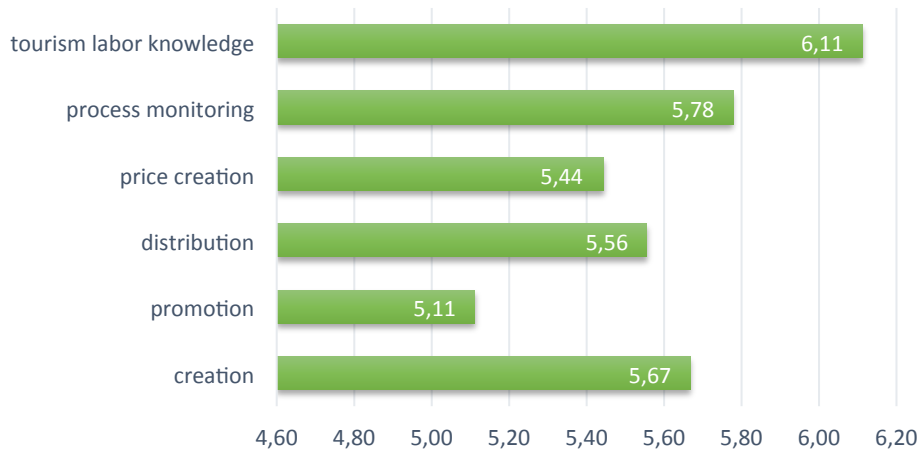
### CREATIVE TOURISM ASSOCIATIONS INTERNATIONAL



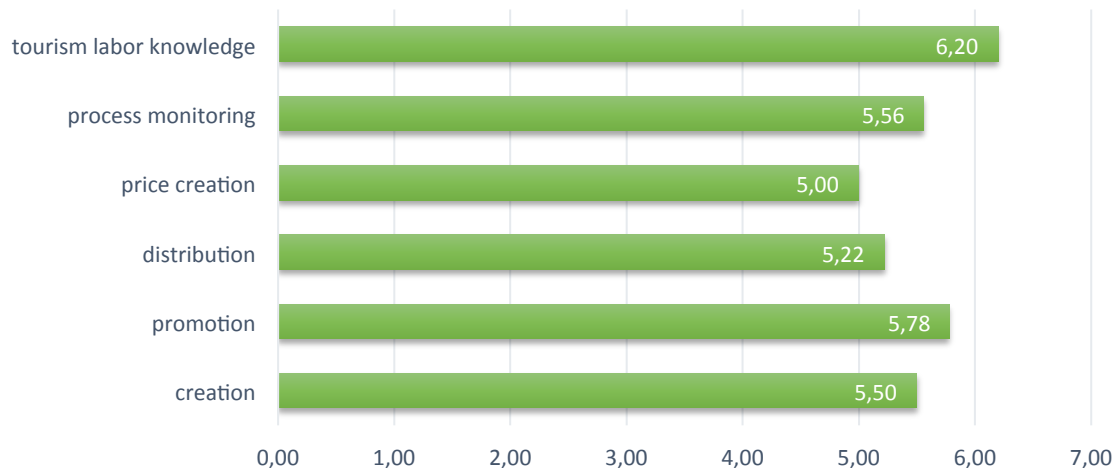
- *Eco tourism*

## ADMINISTRATION

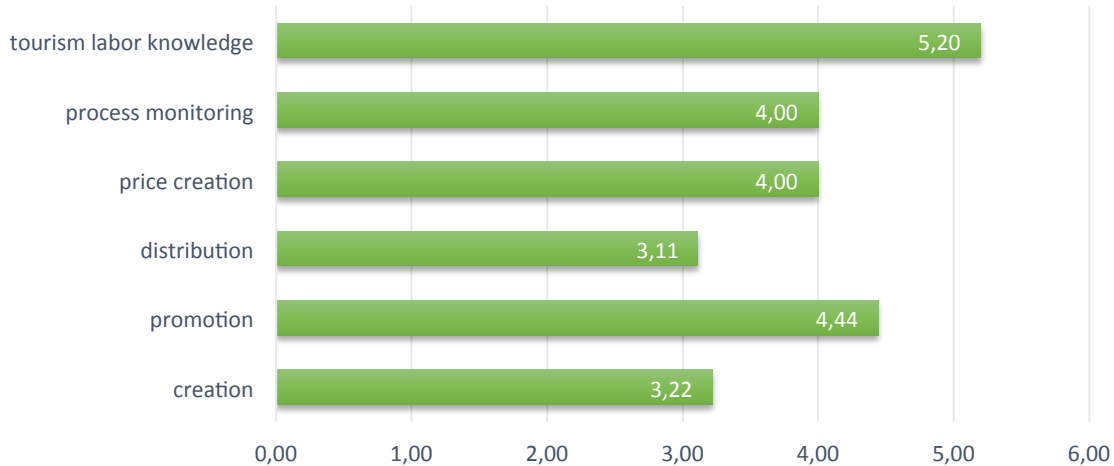
### ECOTOURISM ADMINISTRATION LOCAL



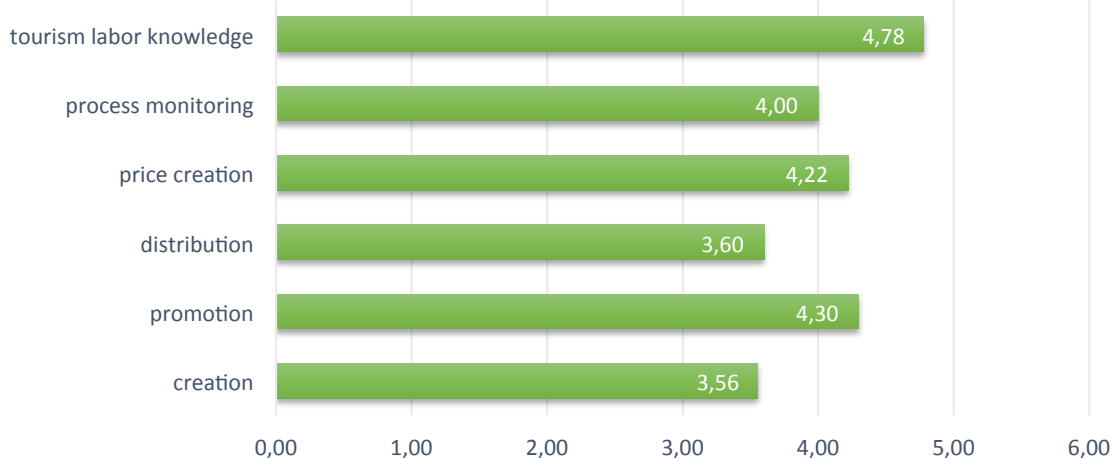
### ECOTOURISM ADMINISTRATION REGIONAL



### ECOTOURISM ADMINISTRATION NATIONAL



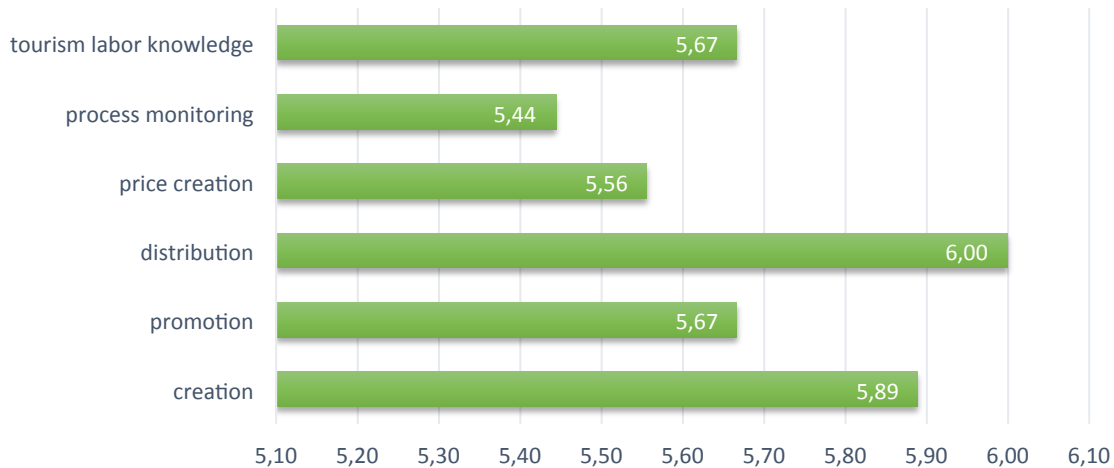
### ECOTOURISM ADMINISTRATION INTERNATIONAL



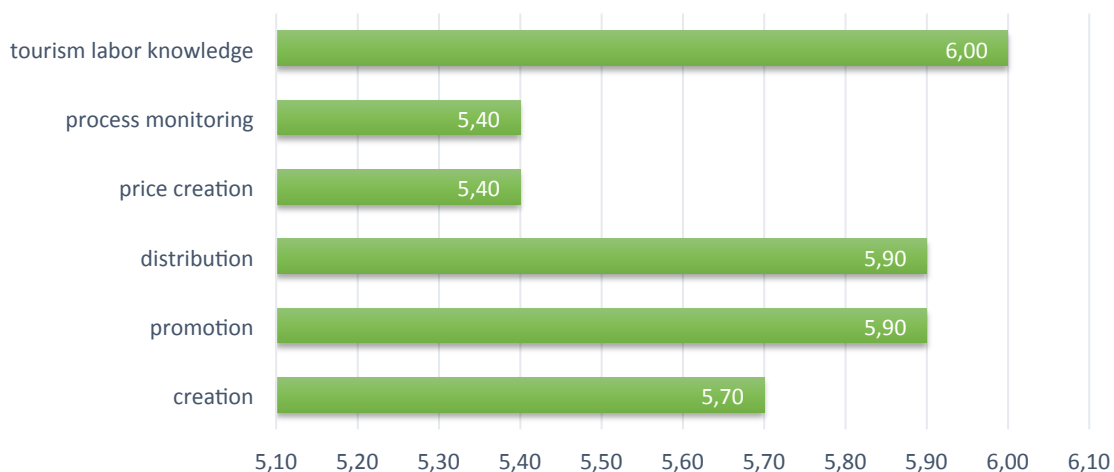
## DESTINATION MANAGEMENT ORGANISATIONS



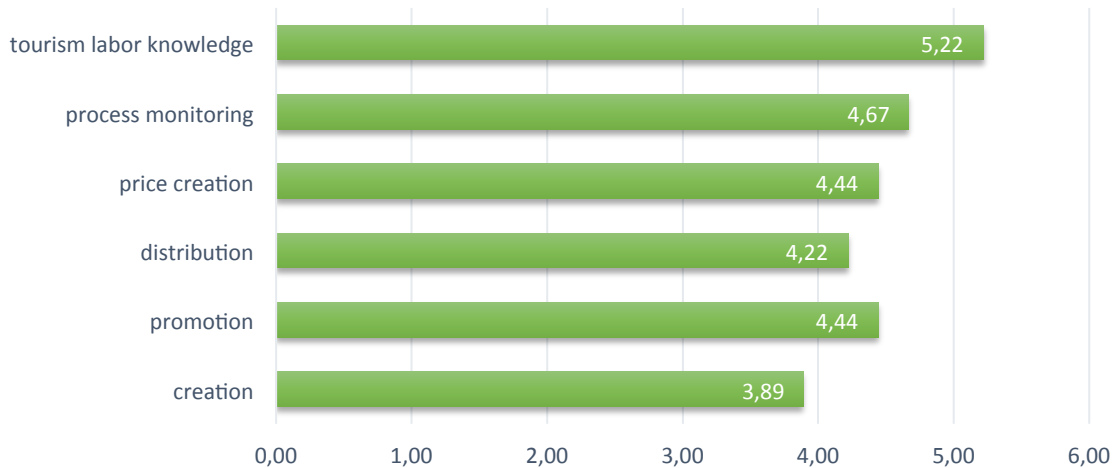
### ECOTOURISM DMO LOCAL



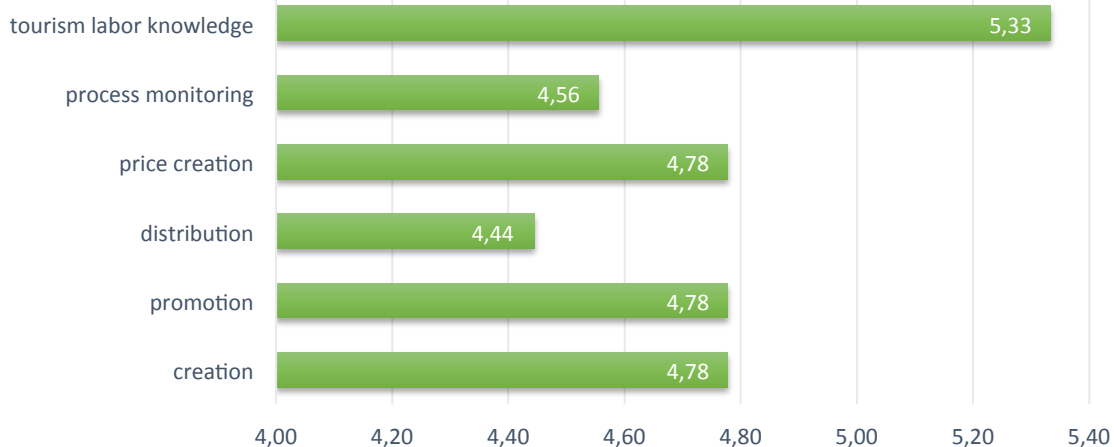
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### ECOTOURISM DMO NATIONAL

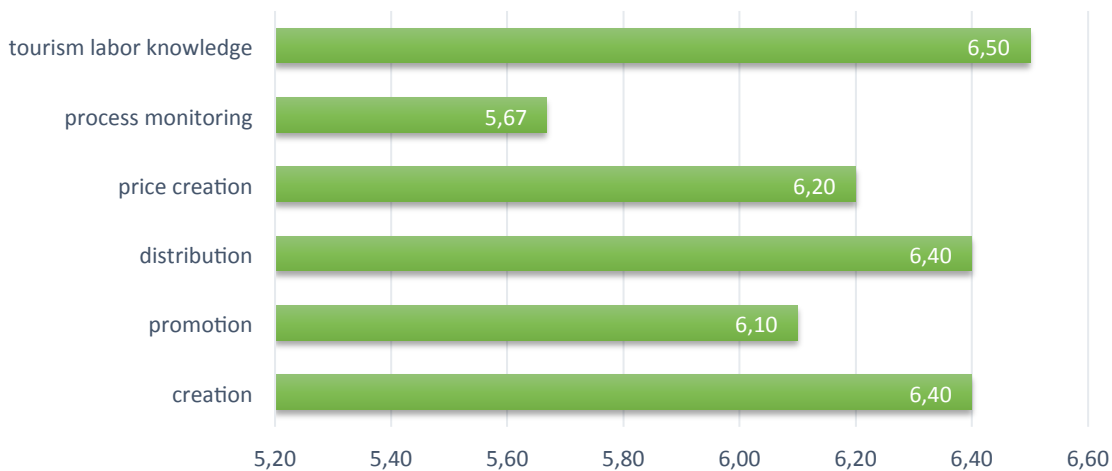


### ECOTOURISM DMO INTERNATIONAL

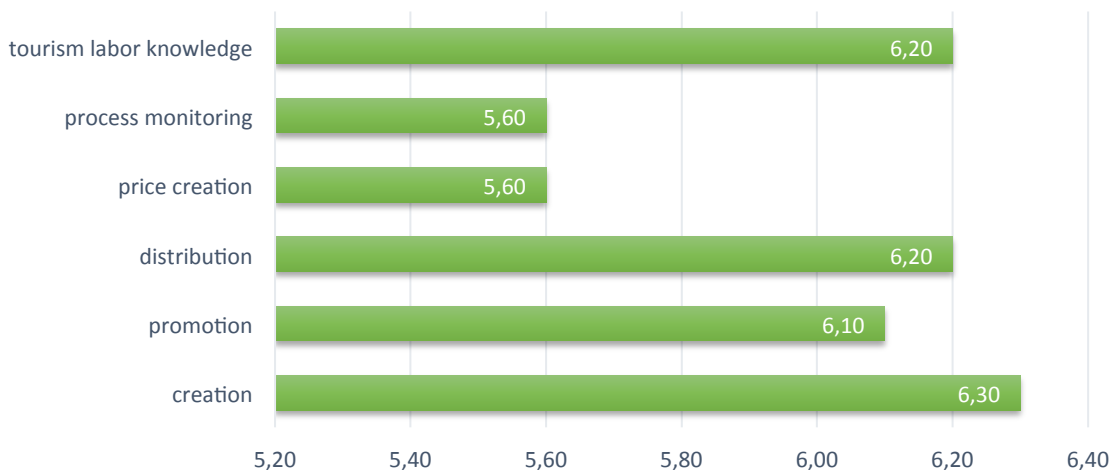


## PRIVATE STAKEHOLDERS

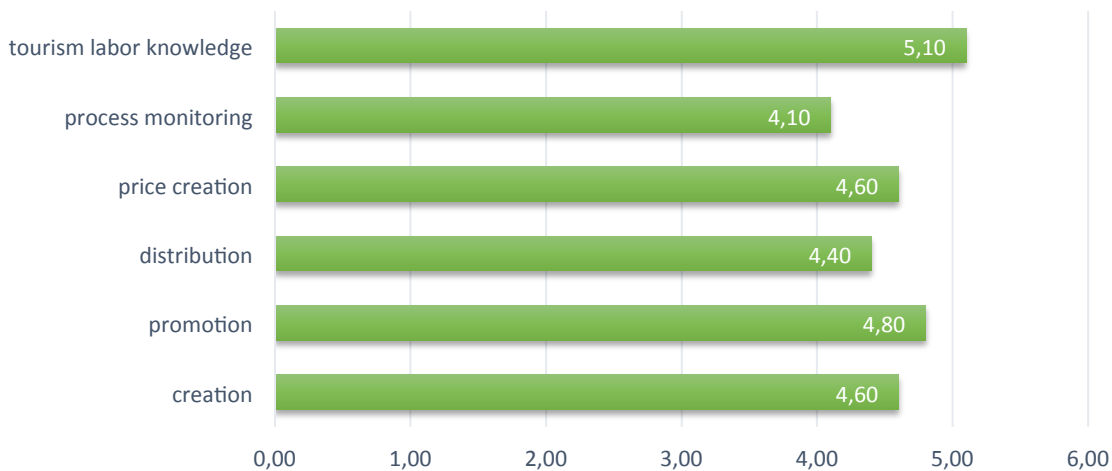
### ECOTOURISM PRIVATE STAKEHOLDERS LOCAL



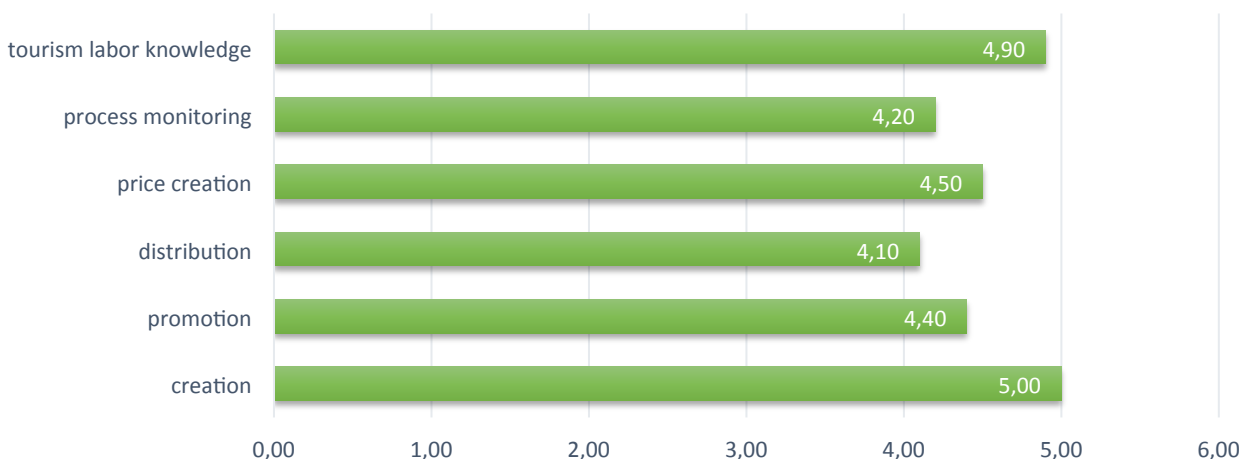
### ECOTOURISM PRIVATE STAKEHOLDERS REGIONAL



### ECOTOURISM PRIVATE STAKEHOLDERS NATIONAL

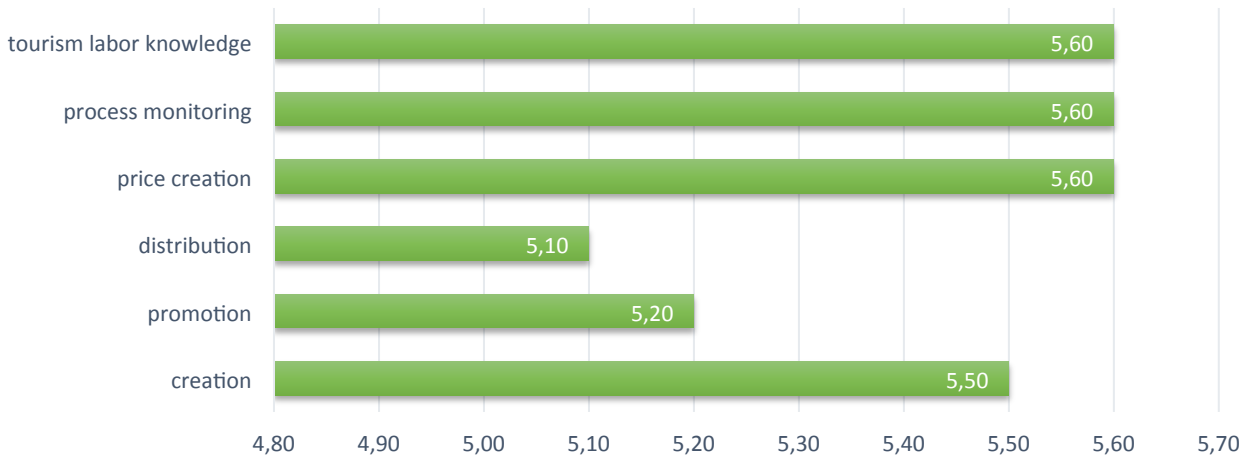


### ECOTOURISM PRIVATE STAKEHOLDERS INTERNATIONAL

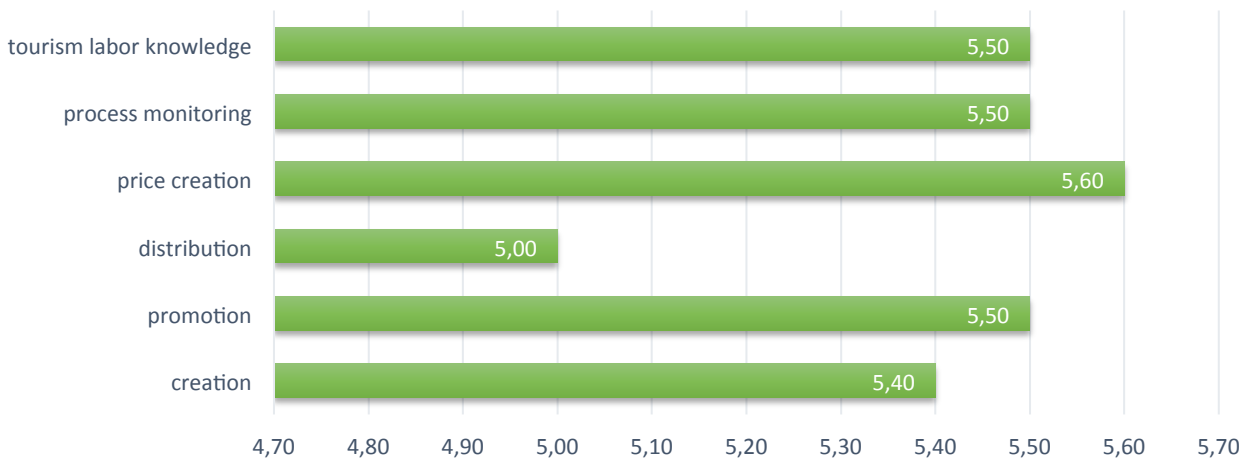


## TOURISTS

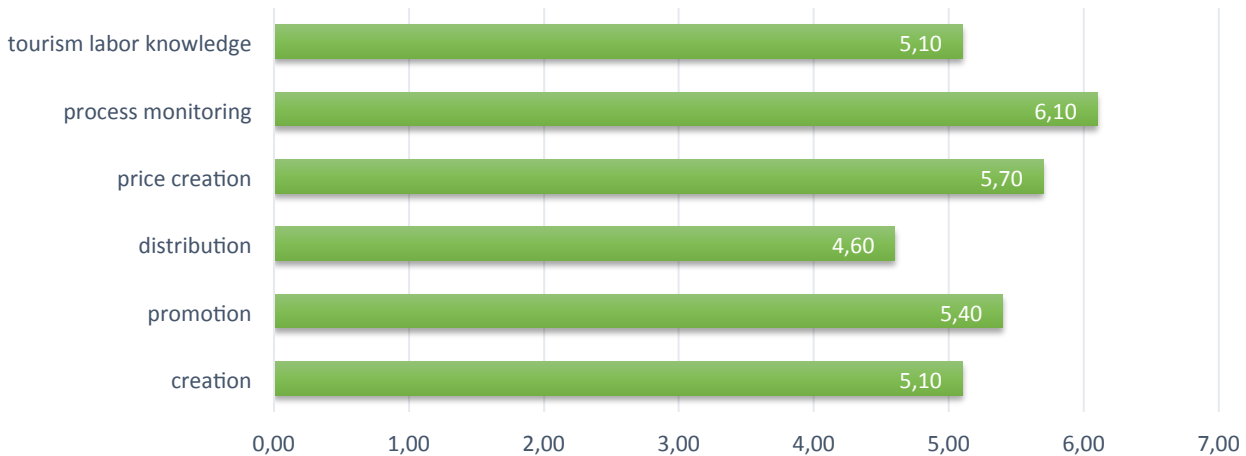
### ECOTOURISM TOURISTS LOCAL



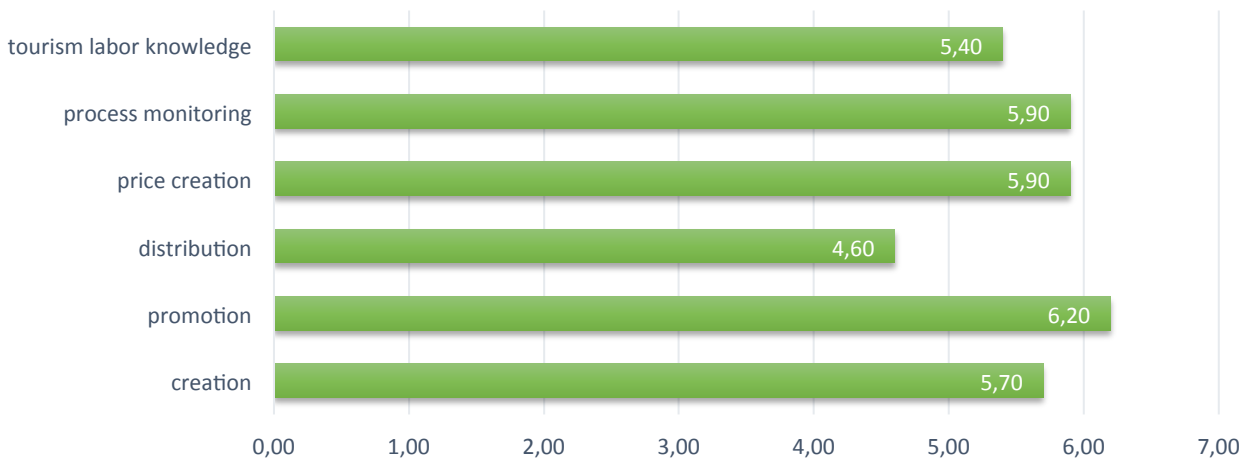
### ECOTOURISM TOURISTS REGIONAL



### ECOTOURISM TOURISTS NATIONAL

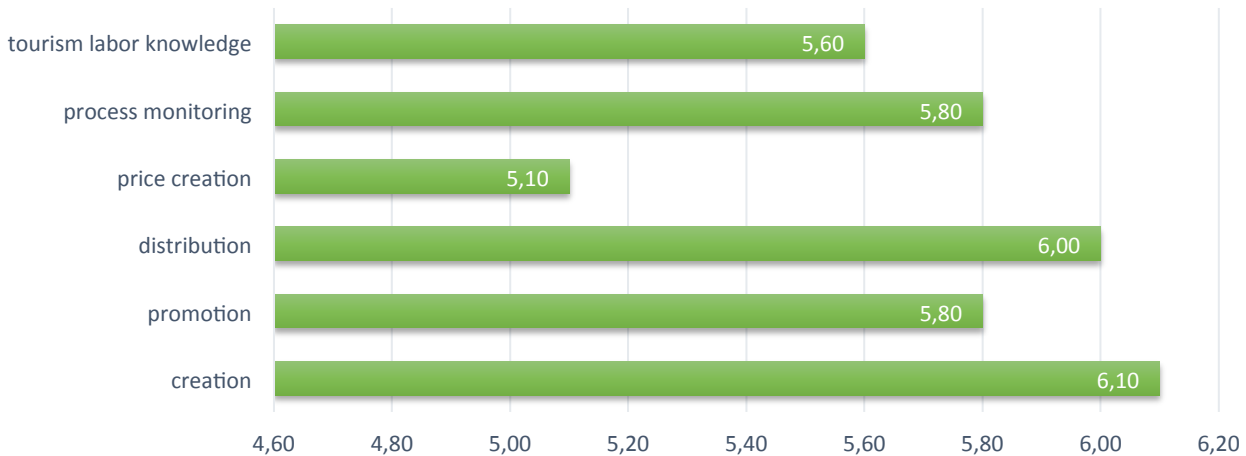


### ECOTOURISM TOURISTS INTERNATIONAL

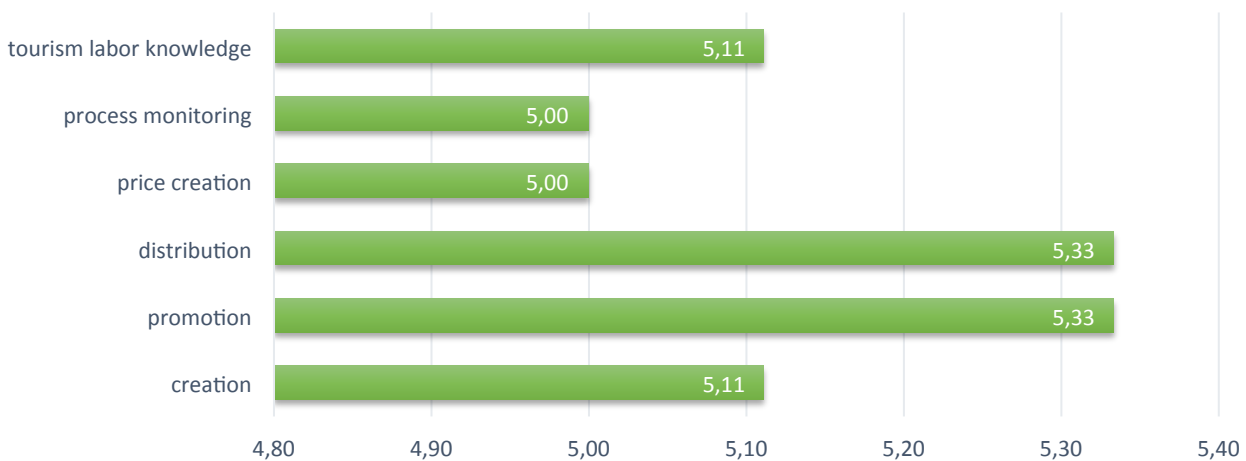


## RESIDENTS

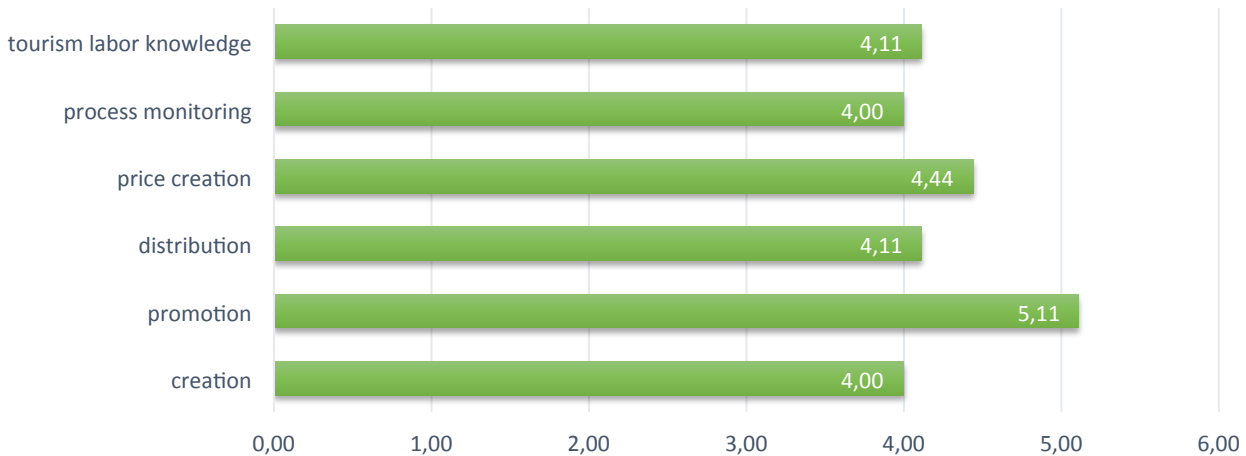
### ECOTOURISM RESIDENTS LOCAL



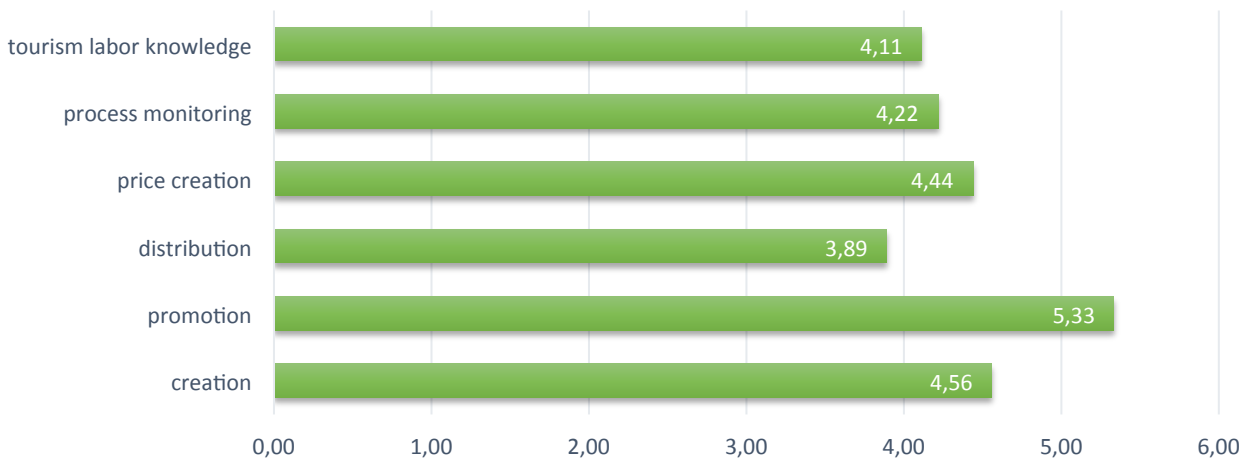
### ECOTOURISM RESIDENTS REGIONAL



### ECOTOURISM RESIDENTS NATIONAL



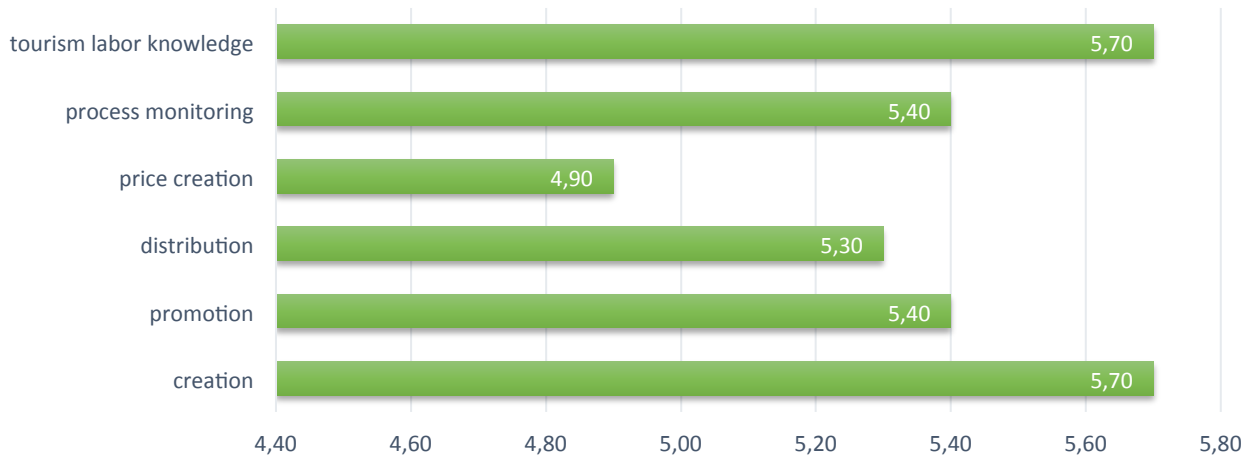
### ECOTOURISM RESIDENTS INTERNATIONAL



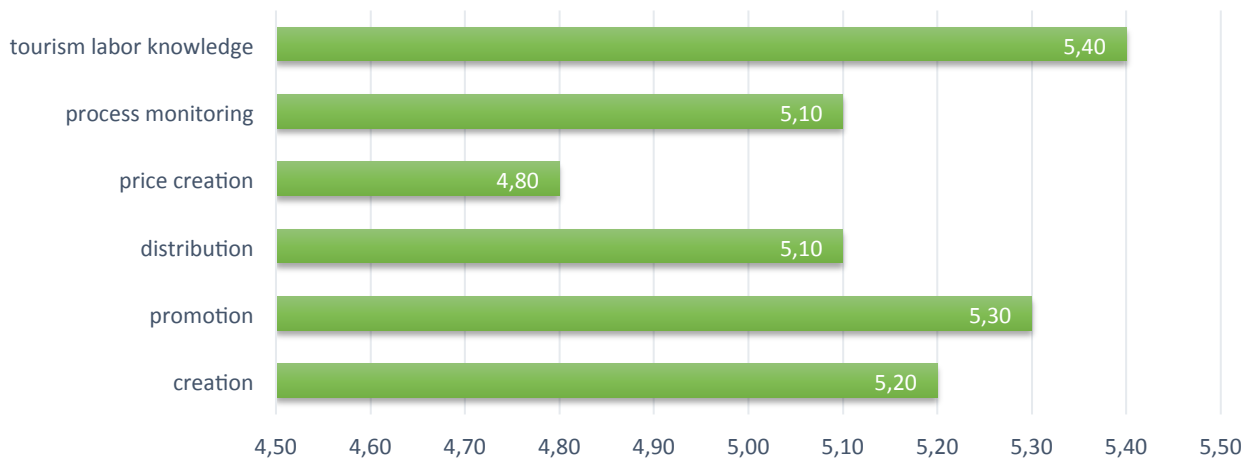
## CIVIL SECTOR



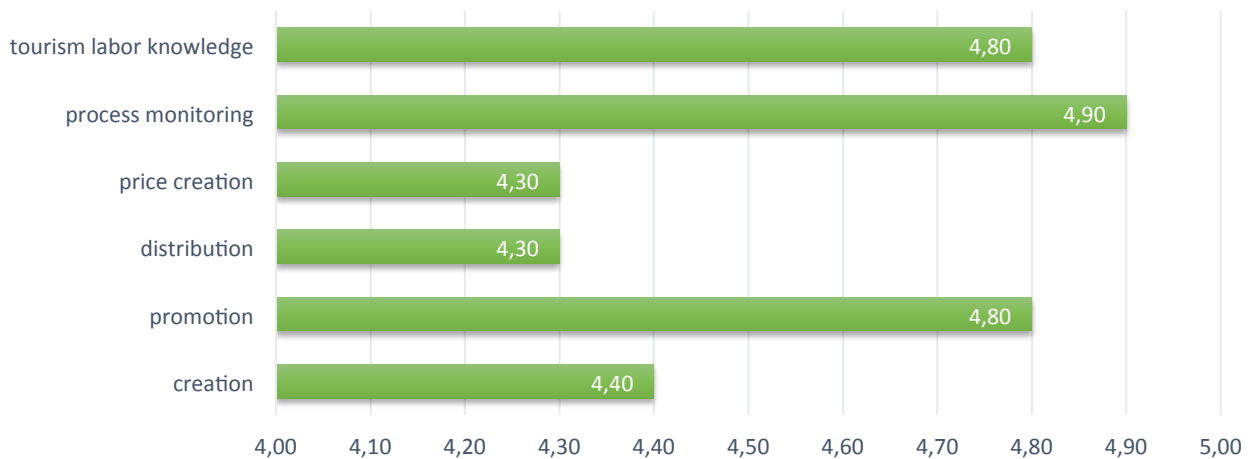
### ECOTOURISM CIVIL SECTOR LOCAL



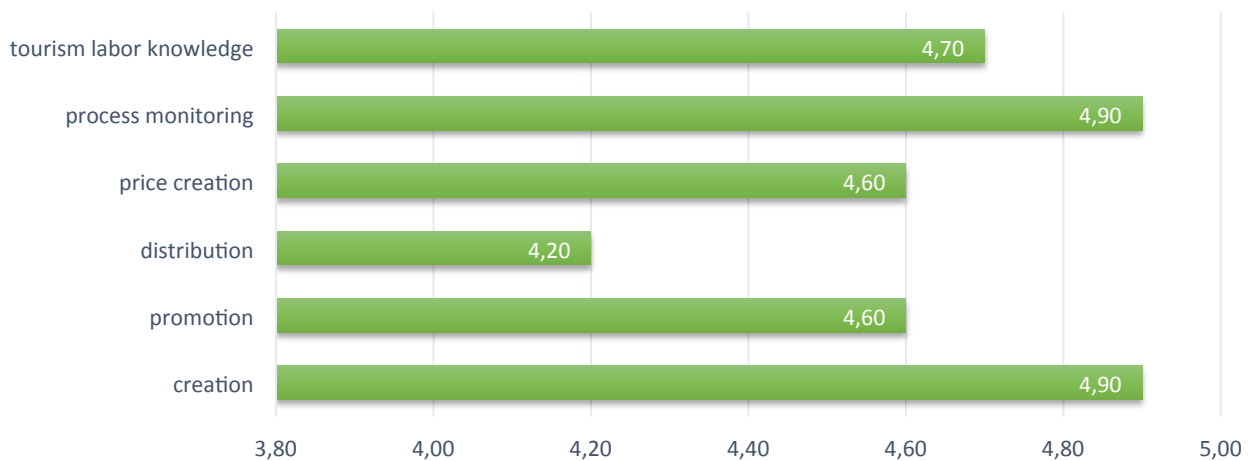
### ECOTOURISM CIVIL SECTOR REGIONAL



### ECOTOURISM CIVIL SECTOR NATIONAL

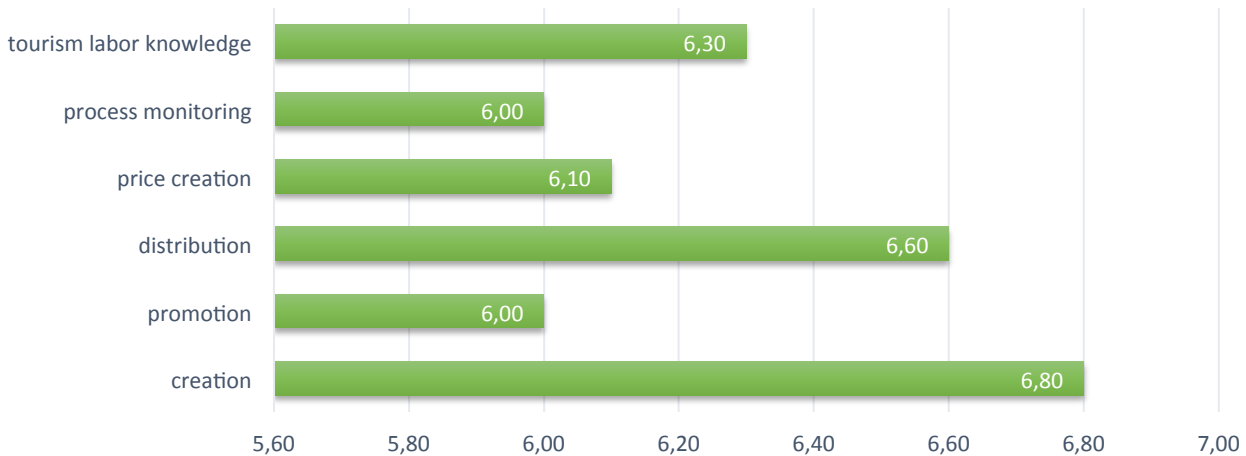


### ECOTOURISM CIVIL SECTOR INTERNATIONAL

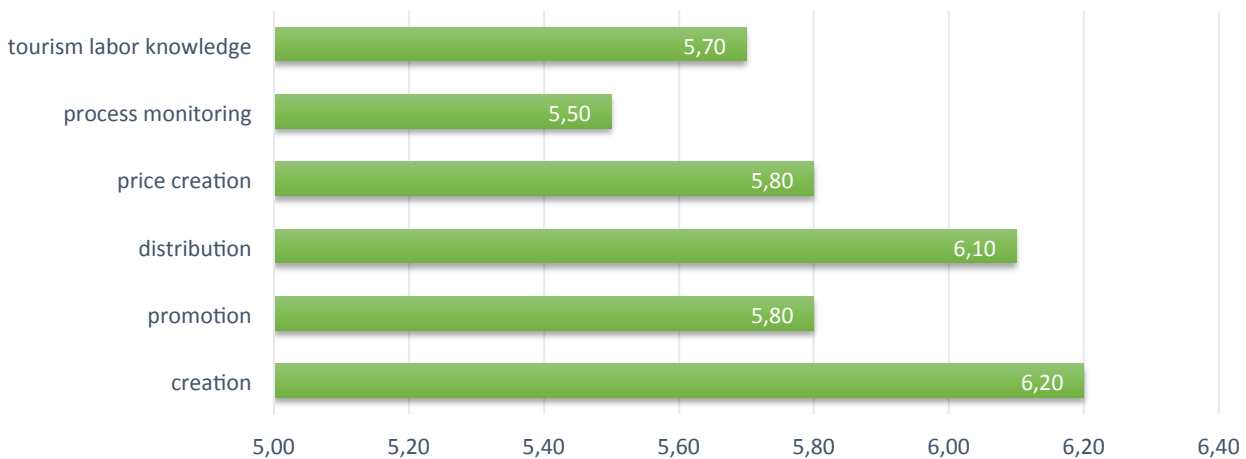


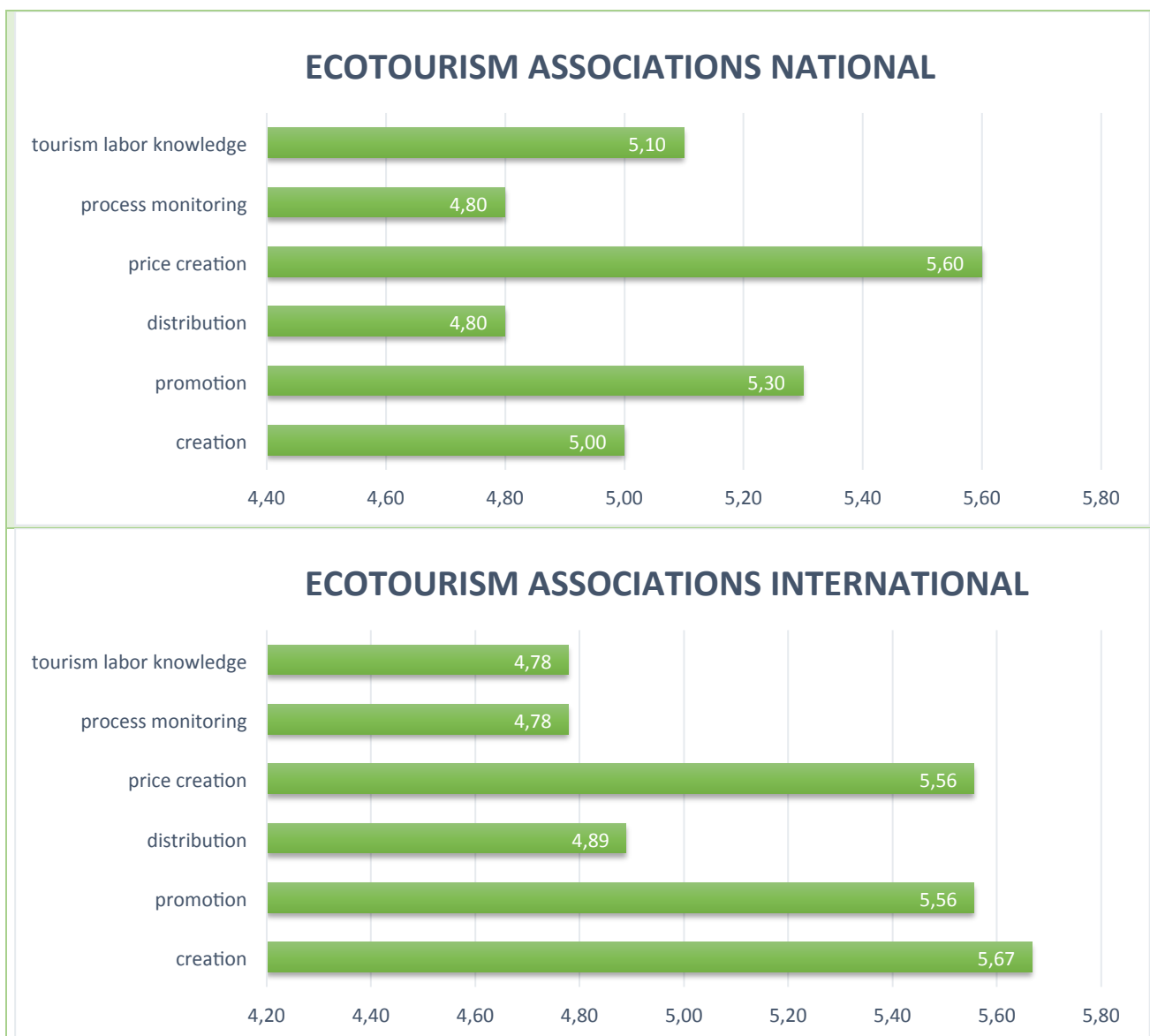
## ASSOCIATIONS/ORGANIZATIONS RELATED TO CULTURAL AND NATURAL HERITAGE OF THE AREA

### ECOTOURISM ASSOCIATIONS LOCAL



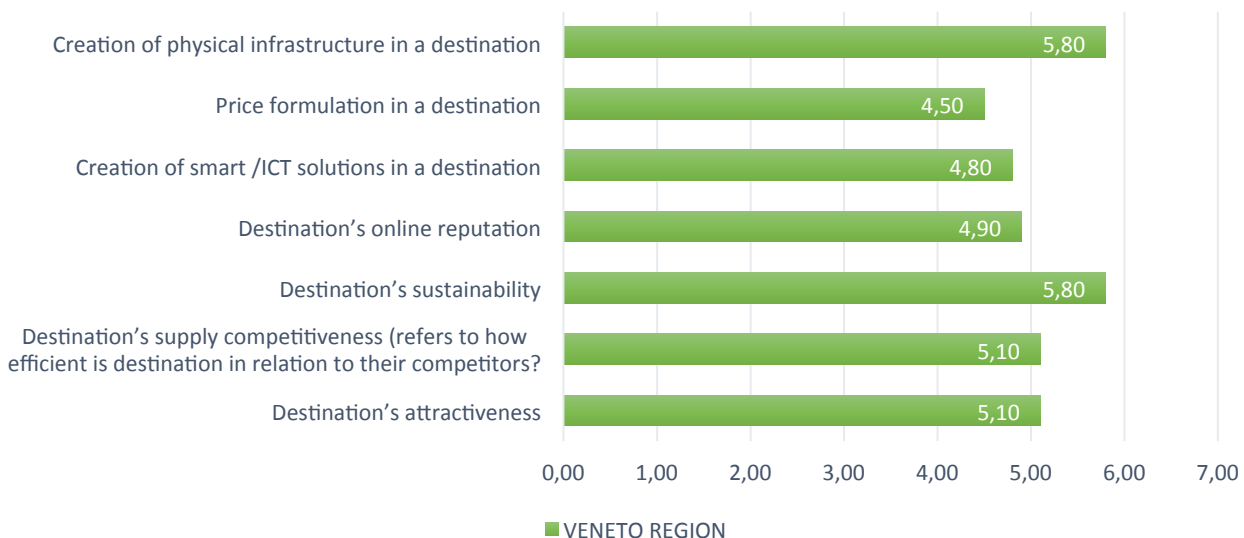
### ECOTOURISM ASSOCIATIONS REGIONAL



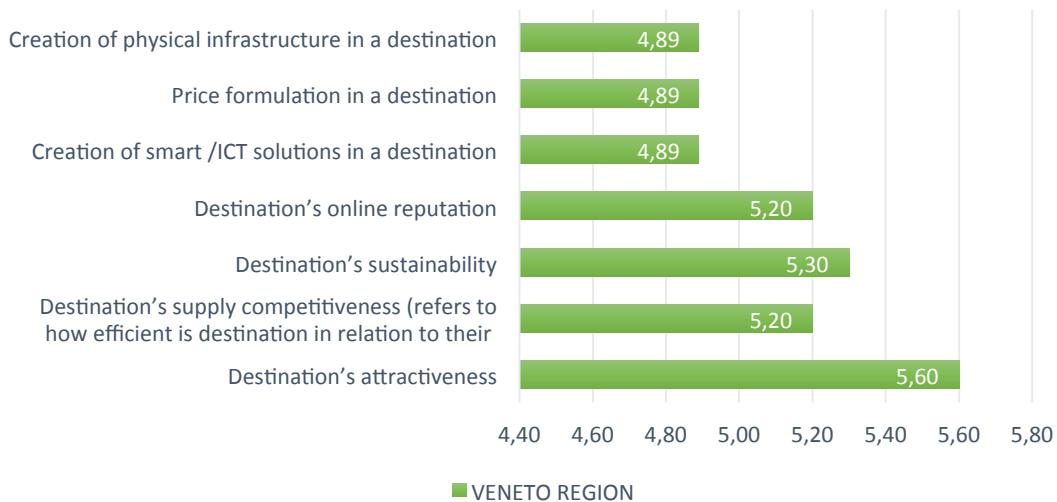


- *Impact of stakeholders*

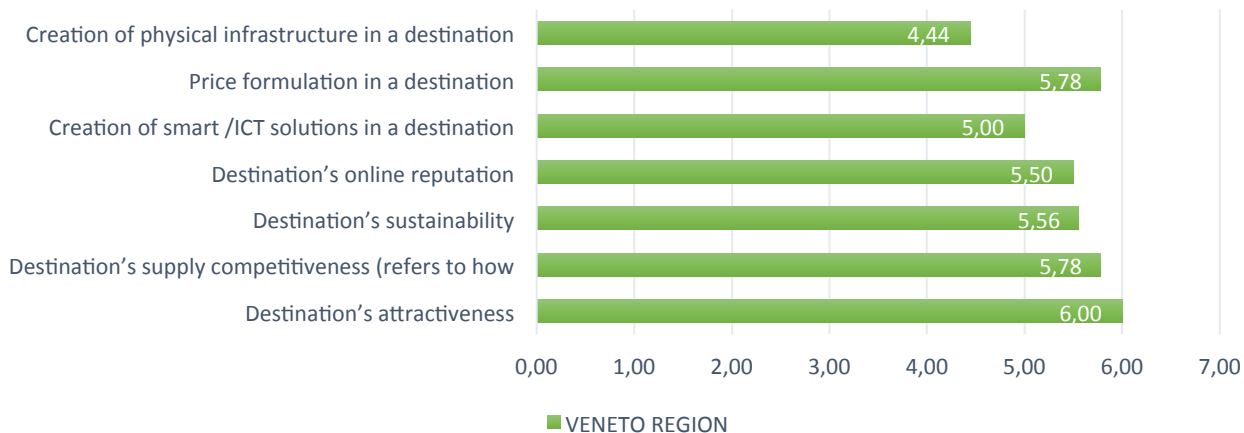
## IMPACT OF PUBLIC INSTITUTIONS AT DIFFERENT LEVELS



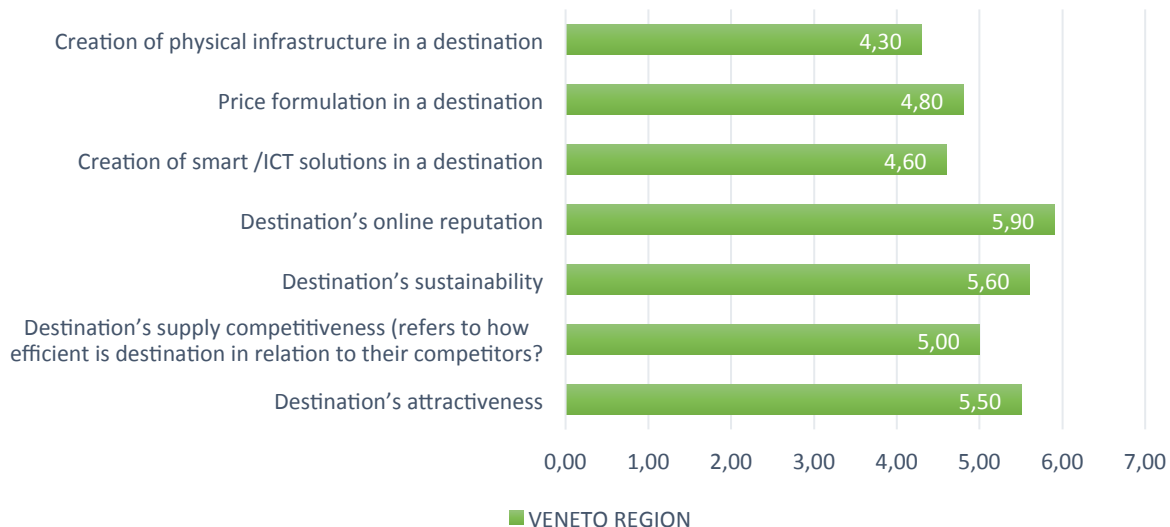
## DMO'S IMPACT ON



## PRIVATE STAKEHOLDERS' IMPACTS ON



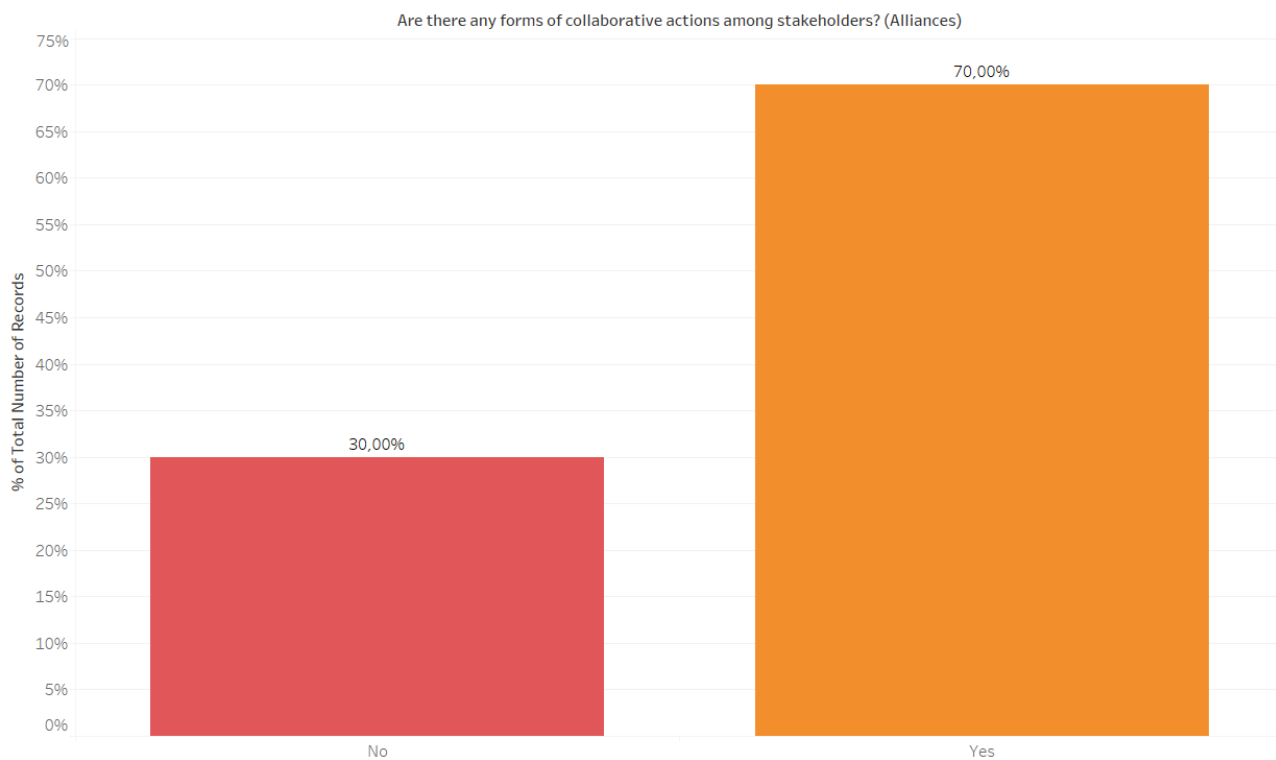
## TOURISTS' IMPACT ON



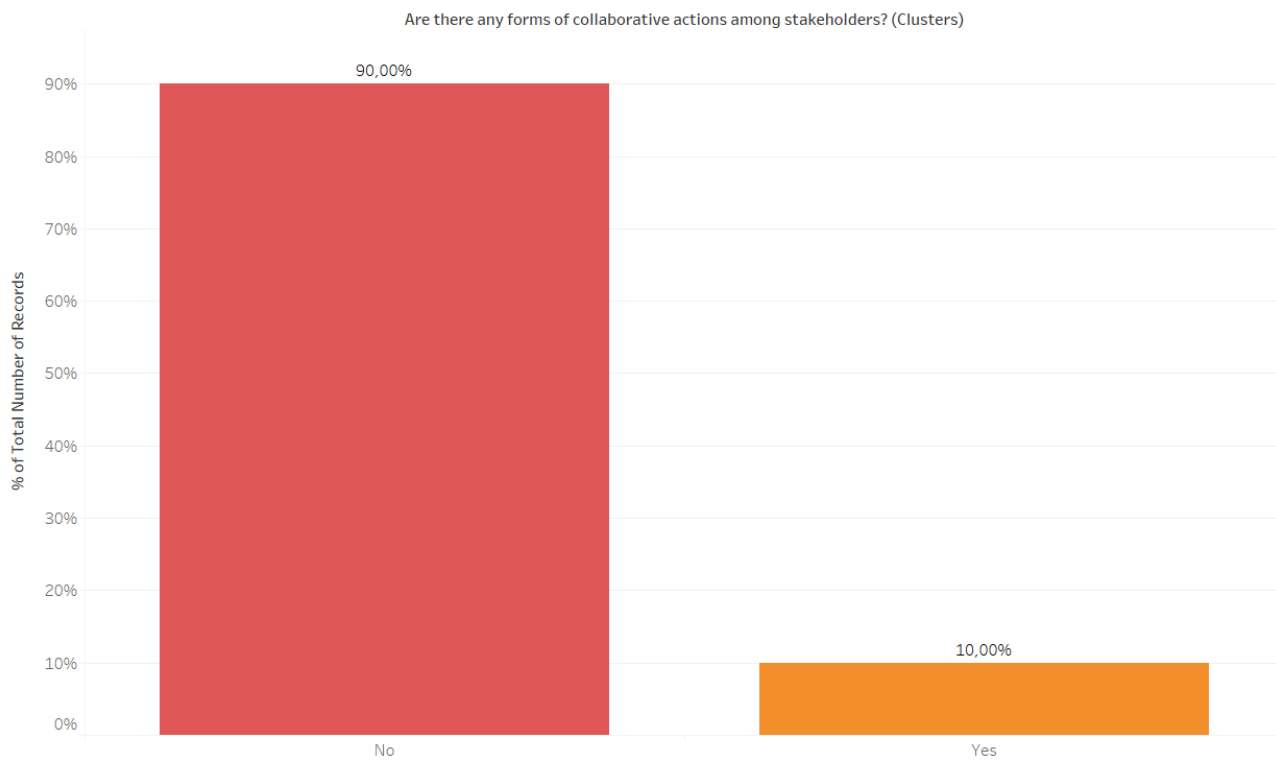
- *Collaborative actions*

Are there any forms of collaborative actions among stakeholders?

### Alliances

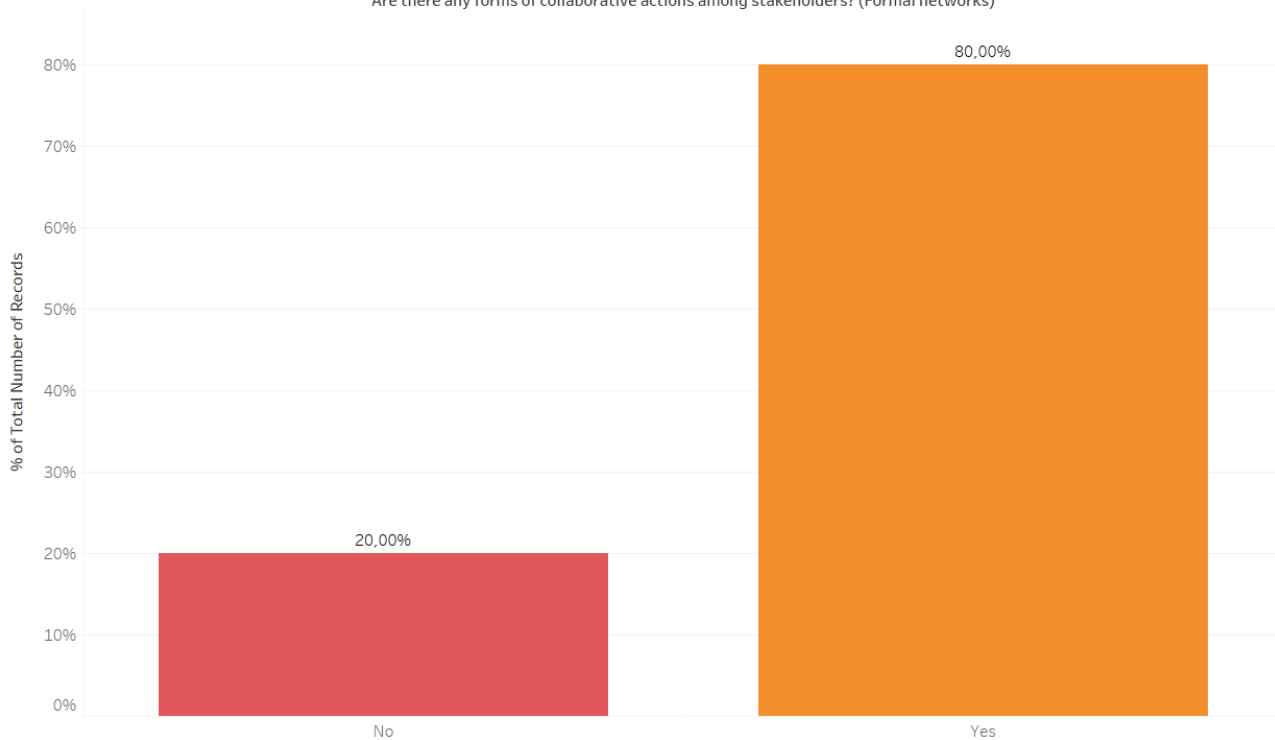


### Clusters



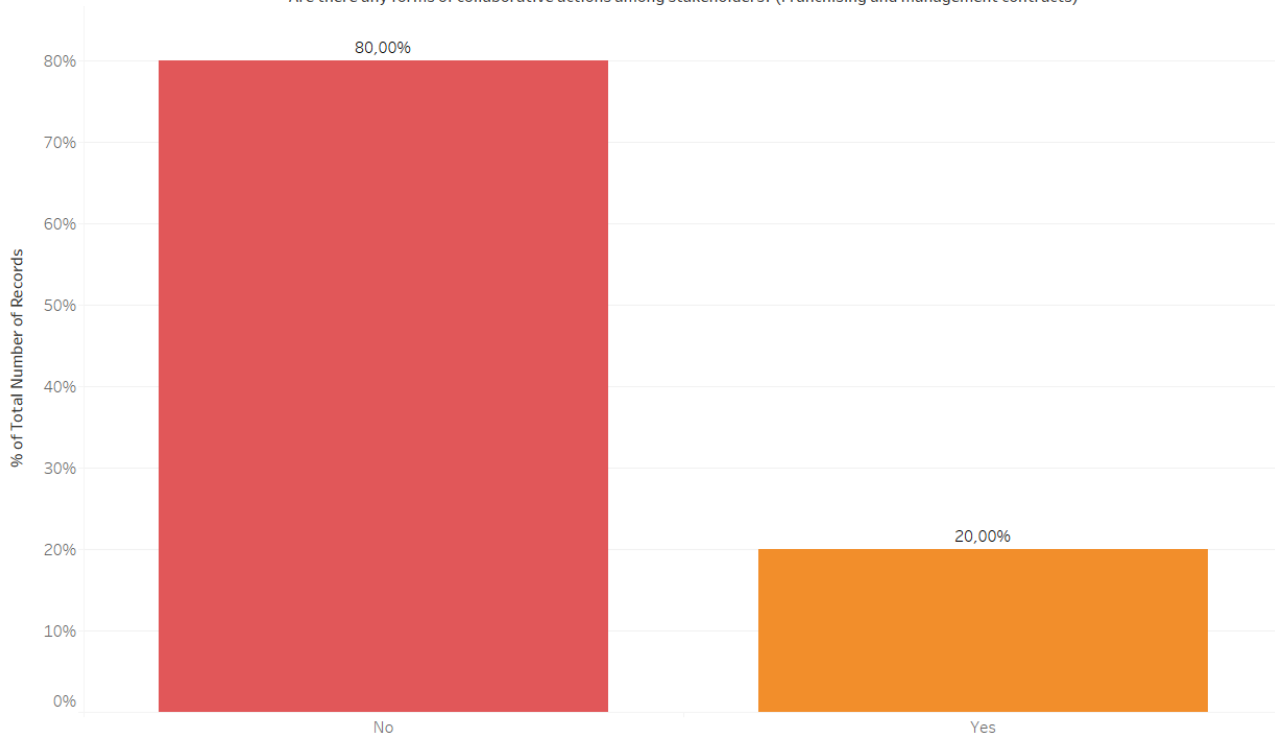
### Formal Networks

Are there any forms of collaborative actions among stakeholders? (Formal networks)



### Franchising and management contracts

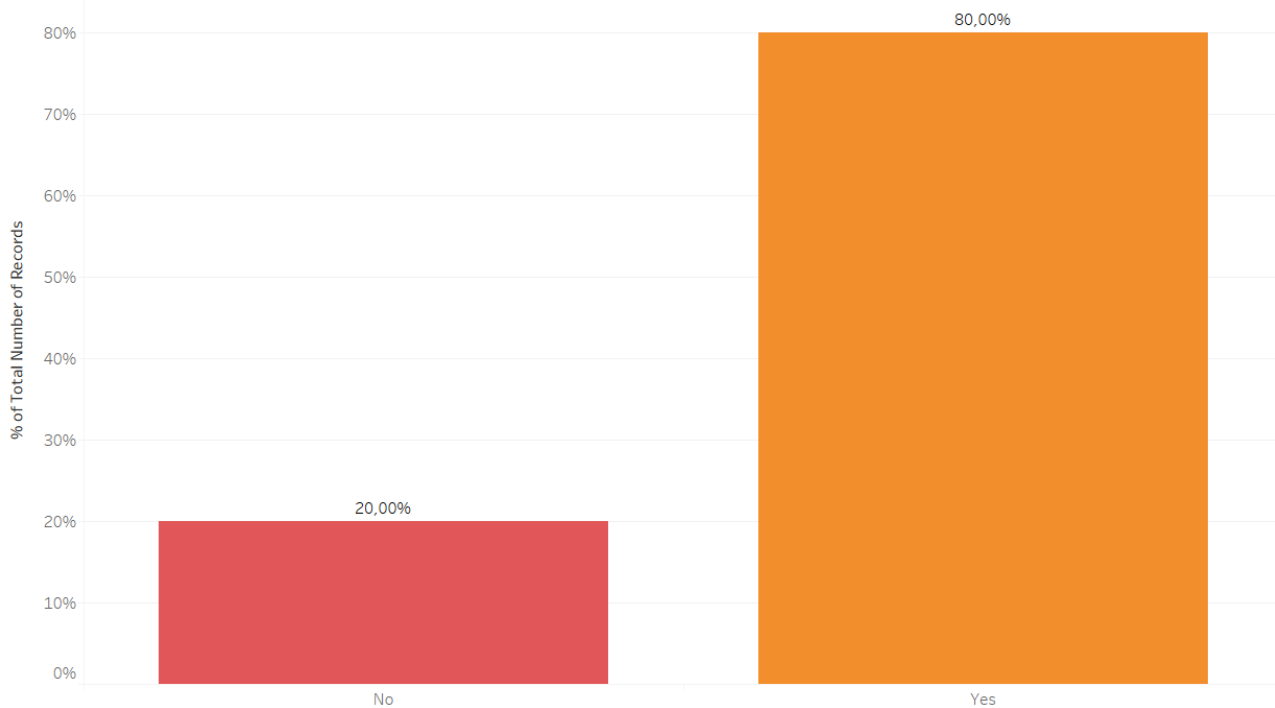
Are there any forms of collaborative actions among stakeholders? (Franchising and management contracts)





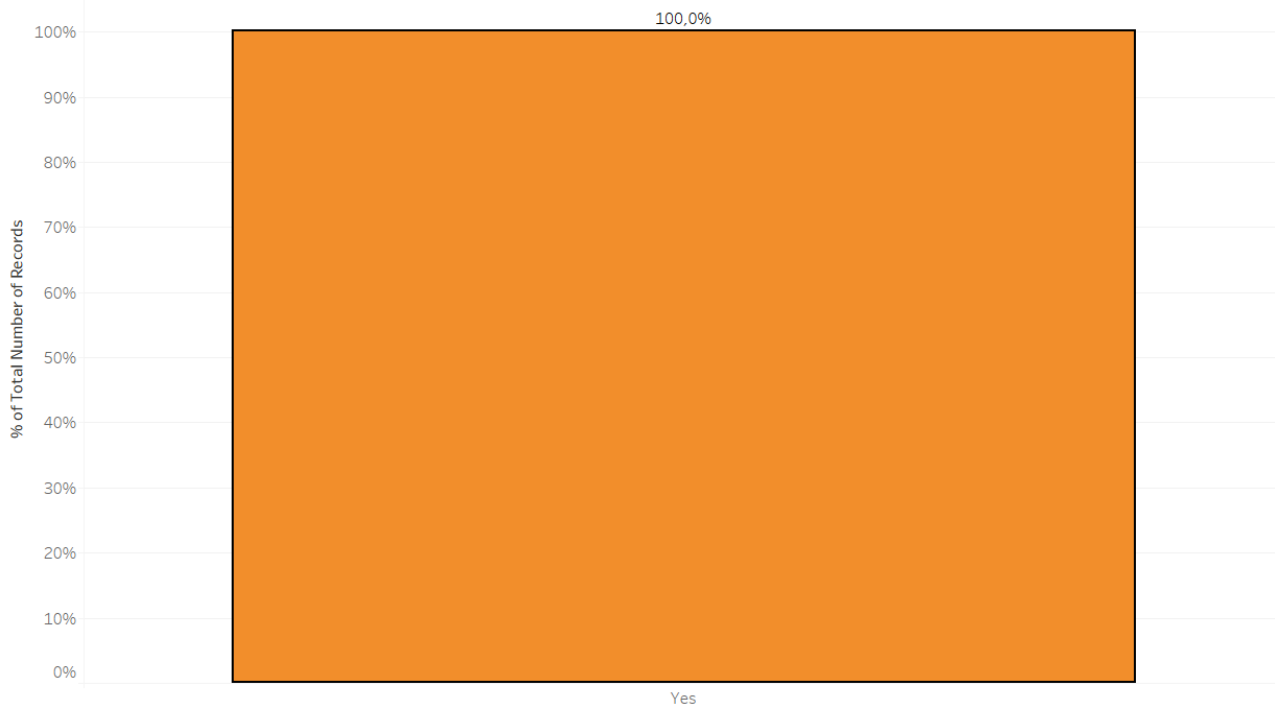
### Informal Networks

Are there any forms of collaborative actions among stakeholders? (Informal networks)



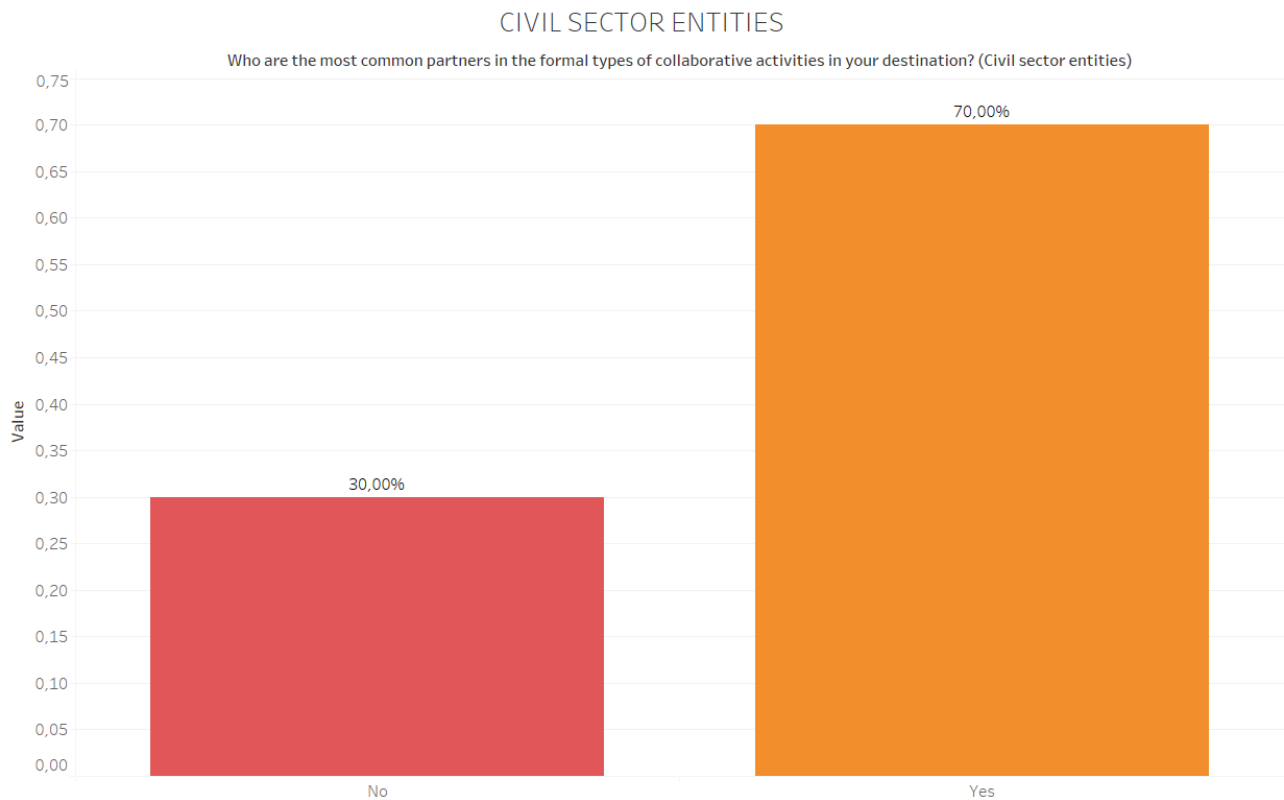
### Local action groups

Are there any forms of collaborative actions among stakeholders? (Local action groups)



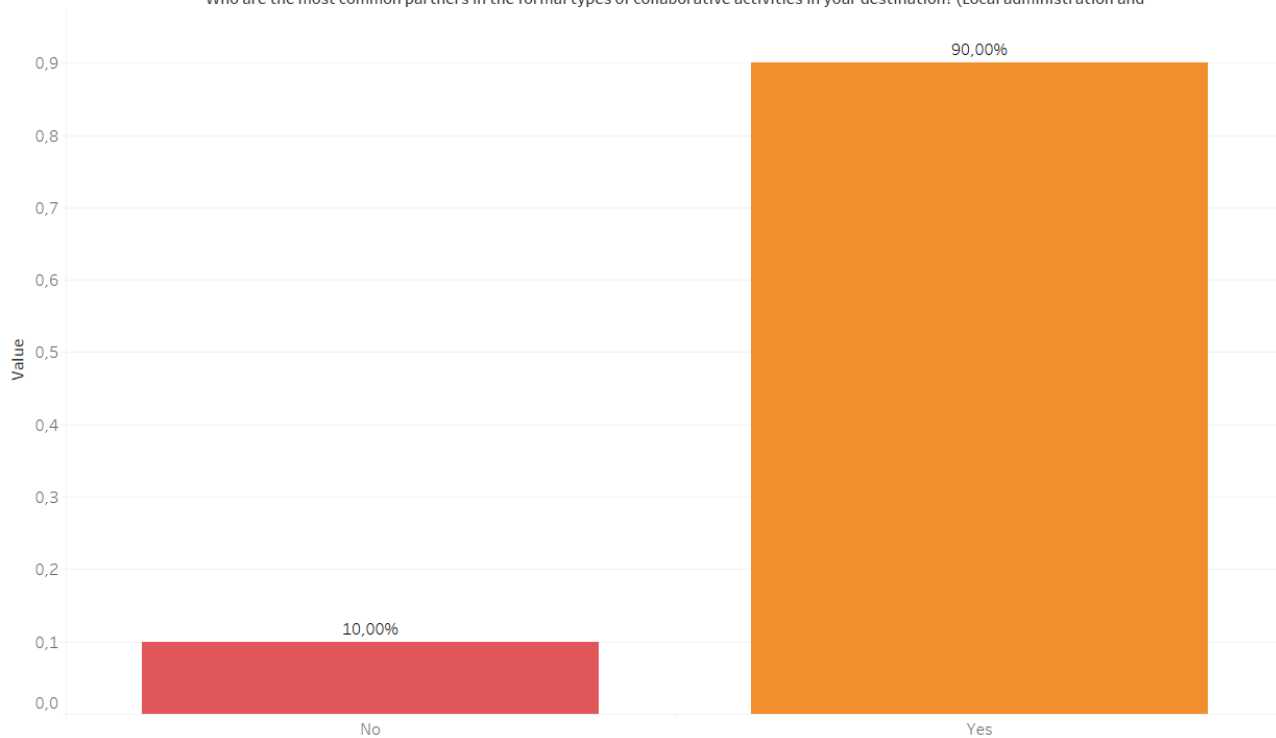
- Common partners*

Who are the most common partners in the formal types of collaborative activities in your destination?



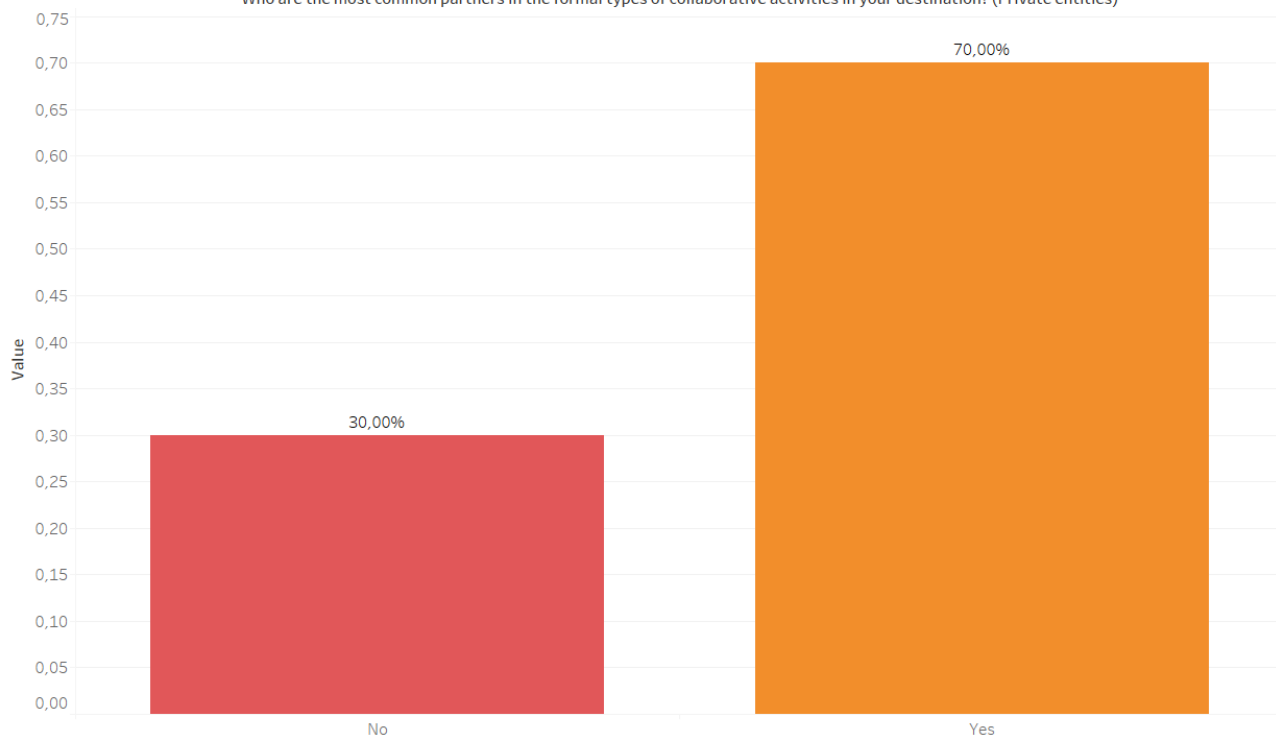
### LOCAL ADMINISTRATION

Who are the most common partners in the formal types of collaborative activities in your destination? (Local administration and



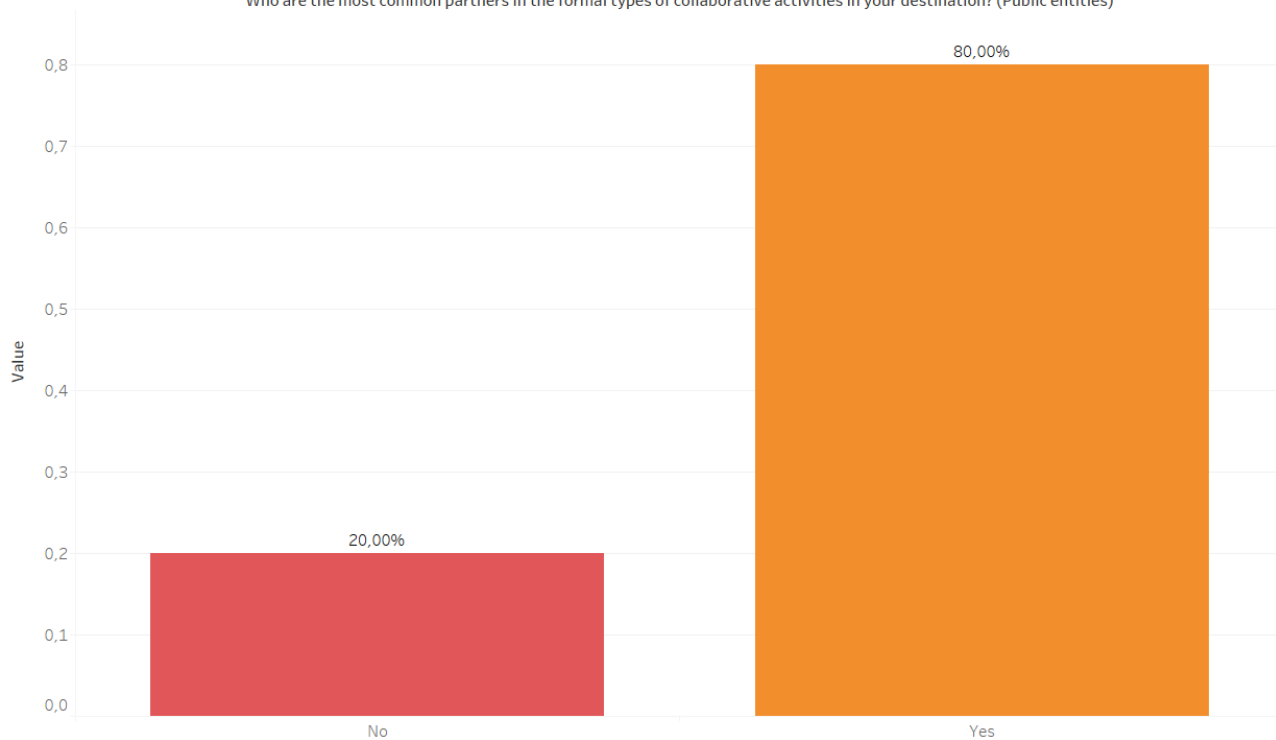
### PRIVATE ENTITIES

Who are the most common partners in the formal types of collaborative activities in your destination? (Private entities)



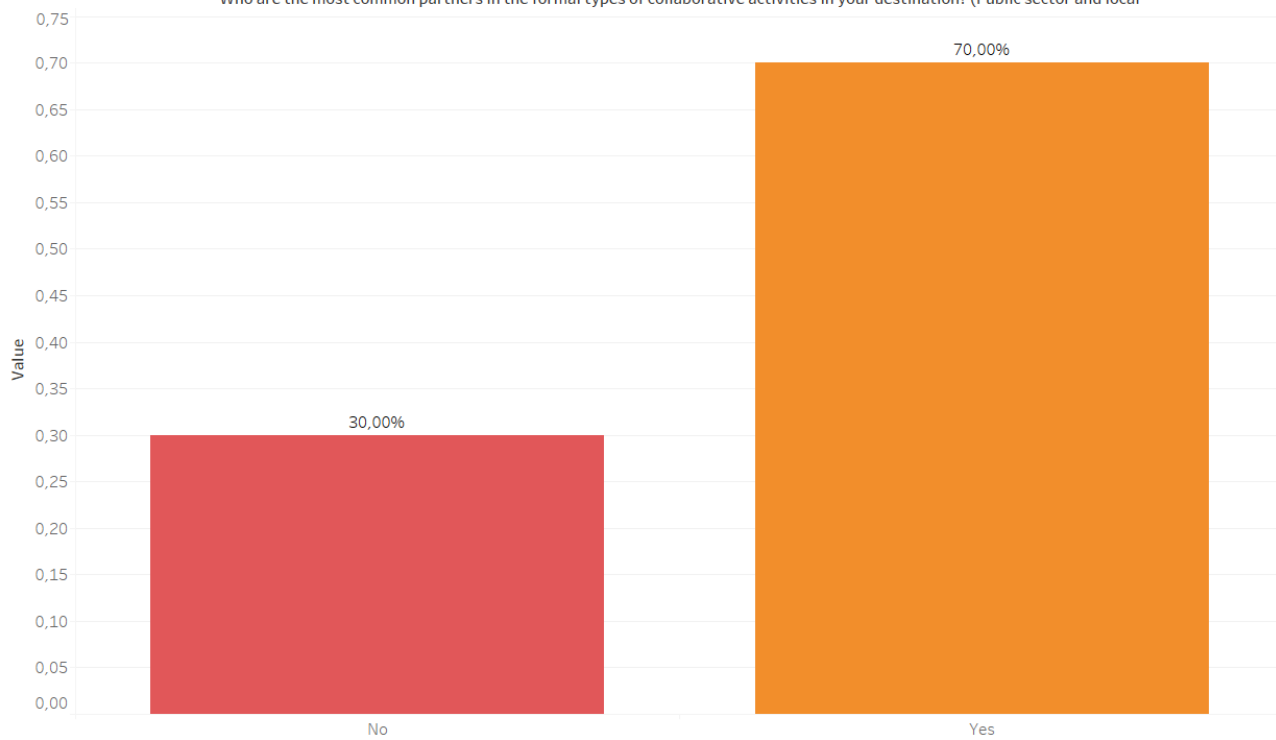
### PUBLIC ENTITIES

Who are the most common partners in the formal types of collaborative activities in your destination? (Public entities)

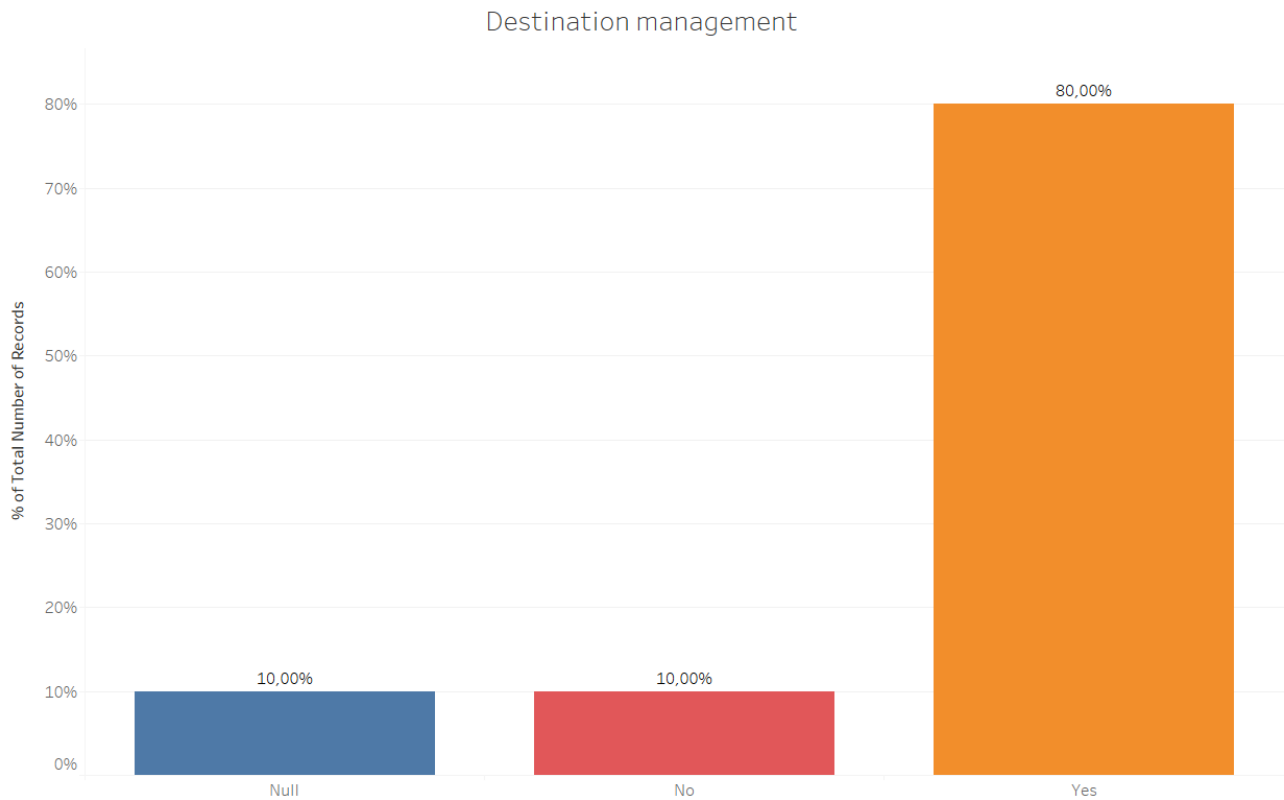


### PUBLIC SECTOR

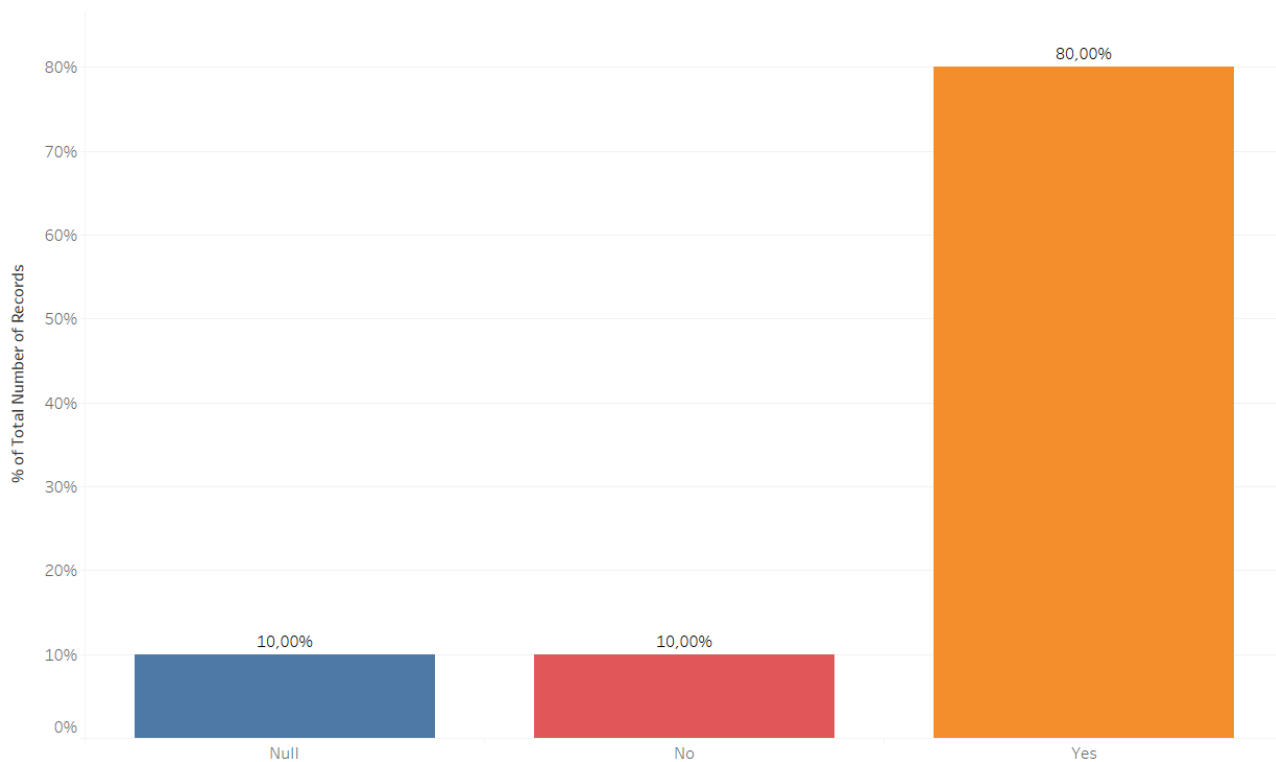
Who are the most common partners in the formal types of collaborative activities in your destination? (Public sector and local)



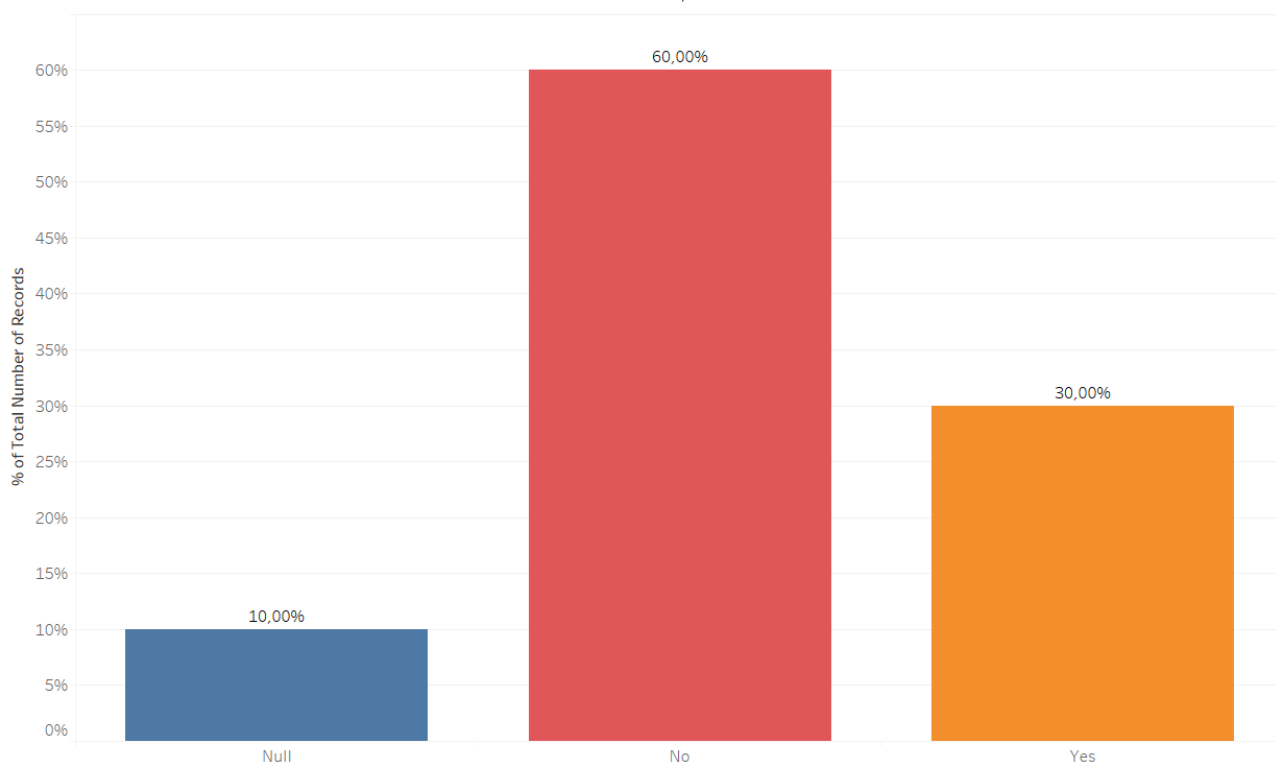
- Types of activities**  
 What types of activities are most commonly shared between different stakeholders?



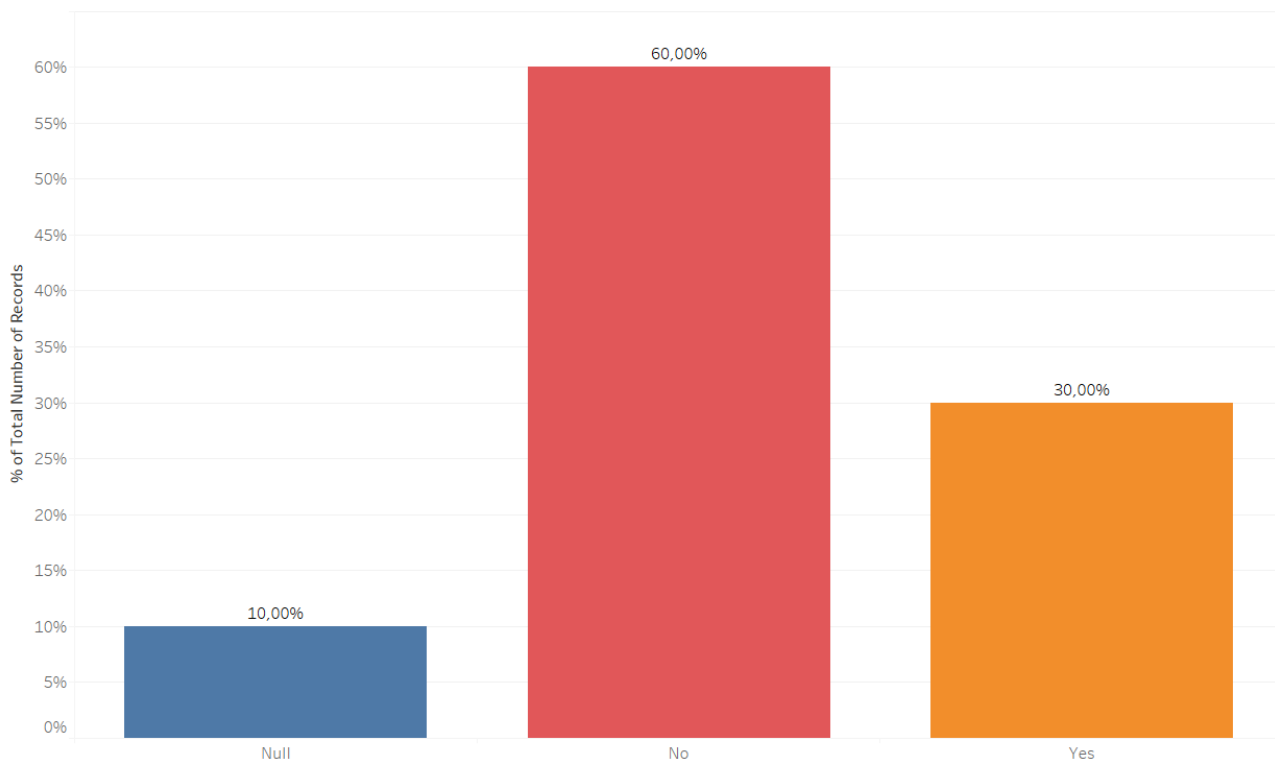
Creation of the products



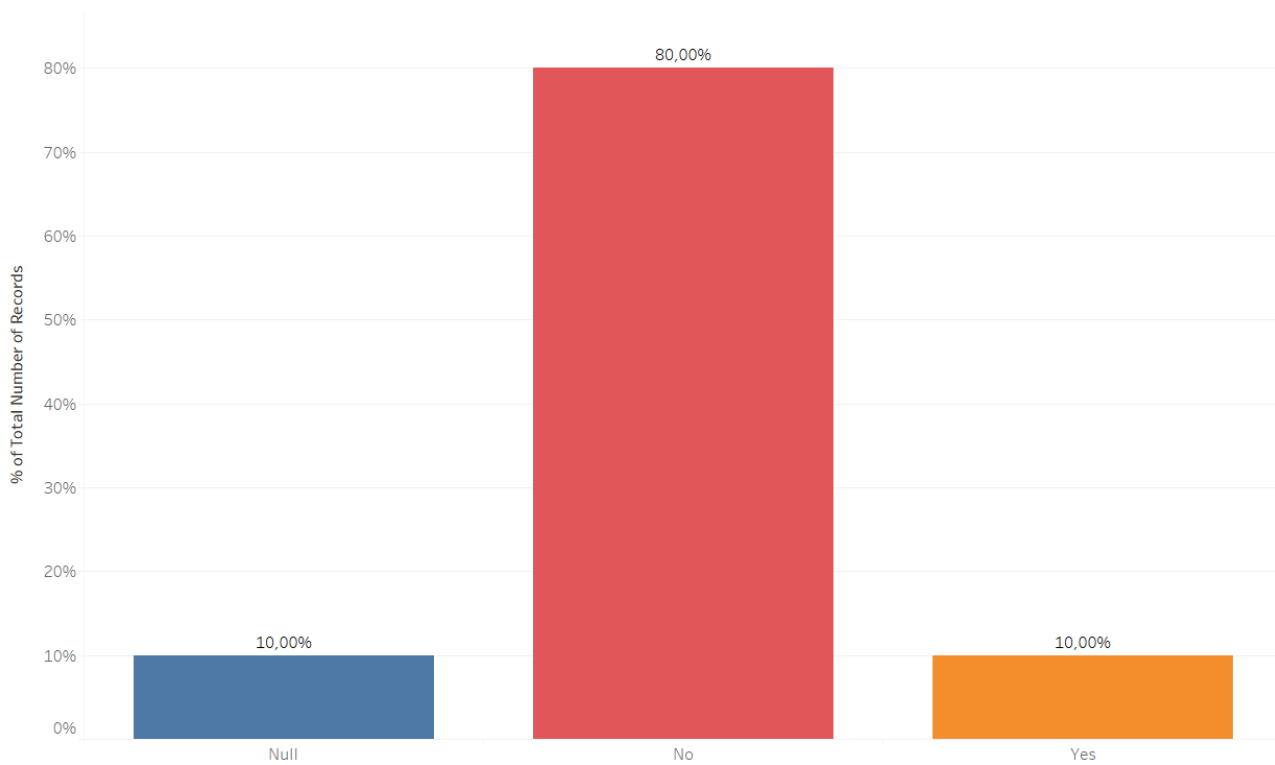
Distribution of products



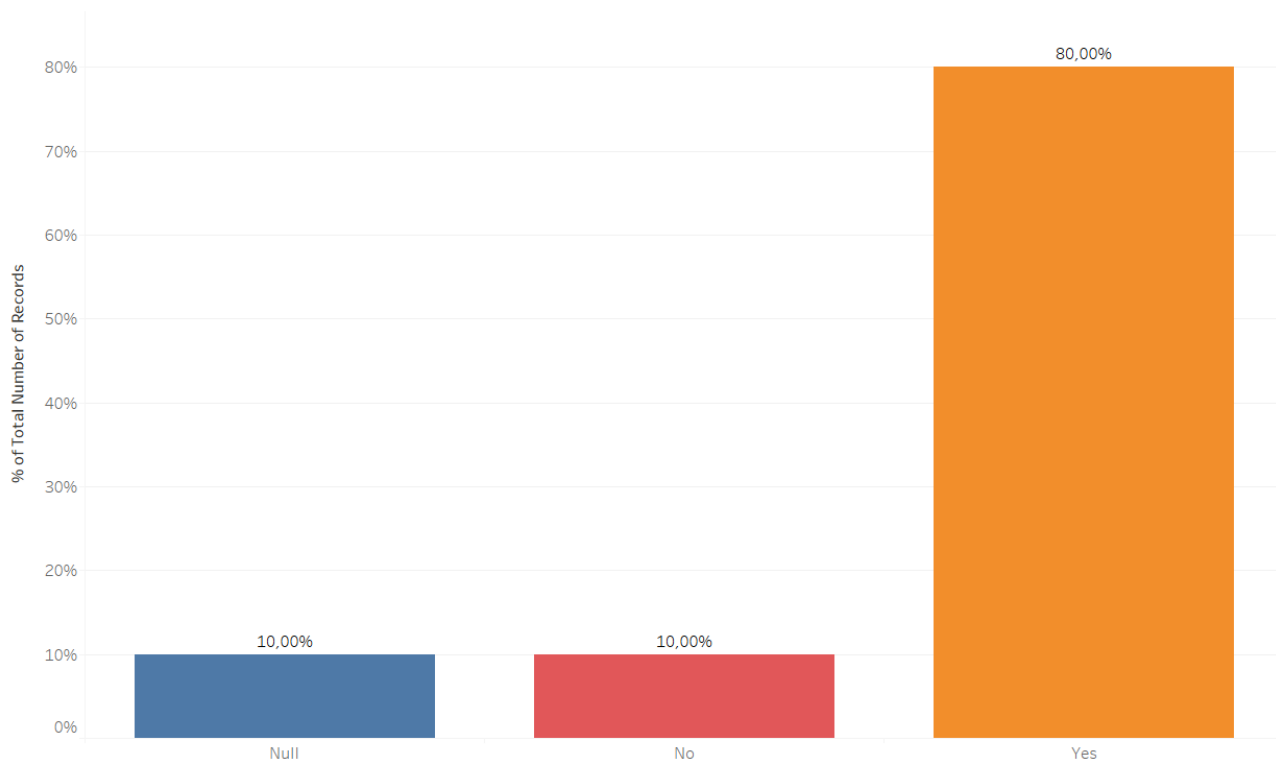
### Monitoring the process of a products



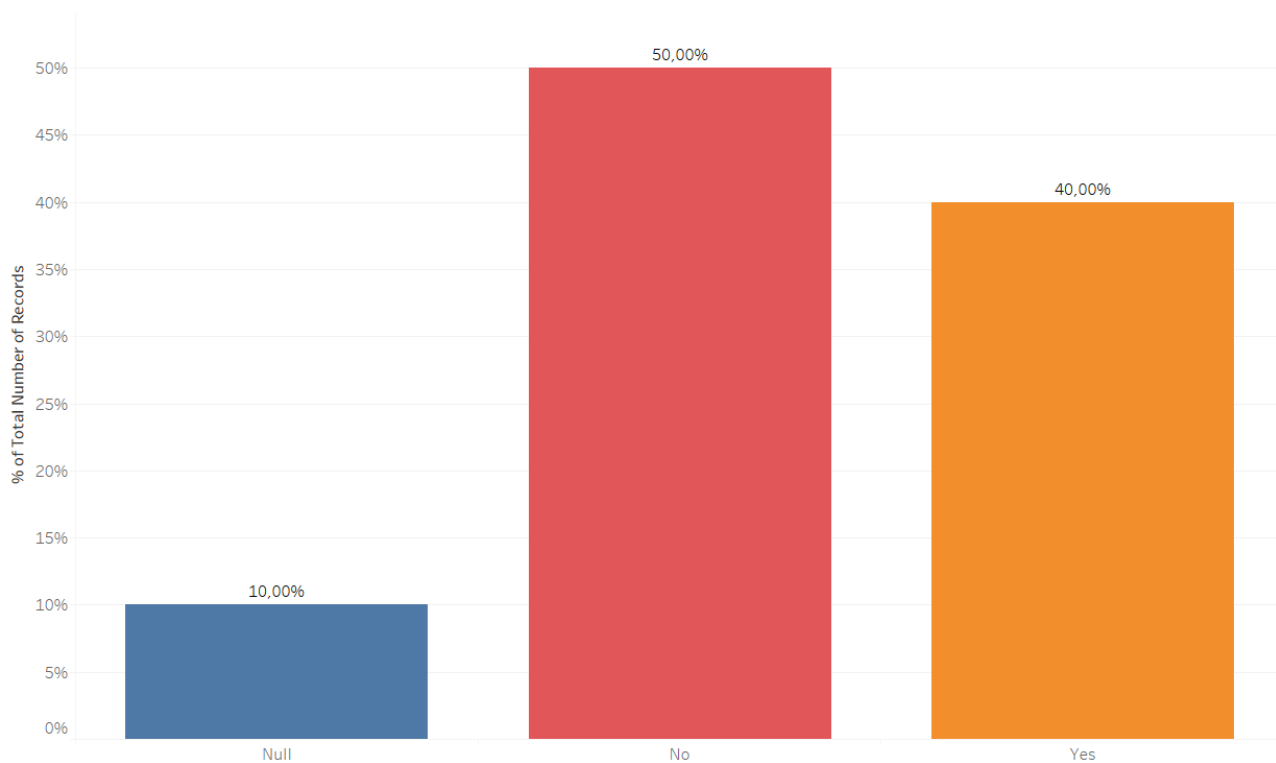
### Price creation of products



### Promotion of products

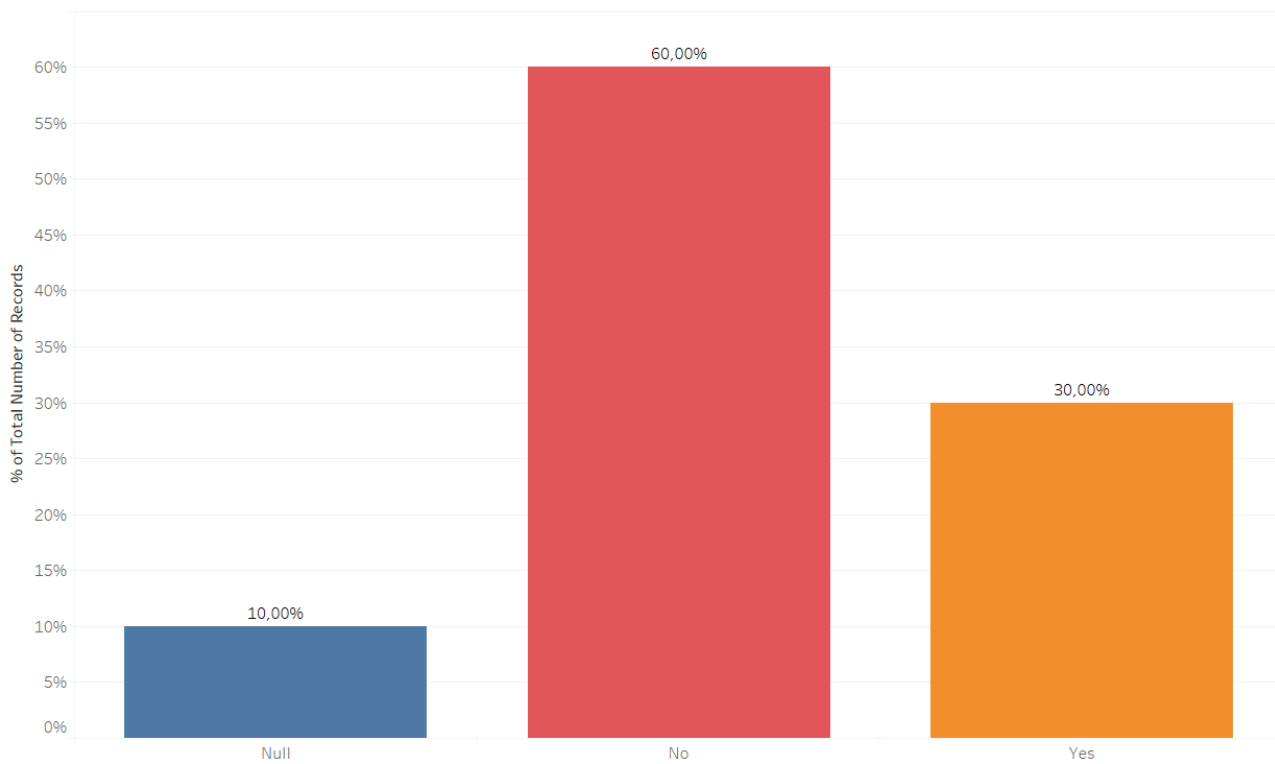


### ICT dissemination and implementation

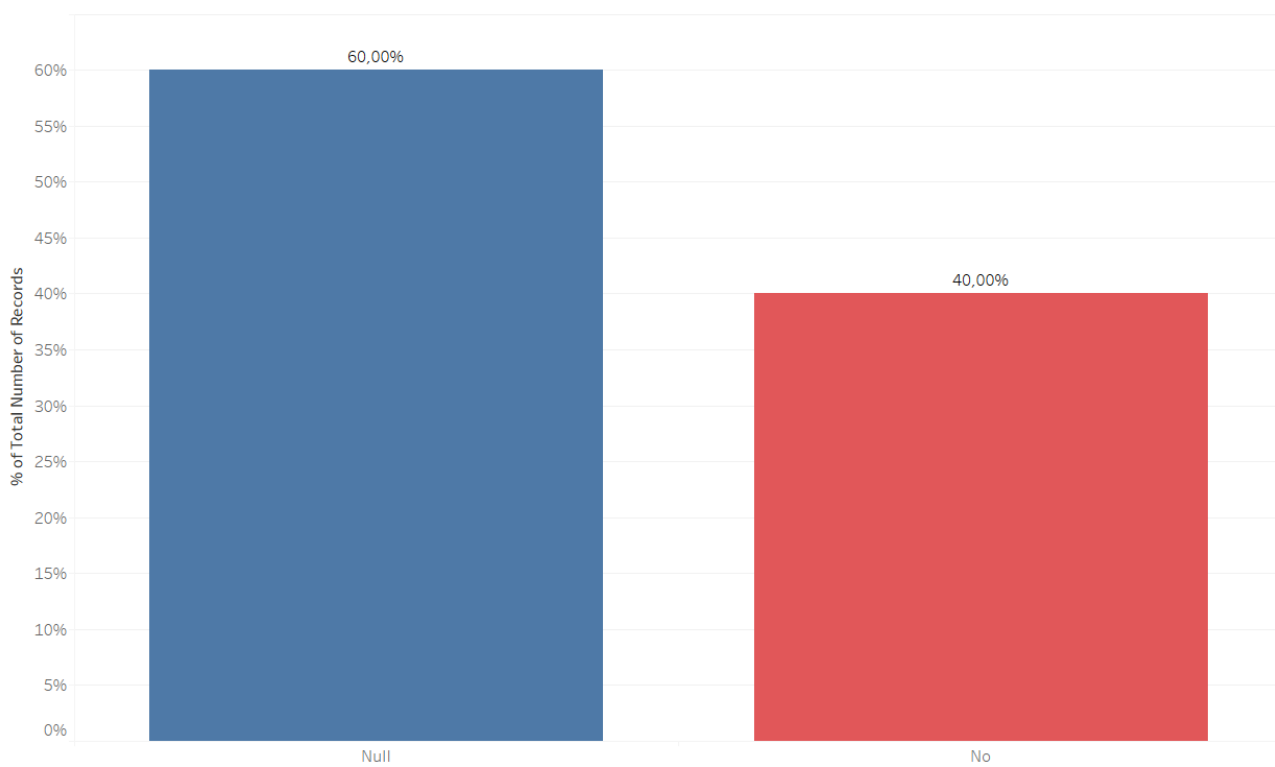


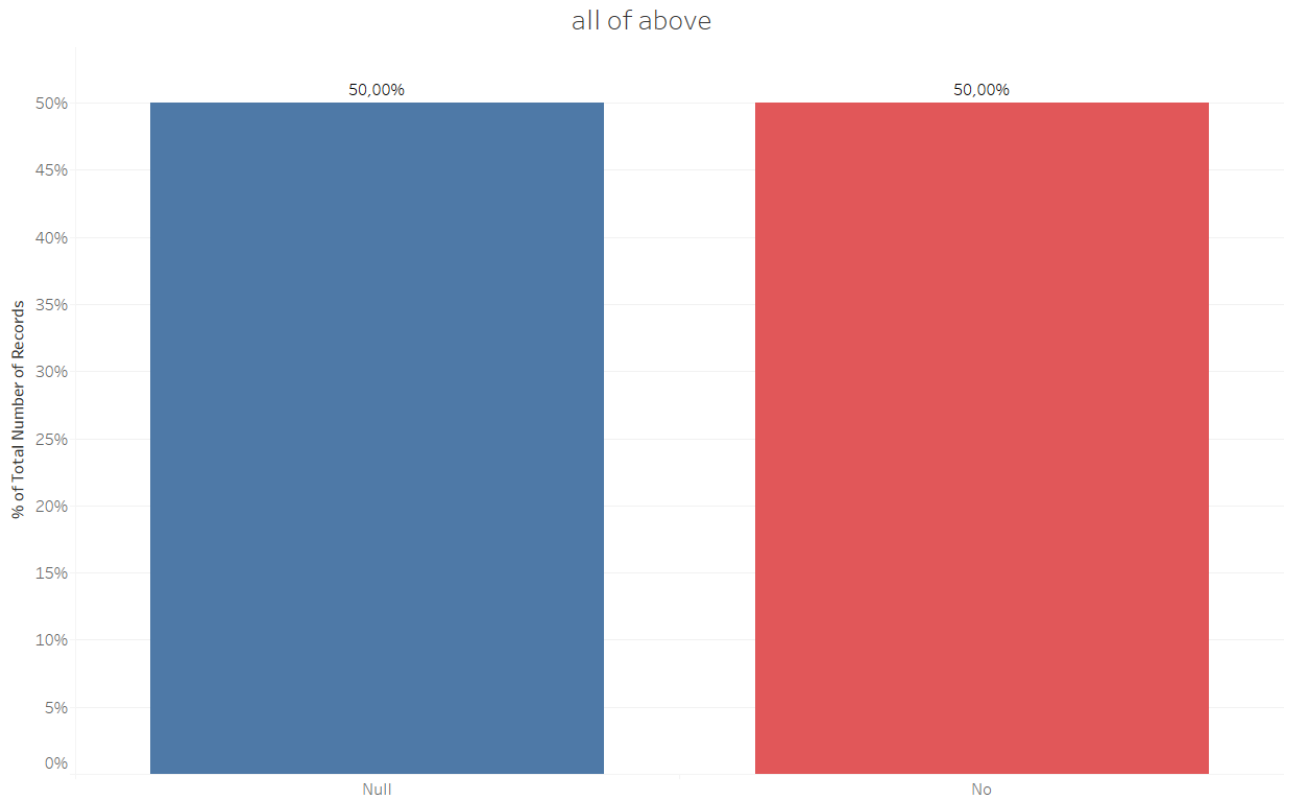


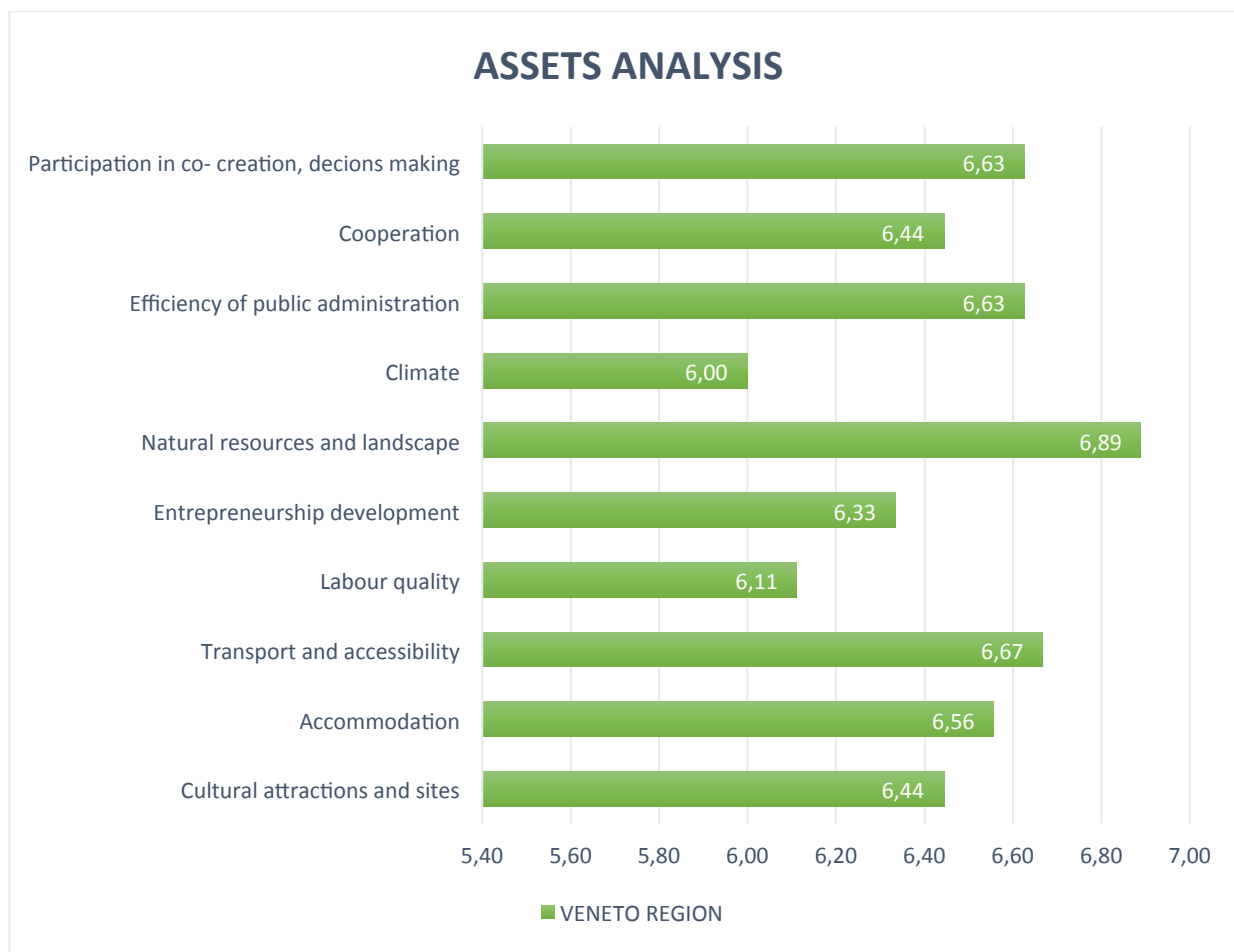
### Tourist labour knowledge enhancement



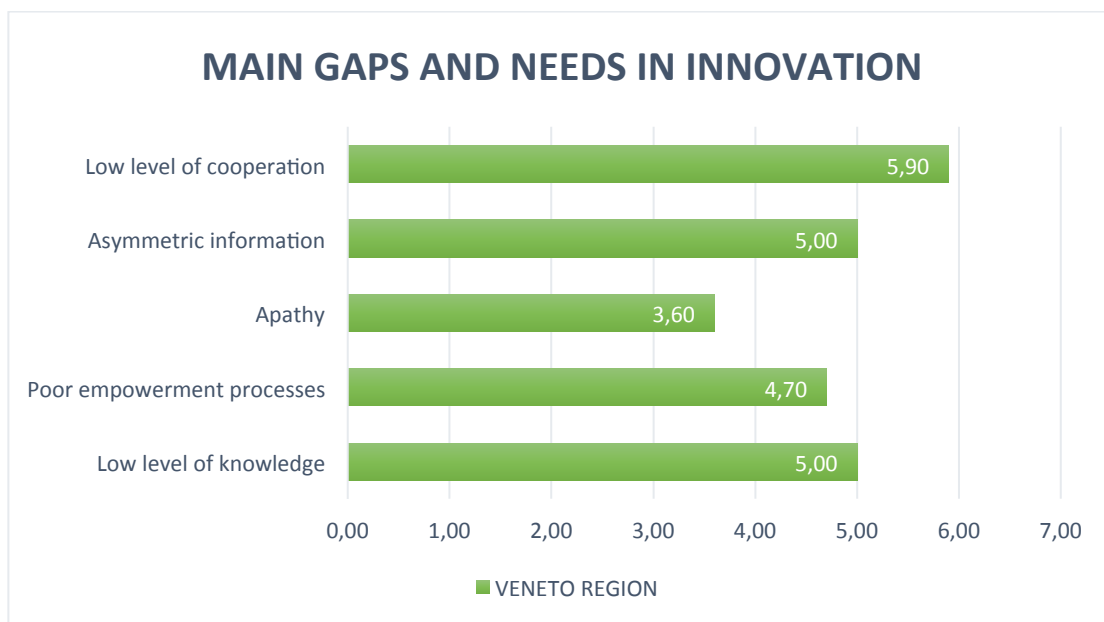
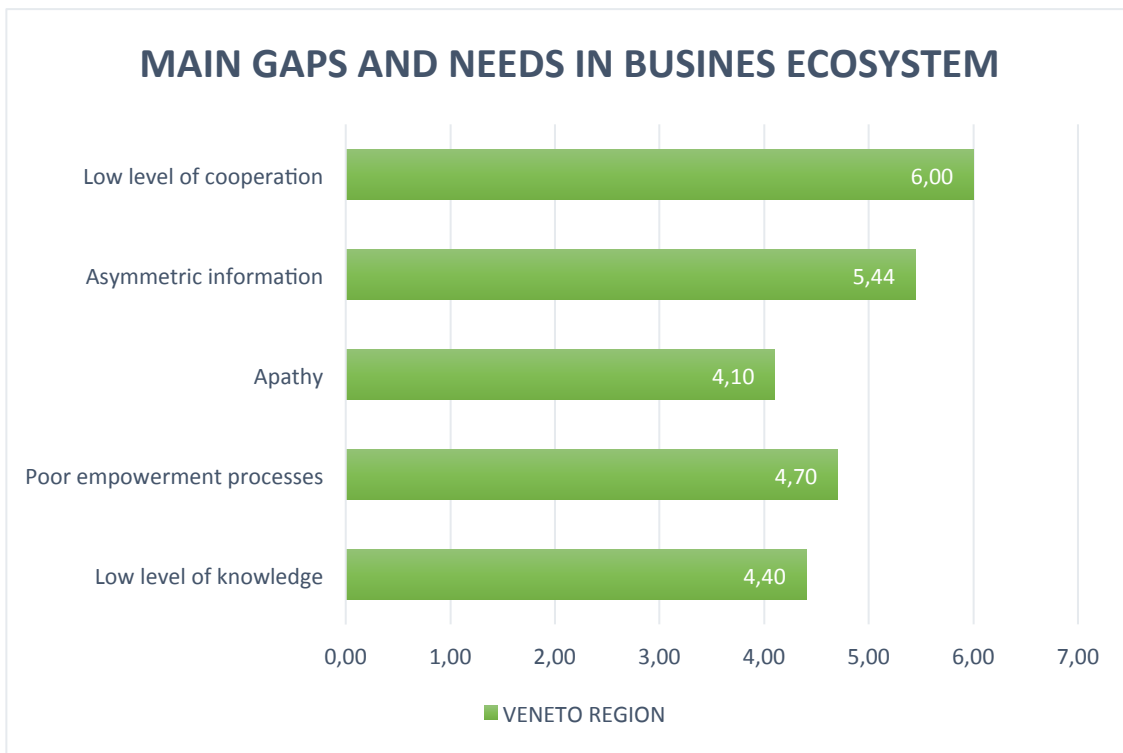
### None of above







- GAPS AND NEEDS TOWARDS INNOVATION OF THE PILOT AREA'S BUSINESS ECOSYSTEM**



## Conclusion: Gaps and needs

- a) In terms of knowledge*
- b) In terms of skills*
- c) In terms of services*
- d) In terms of infrastructure*



# BLUTOURSYSTEM

Puglia Region – Report on interview results  
rev. 1 – date 22<sup>nd</sup> November 2018



## Document references

deliverable: **3.2.2 Tracks for interviews and Report on interview**

## Credits

edited by: Region Puglia

elaborated by: communication manager

checked and reviews by: QPM

approved by: Steering Committee

## Scope:

BLUTOURSYSTEM aims to improve the frame conditions for blue tourism sustainable growth. It provides tourism operators with tools and skills to develop new business ecosystems (BEs). Capitalizing the knowledge gained with TourMedAssets, the project steers decision makers to rethink tourism, reduce gaps and design eco-innovative scenarios thus to promote sustainable growth. The project aims to stimulate competitiveness, innovation and creative enhancement of the tourism offer.

The success of tourism depends on the capacities of actors to cooperate within the business ES. In order to stimulate networking and innovative BE development, as well as destination enhancement by the joint policies, the nature and the status of the existing BEs in the blue tourism sector of the pilot areas should be done.

## Targets

10 subjects were interviewed, equally divided between the "operators and public bodies"

Categories With the multi-purpose survey promoted by the Blutoursystem project, we intend to measure the main aggregates of tourism demand, highlighting its salient aspects and specific needs.

For public dissemination: Yes

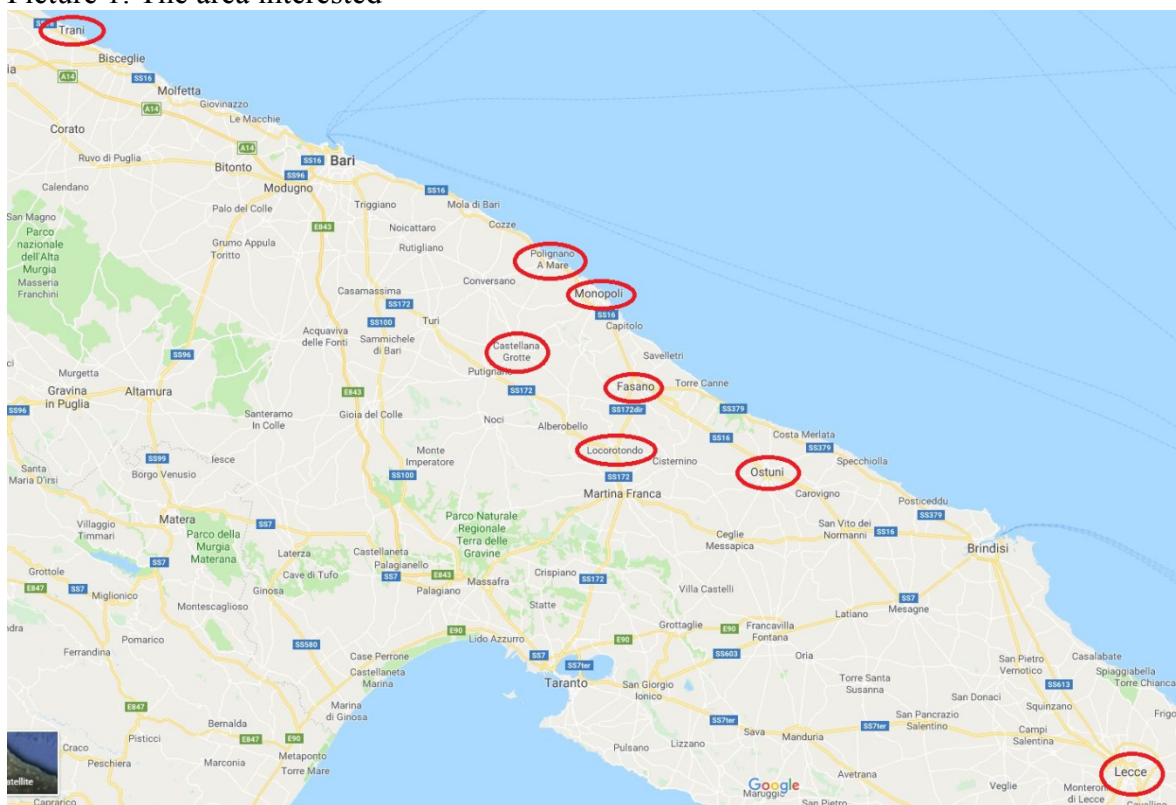
## 1. Table of contents

Pilot area description	37
Panel of stakeholders interviewed .....	7
Stakeholders addressed .....	8
Outcomes from the interviews.....	8
Conclusion: Gaps and needs.....	61
References.....	61

## 2. Pilot area description

The questionnaire in question was administered in October 2018, selecting 10 respondents from: Locorotondo, Ostuni, Polignano a Mare, Fasano, Castellana Grotte, Monopoli, Lecce, Trani, Bari. Respondents they were chosen according to a territorial criterion, trying to maintain the balance between the categories of economic operators and public bodies. One aspect that should be emphasized from the outset is the great willingness of the interviewees to collaborate on the project, grasping its potential and underlining the importance of the commitment to "always doing better".

Picture 1: The area interested





The municipalities that you intend to involve for the administration of the "Blutoursystem" questionnaire are all those municipalities that are territorially influenced by the presence of the trulli, from the coast to the valley of Itria, in particular: Castellana Grotte, Fasano, Locorotondo, Monopoli, Ostuni, Polignano a Mare. In addition to these, we decided to involve Lecce and Trani, due to their significant importance in the Apulian tourist context. In this way it is believed that the homogeneity and relevant size requirements can be sufficiently met by preserving the governability of the STT. In this way it is believed that the homogeneity and relevant size requirements can be sufficiently met. The area of reference involves the provinces of Bari, Bat, Brindisi and Lecce. The area represents in terms of population about 8% of the Apulian population with an approximate total of 300,000 inhabitants (ISTAT data, Census 2018).

### Analysis of the tourist context of Puglia

From the analysis of the final data of 2017 and the forecast ones of 2018, still incomplete, of the performance of the tourism sector in Puglia, a rising picture emerges which is about 15 million total overnight stays of national and foreign tourists, bringing the region into the top ten overnight stays in Italy.

### HIGHLIGHTS PUGLIA 2017: superati i 15milioni di pernottamenti



#### 1 Update 2018

There remains a marked seasonality in the tourist flows directed towards the region: 59.7% of arrivals and 79.3% of the total presences are concentrated between June and September. The presence of foreign tourists is more evenly distributed during the year, with a concentration in the months of April, June, and September. The presence of Apulian tourists in the same region is

significant, with + 19.05% compared to the previous year and tourists from Lombardy + 15.29% and Lazio + 13.12. The average stay of Italian tourists in Puglia is 4.9 days; in addition, the average stay in the complementary financial years is 8.6 days, far higher than the average stay in hotels of 3.2 days.

## **METHOD OF ADMINISTRATION AND INSERTION OF QUESTIONNAIRES**

Questionnaires were administered through paper version and then submitted online together within excel file.

### **Public administrations:**

- Municipality of Ostuni

The councilor for tourism of the Municipality Vittorio Carparelli was interviewed on site during an educational tour. The questionnaire was completed without any significant hitch or problem. The commissioner Carparelli, very attentive to the projects of mobility and sustainable tourism, has promoted a widespread exhibition "Picasso - the other half of the sky ", in an unprecedented way, in three different cities of the Valle d' Itria.

- Municipality of Polignano a mare

The questionnaire was sent by e-mail to Domenico Matarrese, official in charge of the Office of Cultural Heritage and Activities, Public Education, Tourism, Sport, Show. There were no comments or difficulties in the compilation of the questionnaire.

- Municipality of Castellana Grotte

Maria Teresa Impedovo, head of the Tourism - Entertainment - Culture - Human Resources sector was sent the questionnaire by e-mail, but it was filled in with telephone support because of difficulties in understanding some of the questions in section 3.2. Organizations/Equivalent public bodies.

- Confcommercio Puglia

The General Manager, Giuseppe Chiarelli, was interviewed. In particular, the questionnaire was sent by e-mail and completed without any particular problems.

- Parco Dune Costiere (Fasano)

The Director, Gianfranco Ciola completed the questionnaire and no problems were found.

- Castellana Caves

Antonio Minoia, of the Press and Social Media Office completed the questionnaire.

### **Economic operators:**

- Allegro Italia Group (Ostuni)

The Group president, Piergiorgio Mangialardi, was interviewed by telephone. The group has invested in the Apulian territory launching the condotel, the trend of the future in Italy-a business for hoteliers and territories with new tourist facilities matching the hotel rooms to larger ones-apartments- that can be bought as holiday homes.

- Leonardo Trulli Resort (Locorotondo)

The questionnaire was delivered by e-mail to the owner Rosalba Cardone and commented by phone. Section 3.1 has caused some doubts and, because of this, it was necessary to assist the interviewee by telephone.

- Marè (Trani)

The questionnaire was sent by e-mail to the owner, Gerolamo Rubini. No problems were found.

- BeeYond Travel (Lecce)

Questionnaire was administered to Felice Zumbo, managing partner, during an educational tour around Puglia. The company based in Lecce and the US, decided to invest in the Puglia region. Felice Zumbo did not find the questionnaire difficult but certainly intense because the questions often seemed identical but they were not, so he made a literary analysis of the questions to avoid falling into the error of giving the same answers. Some expressed some criticism on the use of Word and suggested an online platform, useful for standardizing and extrapolating data in a simpler way.

### ***3. Panel of stakeholders interviewed***

Pilot area	Name	Typology	Contact person
Municipality Ostuni	Tourist Board Ostuni	General public	Vittorio Carparelli
Municipality Polignano a Mare	Tourist Board Polignano a Mare	General public	Domenico Matarrese
Municipality Castellana Grotte	Tourist Board Castellana Grotte	General public	Maria Teresa Impedovo
Italian General Confederation of Enterprises - Puglia	General manager Confcommercio Puglia	General public	Giuseppe Chiarelli
Fasano area	Director Parco Dune Costiere	Enterprise	Gianfranco Ciola
Locorotondo area	Owner of Leonardo trulli resort	Enterprise	Rosalba Cardone
Trani area	Owner of Marè	Enterprise	Gerolamo Rubini
Lecce area	Manager of BeeYond Travel	Enterprise	Felice Zumbo
Ostuni area	President of Allegro Italia Group	Enterprise	Piergiorgio Mangialardi
Castellana Grotte area	Press Office of Castellana Grotte Caves	Enterprise	Antonio Minoia

## 4. Stakeholders addressed

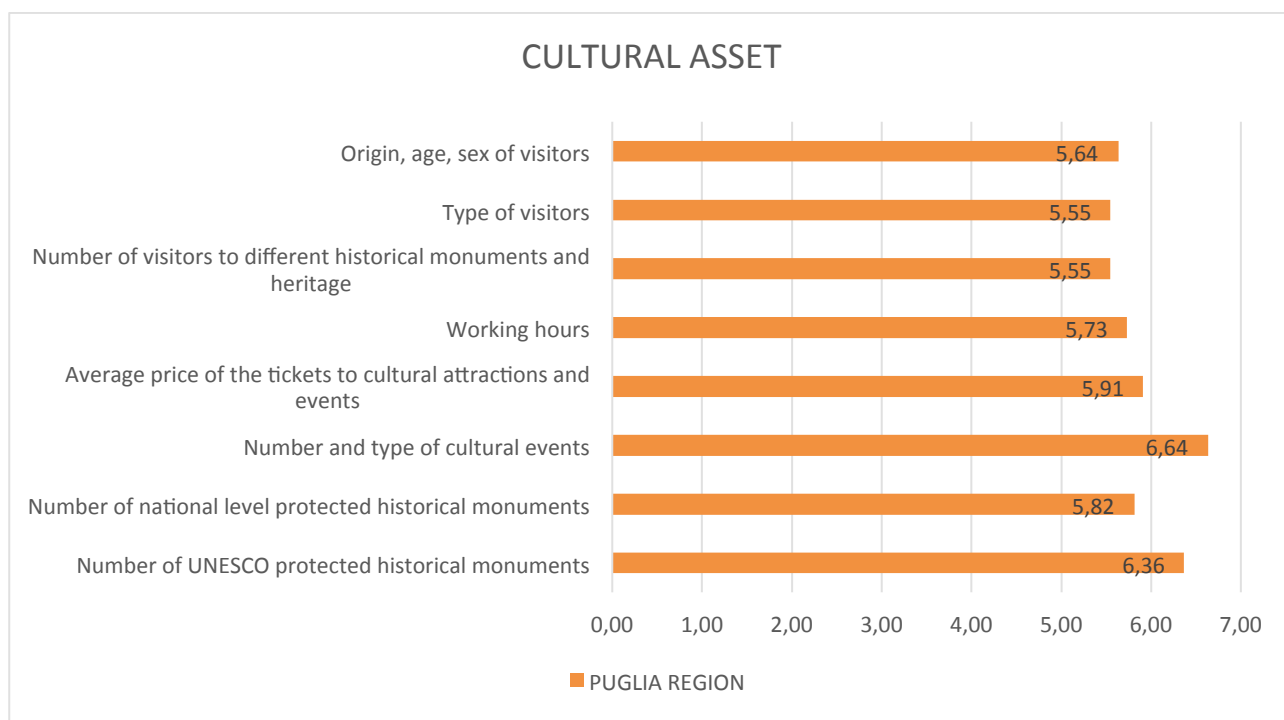
Public sector – Tourist board/DMO, National Park

Private sector – tourism entrepreneurs

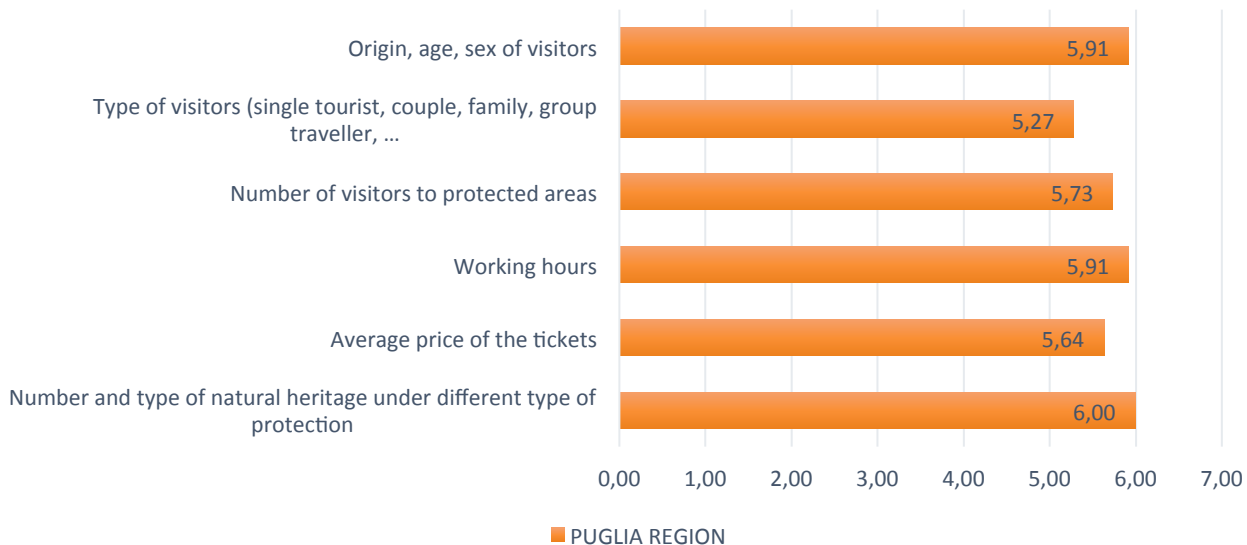
## 5. Outcomes from the interviews

### a. SUGGESTIONS FOR THE CALIBRATION OF THE SMART CROSS BORDER DATA SYSTEM (SCBDS) AND THE CREATION OF NEW INDICATORS

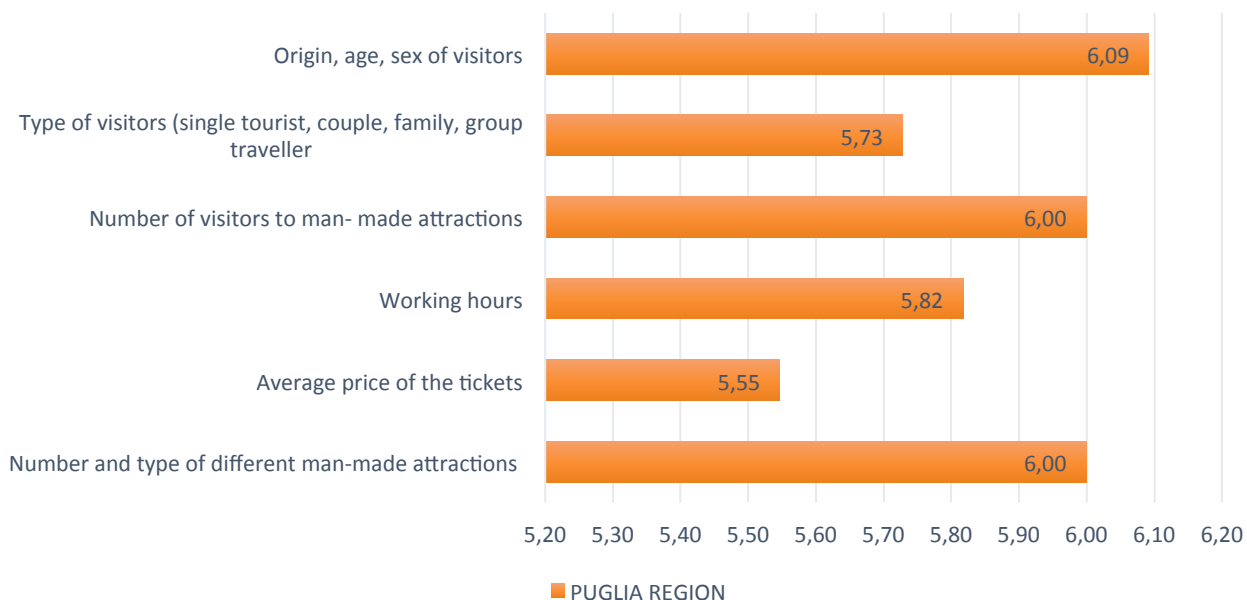
- **Attractions**



## Natural assets

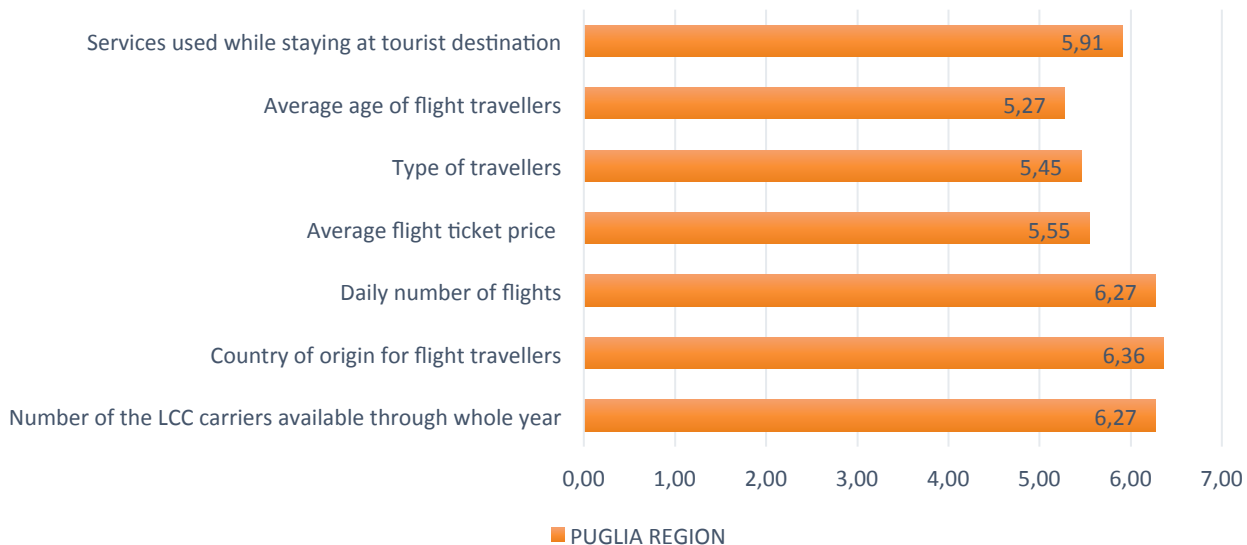


## Man-made attractions



- **Accessibility**

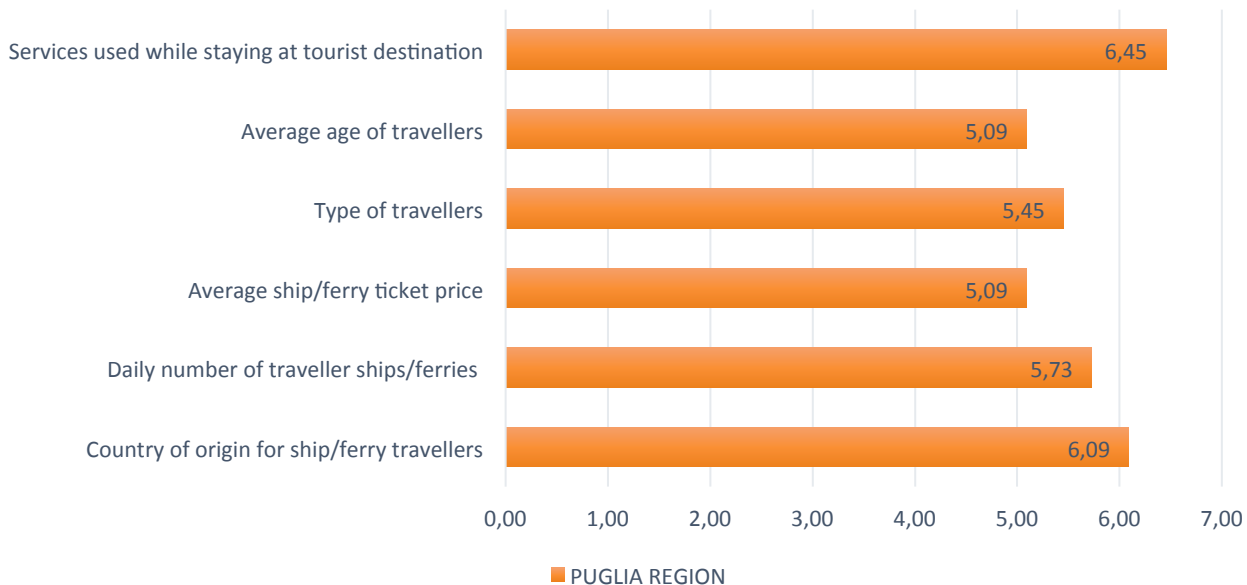
### EXTERNAL ACCESSIBILITY - FLIGHT



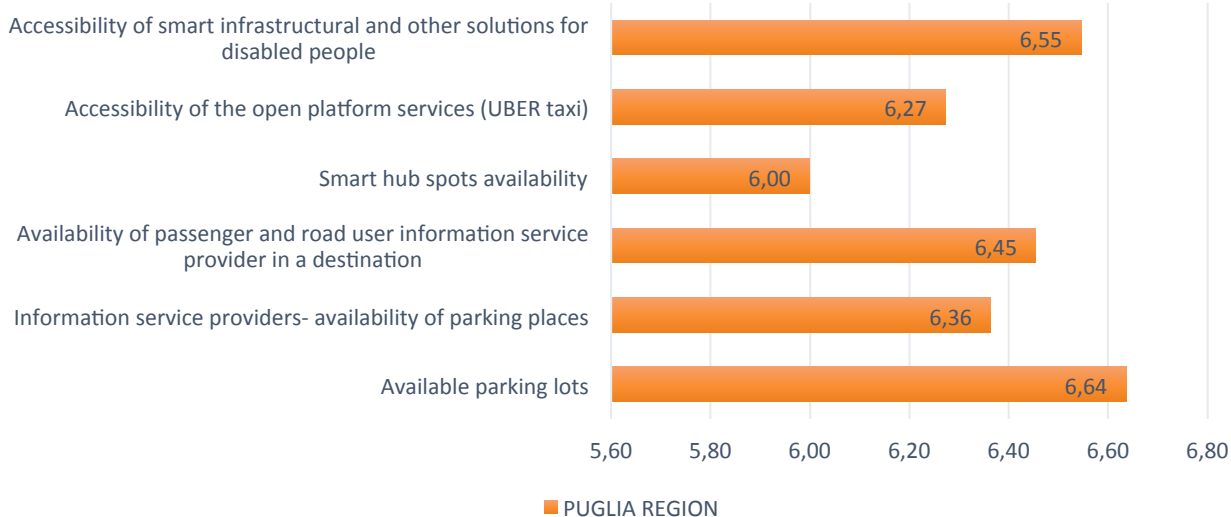
### EXTERNA ACCESSIBILITY - TRAIN



### EXTERNAL ACCESSIBILITY - SHIP

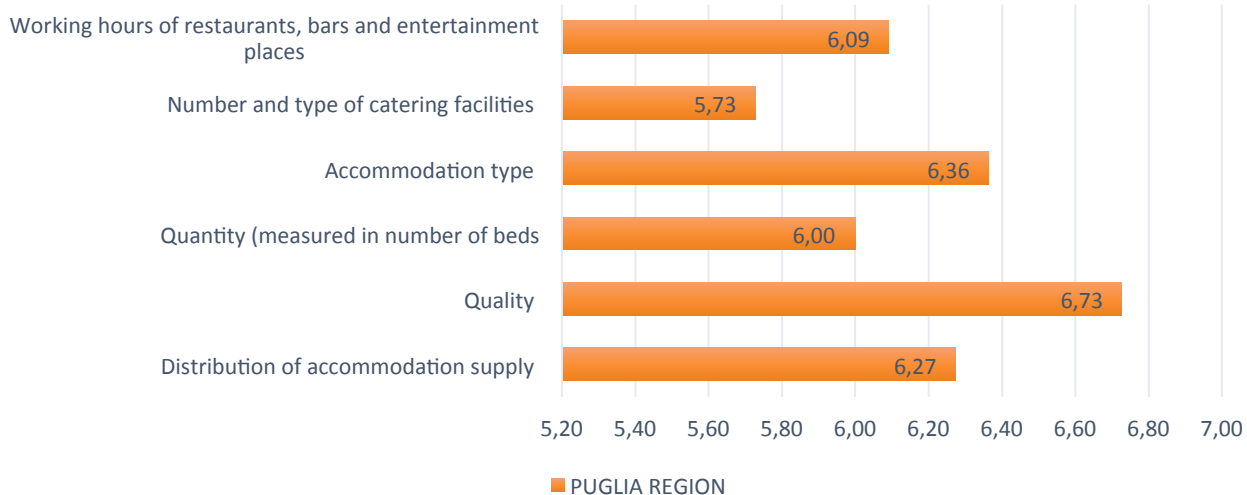


### INTERNAL ACCESSIBILITY - SMART SOLUTION



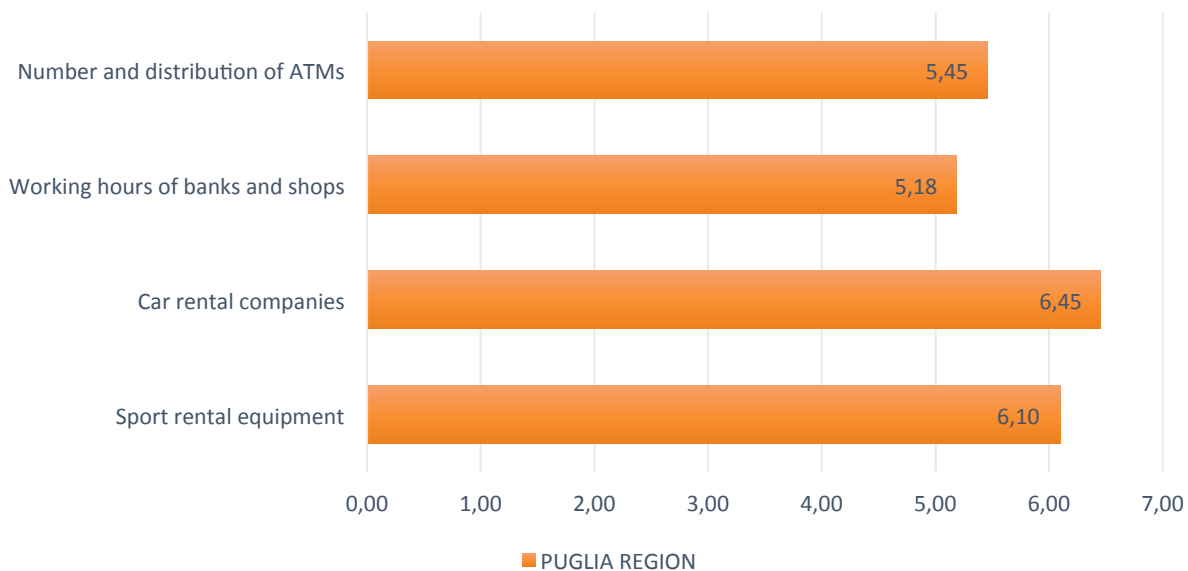
- **Amenities**

## INDICATORS - ACCOMMODATION



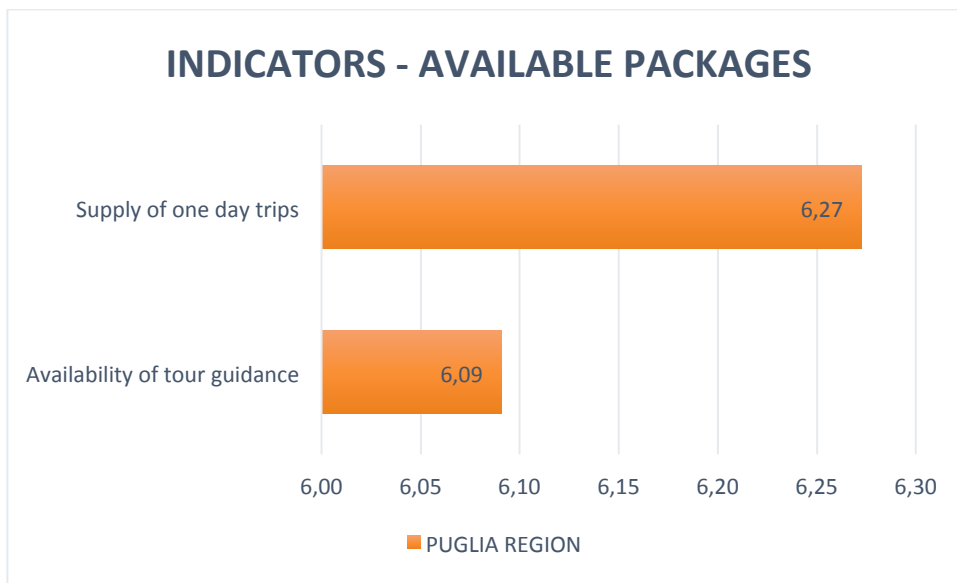
- *Ancillary services*

## INDICATORS - SERVICES

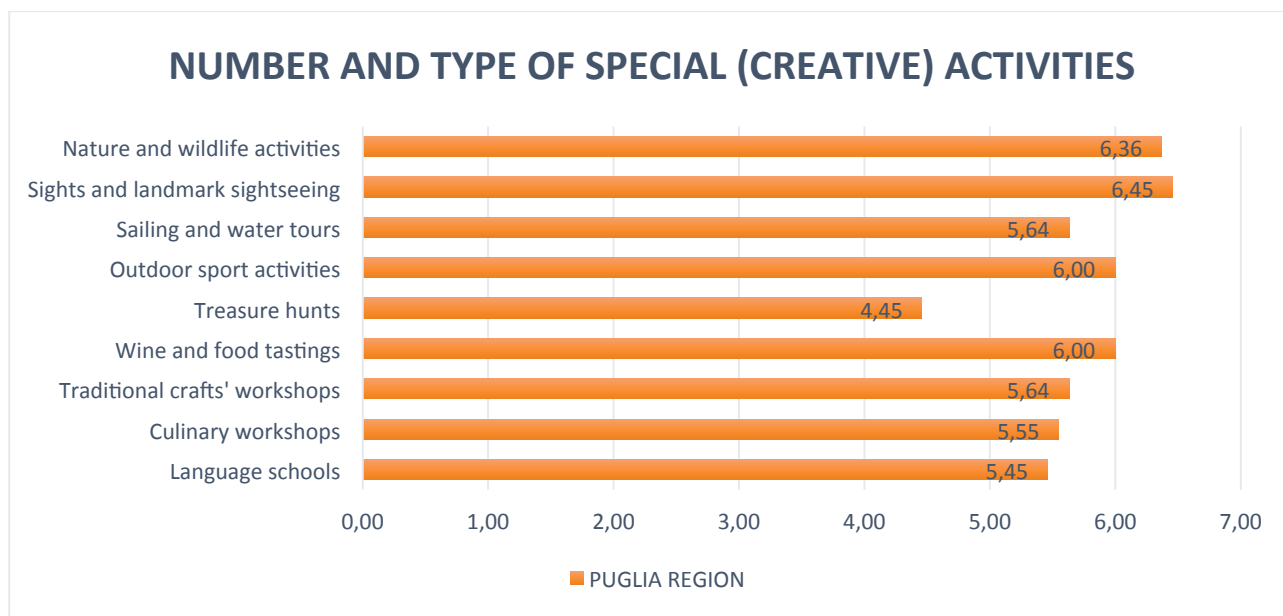


- *Available packages*

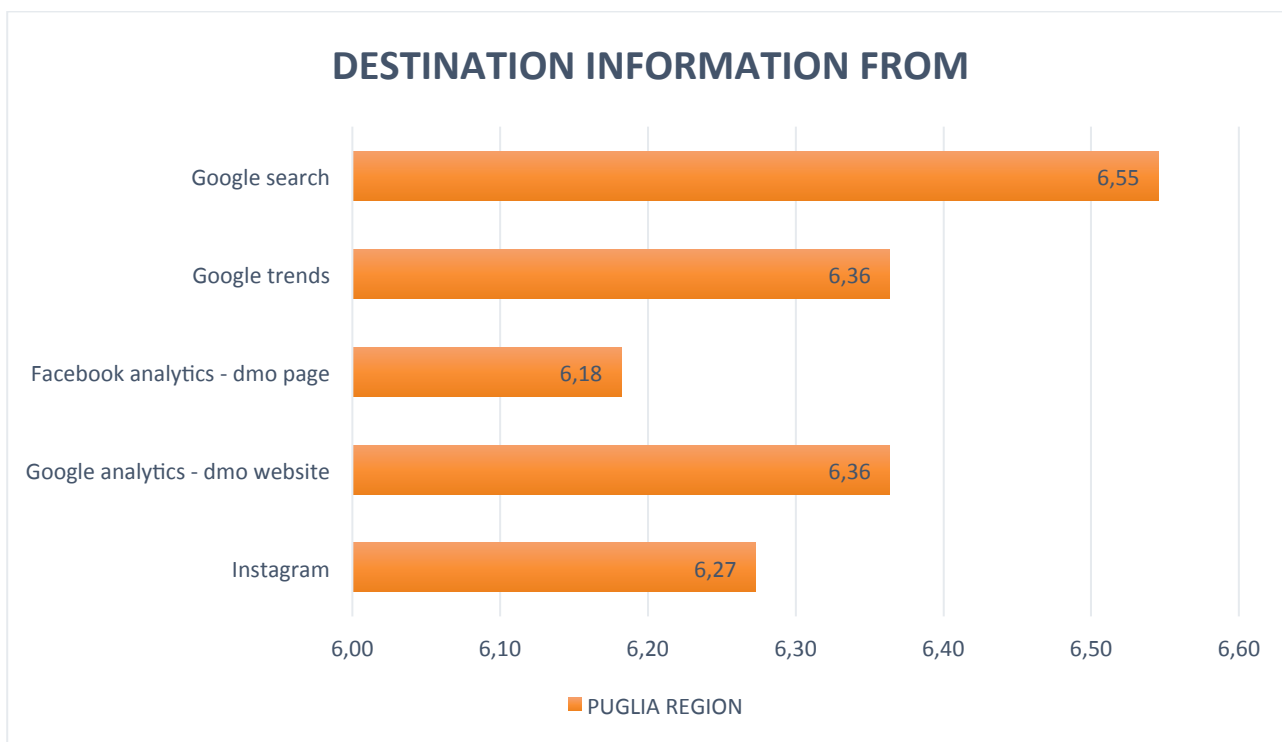




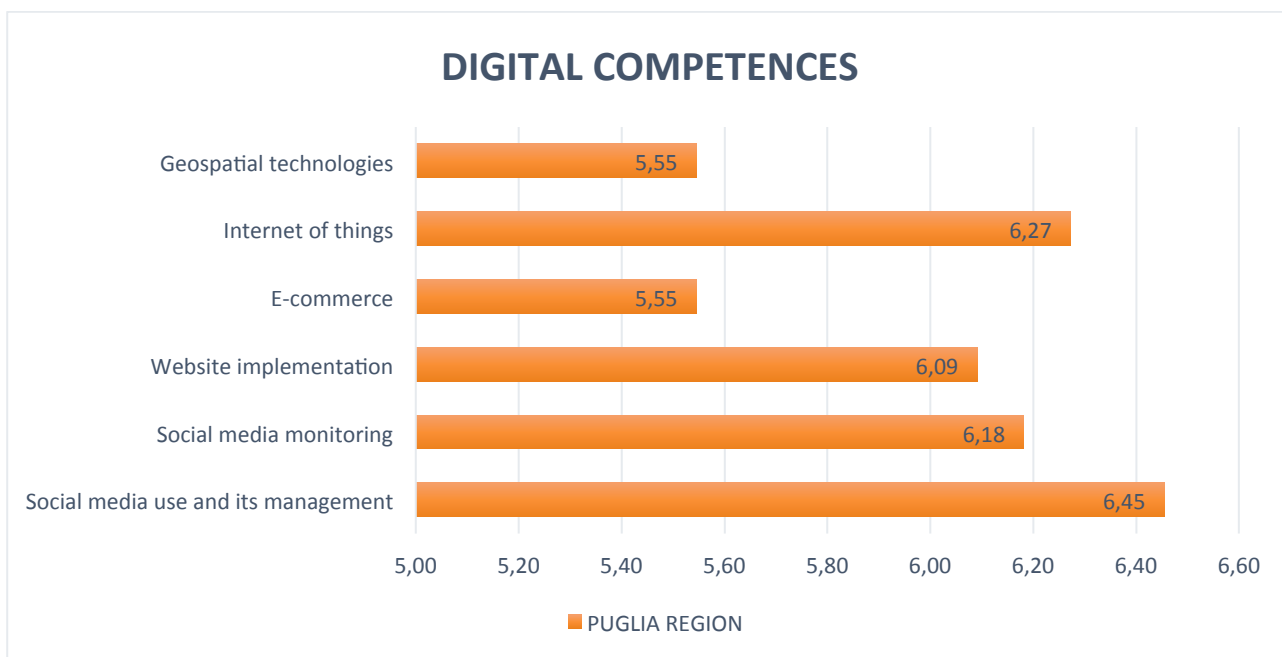
- **Activities**



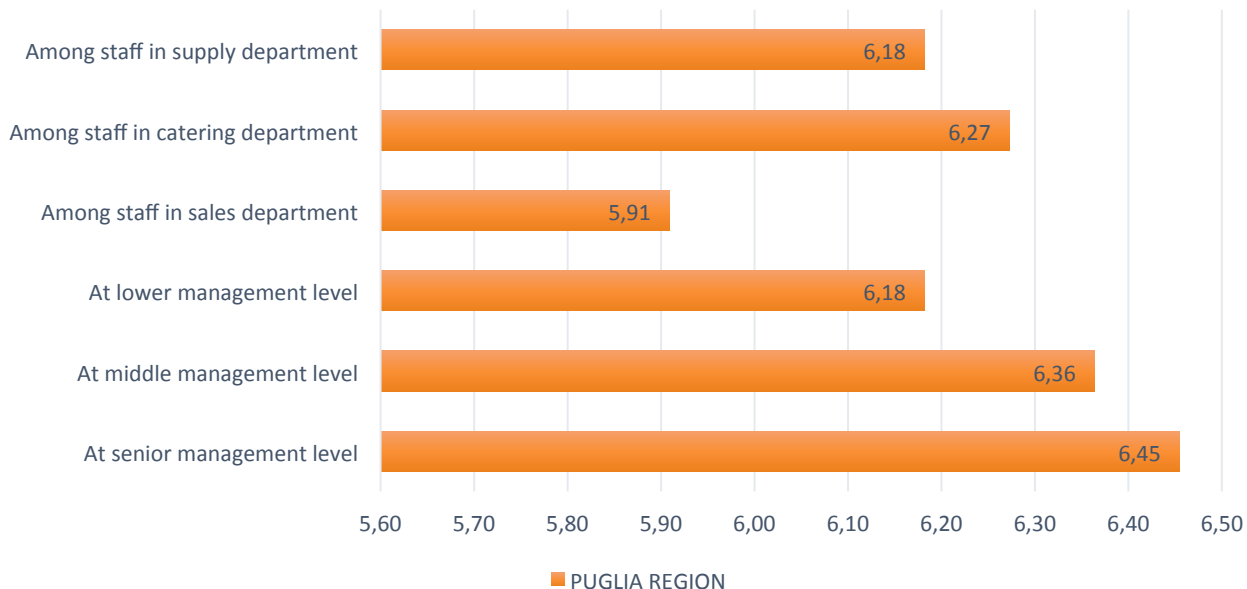
- **Source of destination information**



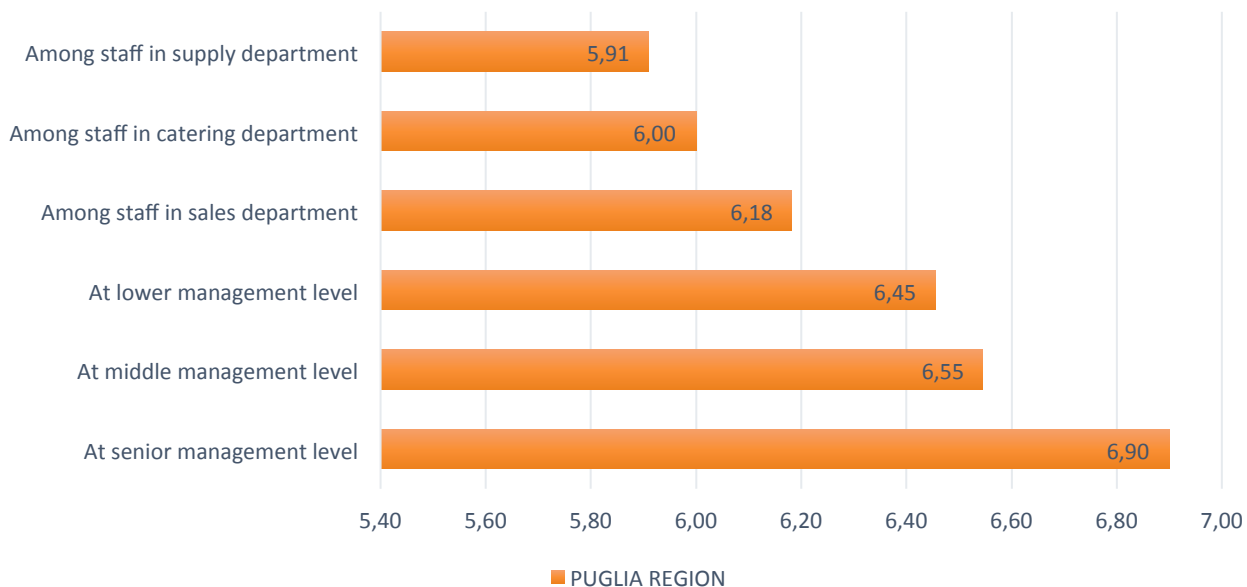
***b. GAPS AND NEEDS IN CAPACITY BUILDING PROCESSES (at CB Area level)***

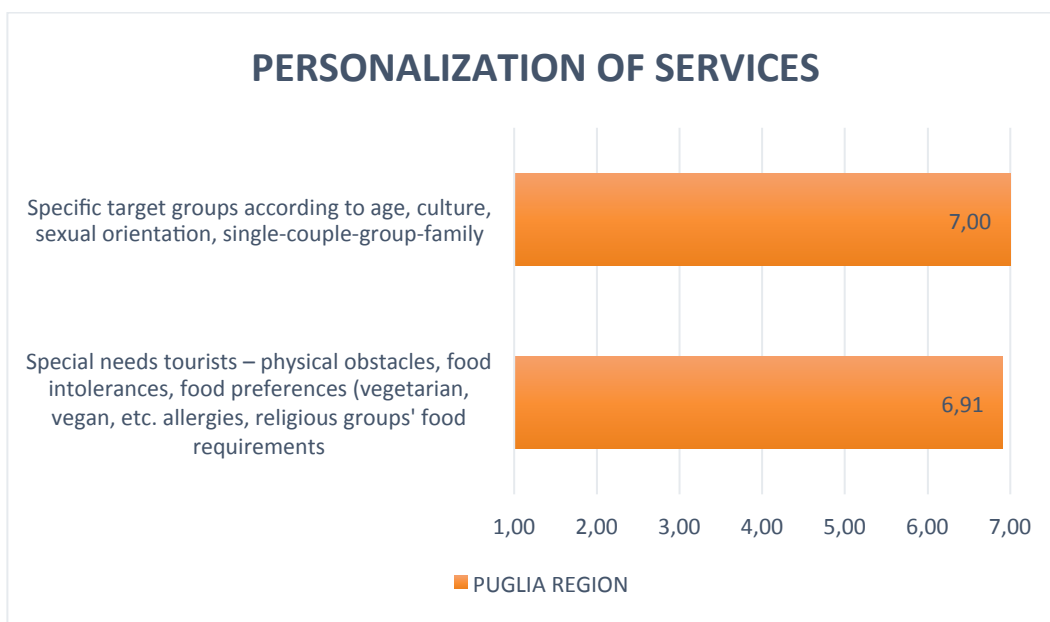
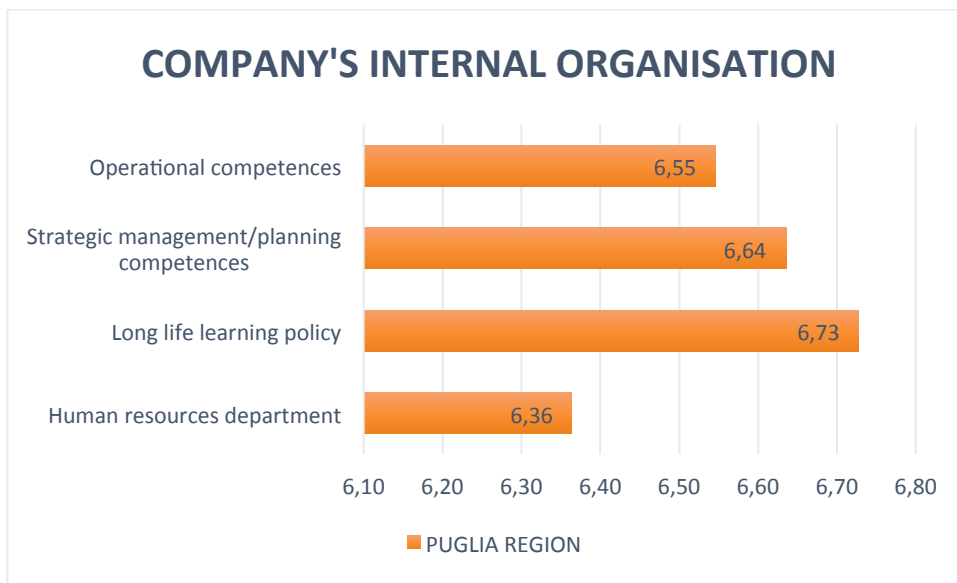


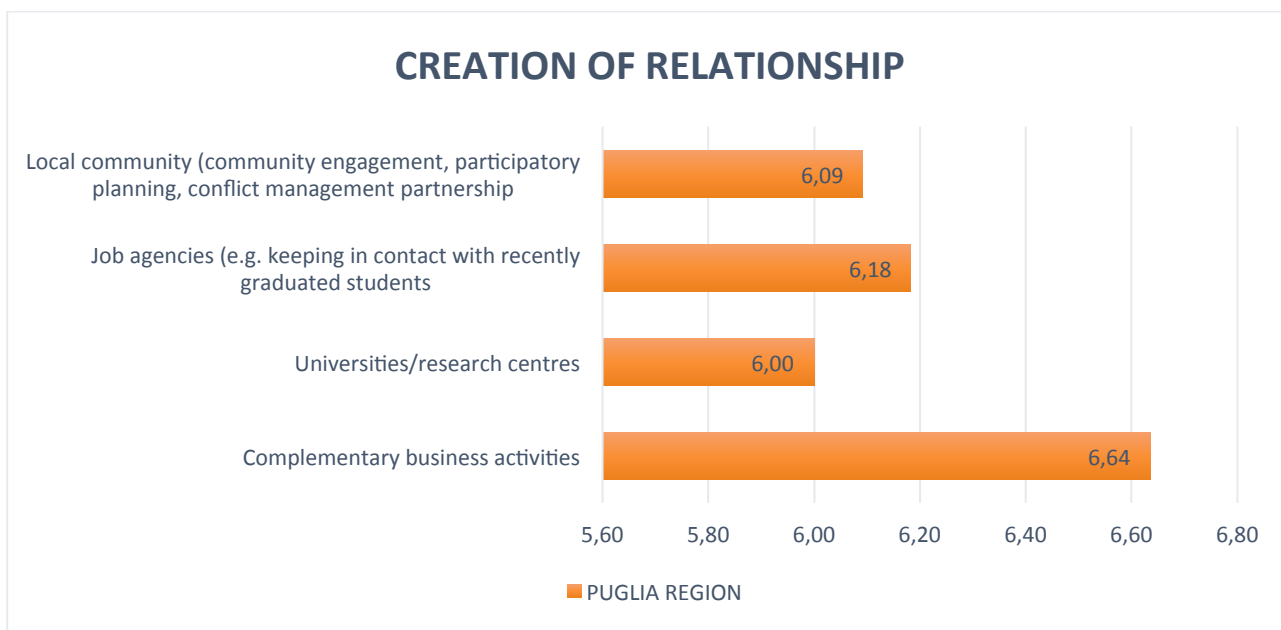
## COMPANY'S INTERNAL COMMUNICATION QUALITY



## KNOWLEDGE OF FOREIGN LANGUAGES

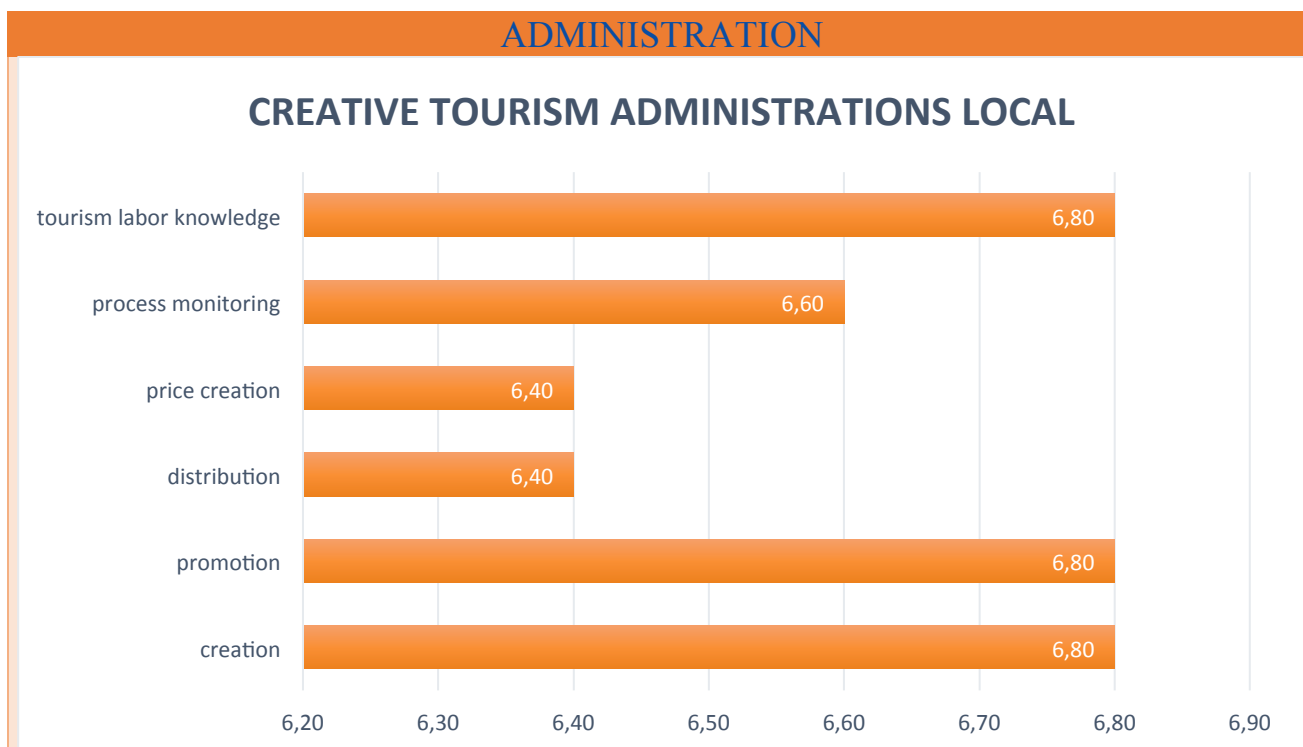




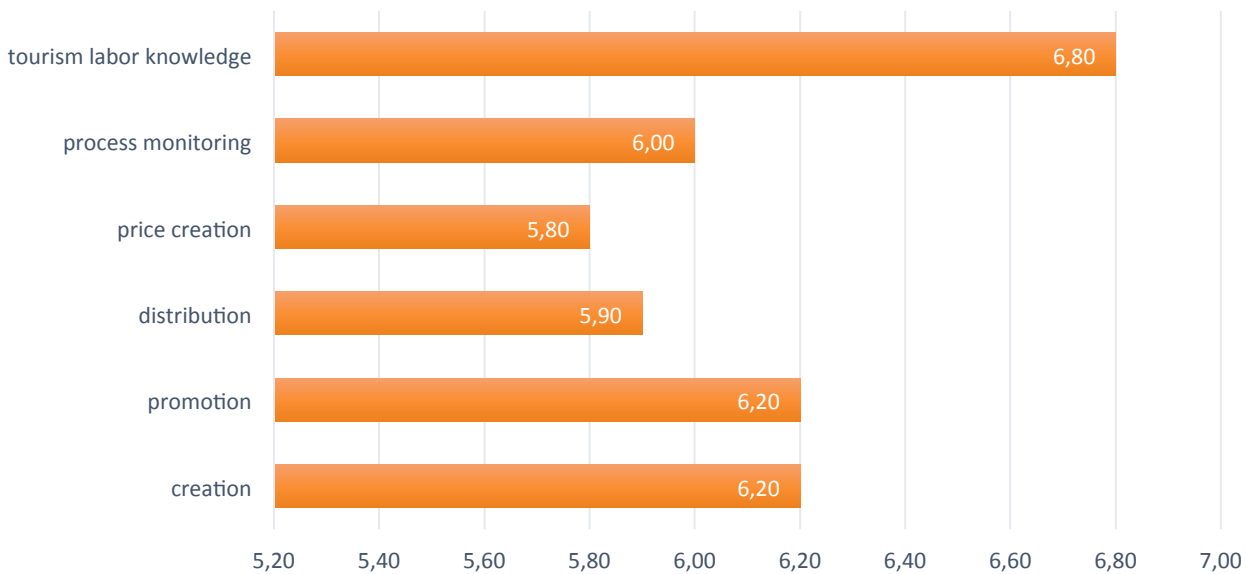


### ***c. IDENTIFICATION OF THE BUSINESS ECOSYSTEM OF THE CHOSEN PILOT AREA***

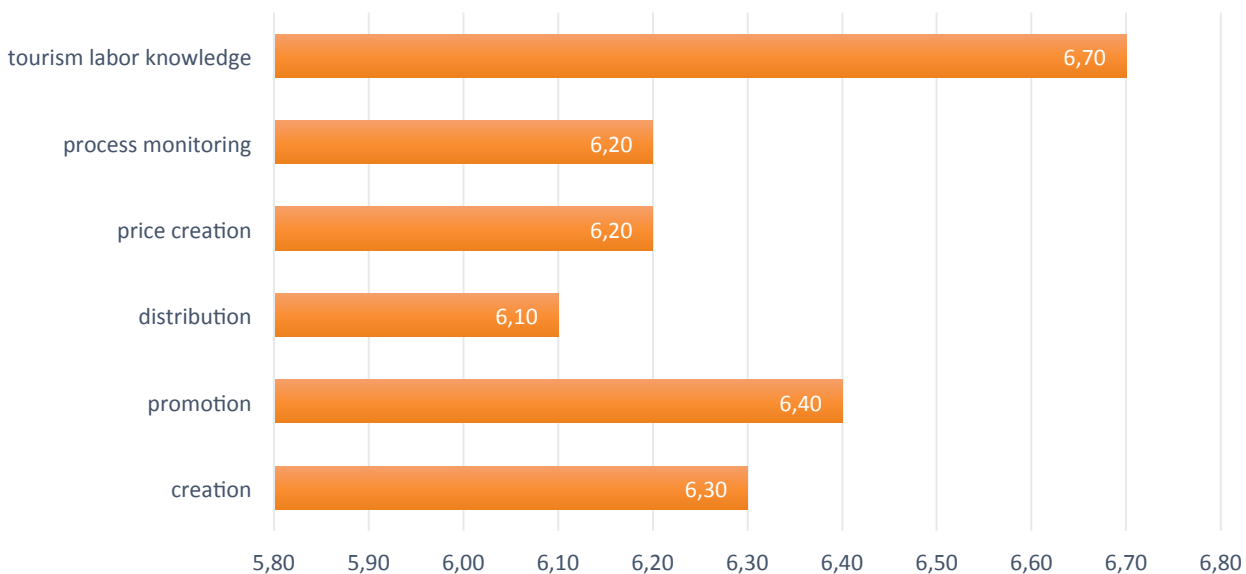
- ***Creative tourism***



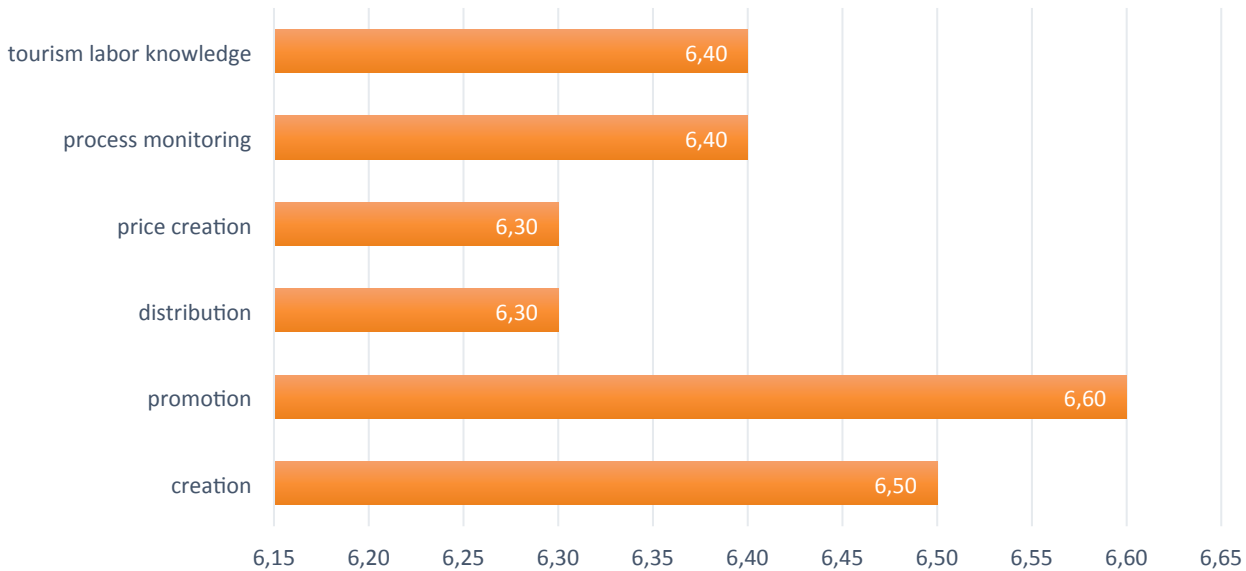
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### CREATIVE TOURISM ADMINISTRATIONS NATIONAL

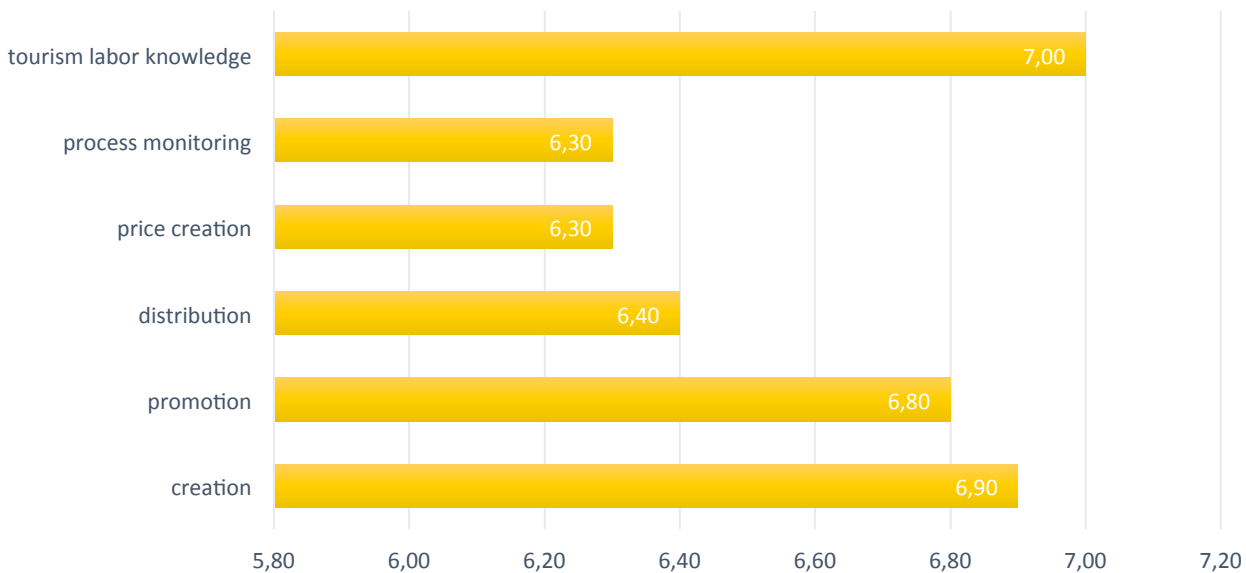


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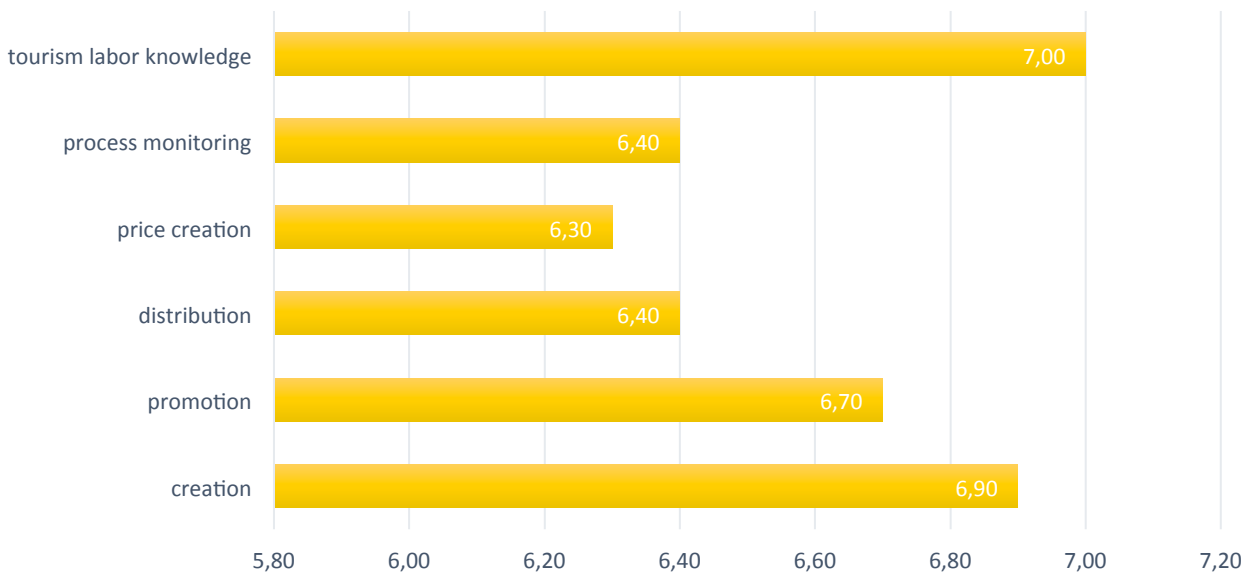


### DESTINATION MANAGEMENT ORGANISATIONS

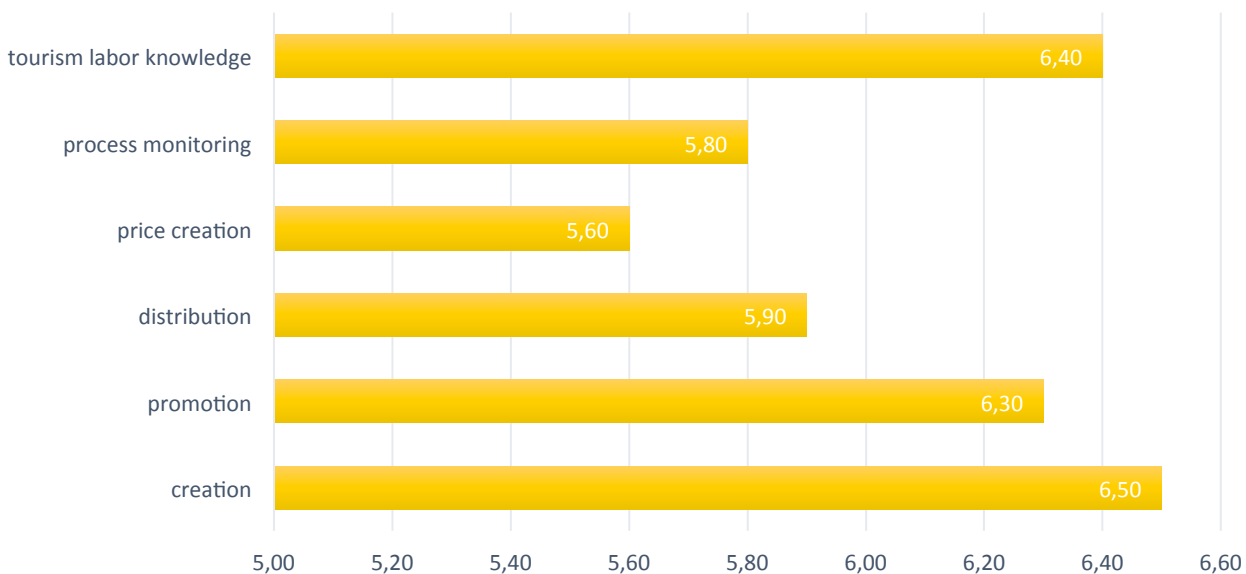
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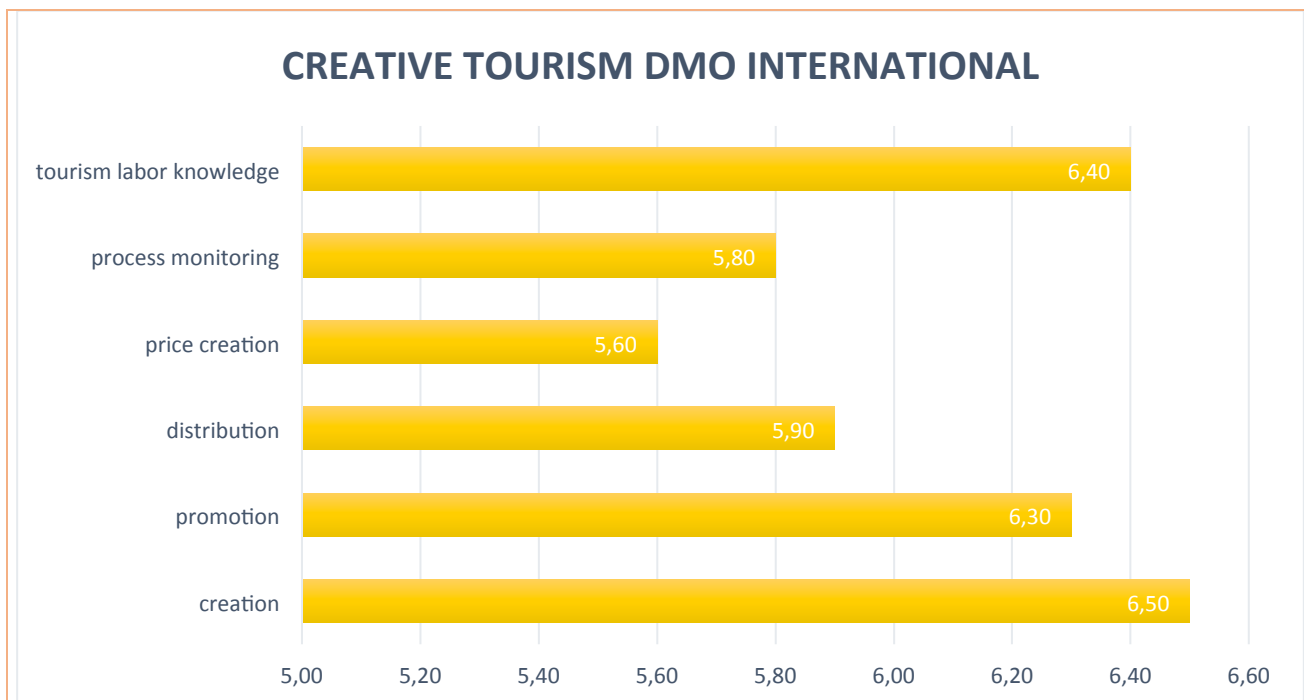
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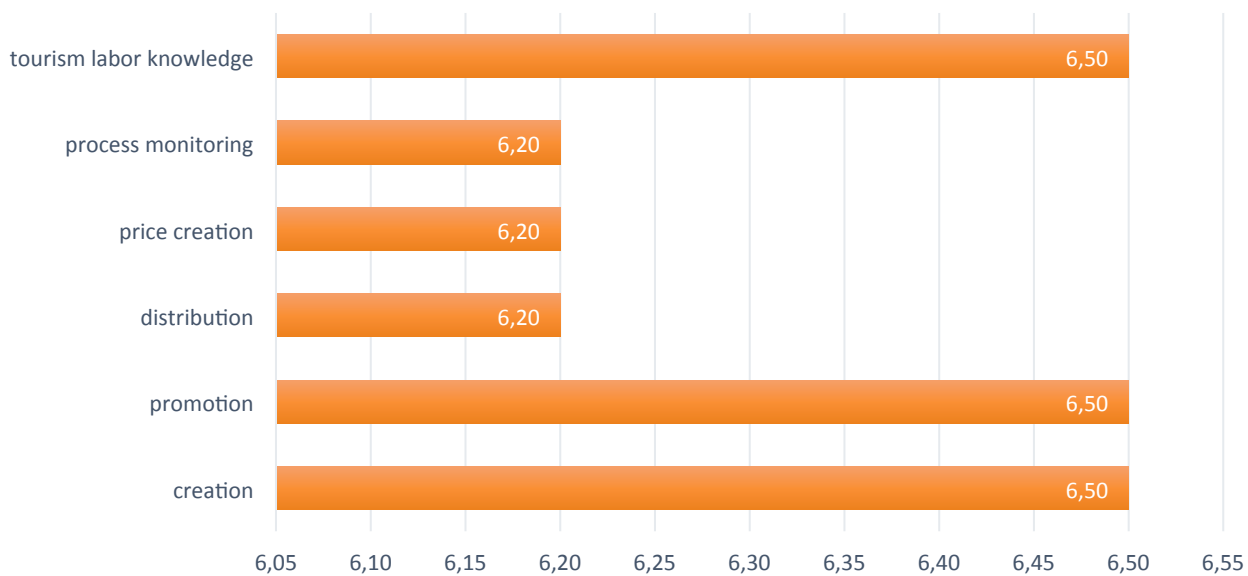
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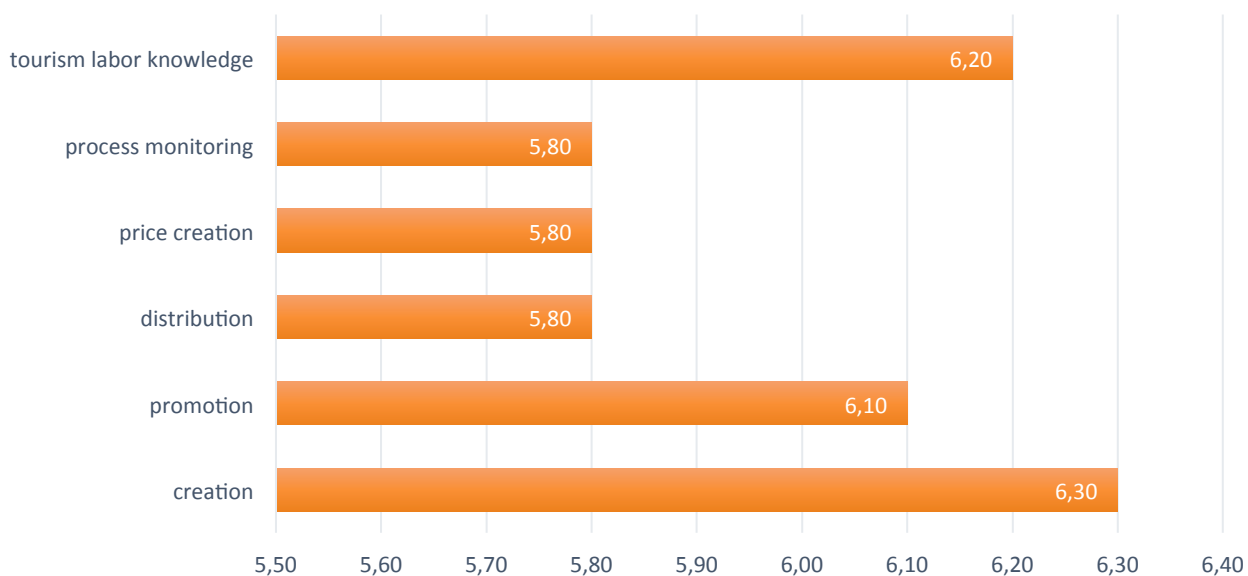


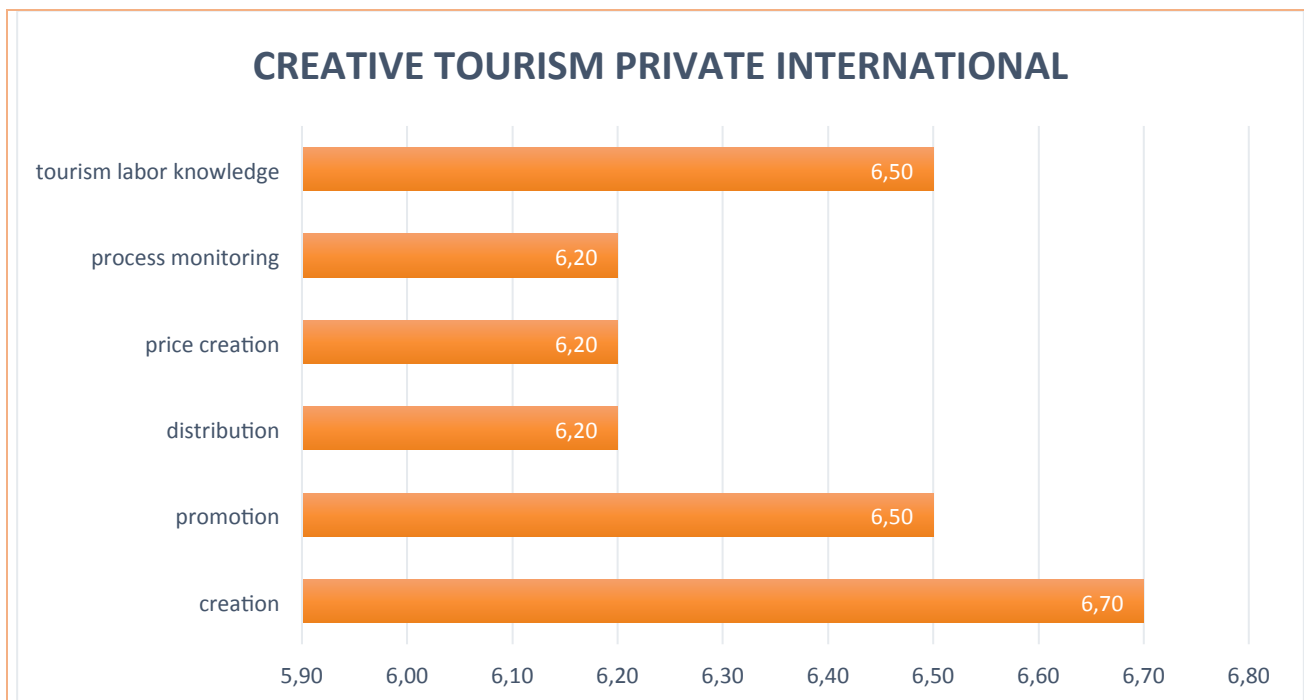


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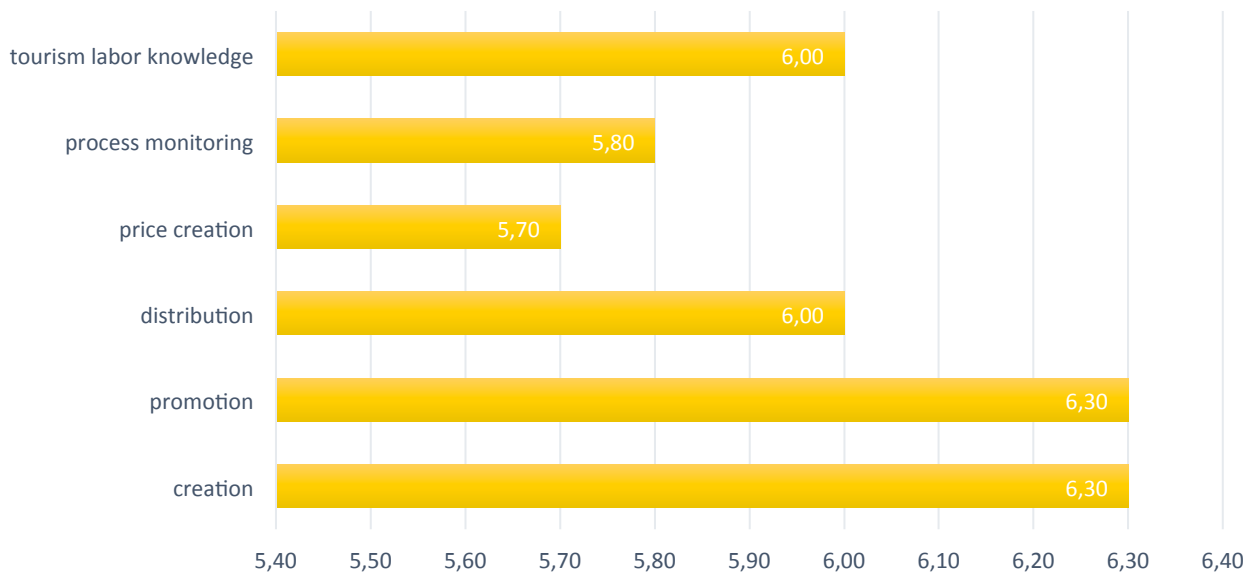


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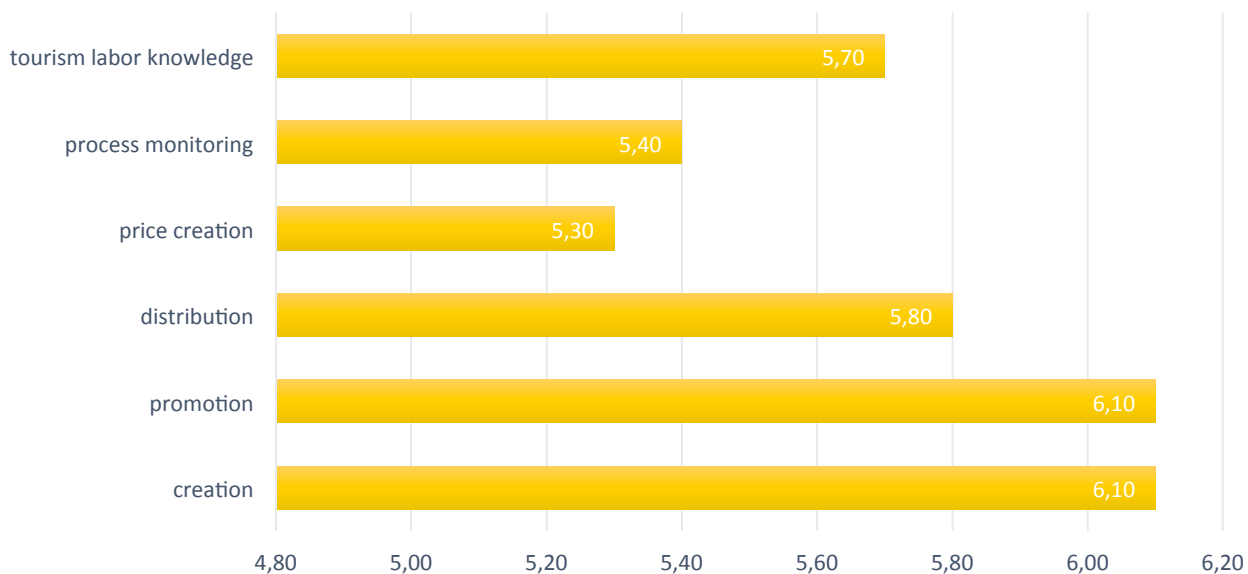


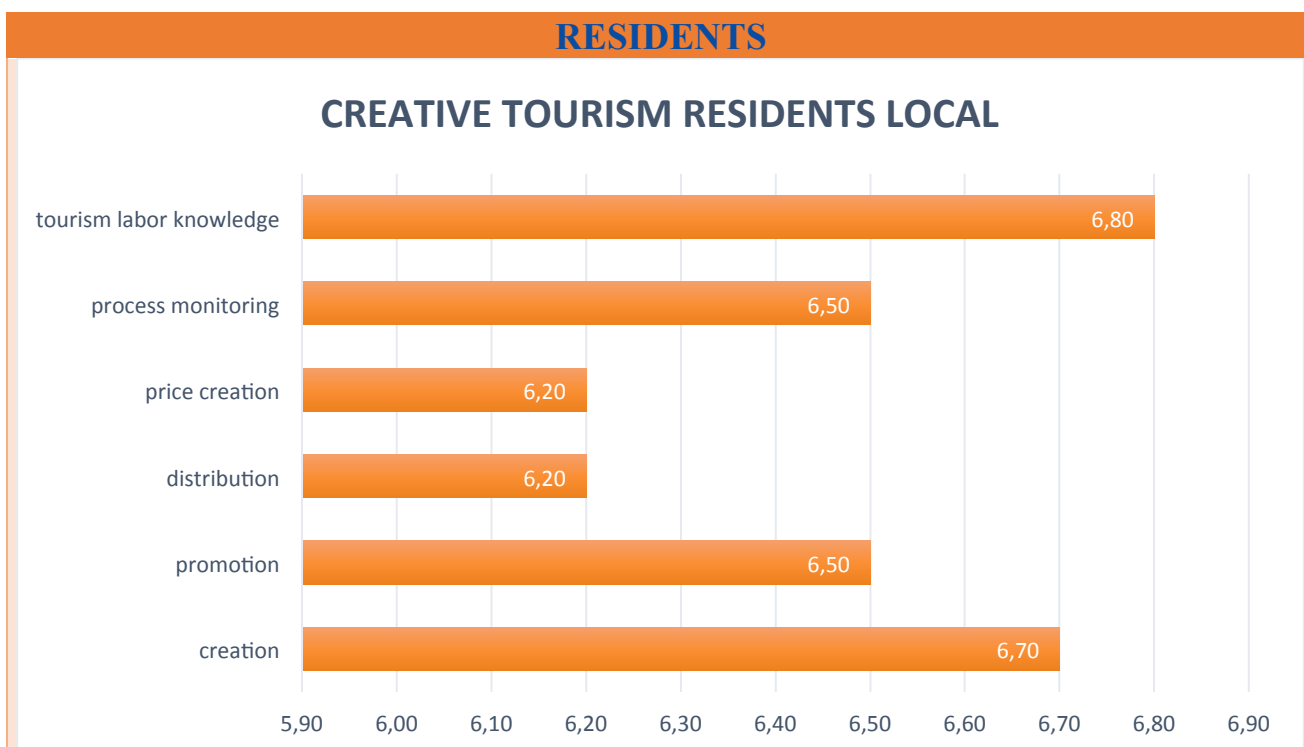
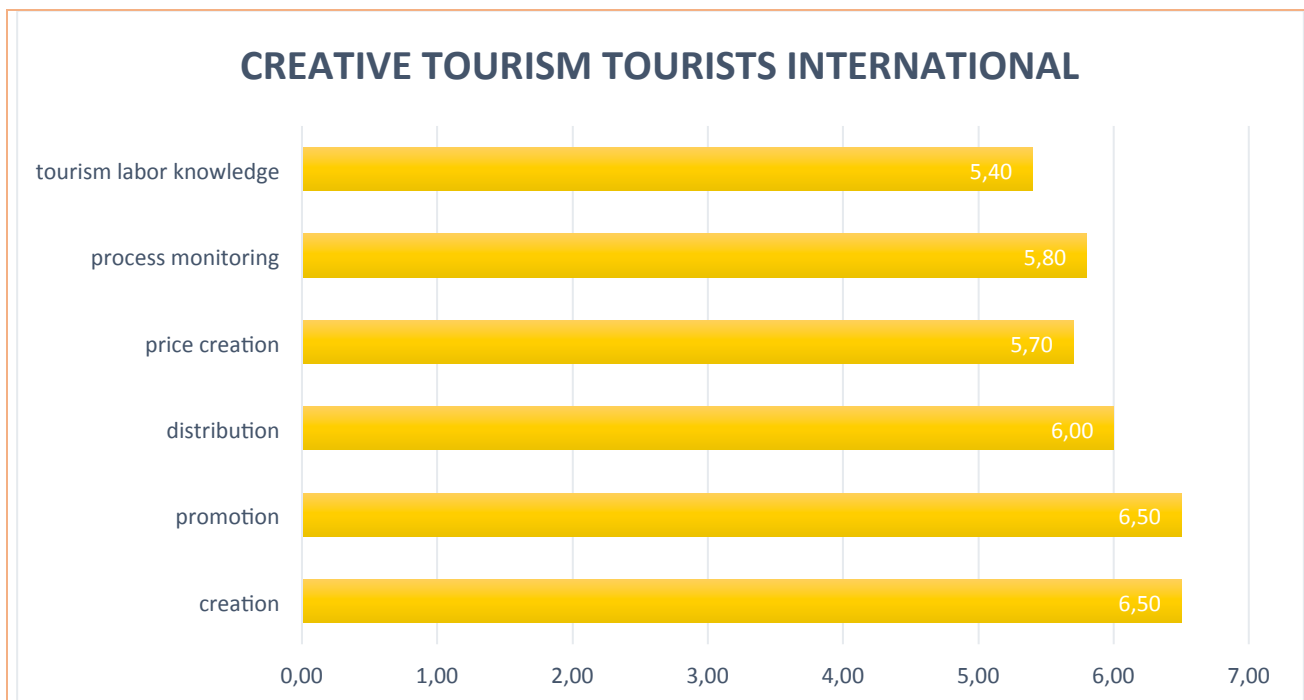


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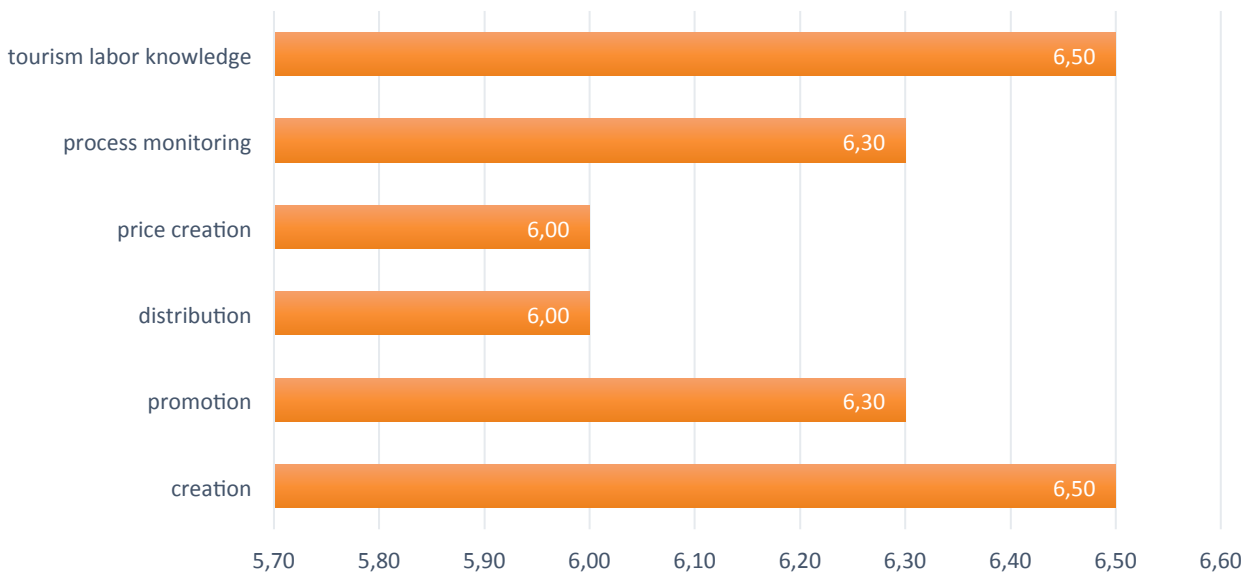


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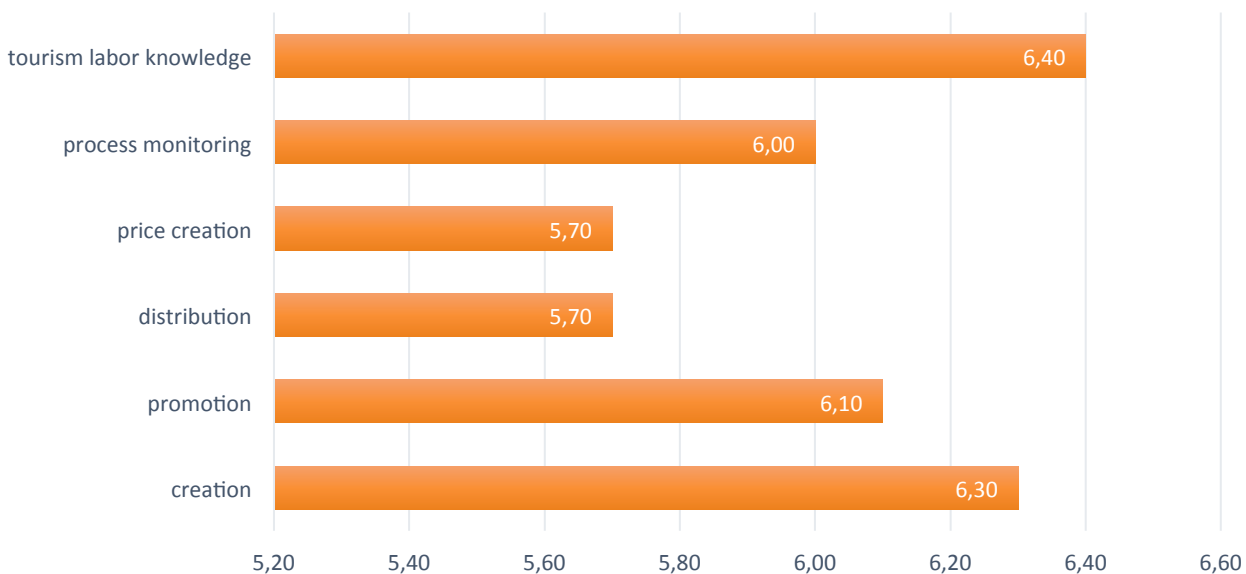


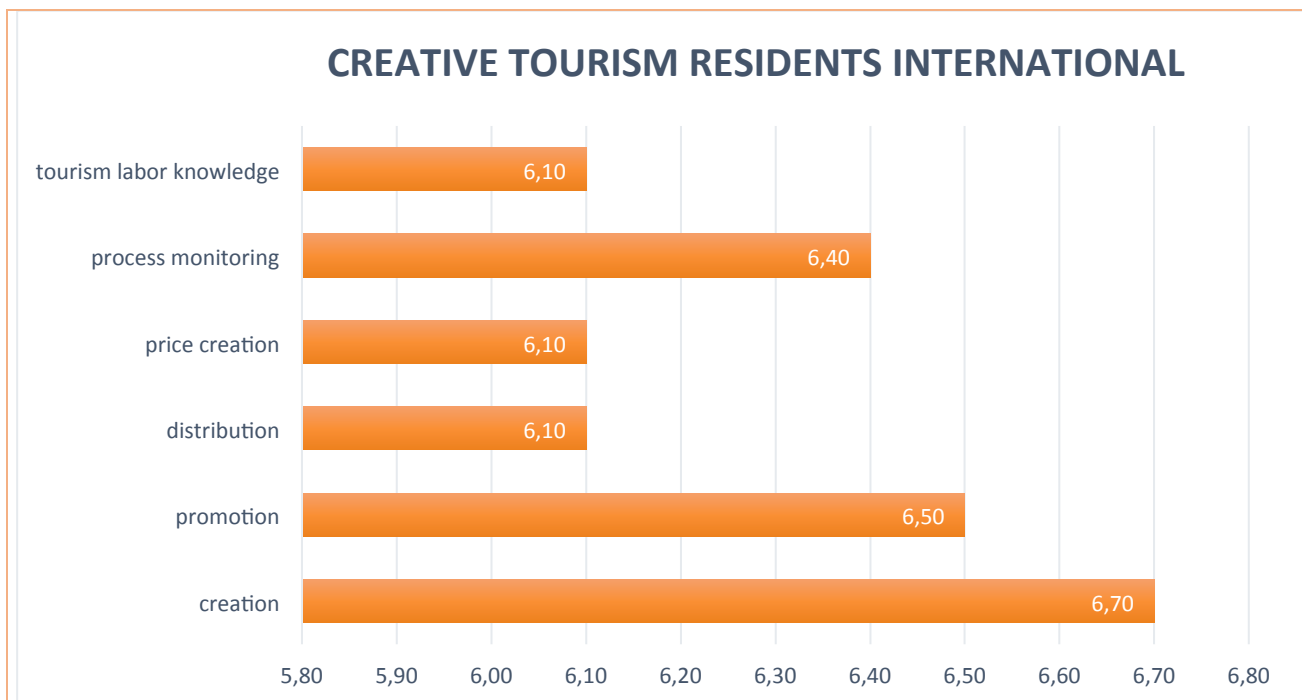


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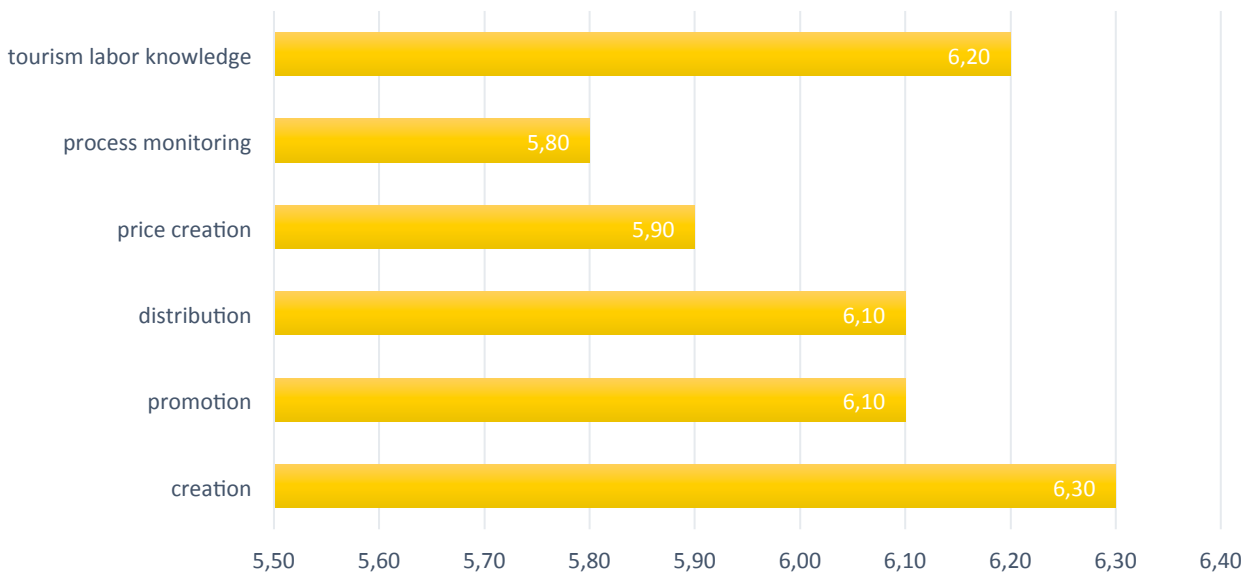


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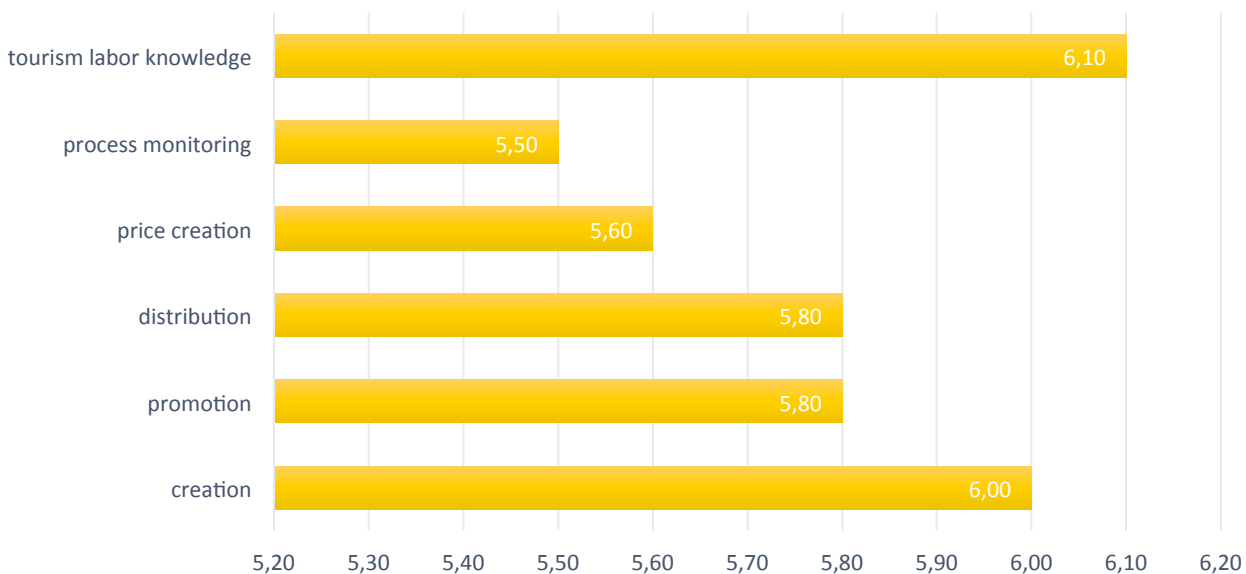




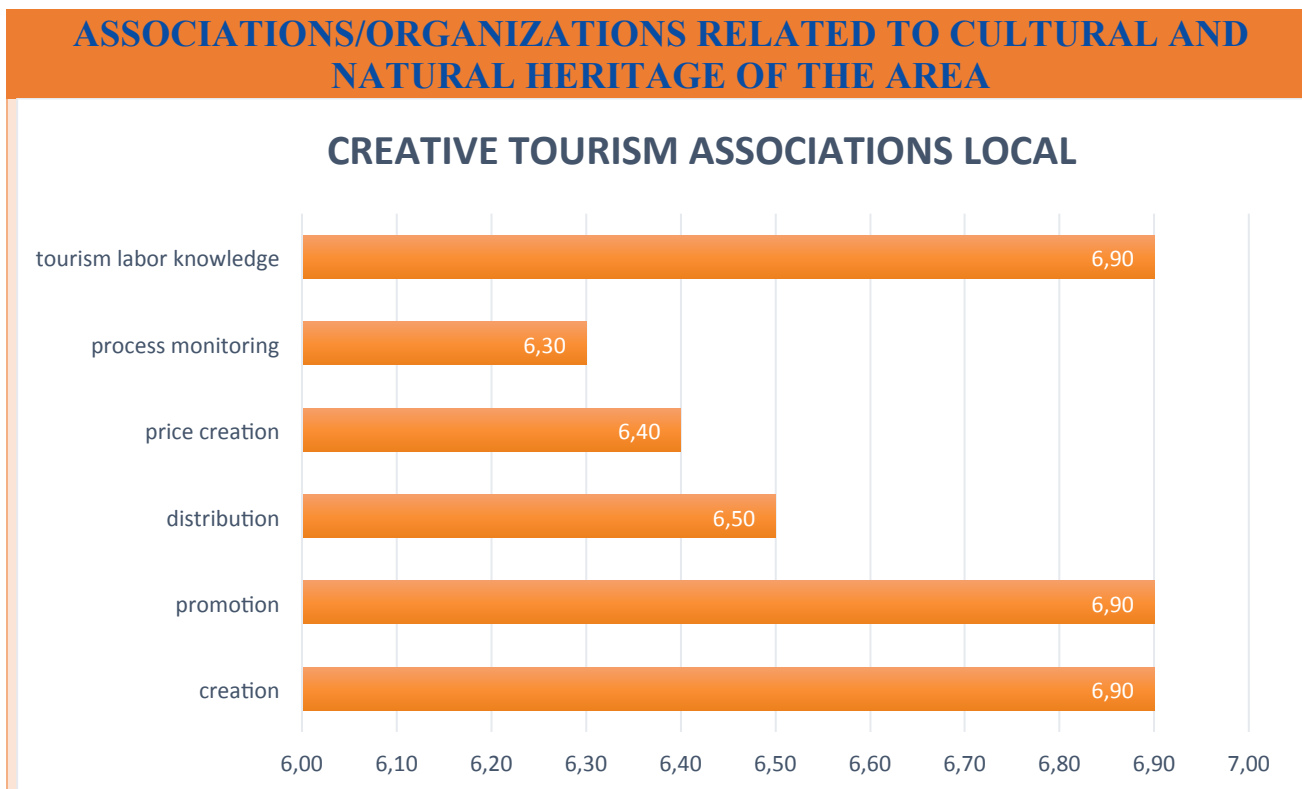
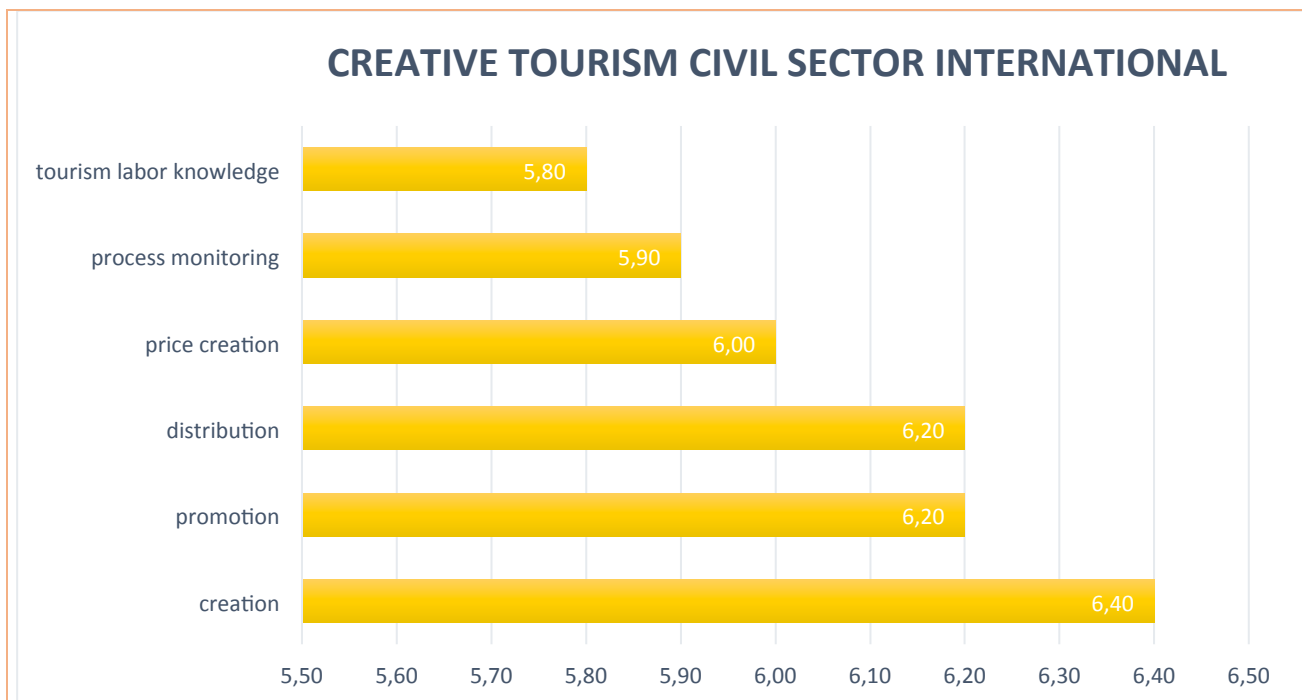
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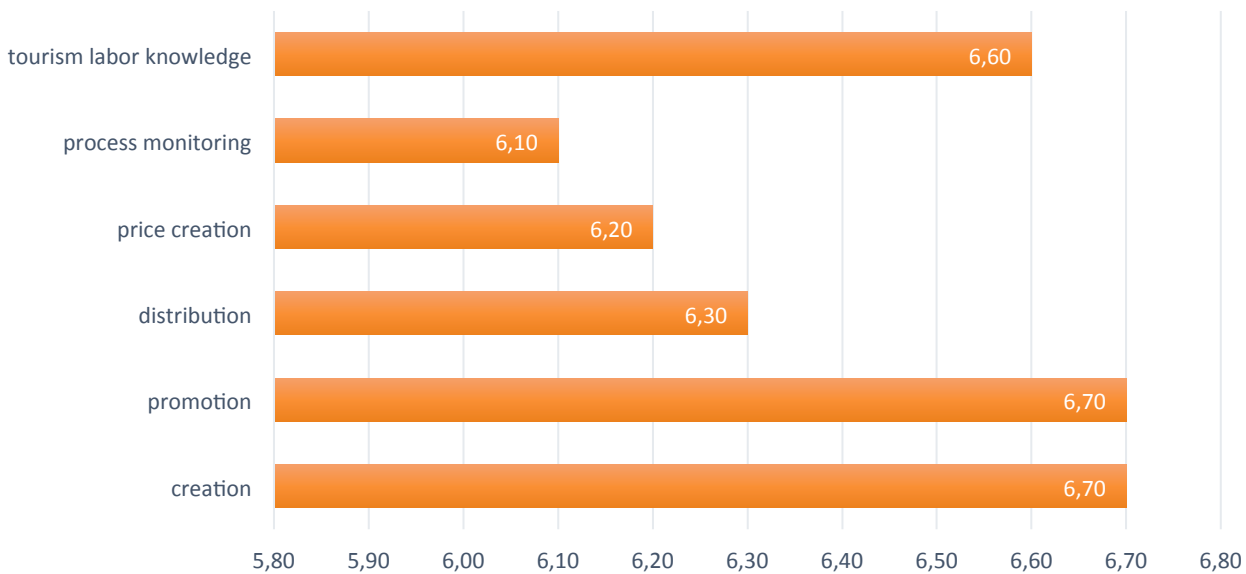
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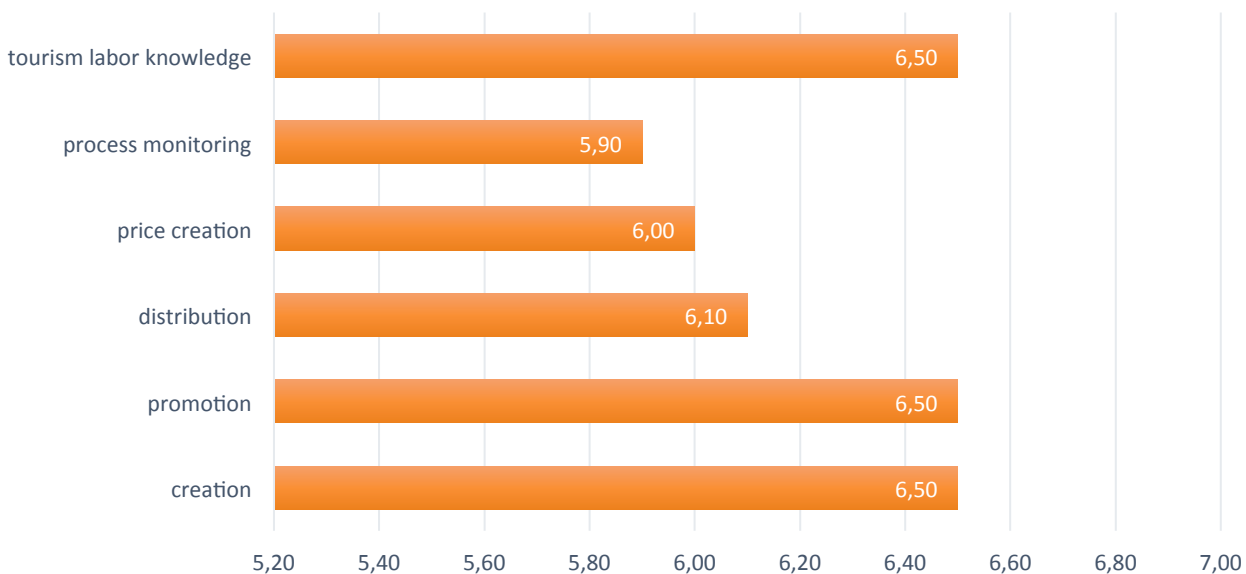




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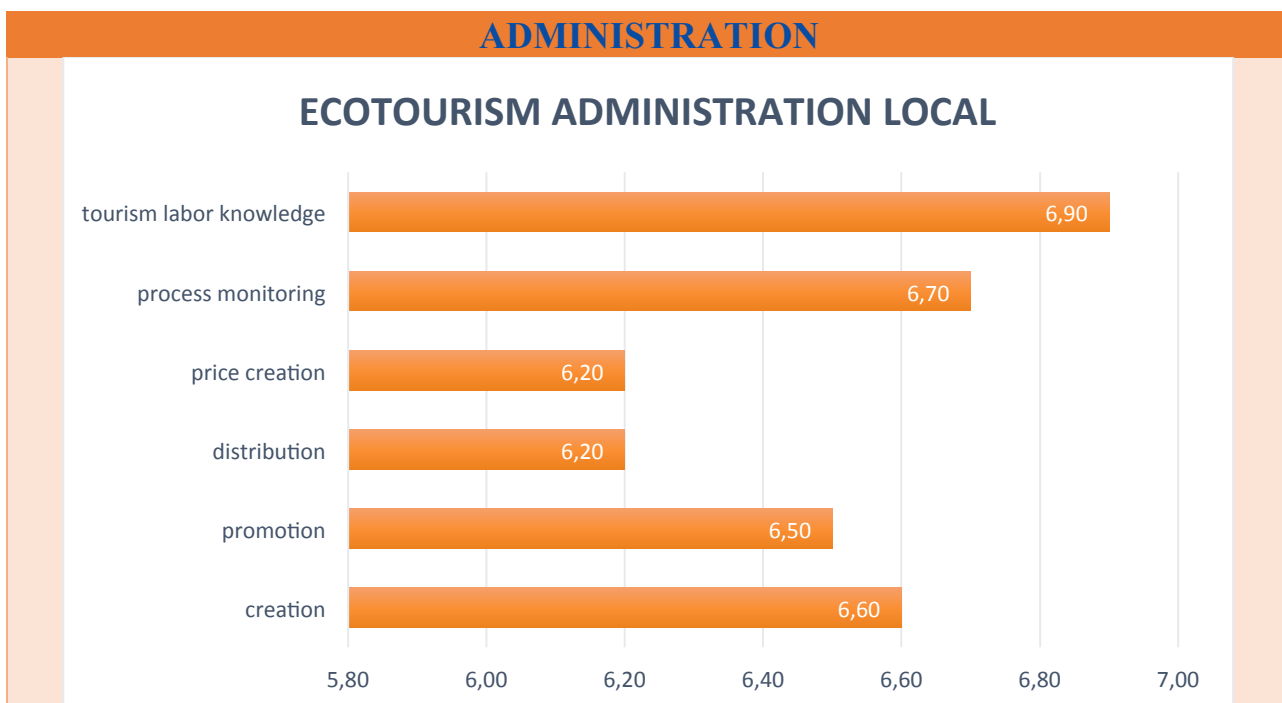


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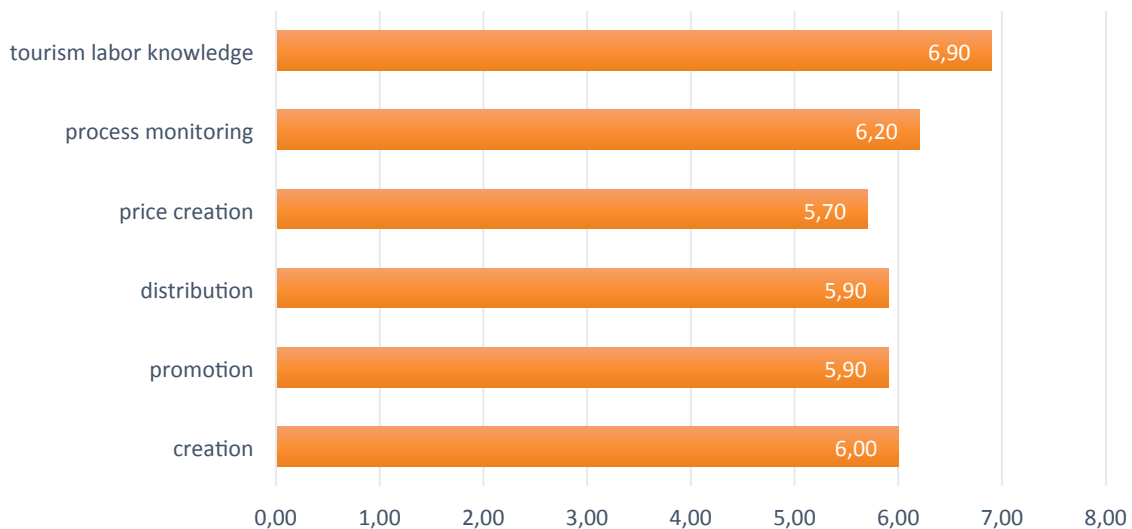




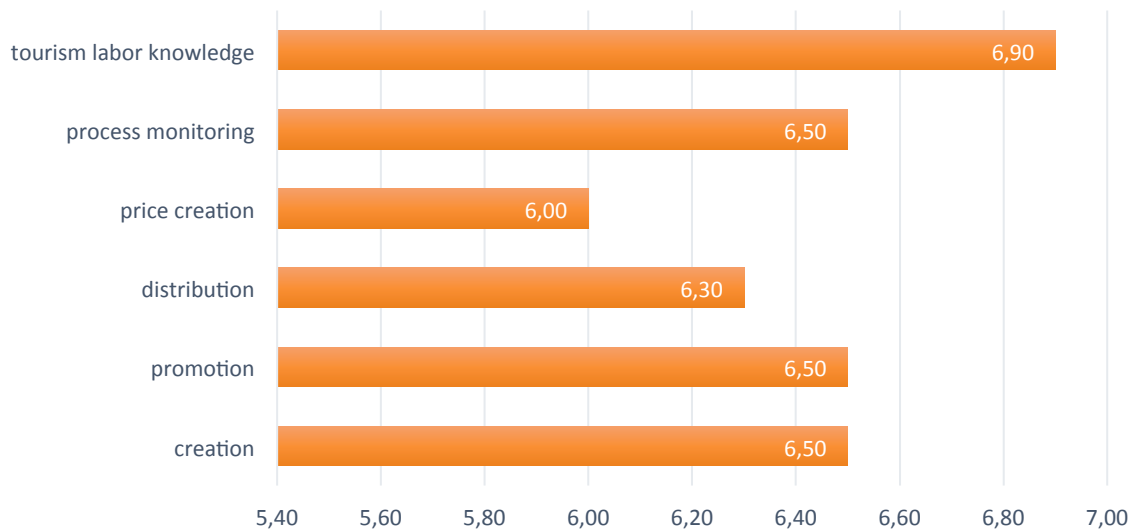
- *Eco tourism*



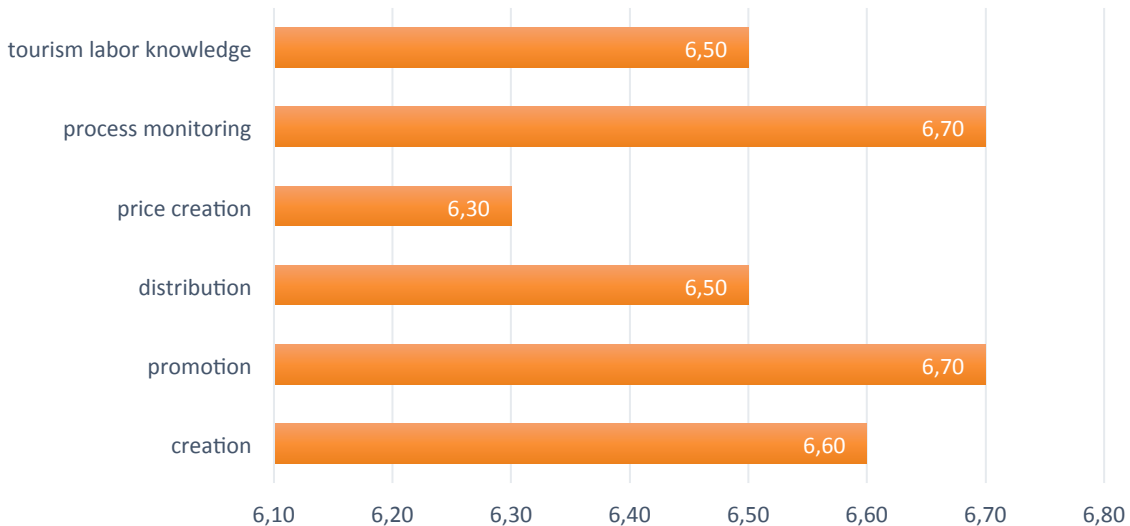
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### ECOTOURISM ADMINISTRATION NATIONAL

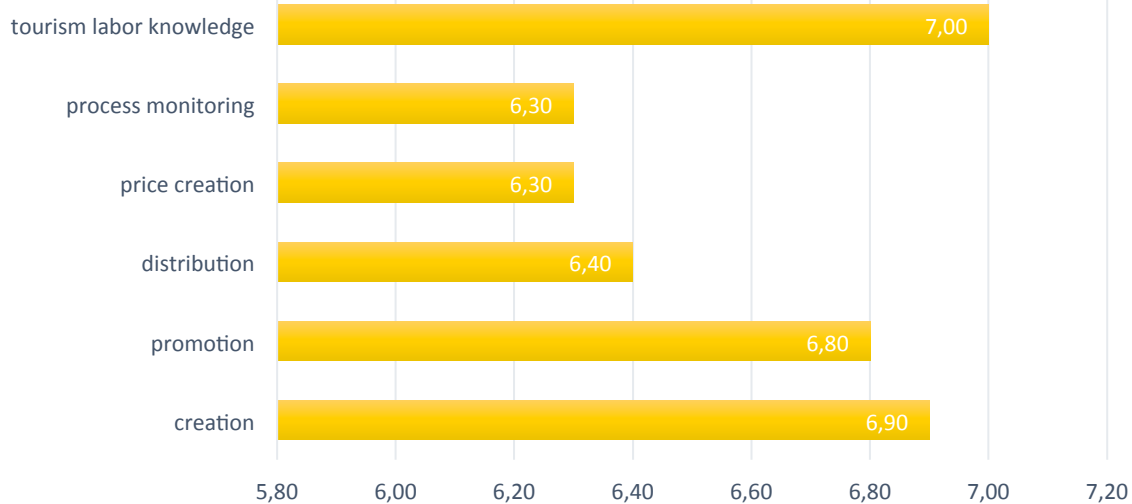


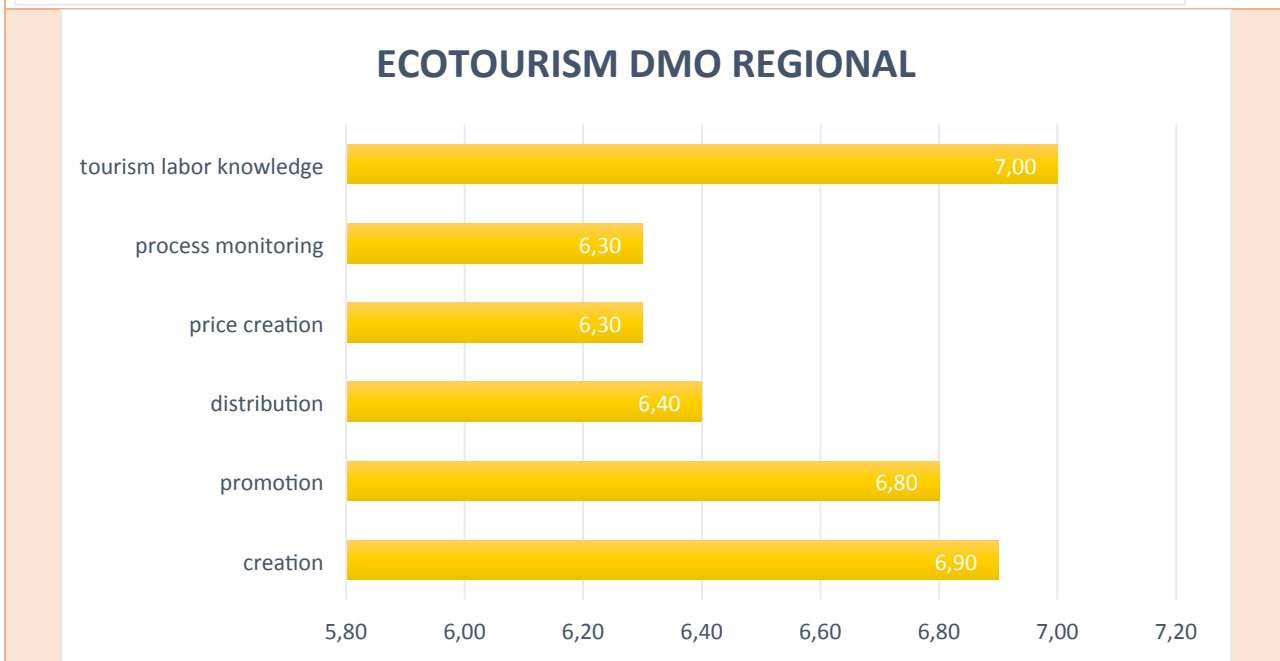
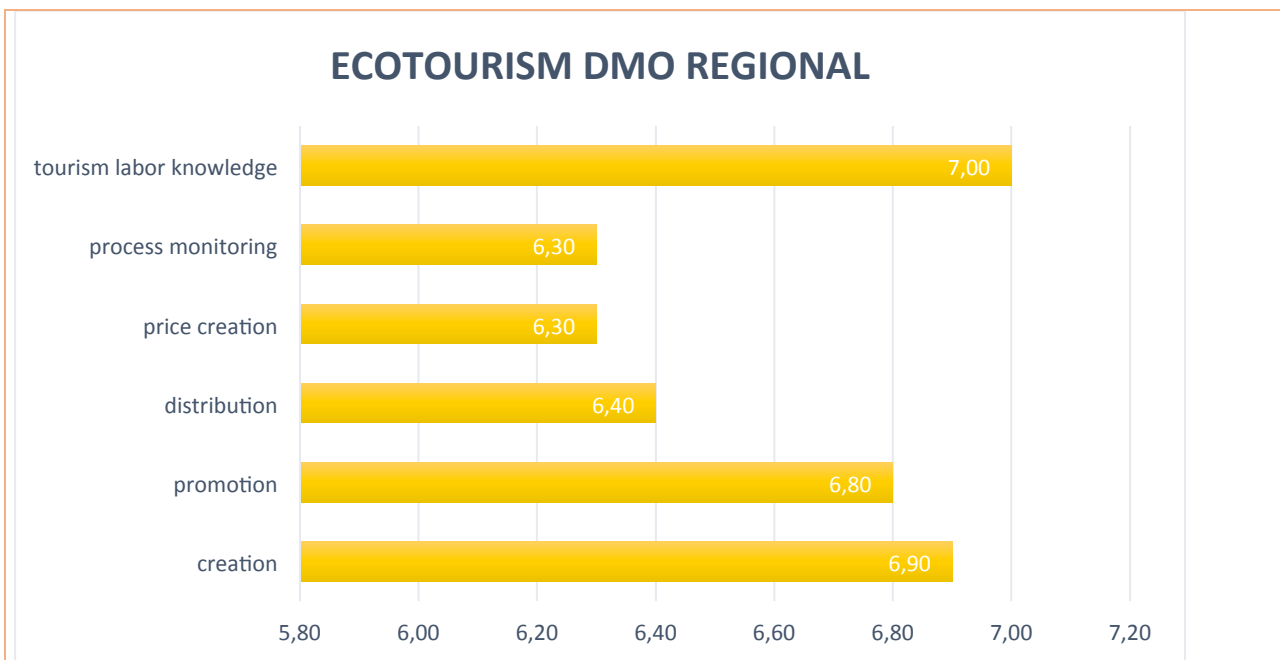
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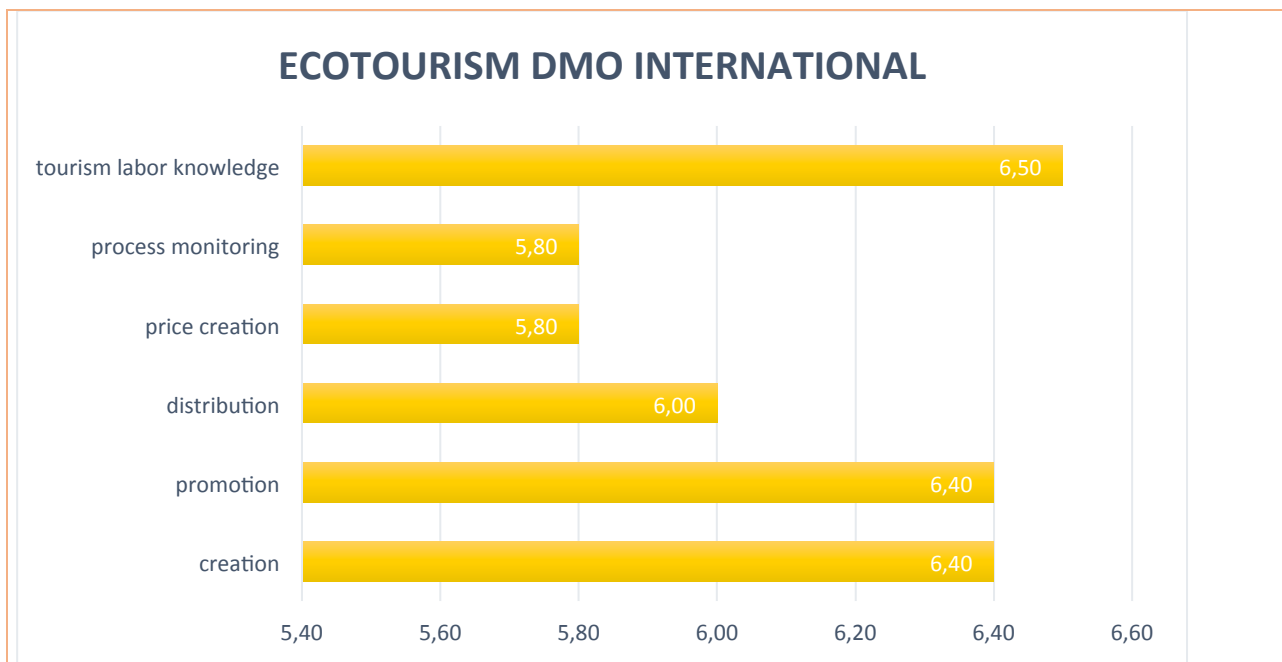


### DESTINATION MANAGEMENT ORGANISATIONS

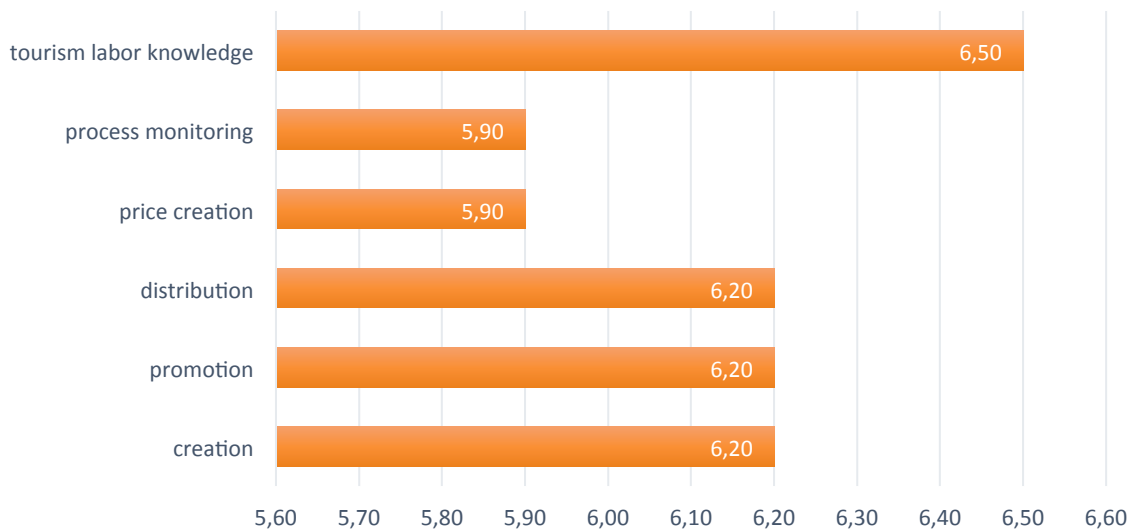
#### ECOTOURISM DMO LOCAL



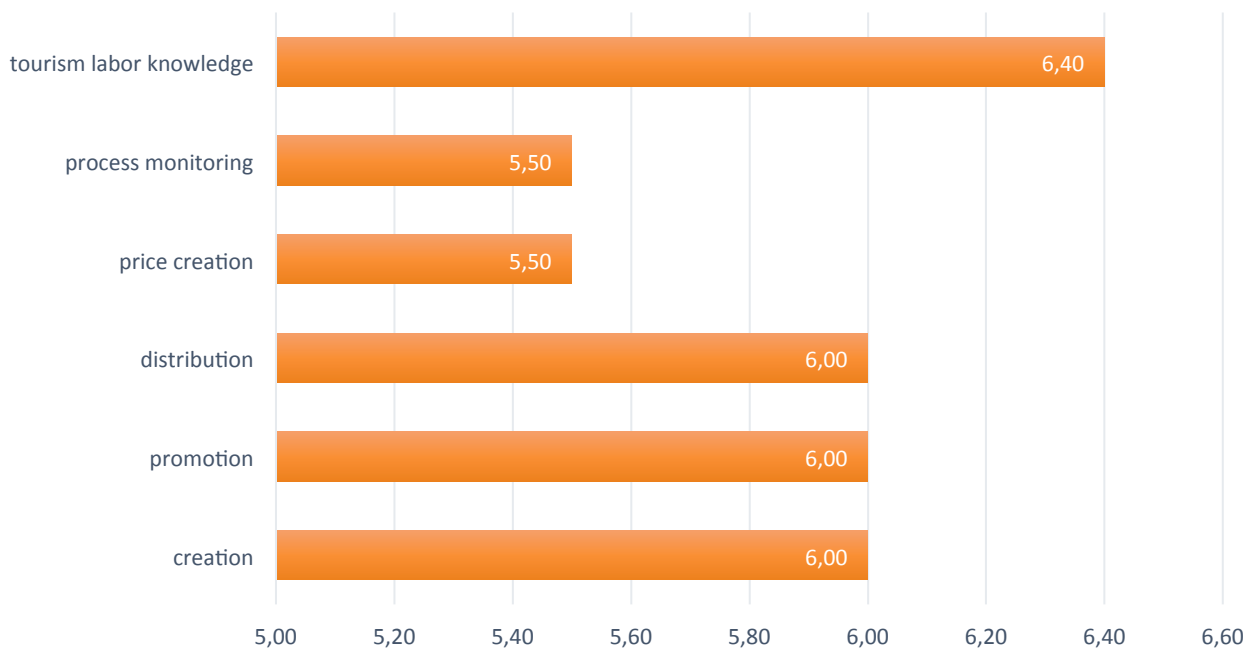




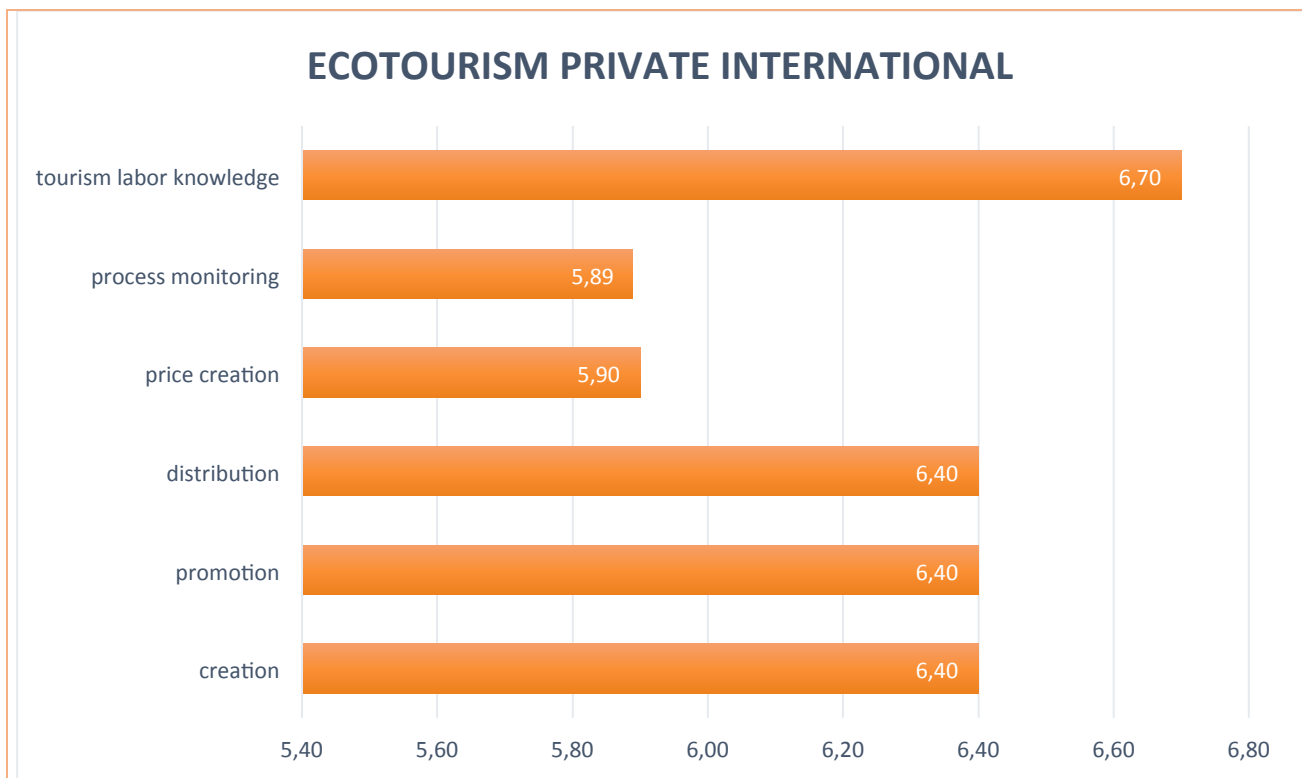
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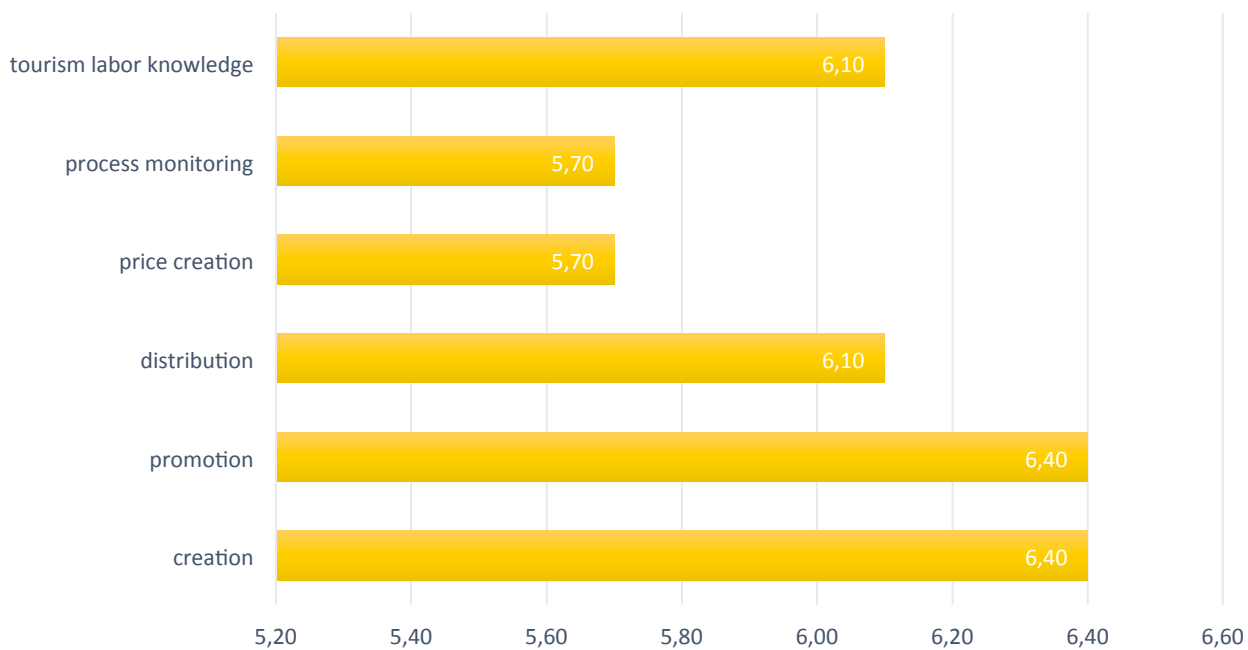
### ECOTOURISM PRIVATE NATIONAL



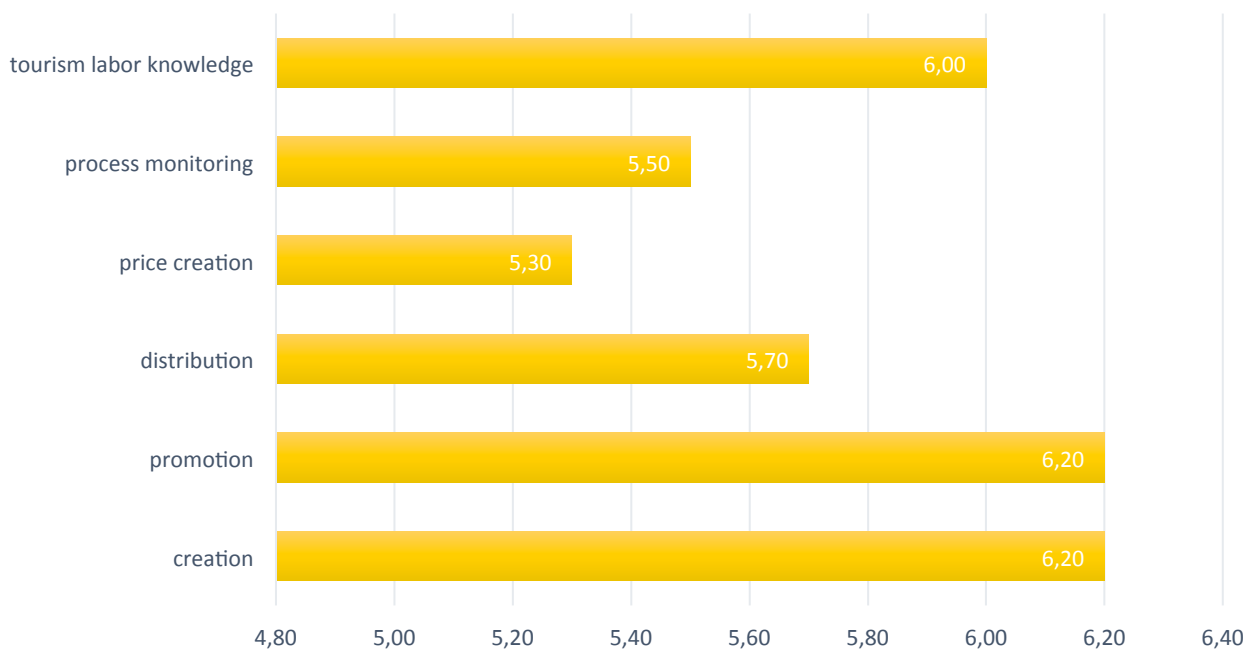


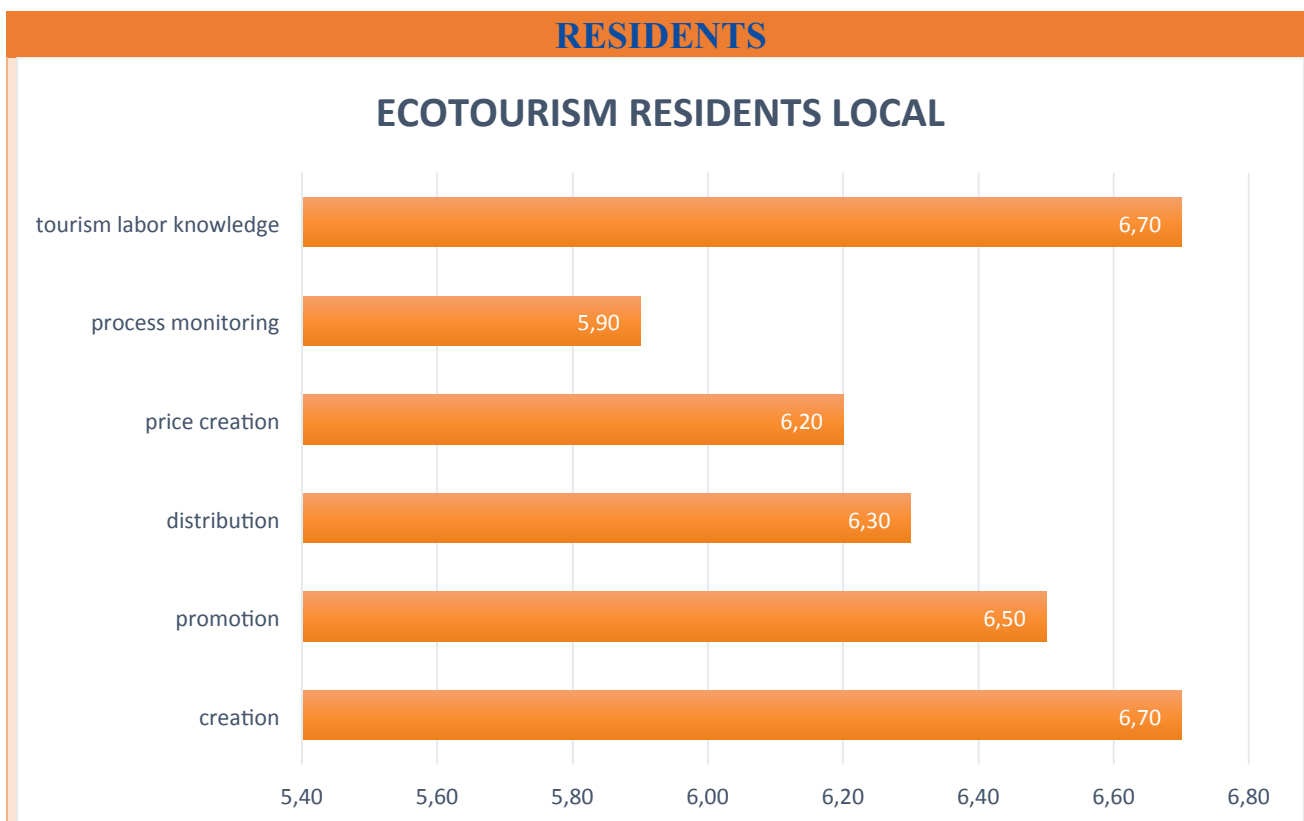


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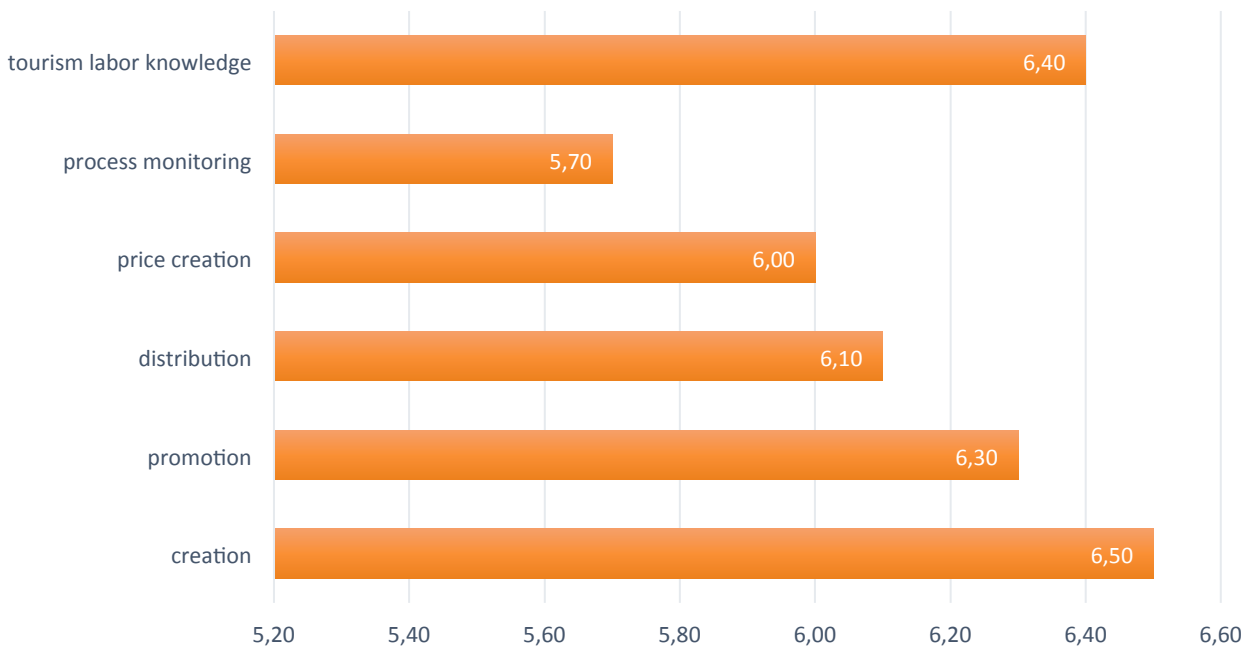


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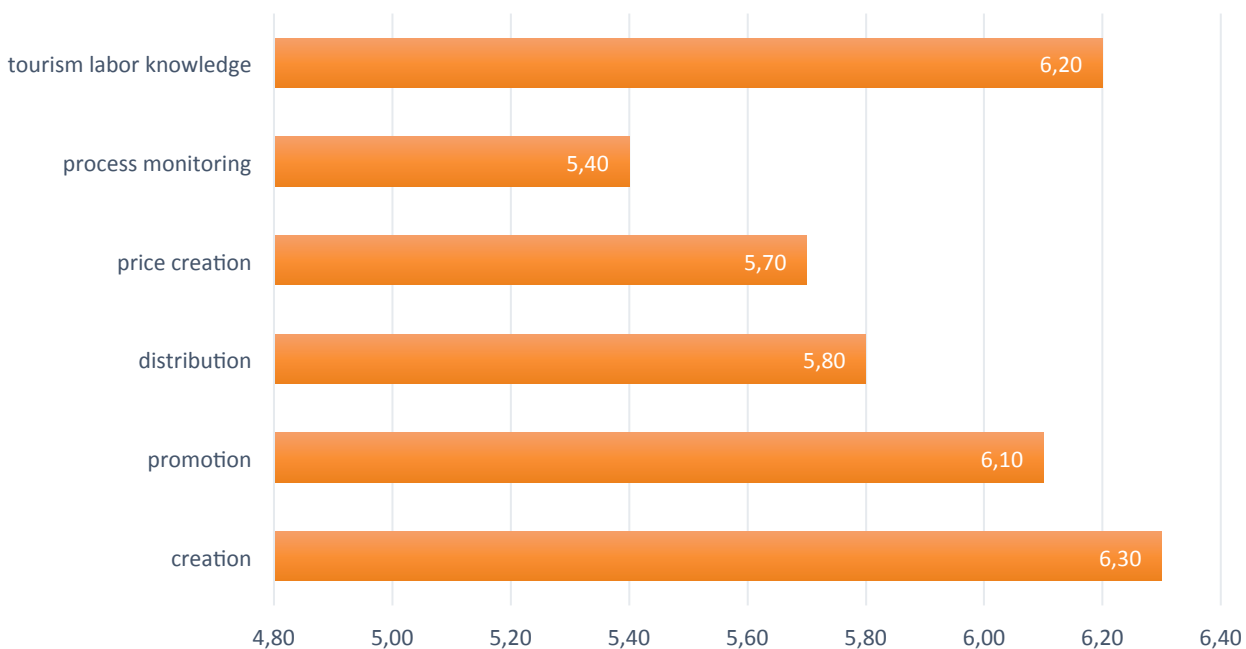


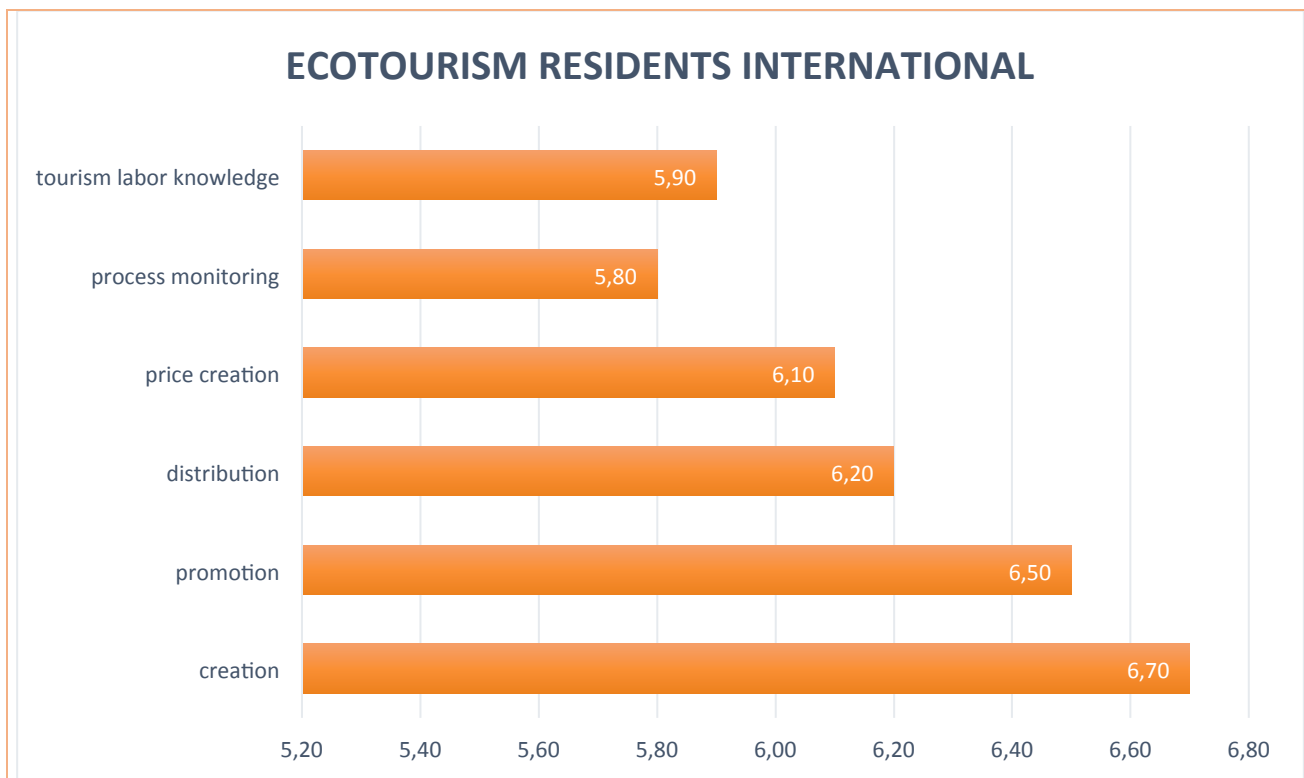


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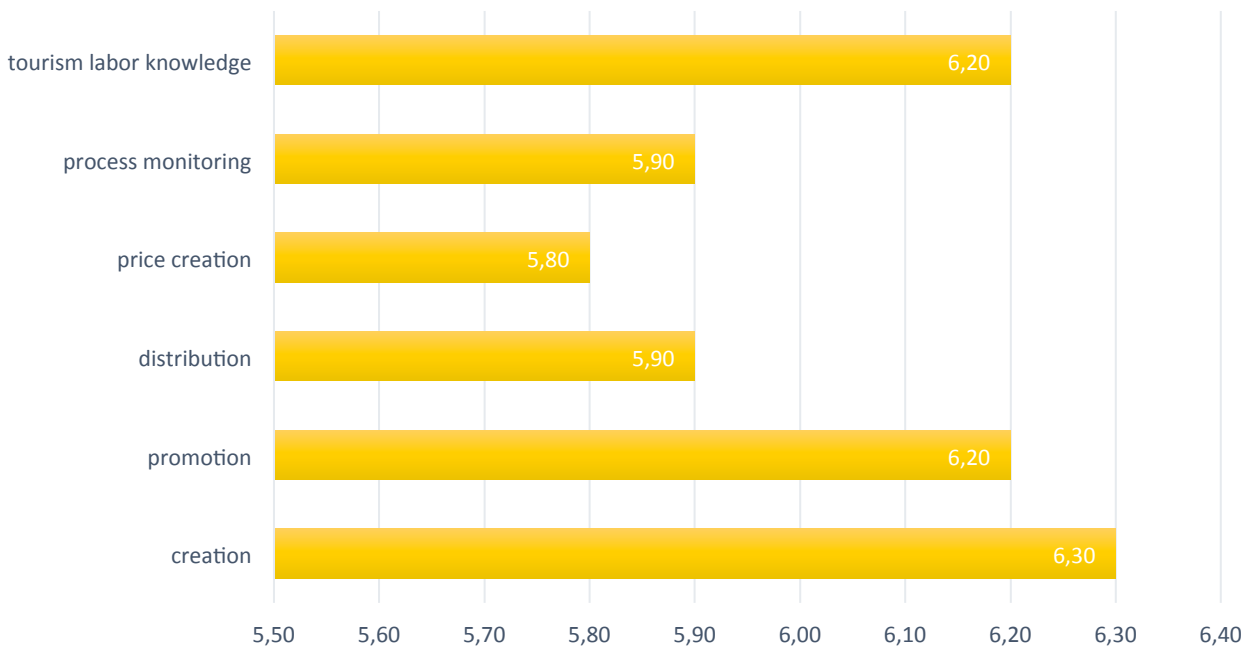


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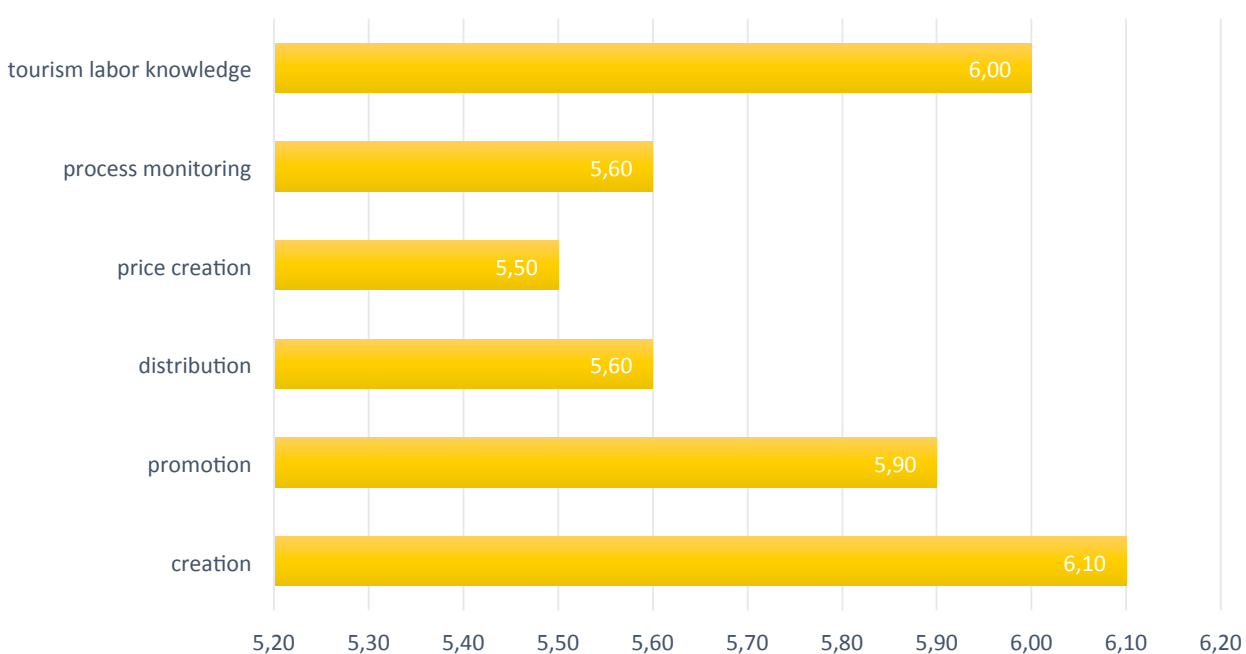


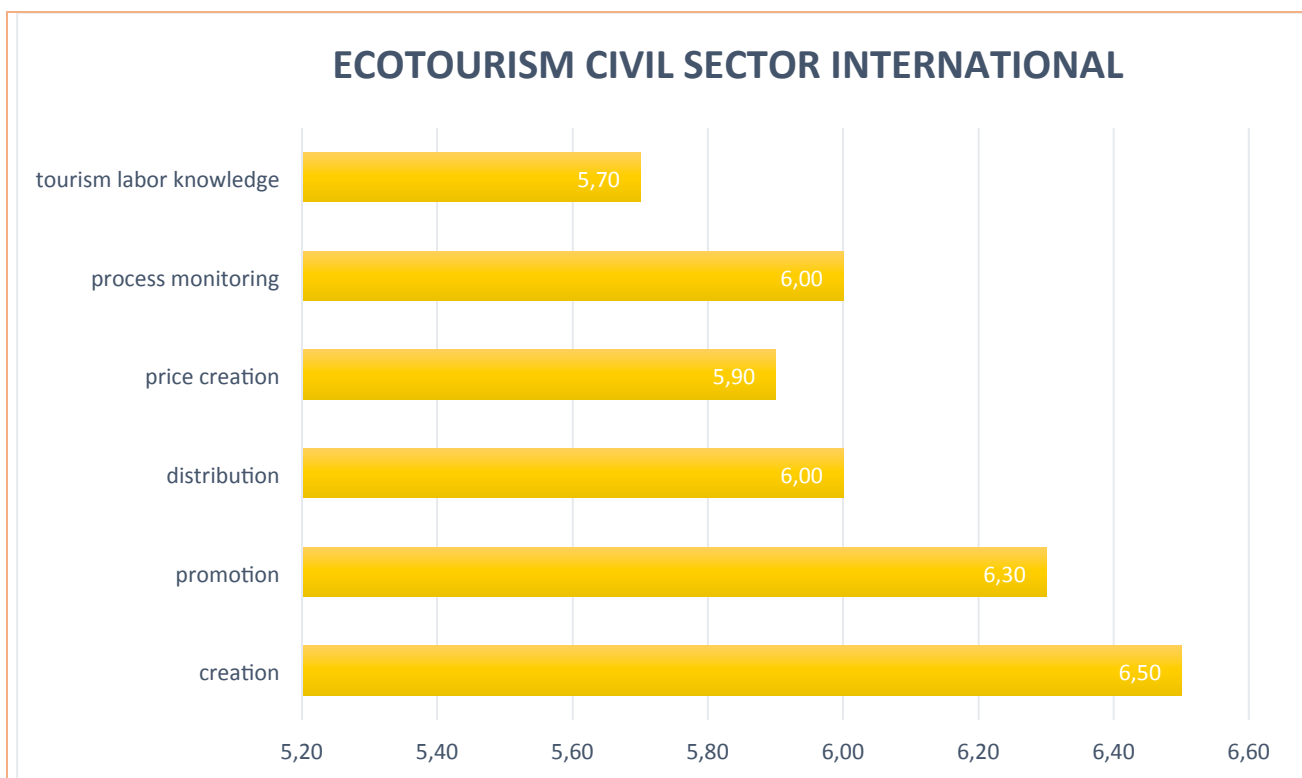


### ECOTOURISM CIVIL SECTOR REGIONAL

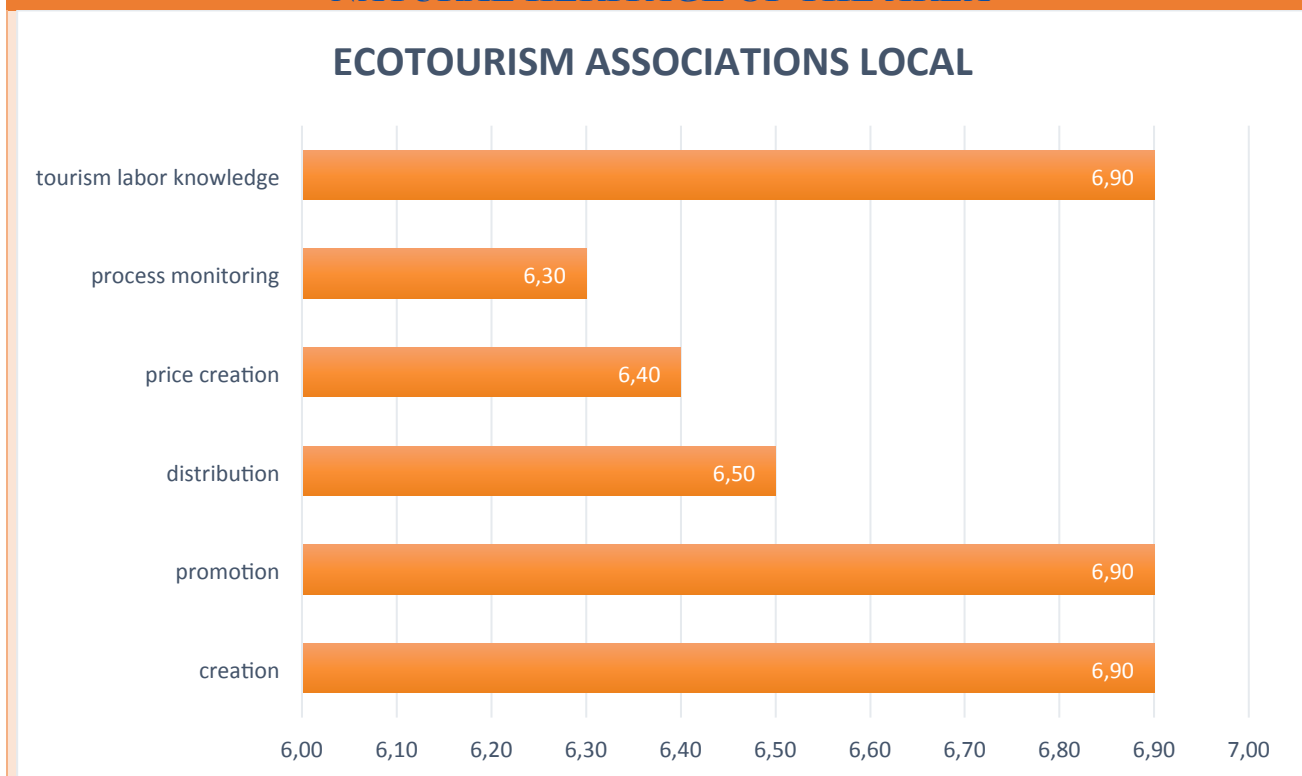


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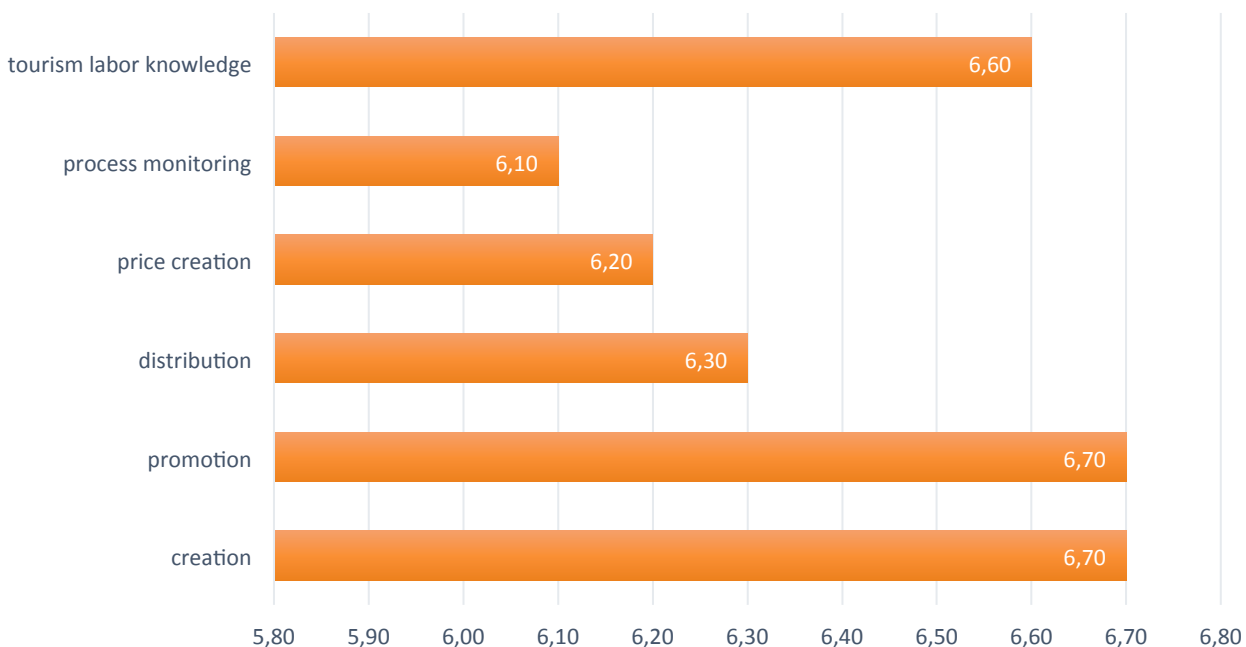




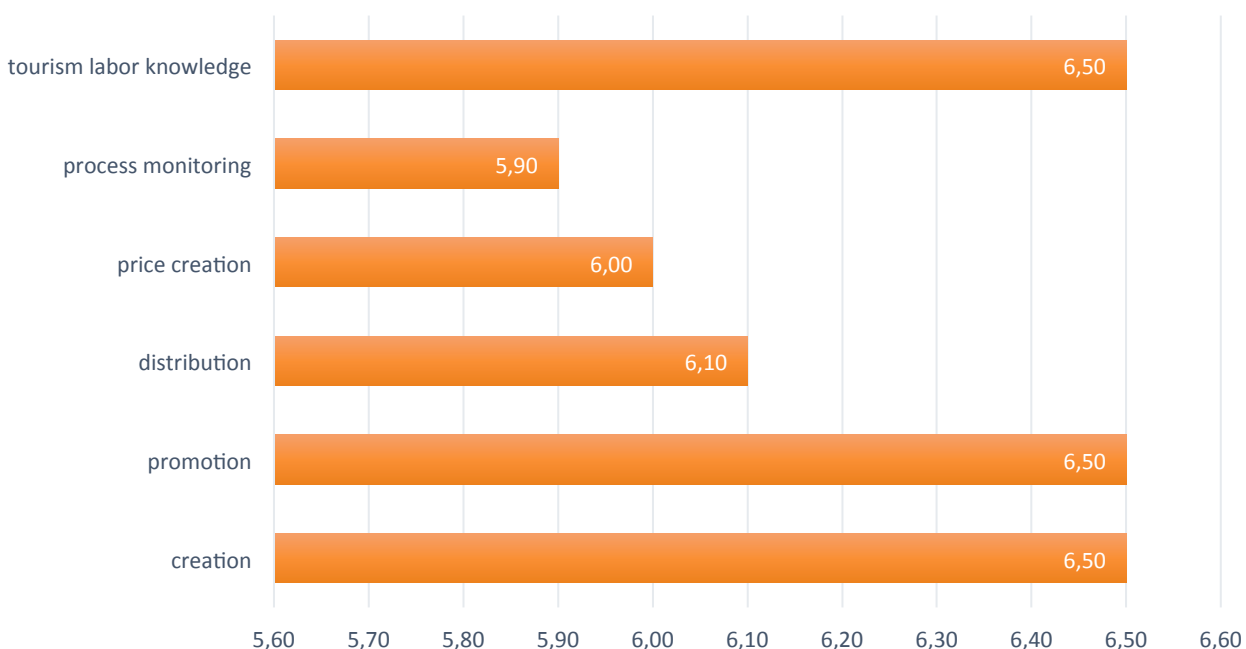
## ASSOCIATIONS/ORGANIZATIONS RELATED TO CULTURAL AND NATURAL HERITAGE OF THE AREA



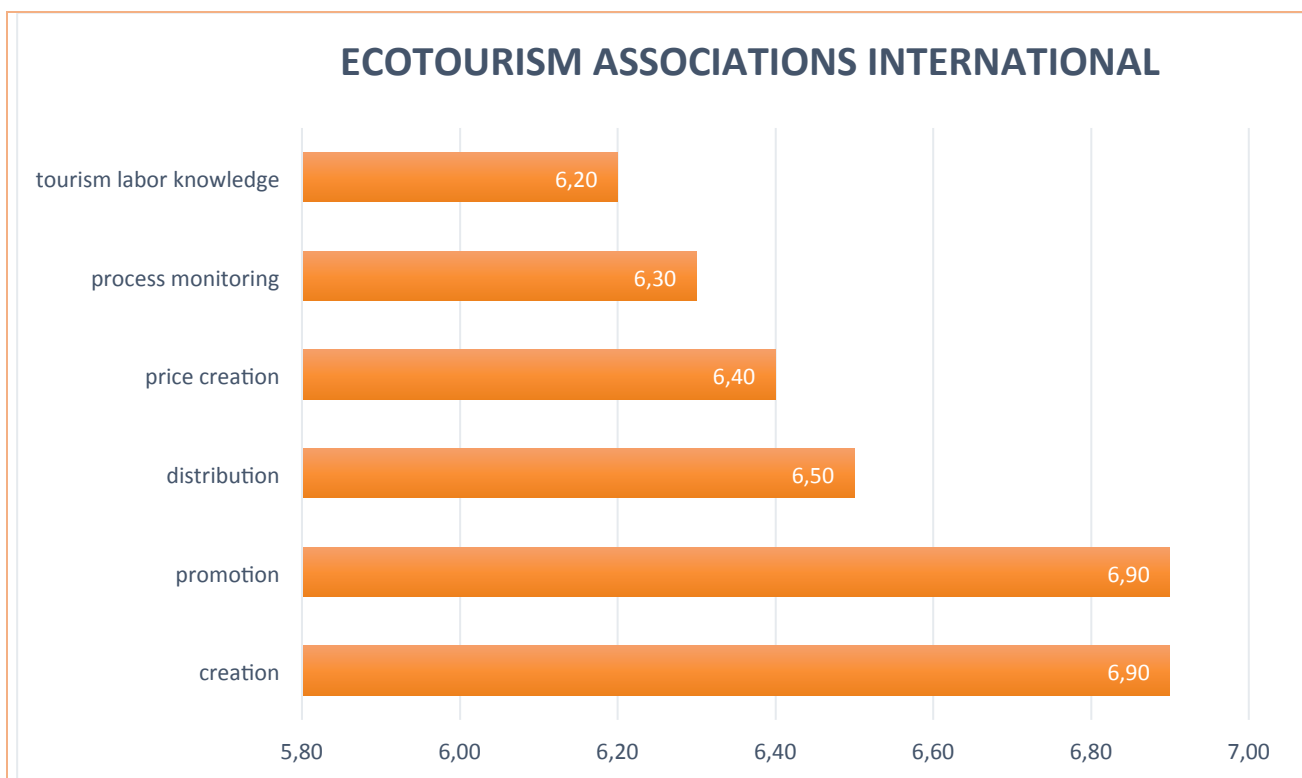
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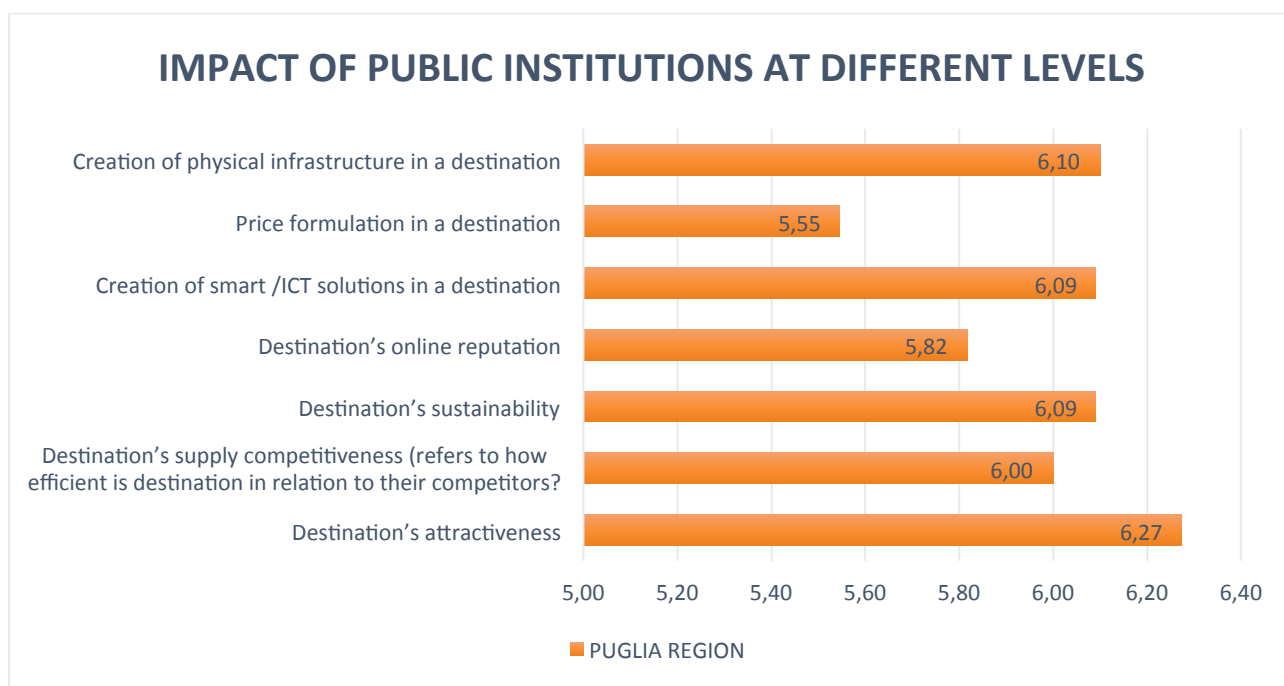
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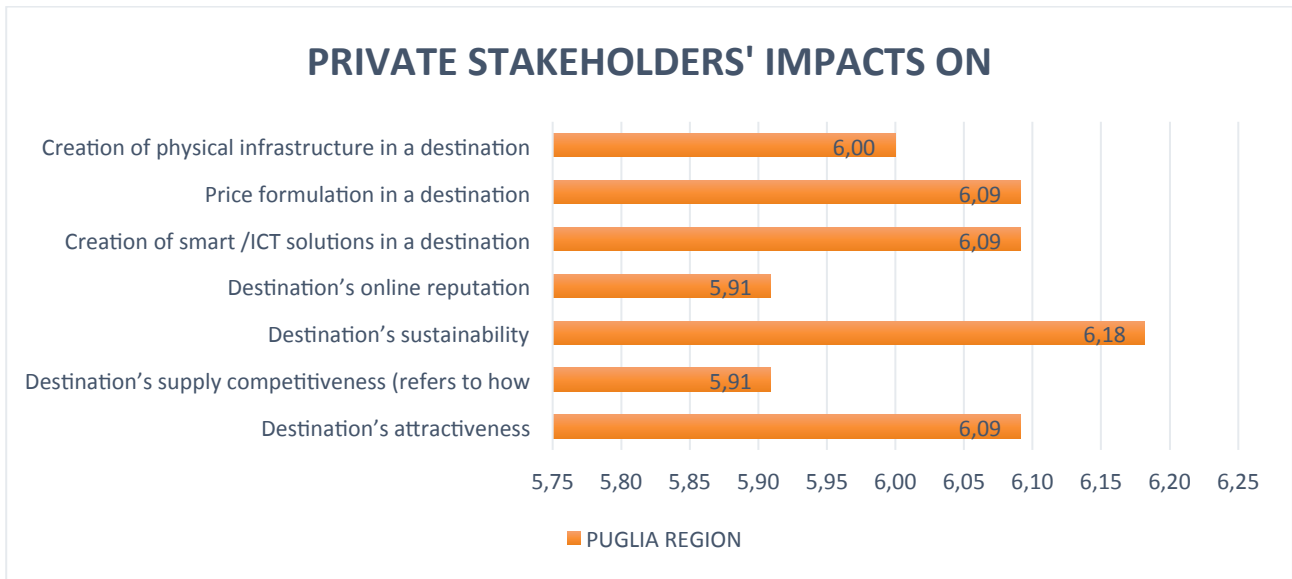
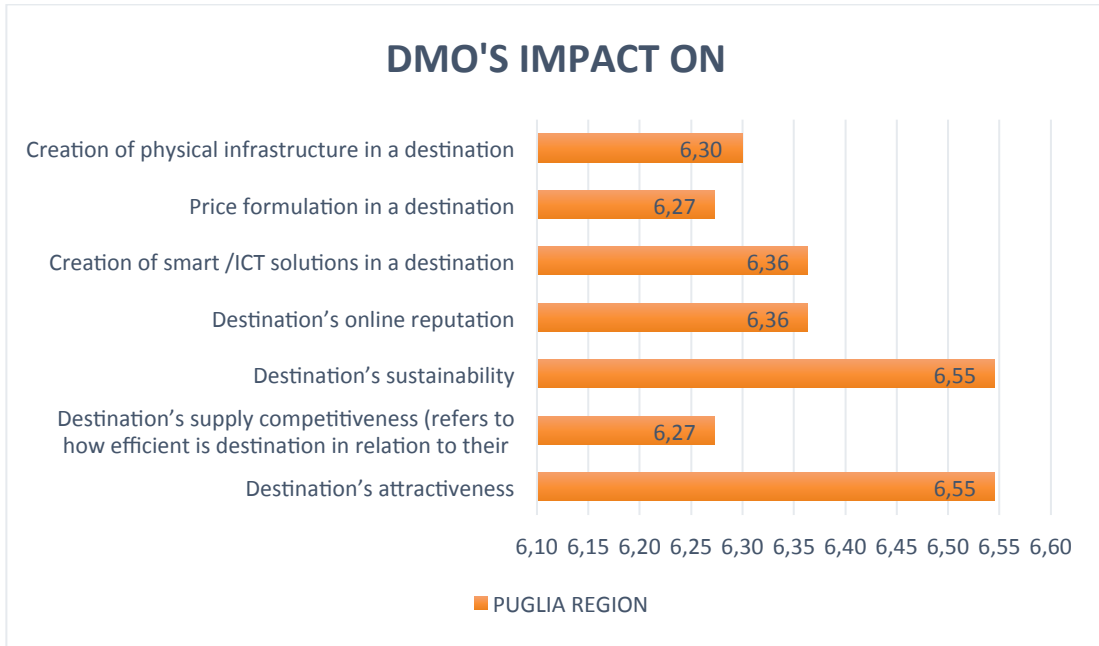


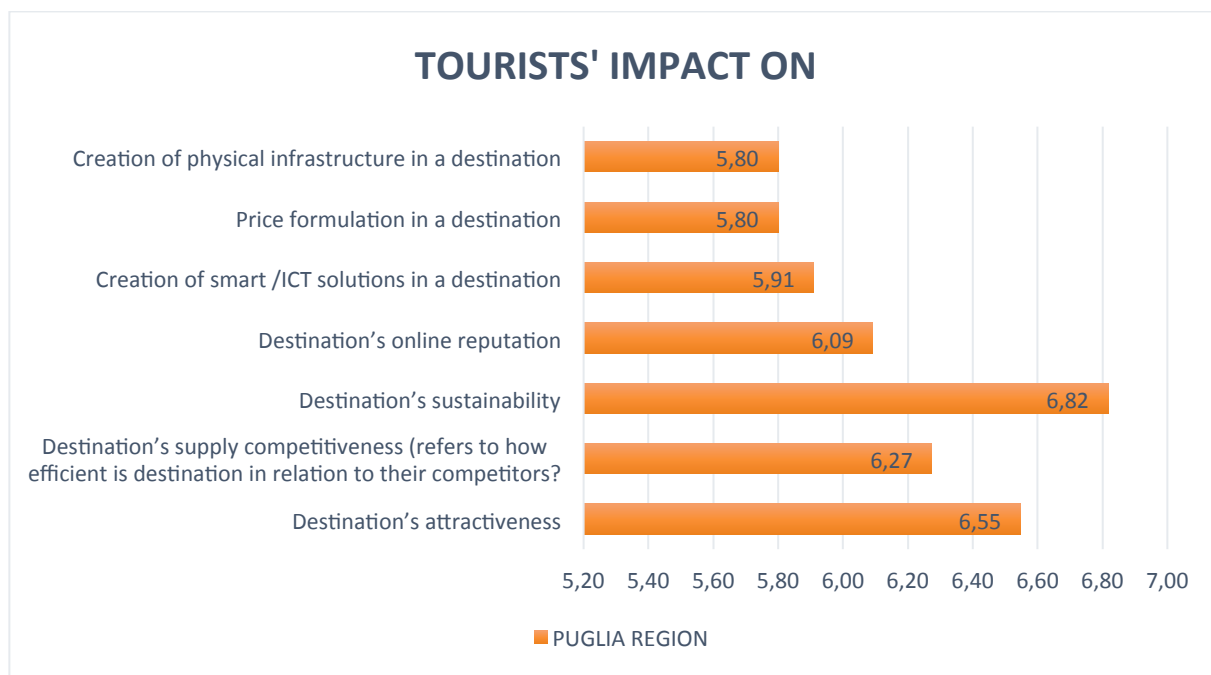




- **Impact of stakeholders**

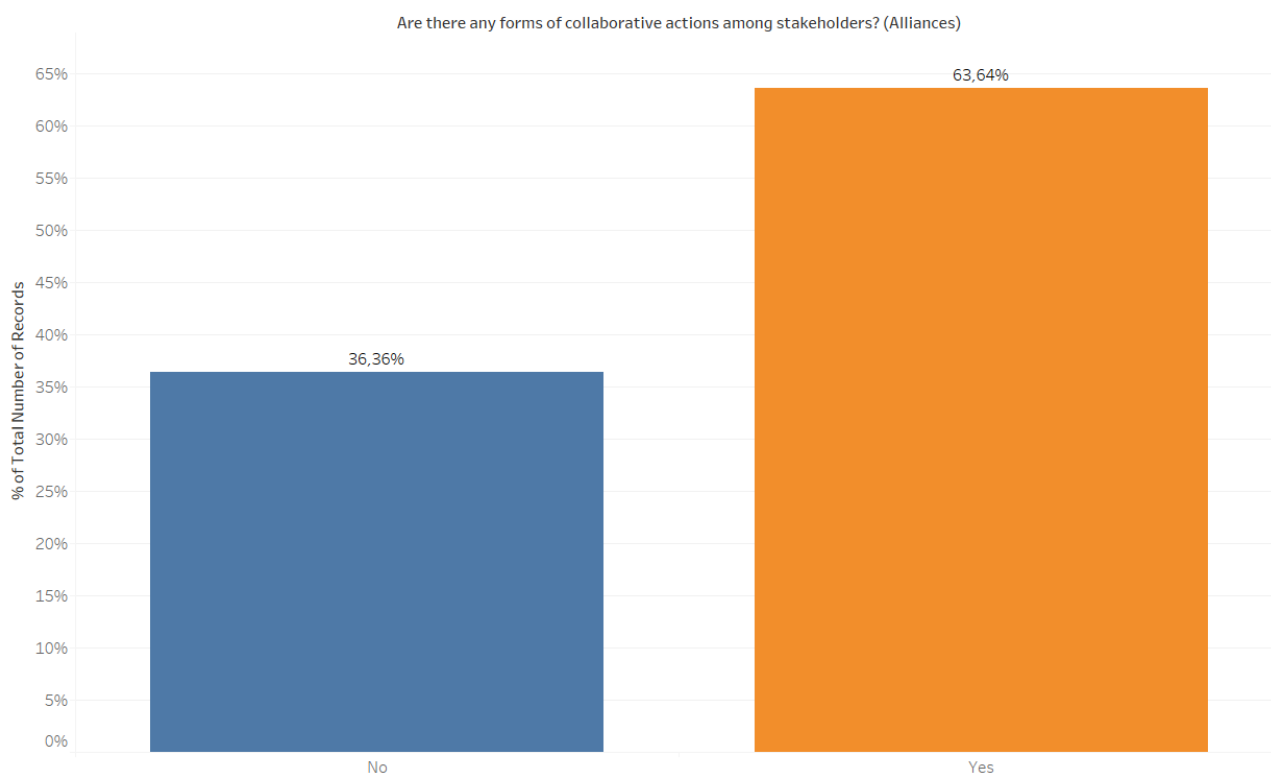


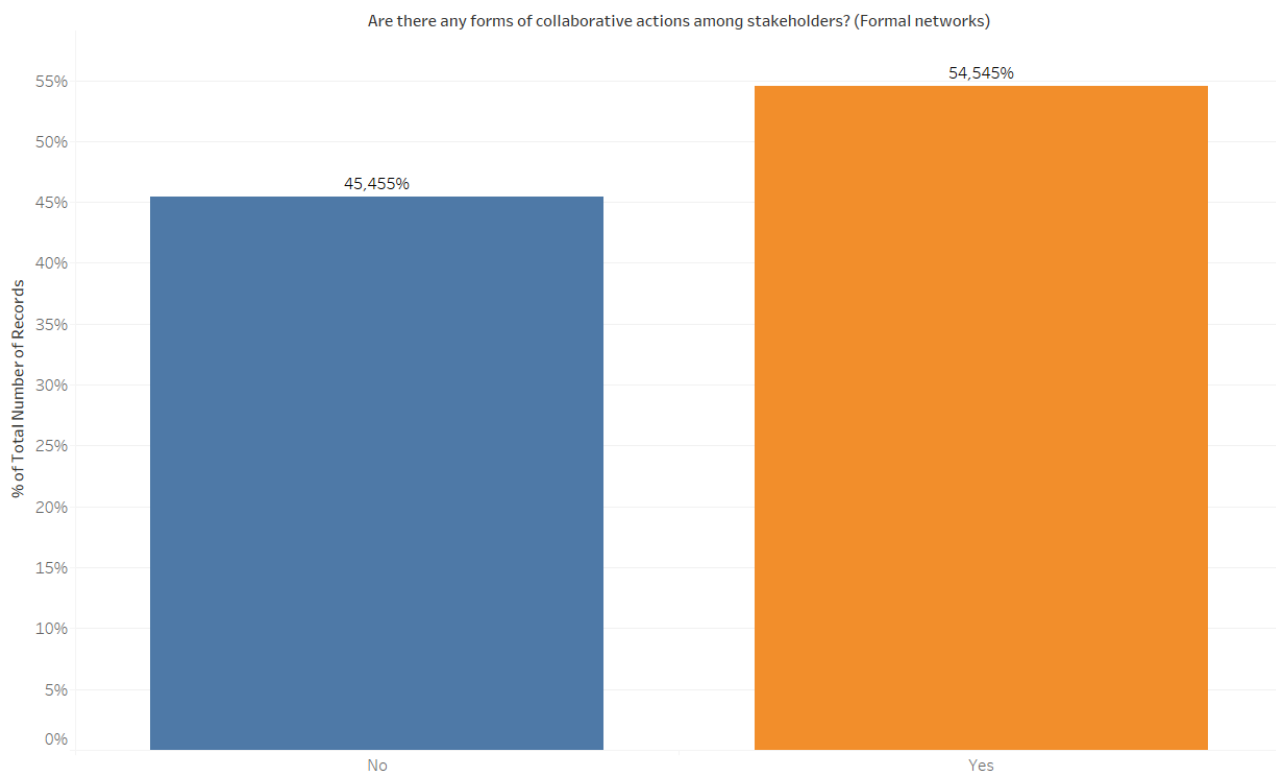
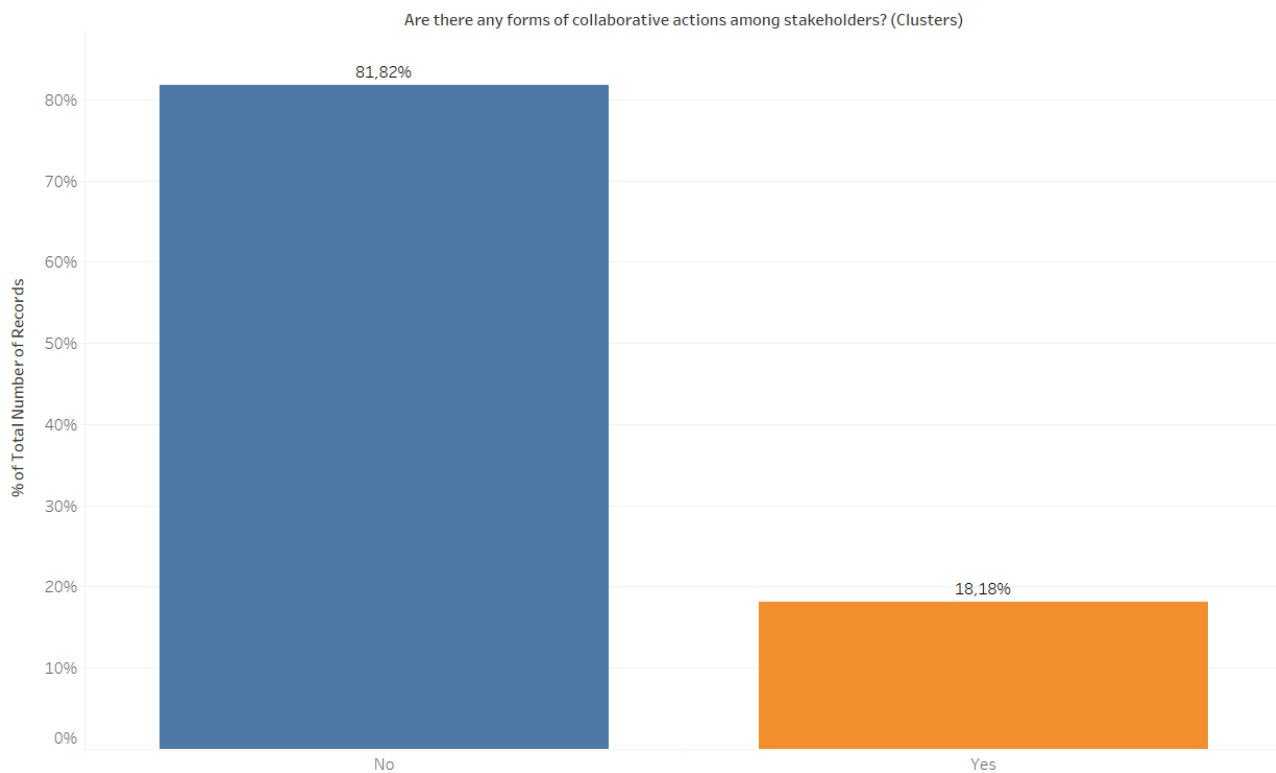




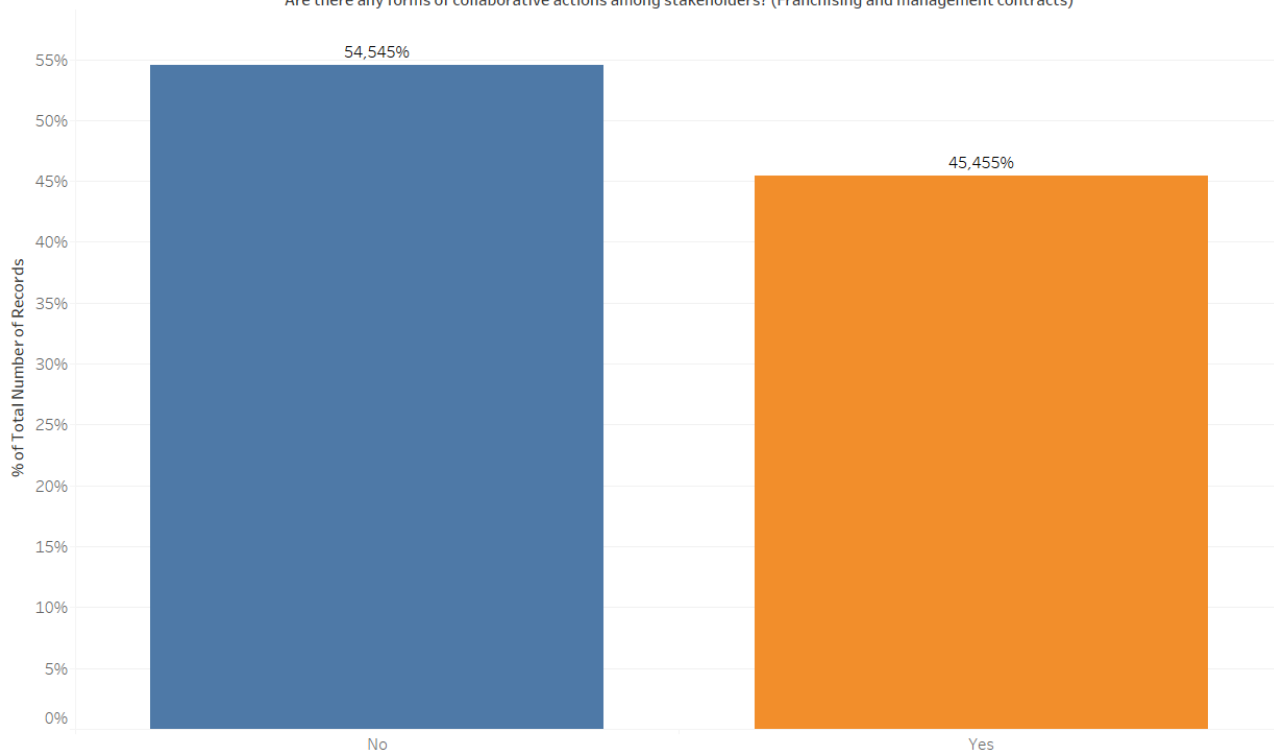
- **Collaborative actions**

Are there any forms of collaborative actions among stakeholders?

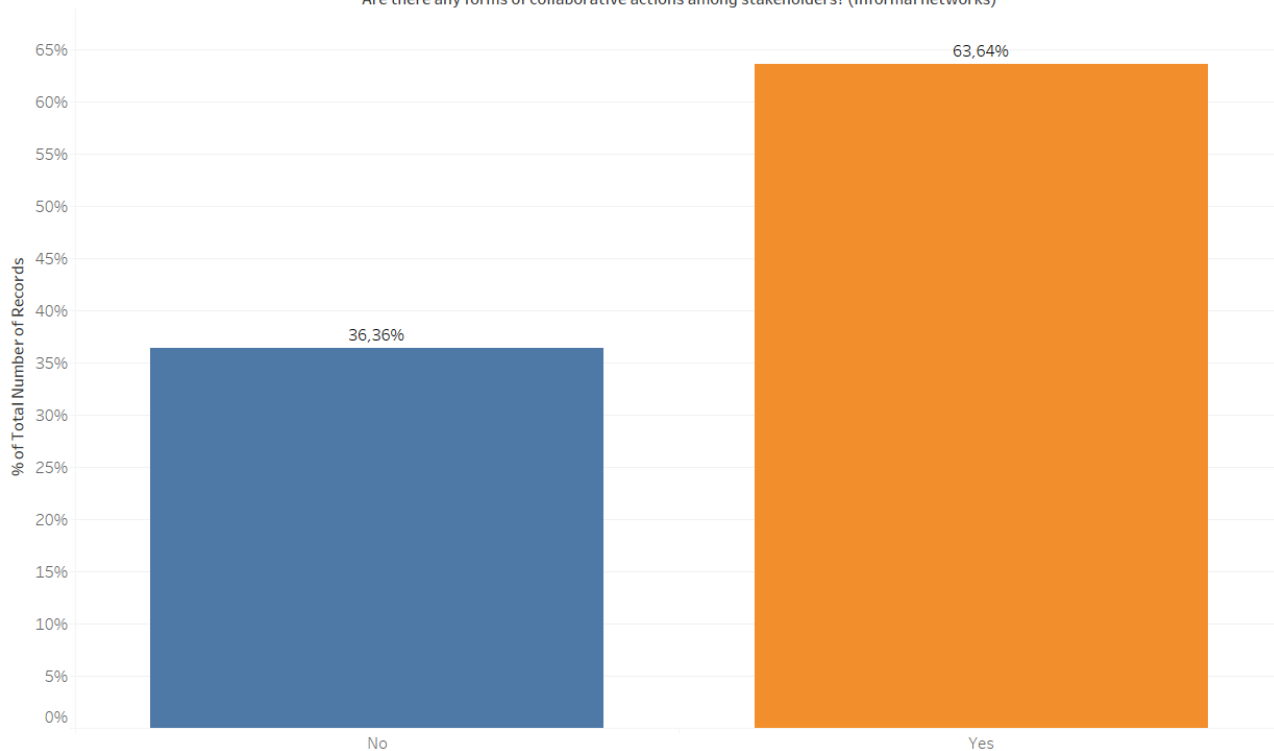


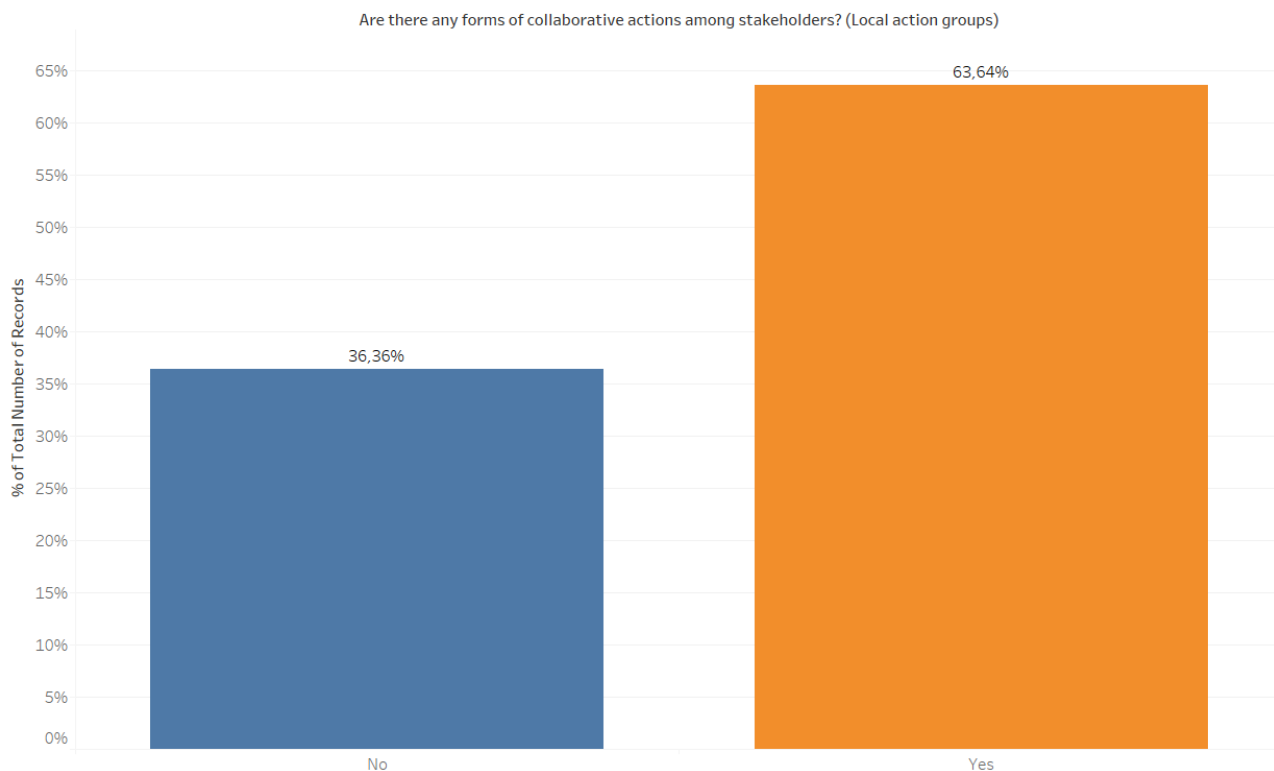


Are there any forms of collaborative actions among stakeholders? (Franchising and management contracts)



Are there any forms of collaborative actions among stakeholders? (Informal networks)

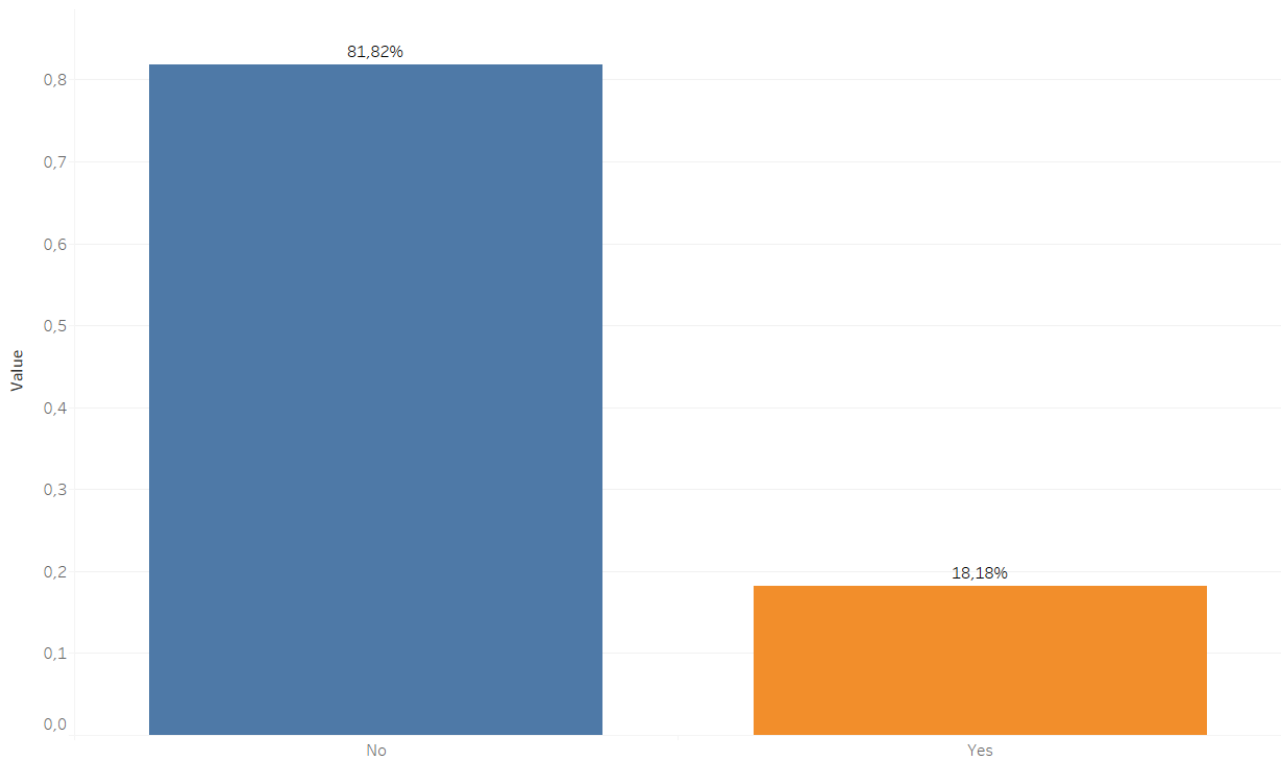




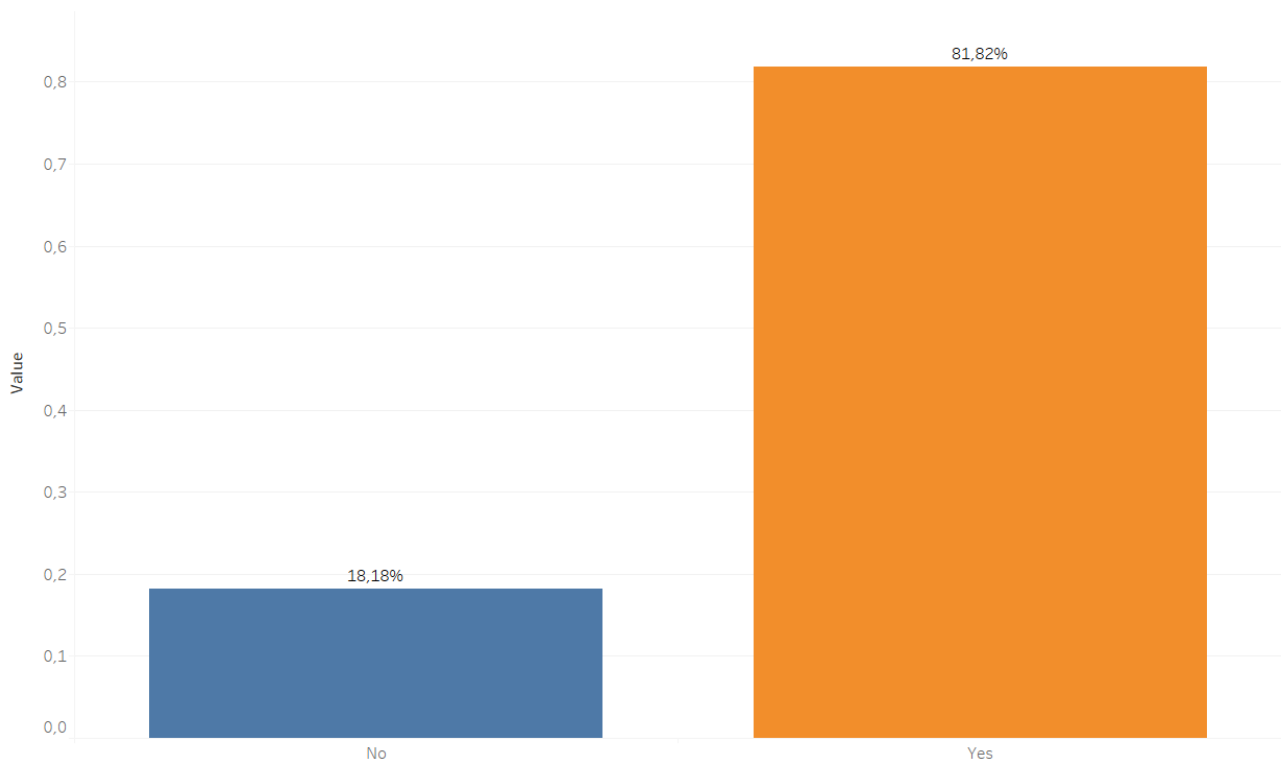
- ***Common partners***

Who are the most common partners in the formal types of collaborative activities in your destination?

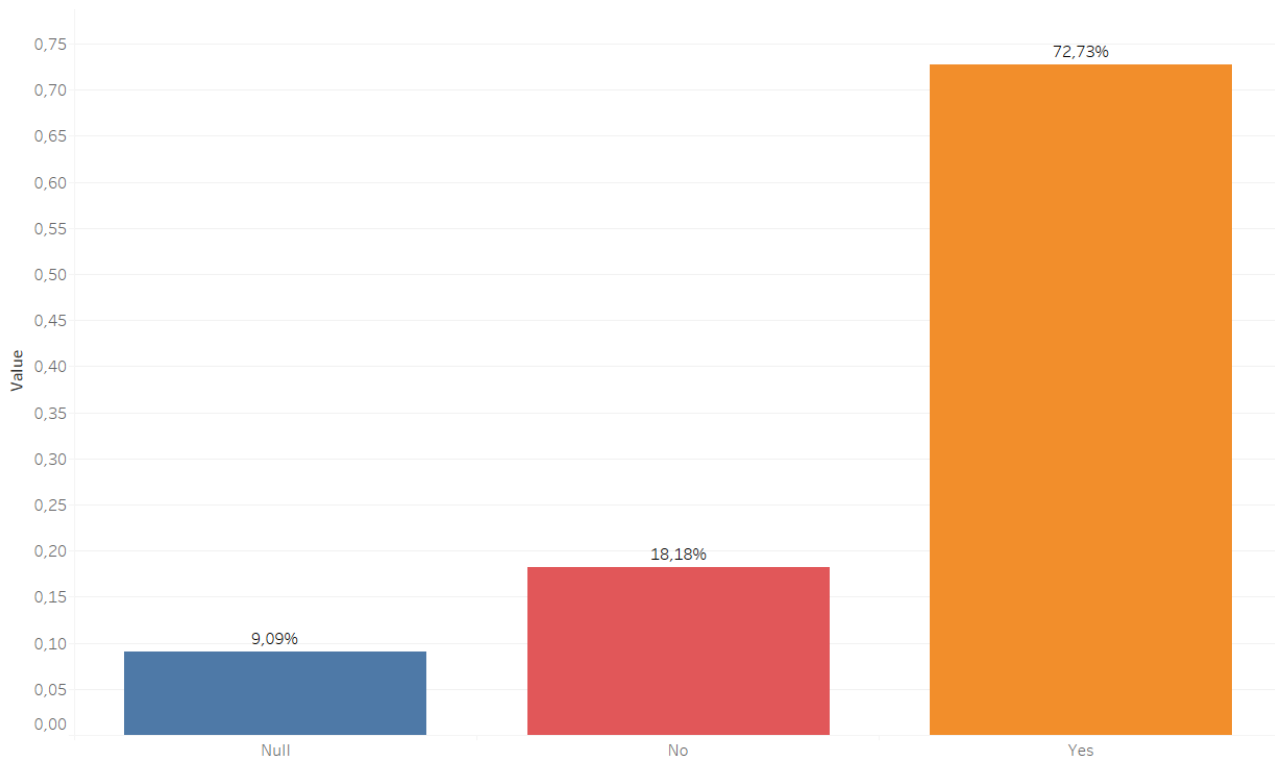
### Civil sector entities



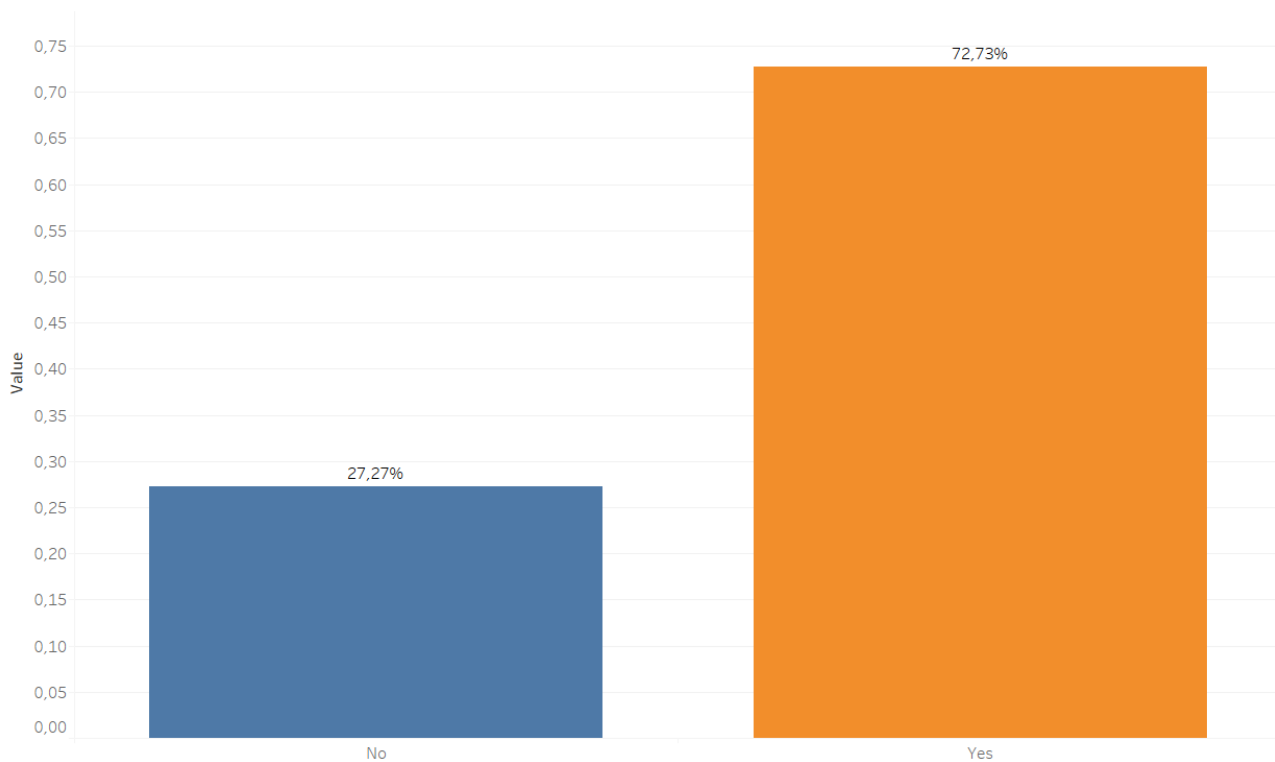
### Local Administration



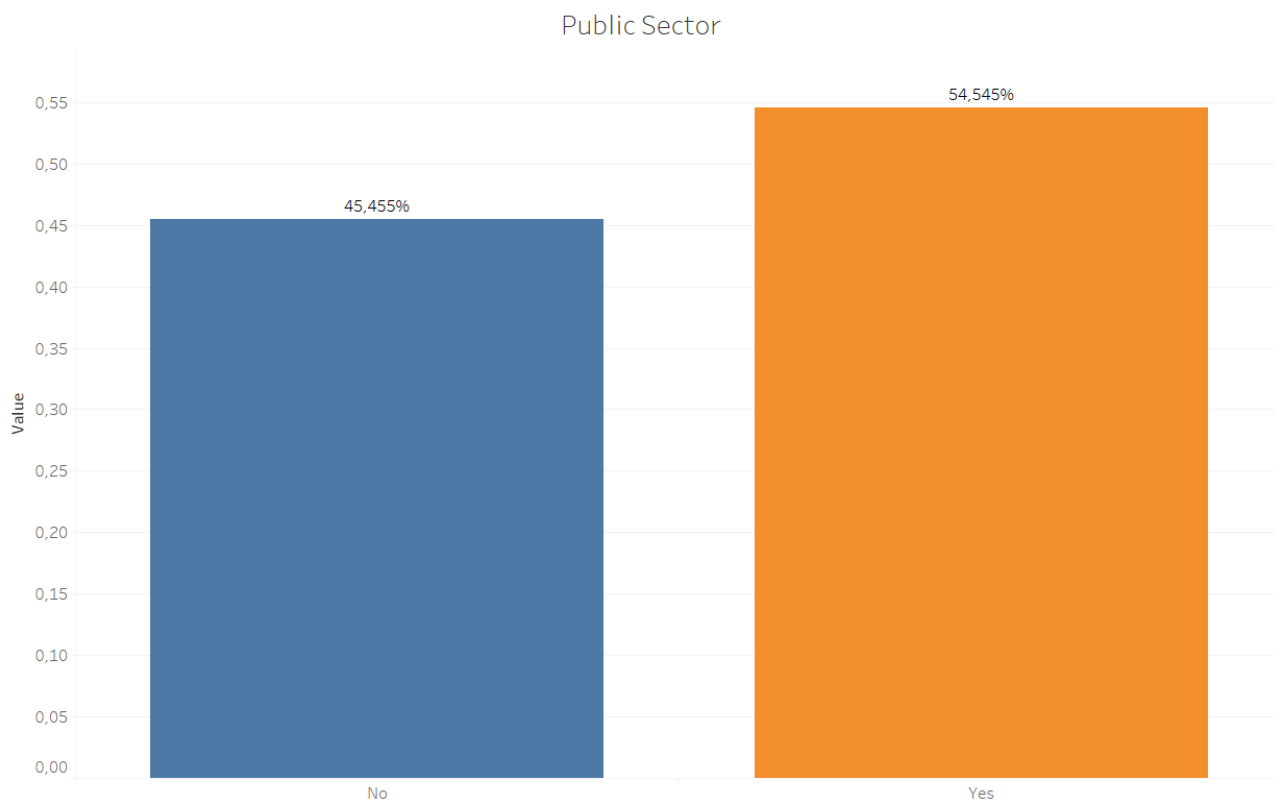
### Private entities



### Public Entities



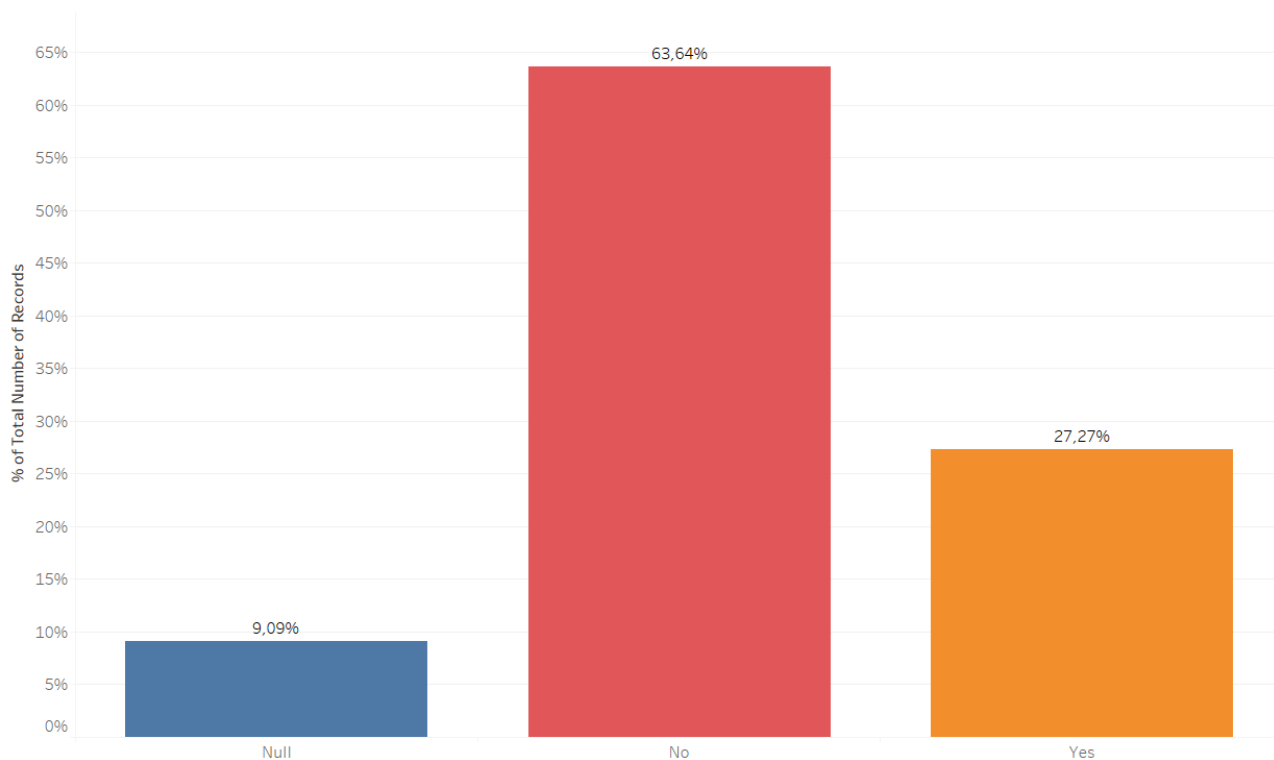




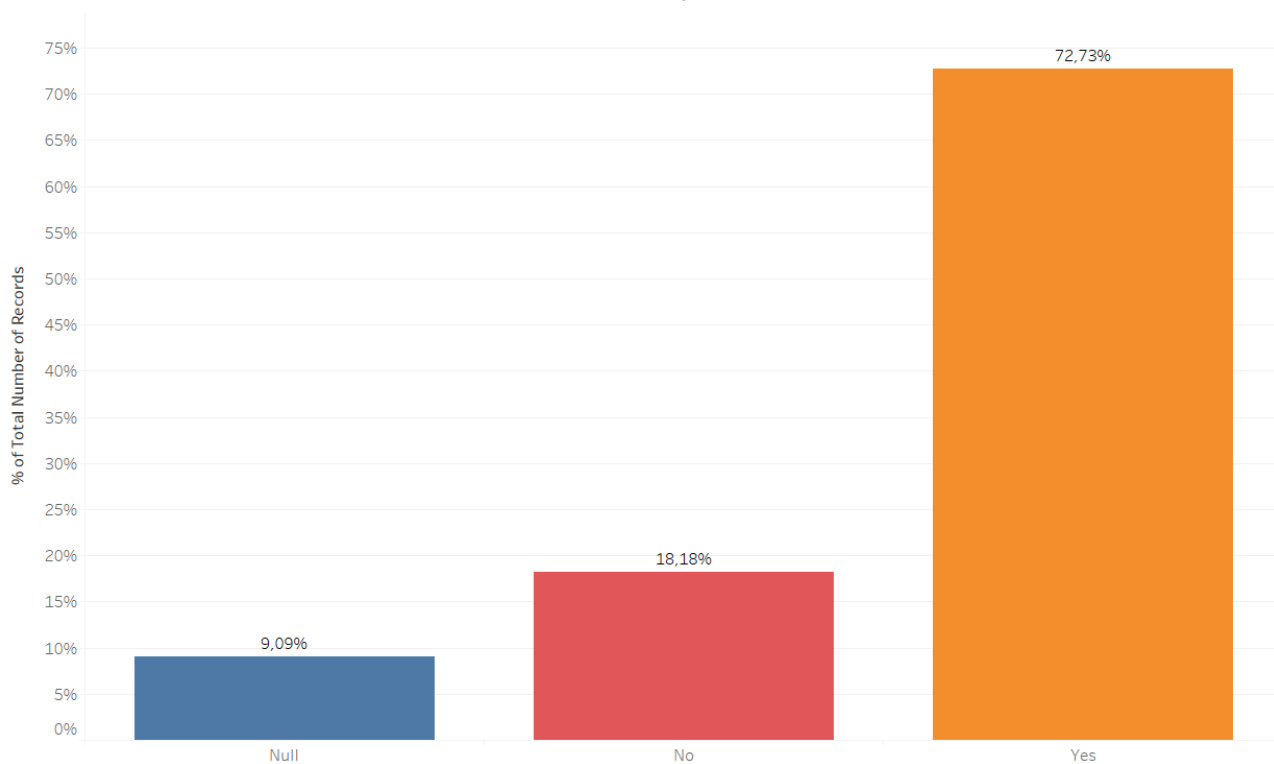
- ***Type of activities***

What types of activities are most commonly shared between different stakeholders?

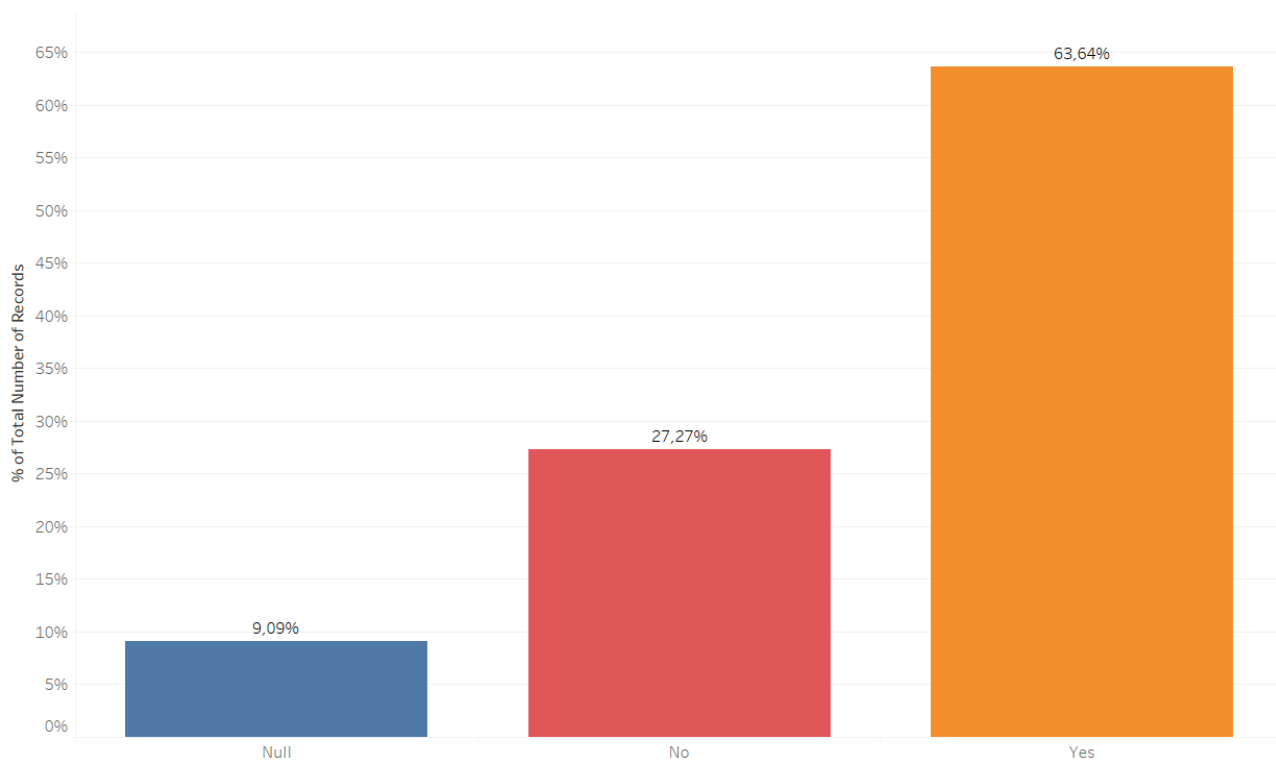
### Destination management



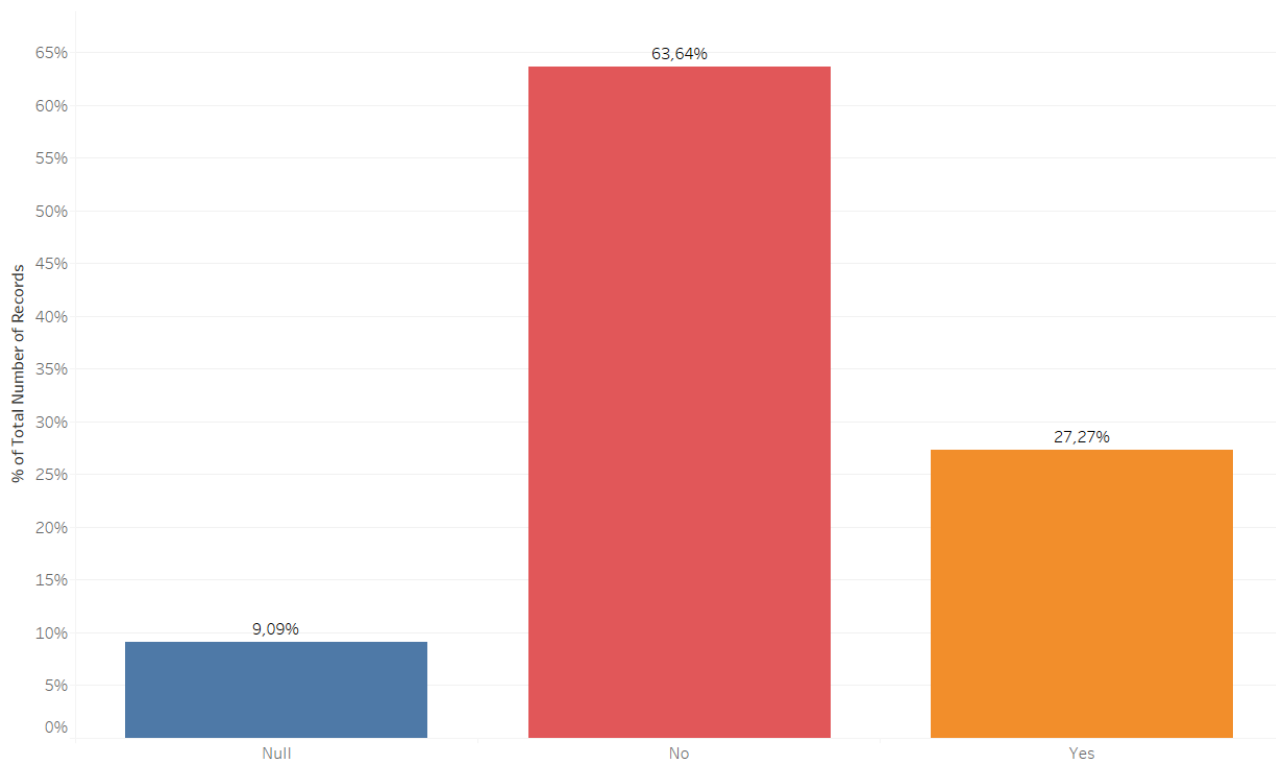
### Creation of the products



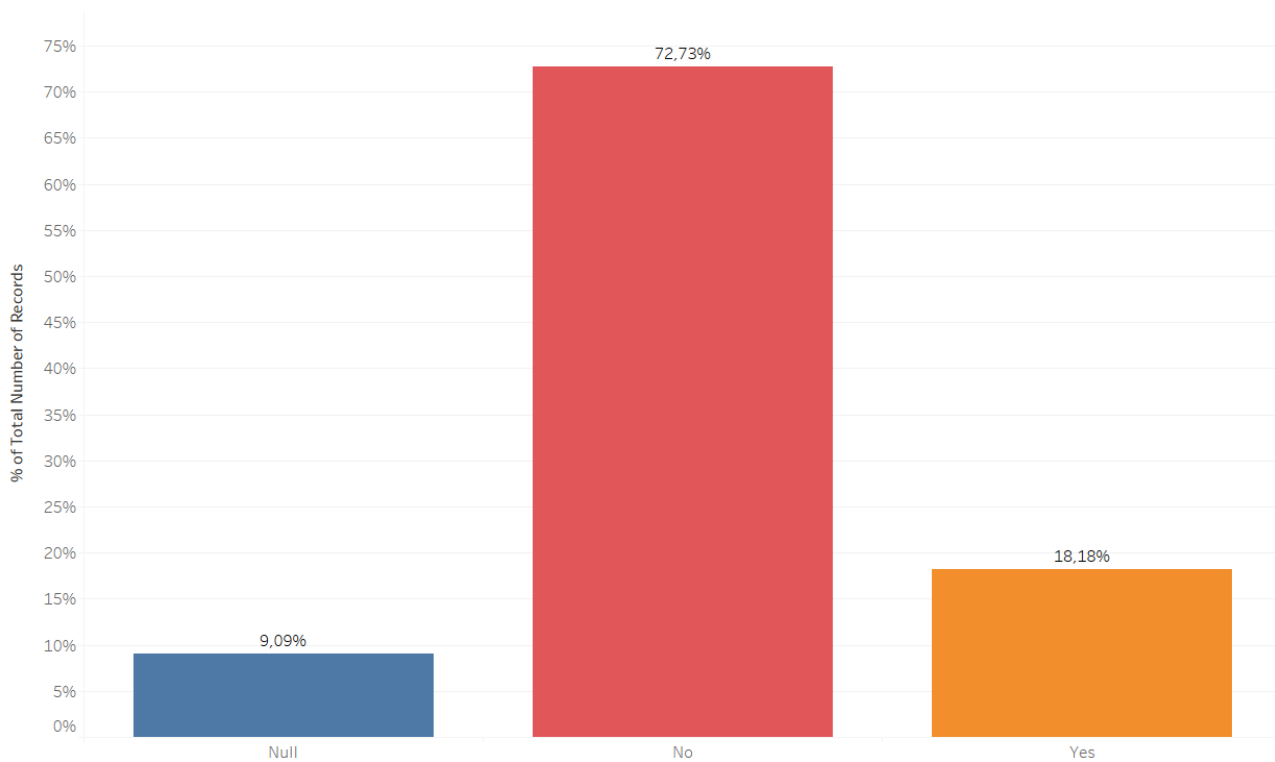
Distribution of products



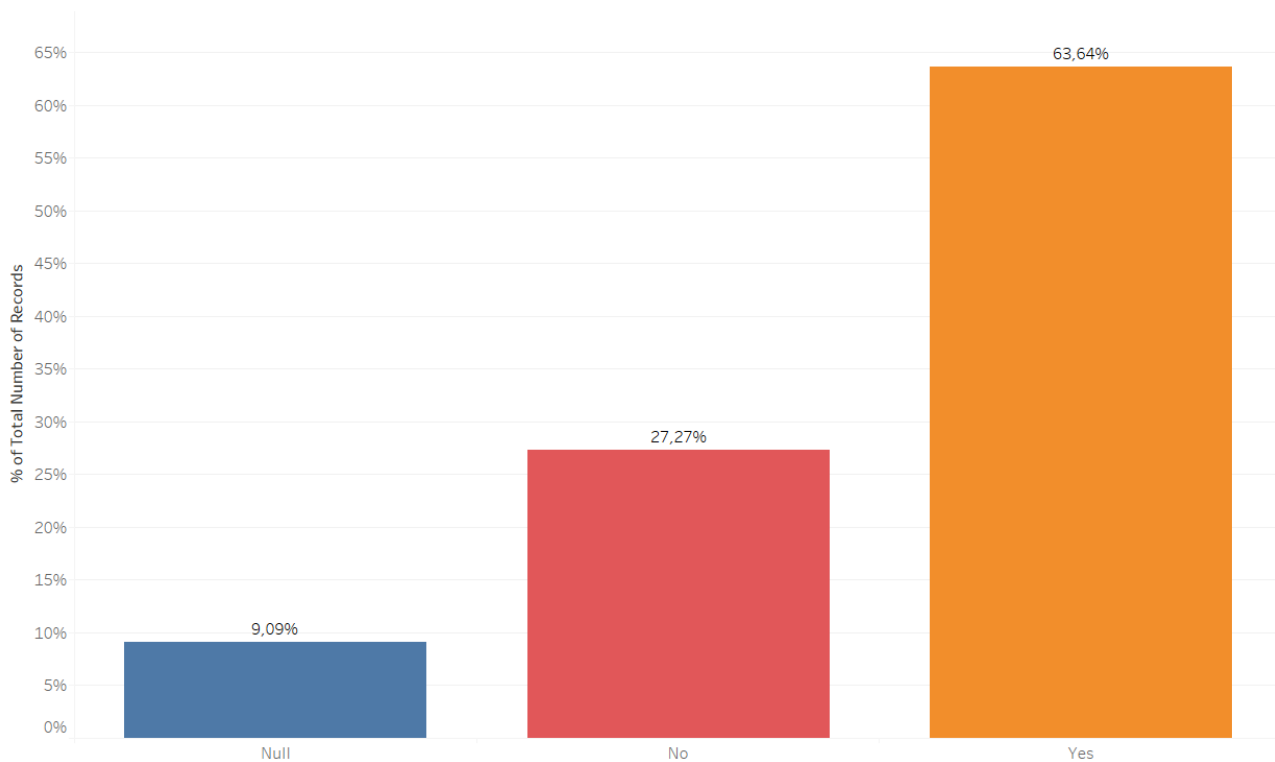
Monitoring the process of a products



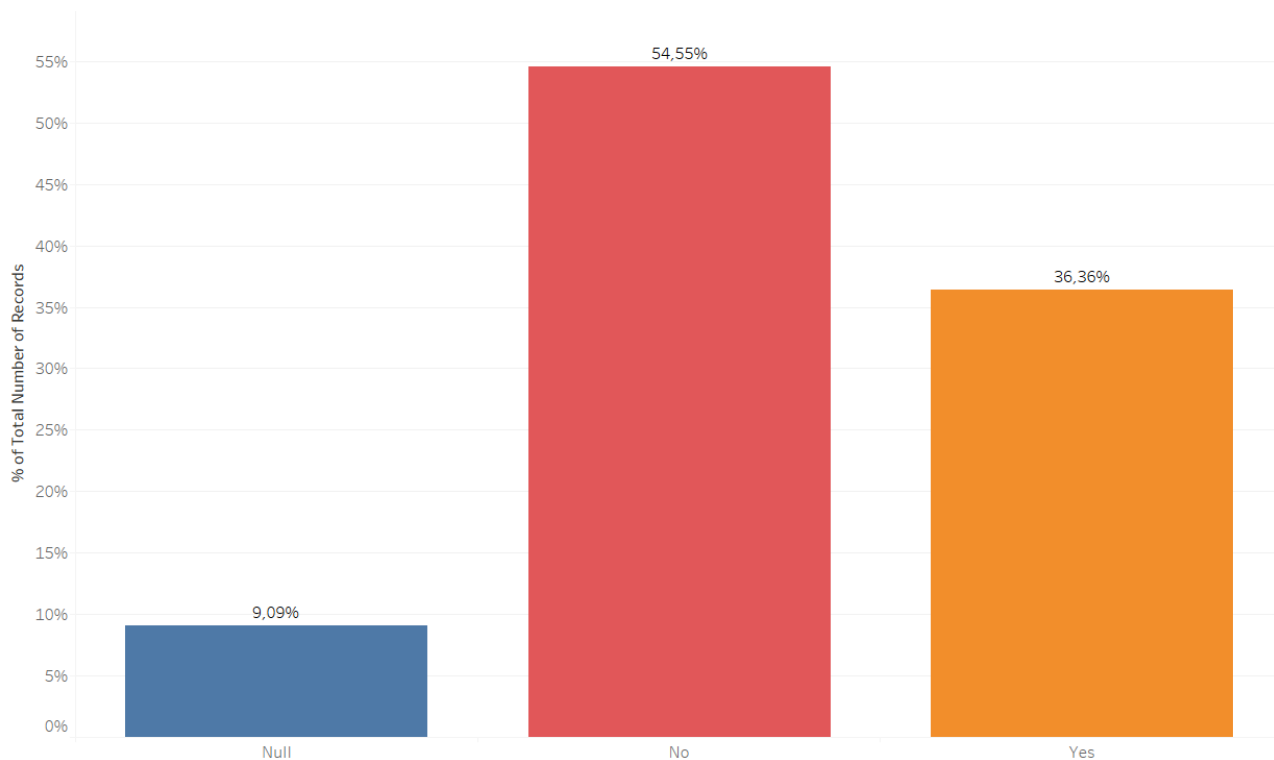
### Price creation of products



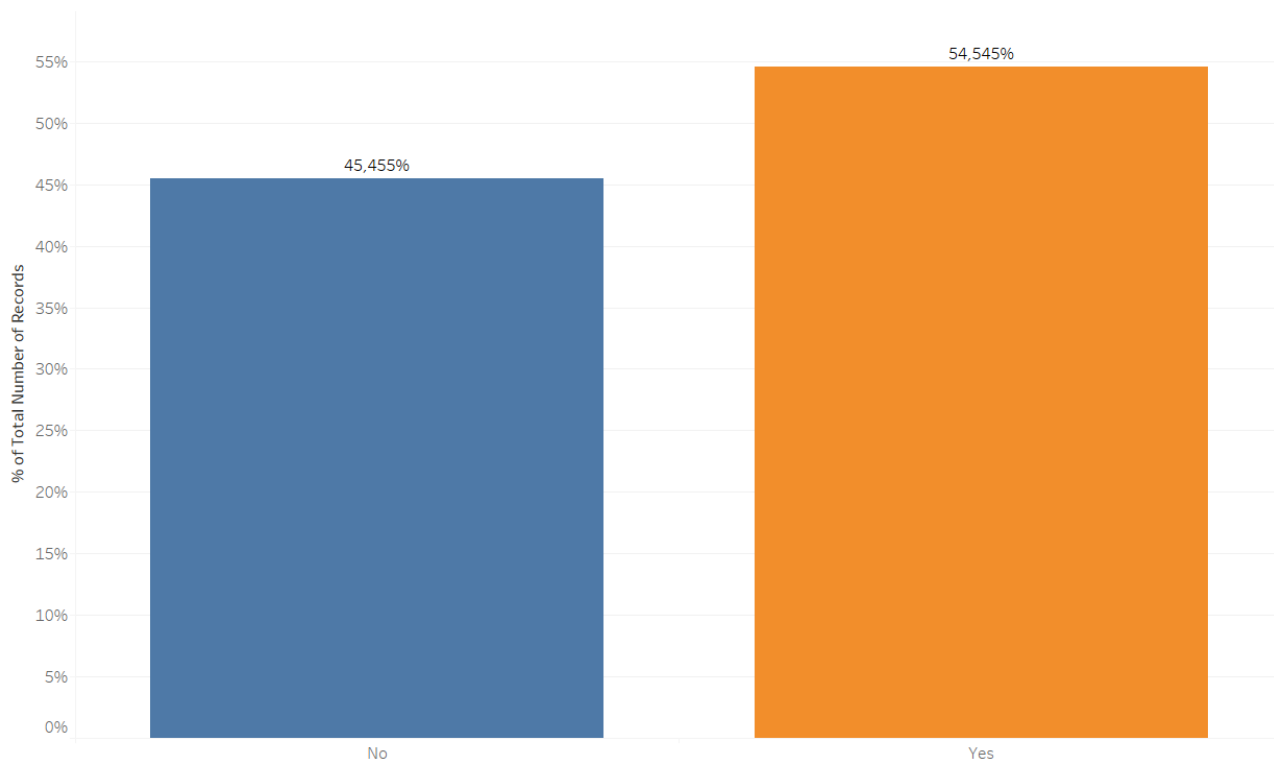
### Promotion of products



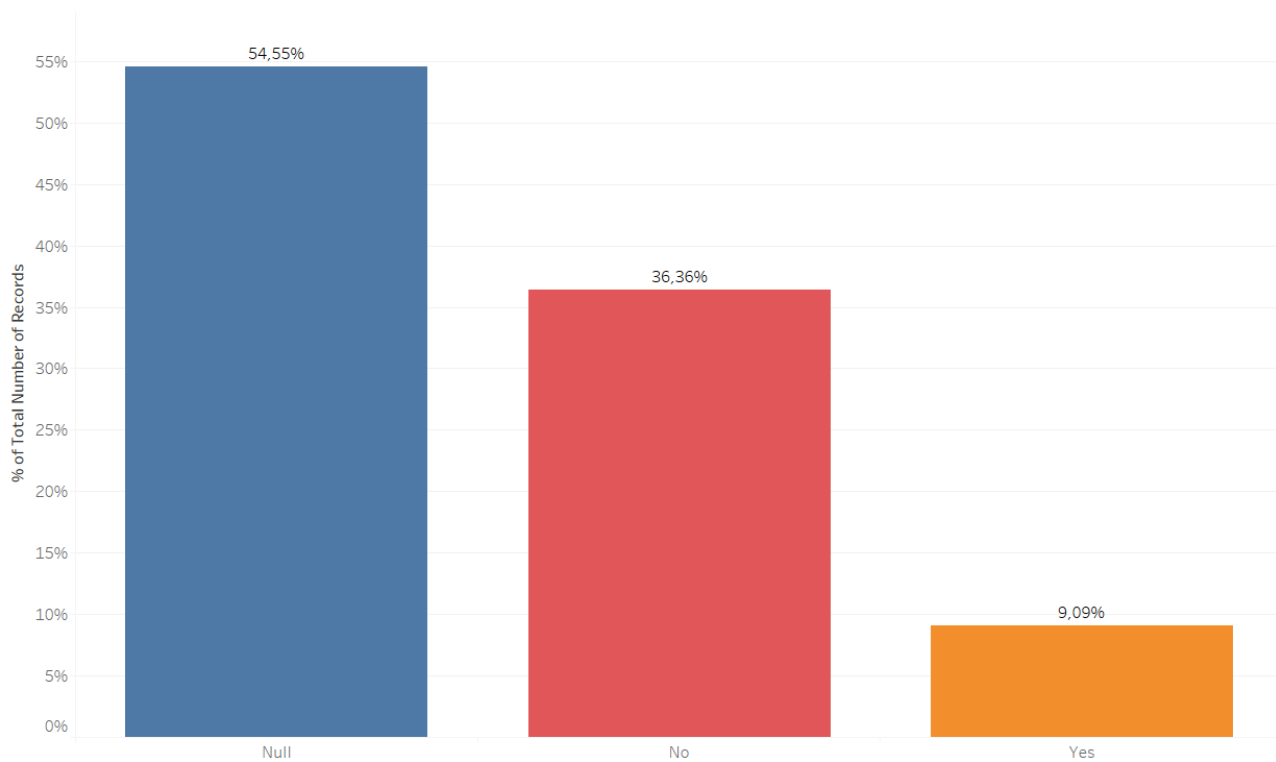
### ICT dissemination and implementation



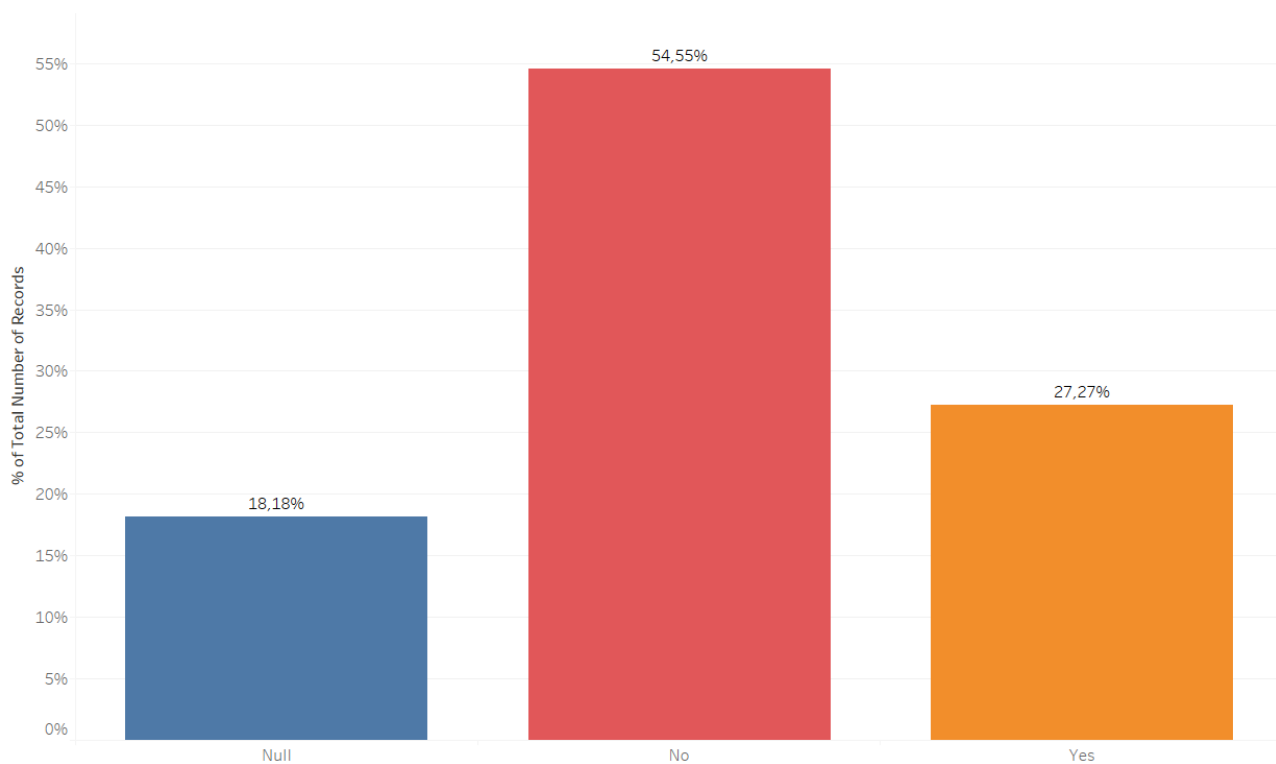
### Tourist labour knowledge enhancement

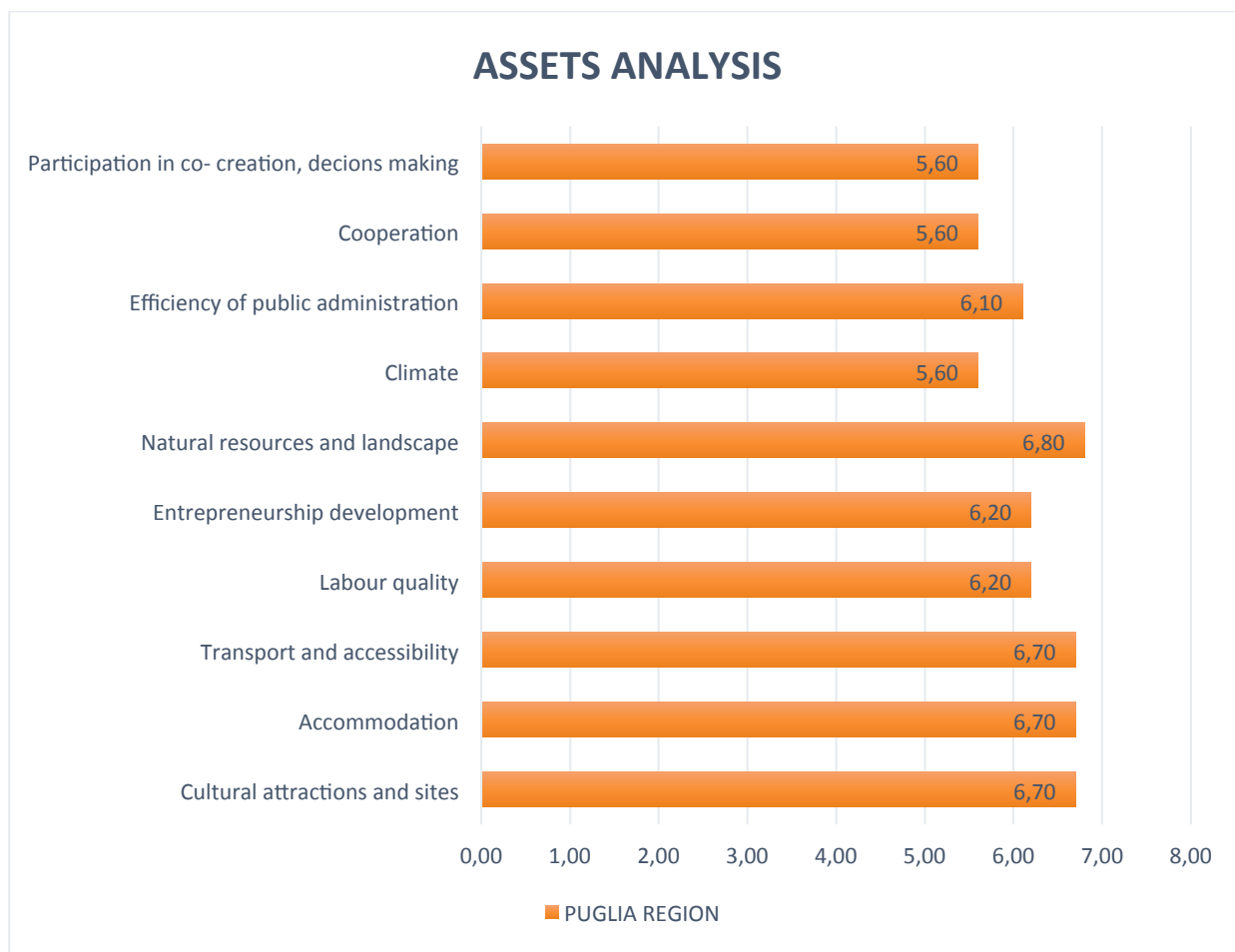


None of above

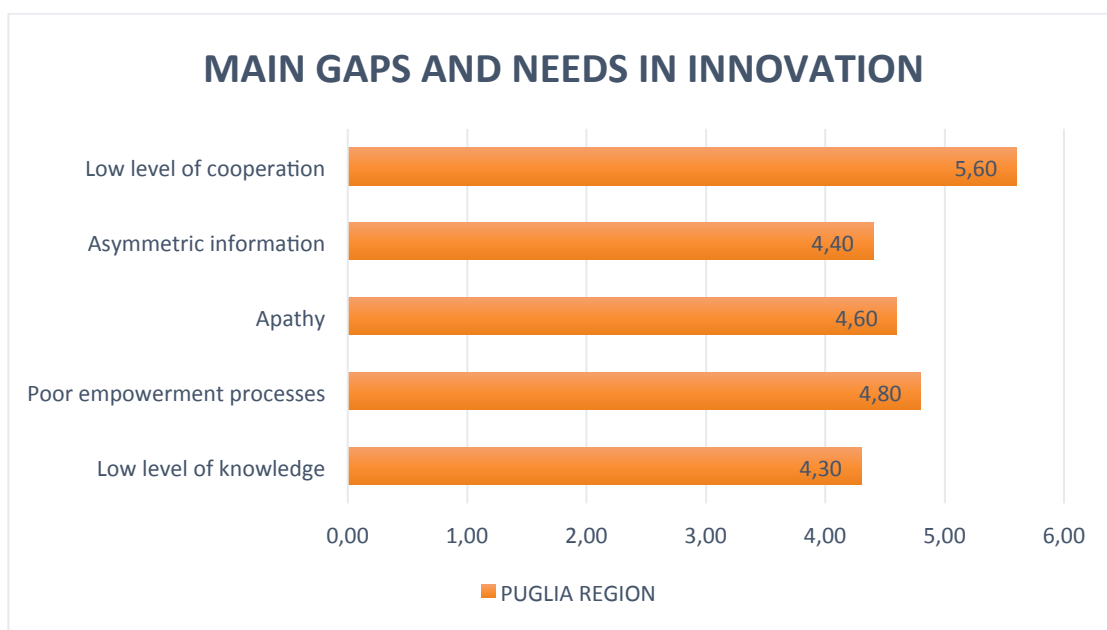
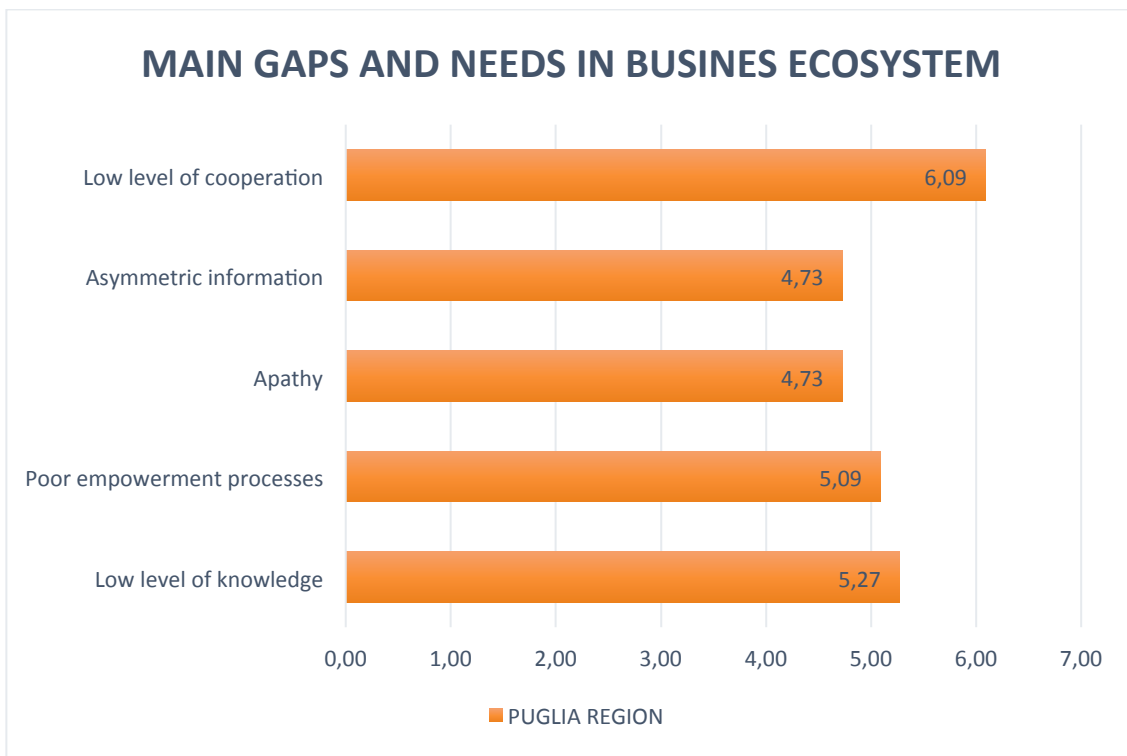


all of above





#### ***d. GAPS AND NEEDS TOWARDS INNOVATION OF THE PILOT AREA'S BUSINESS ECOSYSTEM***





## *e. POTENTIALS OF THE PILOT AREA'S BUSINESS ECOSYSTEM*

### **6. Conclusion: Gaps and needs**

In the area, in relation to regional values, 12.41% of the accommodation facilities and 9.49% of the complementary structures are concentrated, guaranteeing a number of beds equal to 11.208 in the first and 10.080 in the second (respectively 14.68 % and 10.29% in relation to regional values). Monopoli, Fasano and Ostuni are the municipalities that have the largest number of accommodations and beds representing 65% of the accommodation capacity of the area. Fasano is the Municipality with the highest number of luxury accommodation facilities, not only in the area but in all the local area. Of the 7 5-star superior structures in Puglia, 4 are in the Fasano area. For what concerns the "alternative or complementary structures", the greatest presence of exercises is registered between Fasano and Ostuni, the latter representing 62% of the accommodation capacity with 44 facilities and 6,249 beds.

The area is characterized by 3 and 4-star facilities, with a low incidence of the lower category structures. There is the absence of one-star hotels and hostels. In the additional accommodation facilities the most significant percentage is given by the B & B and Agriturismo. Within the reference area, there are 11 camps and tourist villages, with a total of 6,730 beds equal to 3.73% of the regional total. The accommodation offer of the STT Costa dei Trulli area is therefore characterized by a medium-high level of the tourism sector with a distribution that privileges coastal municipalities.

#### **Points of excellence**

- the value of the environment, as a natural resource that can not be reproduced;
- the quality of hospitality, in a broad sense, characterized by the "warmth" that can express family conduits, which make up the majority of the management of tourist businesses operating in the District;
- tourist presences in particular of Italian tourists;
- Good concentration in this territory of mid-level tourism-hotel companies, bathing establishments, catering, entertainment and leisure facilities;
- The excellence of agricultural production: oil, wine and vegetables; which added value that complements, improving the tourist offer;
- The quality of fish products;
- International aspects in the image due to the presence of one of the UNESCO heritage sites
- Commitment of operators in training actions in order to ensure cultural and entrepreneurial growth to best compete in the increasingly difficult market of the tourism offer;

- presence in the hinterland of level catering facilities and landscape attractions able to satisfy the curiosity of tourists looking for alternative routes;

### **The critical points**

- The critical points are generated by the strong change in tourist habits, no longer oriented to vacation, that is to say the whole month of vacation, but, increasingly, about 5-6 days or even on weekends. In the current socio-economic context it is necessary to be competitive also in economic terms to enlarge the offer.
- Other critical issues are represented by:
  - little promotional action of a general nature due to lack of coordination between the various entities directly or indirectly connected to the tourism economy;
  - fragmentation of companies with strong managerial personals that slows down system policies;
  - concentration of demand only in some months of the year and consequent need to extend seasonality;
  - Lack of development actions towards "atypical" customers (accessible and congress tourism);
  - Inefficient state of infrastructures, understood as viability and parking;
  - Poor influence of the intermediaries of the sector in the choices of tourists and consequent importance of self-organized tourism;
  - Absence of supply chain policies for the promotion of typical local products,
  - Low "network" action among small businesses, a winning factor for competition in the markets;
  - the difficulties of relationship and interaction with the rest of Puglia, in order to promote global marketing actions;
  - Absence of facilities such as hostels and campsites
  - Poor sensitiveness of operators to issues of environmental certification of companies.



## References

## Annexes

### Analysis of the tourist context chosen area

Puglia Region  
ANNUAL TOURIST MOVEMENT  
REPORT  
Definitive numerical data - YEAR 2017

Municipality	TOTAL		Average stay
	Arrivals	Presences	
Castellana Grotte	28.489	62.685	2,2
Locorotondo	10.081	39.431	3,9
Monopoli	96.457	341.385	3,5
Polignano a Mare	86.452	251.751	2,9
Fasano	151.271	636.575	4,2
Ostuni	98.998	400.777	4,0
Trani	41.171	80.407	2,0
Lecce	269.115	746.347	2,8
<b>Total</b>	<b>782.034</b>	<b>2.559.358</b>	<b>3,3</b>

Source: Pugliapromozione Tourism Observatory

Puglia Region  
ANNUAL TOURIST MOVEMENT REPORT  
Definitive numerical data - YEAR 2017

Municipality	ITALIANS			FOREIGNERS		Average stay	TOTAL		Average stay
	Arrivals	Presences	Average stay	Arrivals	Presences		Arrivals	Presences	
Castellana Grotte	23.798	47.194	2,0	4.691	15.491	3,3	28.489	62.685	2,2
Locorotondo	4.984	16.175	3,2	5.097	23.256	4,6	10.081	39.431	3,9
Monopoli	65.602	228.955	3,5	30.855	112.430	3,6	96.457	341.385	3,5
Polignano a Mare	56.134	135.739	2,4	30.318	116.012	3,8	86.452	251.751	2,9
Fasano	102.977	417.321	4,1	48.294	219.254	4,5	151.271	636.575	4,2
Ostuni	68.617	290.434	4,2	30.381	110.343	3,6	98.998	400.777	4,0
Trani	28.454	53.039	1,9	12.717	27.368	2,2	41.171	80.407	2,0
Lecce	187.785	508.934	2,7	81.330	237.413	2,9	269.115	746.347	2,8
<b>Total</b>	<b>538.351</b>	<b>1.697.791</b>	<b>3,2</b>	<b>243.683</b>	<b>861.567</b>	<b>3,5</b>	<b>782.034</b>	<b>2.559.358</b>	<b>3,3</b>

Source: ISTAT, REGION PUGLIA, STRATEGIC PLAN OF ITRIA VALLEY  
\* presumed data extrapolated from the cumulative data for the current privacy regulations



## BLTOURSYSTEM

LAG5 – Report on interview results

rev. 1 – date 22<sup>nd</sup> November 2018

## Document references

deliverable: **3.2.2 Tracks for interviews and Report on interview**

## Credits

edited by: Partner n. 5 – LAG 5

elaborated by: Project manager

checked and reviews by: QPM

approved by: Steering Committee

## Scope:

BLUTOURSYSTEM aims to improve the frame conditions for blue tourism sustainable growth. It provides tourism operators with tools and skills to develop new business ecosystems (BEs). Capitalizing the knowledge gained with TourMedAssets, the project steers decision makers to rethink tourism, reduce gaps and design eco-innovative scenarios thus to promote sustainable growth. The project aims to stimulate competitiveness, innovation and creative enhancement of the tourism offer.

The success of tourism depends on the capacities of actors to cooperate within the business ES. In order to stimulate networking and innovative BE development, as well as destination enhancement by the joint policies, the nature and the status of the existing BEs in the blue tourism sector of the pilot areas should be done.

## Targets

Interviews were submitted to 5 stakeholders. Subjects were chosen according to a territorial and sectoral criterion, so to represent both public and private sector in the tourism field.

For public dissemination: Yes



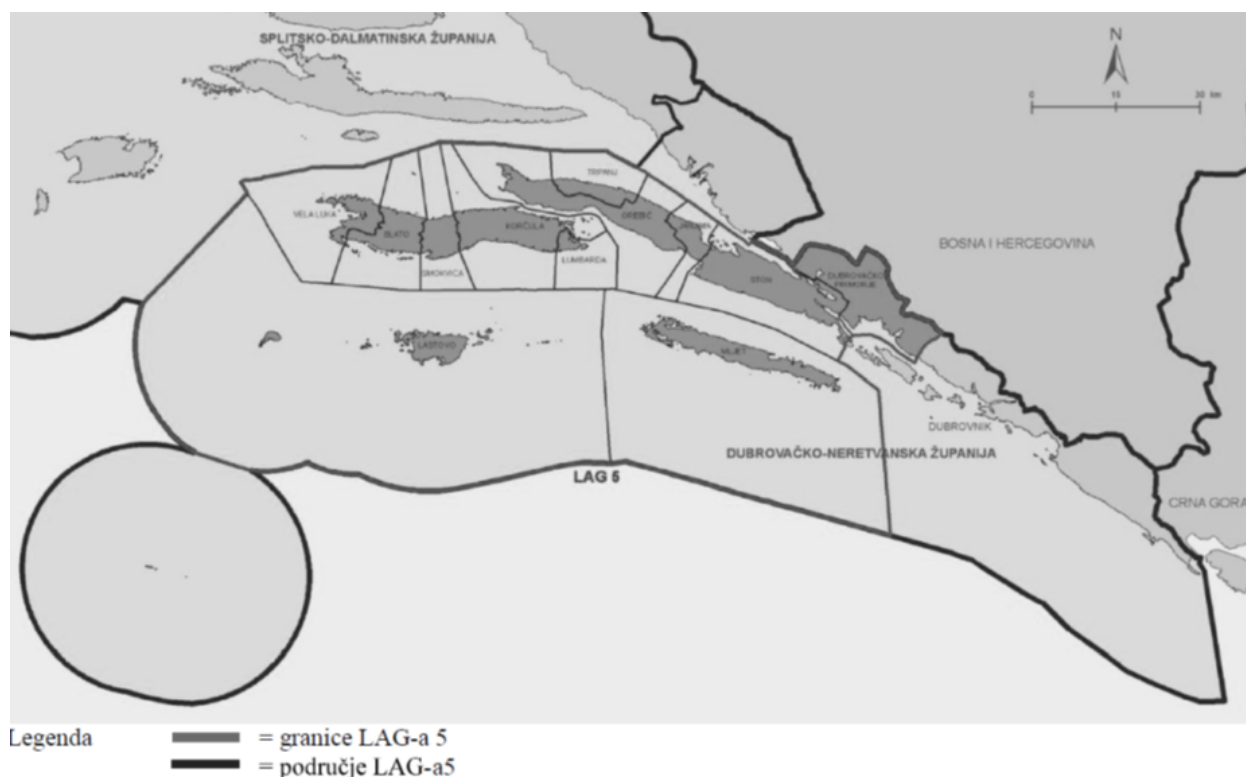
## 1. Table of contents

Pilot area description.....	37
Panel of stakeholders interviewed.....	7
Stakeholders addressed .....	8
Outcomes from the interviews .....	8
Conclusion: Gaps and needs .....	61
References.....	61

## 2. Pilot area description

The area of LAG 5 belongs to the most southern Croatian county, Dubrovacko – neretvanska. It consists of the island of Korčula, Mljet and Lastovo , the peninsula of Peljesac and the narrow coastal part of Dubrovnik seaside region. It borders with Splitsko – dalmatinska county and the Republic of Bosnia and Hercegovina up in the north and with the City of Dubrovnik in the south.

Picture 1: The area of LAG 5



Source: Master plan of Dubrovacko – neretvanska county, 2010



The test pilot area consists of twelve local self – government units; eleven counties and one town (the Town of Korcula) with an area of 5166 km<sup>2</sup> and it is extremely rarely inhabited. With the total number of 25 578 inhabitants it is the least populated part of the Dubrovacko- neretvanska county ( about 22% of the total population of Dubrovacko- neretvanska county or 0.6% of the population of the Republic of Croatia; the density of population is 5,53 inhabitants per square kilometer), with the constantly growing trend of depopulation and people growing old. Negative demographic trends are a huge obstacle to any kind of stimulus to the development in economy or tourism. This trend is the most evident in the county of Mljet and the least in the Town of Korcula, which is one of the most populated units.

Most of the area is on the coast and all the parts have the same or very similar geomorphologic and climate characteristics, the characteristics of biodiversity, economy, social and cultural- historical characteristics. The main characteristics of the area are spatial fragmentation and insufficient traffic connectivity. The sea traffic plays the most important role in the traffic connectivity, which, in order to become more effective, demands faster and more frequent coastal lines, especially in summer season. It is necessary for the sea ports to be reconstructed and modernized. Road traffic; state, county and especially local roads, also demands reconstruction. The area is not connected to the mainland with the airlines apart from the heliports which are used for emergency situations and aids of the local population. The closest international airports are Split and Dubrovnik.

The general characteristic of the area is a bad economic situation marked with the low profitability of the small and large – scale enterprises, the low quality of the business environment and the lack of supporting institutions and programmes, the low level of investments in new technologies and innovations, the low motivation and education level of the workforce; structural unemployment and mostly seasonal employment and disproportion between the supply of the workforce and the demand of the economy, as well as the profile of the workforce produced by educational institutions which are needed for the development of the key economies. According to the values of the development index, the area fits into the Croatian average.

Based on the analysis of the economic and social features some main developmental potentials of the LAG area can be singled out:

#### 1. Natural conditions and resources, preserved nature and the environment

Relief diversity, indented coastline, bays with cliffs and heavily wooded areas have resulted in the law protection of the important natural values of the LAG 5 area. In the area of the Town of Korcula there are seven nature-preserved locations. Since 1960, the considerable part of the island of Mljet has had the status of the national park.

The overall economic and industrial underdevelopment of the LAG 5 area has contributed to the preservation of the intact natural environment, but the growing development of tourism endangers the original landscape.

## 2. The tradition and experience in agricultural production and the accomplished competitiveness and market orientation for some products

The tradition, experience, knowledge and skills of the part of the local population who work in agricultural production, their contemporary ways of marketing goods, as well as the examples of successful bonding and cooperation of the producers realize an exceptionally important developmental potential. The importance has been rooted in competitive advantages (produced), which are different from the natural conditions and resources that belong to comparative advantages (gained). In the LAG 5 area wine- growing, olive – growing, shell farming are developed, and, within the last few years, bee-keeping, the production of the indigenous food products, medicinal and aromatic herbs have been evolving. In those productions, for some producers it is evident that they have been constantly investing in the application of the knowledge, in the new technologies of the production and processing, as well as the elevation of the quality of production. Furthermore, a part of the agricultural workers and producers has successfully mastered and has been continually developing the skills and investing in the contemporary marketing and selling of their products, which takes place in their agricultural holdings ( tasting shops, catering trade etc. ), also on the Internet and organized peasants` markets. This is all about the individual examples of good practice but it is surely the potential for the systematic business enlargement and it can be applied on the whole LAG 5 area.

## 3. The share capital of the local communities, the activities of the civilian society, the preservation and nurturing of the identity, the cultural heritage

There are more than 30 % of the preserved cultural monuments in the Dubrovacko - neretvanska county ( 62 in Korcula, 55 on Mljet ).

The cultural heritage consists of various and extremely valuable objects of the tangible heritage, from the numerous archeological findings, monuments, memorial sites and buildings, to the isolated sacral and profane buildings. The largest part is in the coastal region, but there are also some valuable attractions in the mainland, such as the Napoleon Road on the peninsula of Peljesac. Intangible cultural heritage also reveals the uniqueness of the LAG 5 area. There are many and various manifestations connected to the historical events, tradition, local customs, such as the sword dance “ Moreska “, the protected intangible good of the Republic of Croatia.

## 4. The development of tourism, growing interest and demand for new offers and kinds of tourism

Turistička zajednica	NO OF TOURISTS			OVERNIGHTS		
	Arrivals	Arrivals	Indeks	Overnights	Overnights	Indeks
	total	total		total	total	
2017.	2016.	2017.	2016.			
TZO Orebić	120,213	105,916	113.50	953,885	842,875	113.17
TZG Korčula	84,780	73,261	115.72	416,731	363,157	114.75
TZO Blato	19,674	17,824	110.38	191,002	174,353	109.55
TZO Vela Luka	30,371	30,065	101.02	187,370	180,663	103.71
TZO Ston	33,815	29,286	115.46	181,514	152,499	119.03
TZO Dubrovačko primorje	29,912	31,105	96.16	165,905	182,500	90.91
TZO Trpanj	19,789	18,032	109.74	155,089	142,440	108.88
TZO Mljet	31,513	26,293	119.85	144,533	125,068	115.56
TZO Lumbarda	18,501	16,561	111.71	136,103	130,605	104.21
TZO Janjina	11,921	10,768	110.71	100,489	90,386	111.18
TZO Lastovo	7,958	6,961	114.32	58,344	50,603	115.30
TZO Smokvica	8,322	7,977	104.32	55,813	52,377	106.56
<b>Ukupno:</b>	<b>416,769</b>	<b>374,049</b>	<b>111.42</b>	<b>2,746,778</b>	<b>2,487,526</b>	<b>110.42</b>

The development of tourism in the LAG area and the growing interest and the demand for new offers and new kinds of tourism is a potential with multiplied and integral effects on the agricultural development and processing, on the development of non - agricultural activities, the improvement of the life quality, as well as the nourishing of the identity of the local communities and the whole area.

Tourism is the most important economic sector which has mostly shown the constant growth over the last few years, the tourist offer and the quality of the services have been improving and the structure of the guests and the demand have been changing. Although the area belongs to the more developed tourist areas of the Republic of Croatia, the present tourist possibilities for the rural development have not been used enough having in mind the growing demand for new kinds of tourism and contents in the rural areas ( gastro – wine contests, specific kinds of tourism and so on ) as well as the change in the structure and the priorities of the tourists ( especially interests for healthy food, indigenous products, preservation of nature, spending time outdoors etc. )

Considering the structure of accommodation facilities, private rooms and apartments are still predominantly offered in the LAG 5 area, in Dubrovacko- neretvanska county and in the whole country. In addition, there are hotels and camps. The present hotel capacities and resorts on the attractive locations in Korčula have recently been renovated and consequently they have immensely influenced the overall development of the area.

Furthermore, there is a great difference in the development between the coastal part and the mainland which is evident in the number and the quality of the accommodation facilities and of tourist contents and services.

The tourist and sports infrastructure is inadequate, there is no sufficiently organized and inter-connected offer for the selective types of tourism such as gastro and wine-tourism, outdoor sports, cultural tourism, the usage of the traditional crafts etc. The main facilities of tourist infrastructure are concentrated around the main centres situated by the sea.

What is missing is the joint approach in the planning and the building of the tourist infrastructure, joining of some areas and making of the common products and services which suit the contemporary tourist demand.

Although in the last few years the supply of the different products, based on local resources of the agricultural industry and the traditional ways of processing, has increased, it is still far away from satisfying the possibilities offered by tourism in the LAG area (the number and interests of tourists) and by the production potentials. For the enlargement and the improvement of the tourist offer, the well-organized market centres and well equipped market places are also very important which are still lacking in these areas.

Nautical tourism is a very important potential in the overall tourist offer of the pilot areas, but also of the whole area of the Dubrovacko-neretvanska county. Although it is one of the fastest growing segments of the total tourism, adequate investments in the nautical infrastructure are missing.

The main features of the tourist pilot areas are: relatively longer stays, lower occupancy rates comparing to the rest of the region, high seasonal rates, uneven value for the money in supply, the growth of the nautical and the cruising tourism, the excursion destination of Dubrovnik, the priority of the product “ the sun and the sea “ and a large number of natural and man - created attractions, ready or half-ready to be put on the market.

### *3. Panel of stakeholders interviewed*

Pilot area		Name	Typology	Contact person
LAG 5	The Town of Korčula	Tourist Board Korčula	General public	Hana Turudić
		Lesic Dimitri Palace	Enterprise	Michael Unsworth
		Kaleta Tourist Agency	Enterprise	Andrej Čurčić
		Korcula Hotels	Enterprise	Mihajlo Grgić
	Municipality Mljet	National Park Mljet	General public	Andrea Anelic

### *4. Stakeholders addressed*

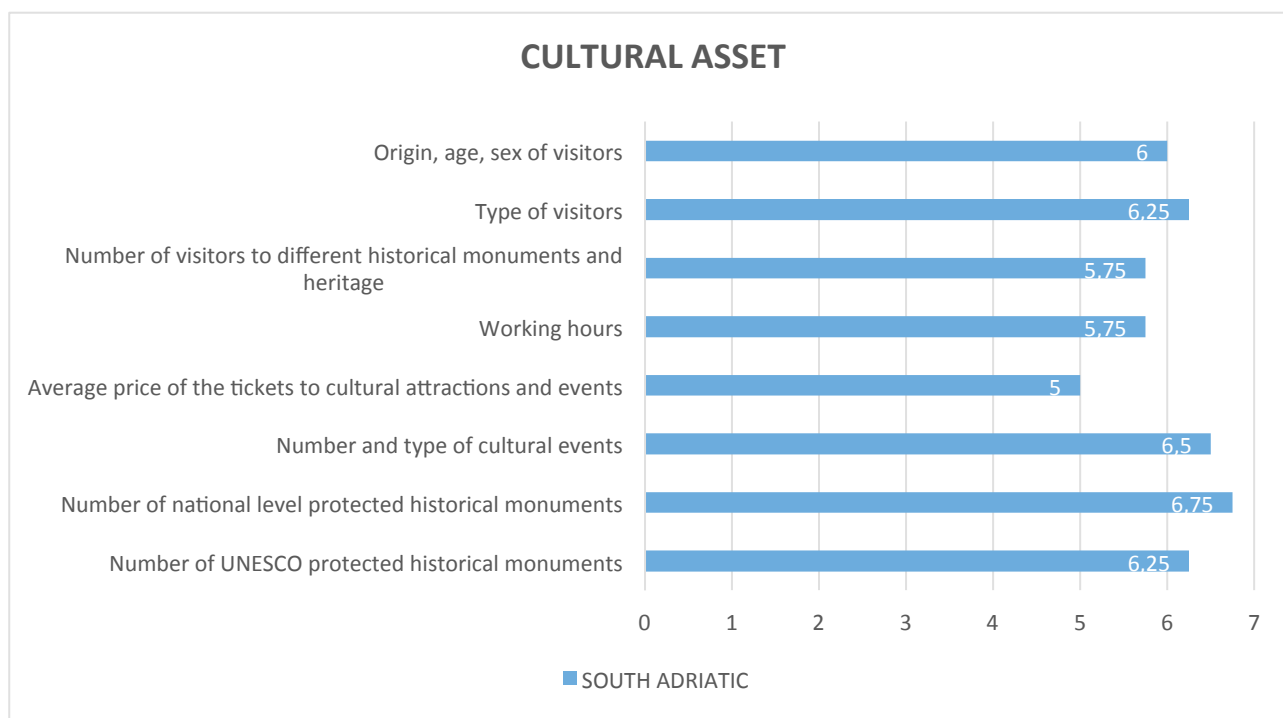
Public sector – Tourist board/DMO, National Park

Private sector – tourism entrepreneurs

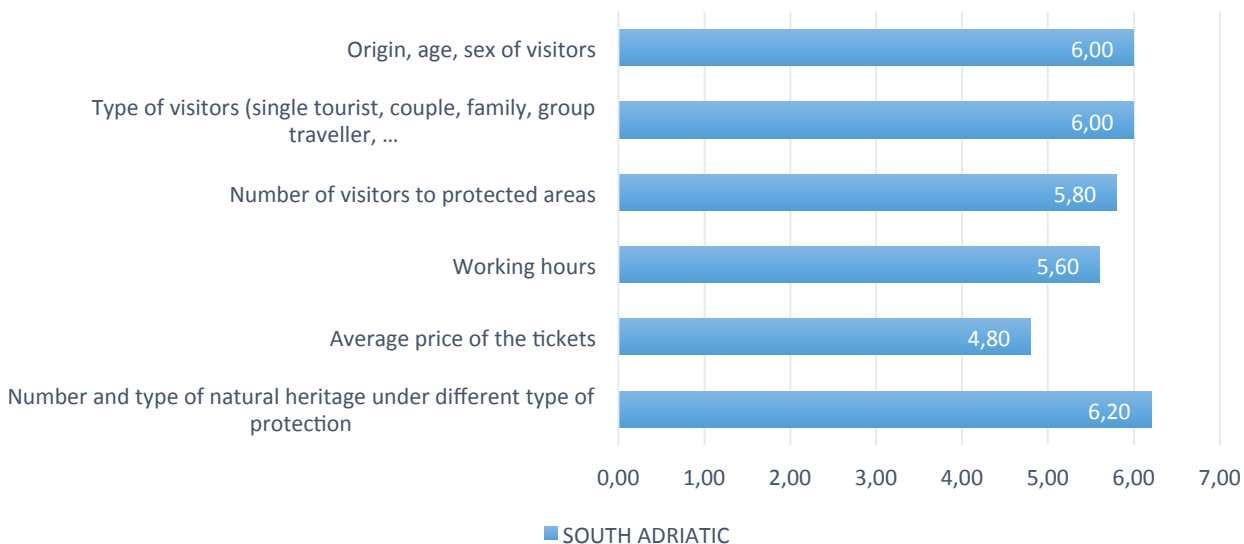
**5. Outcomes from the interviews**

**a. SUGGESTIONS FOR THE CALIBRATION OF THE SMART CROSS BORDER DATA SYSTEM (SCBDS) AND THE CREATION OF NEW INDICATORS**

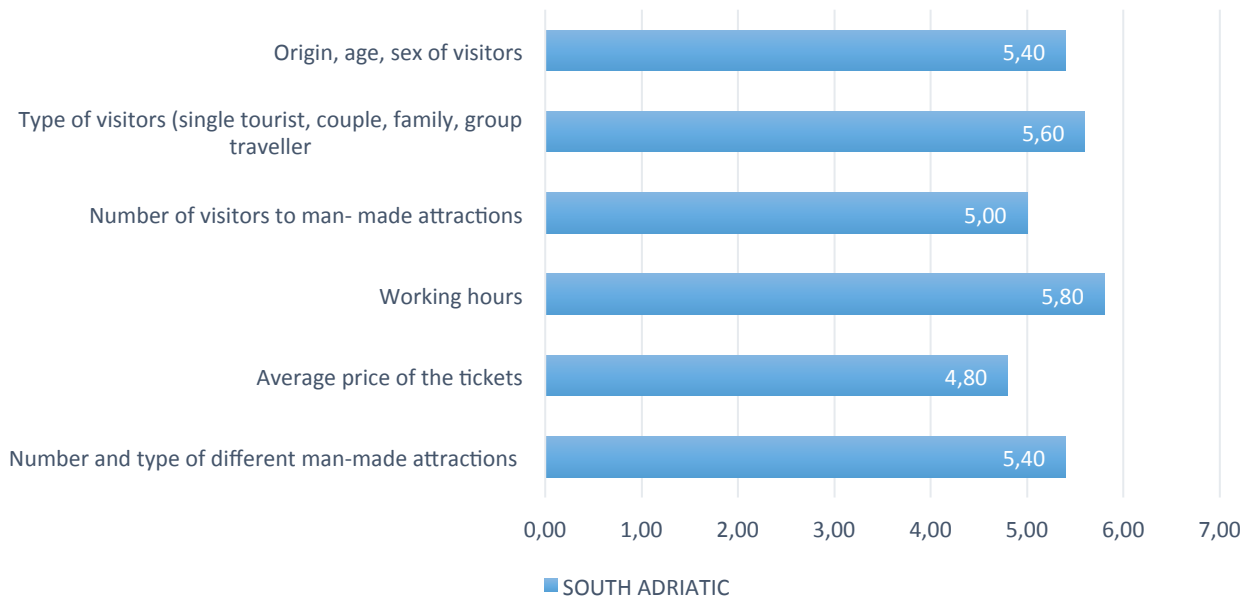
**• Attractions**



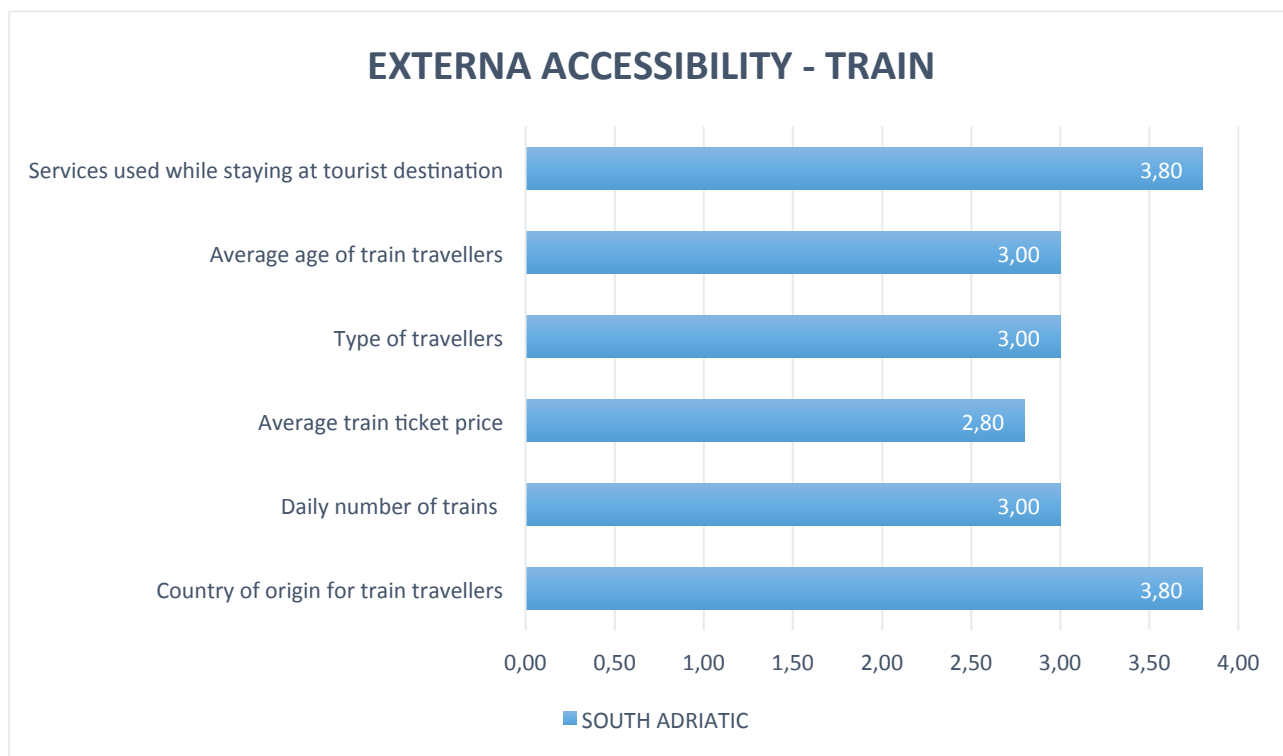
## NATURAL ASSETS



## Man-made attractions



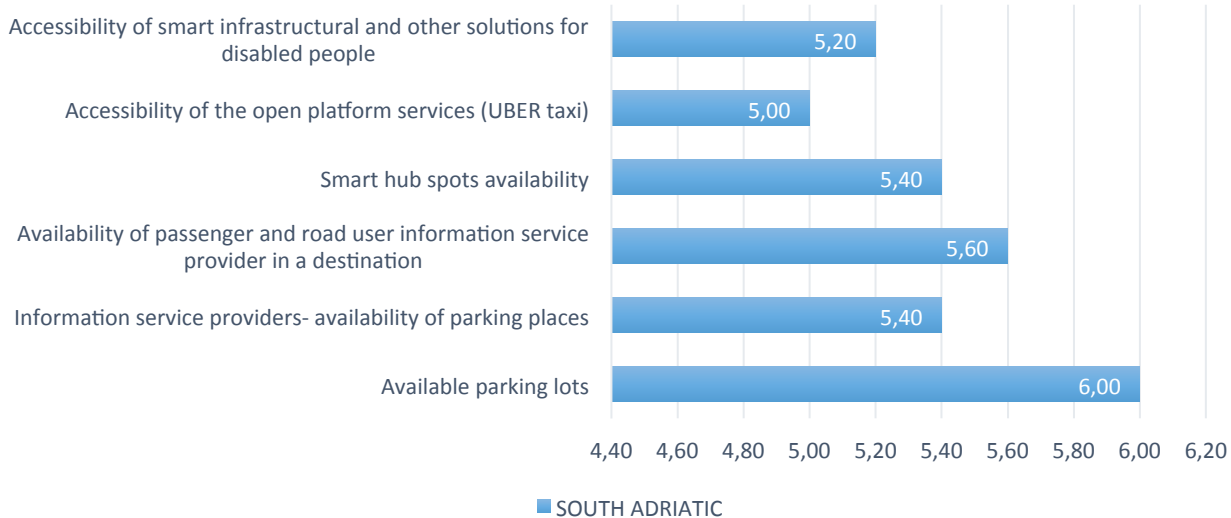
- *Accessibility*



### EXTERNAL ACCESSIBILITY - SHIP

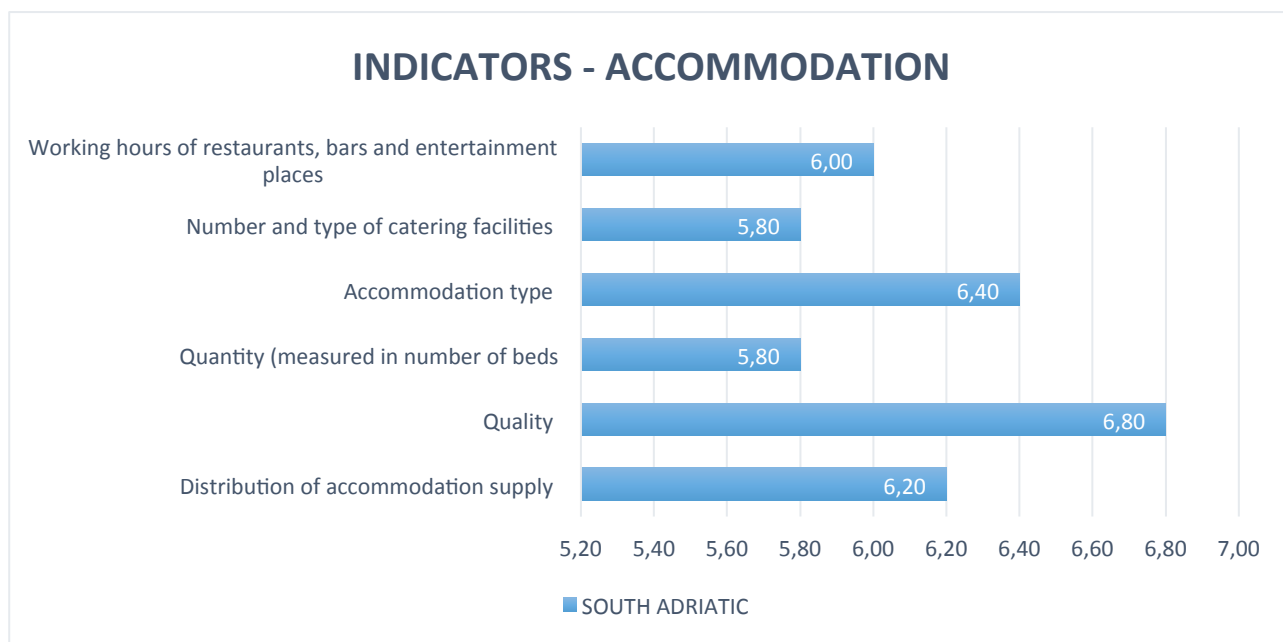


### INTERNAL ACCESSIBILITY - SMART SOLUTION

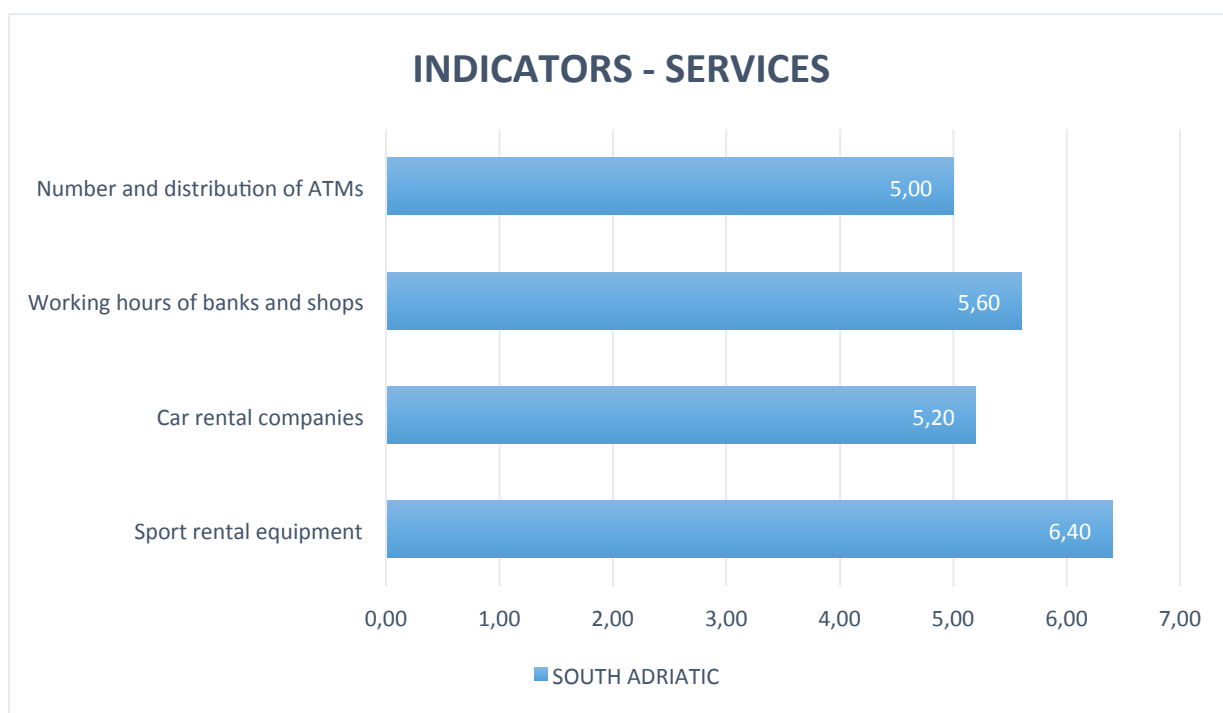




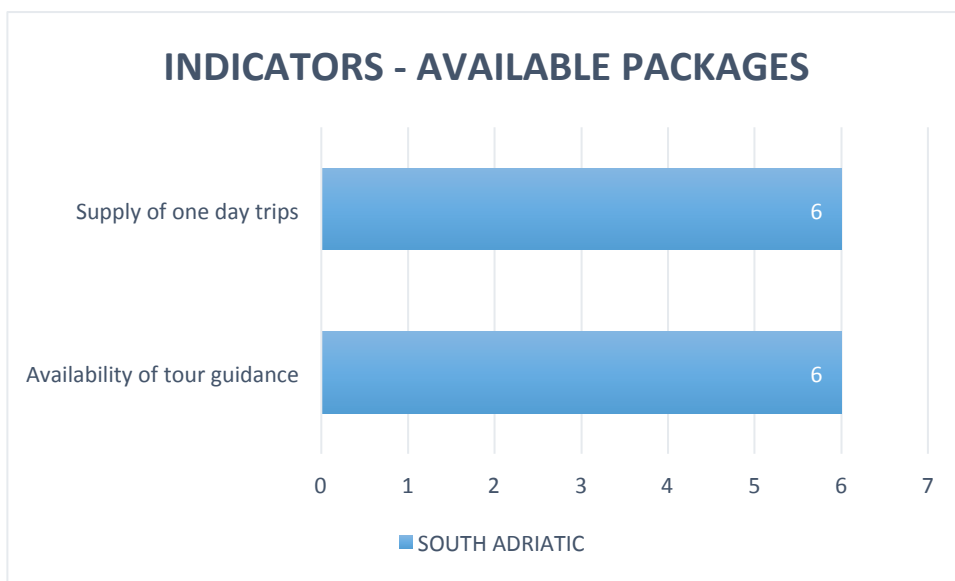
- *Amenities*



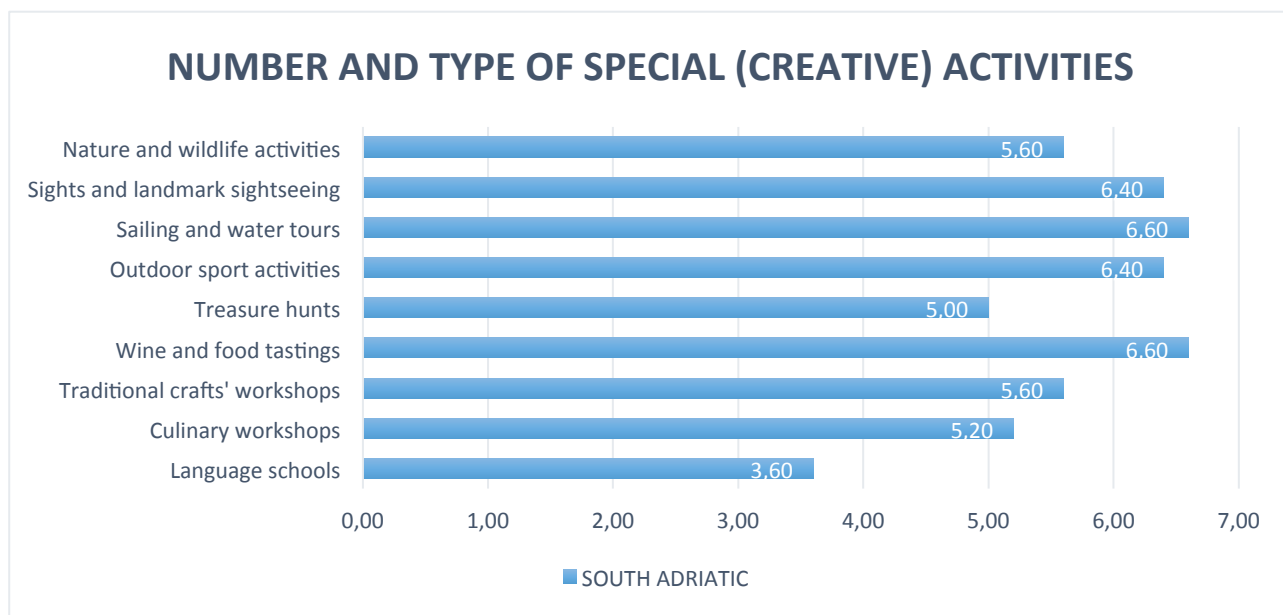
- *Ancillary services*



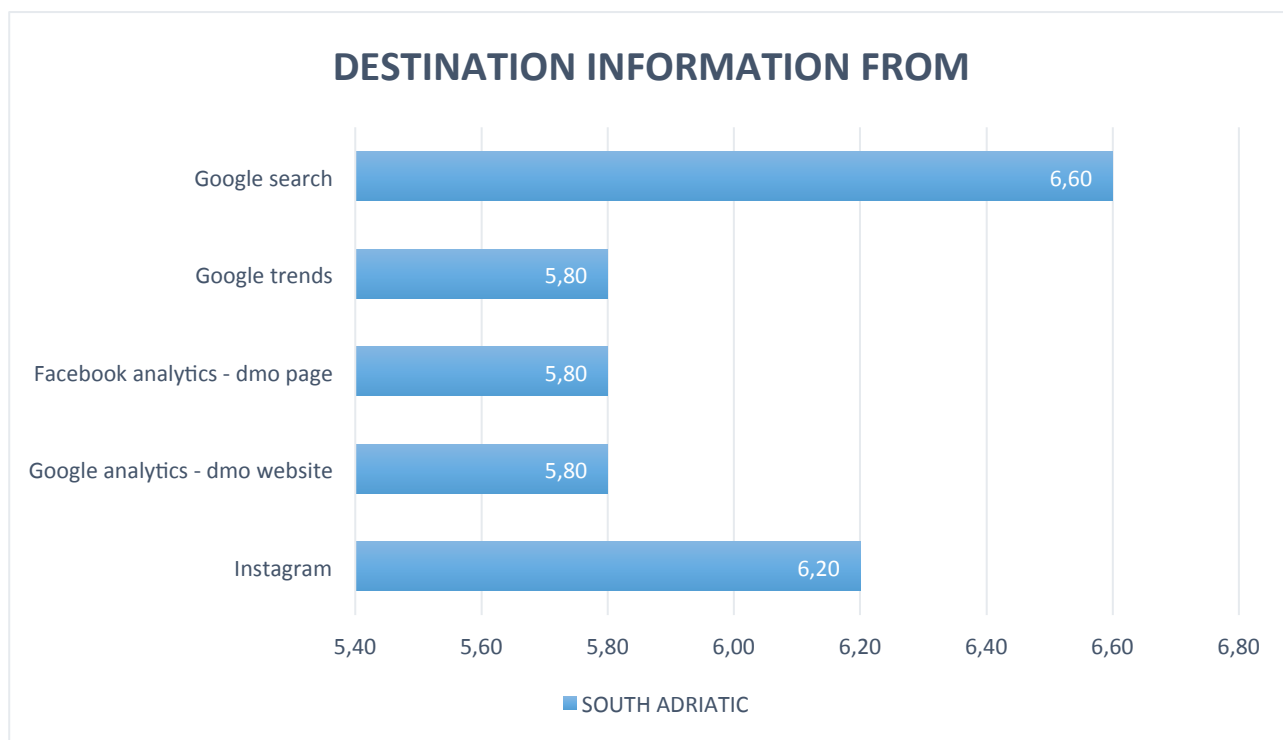
- *Available packages*



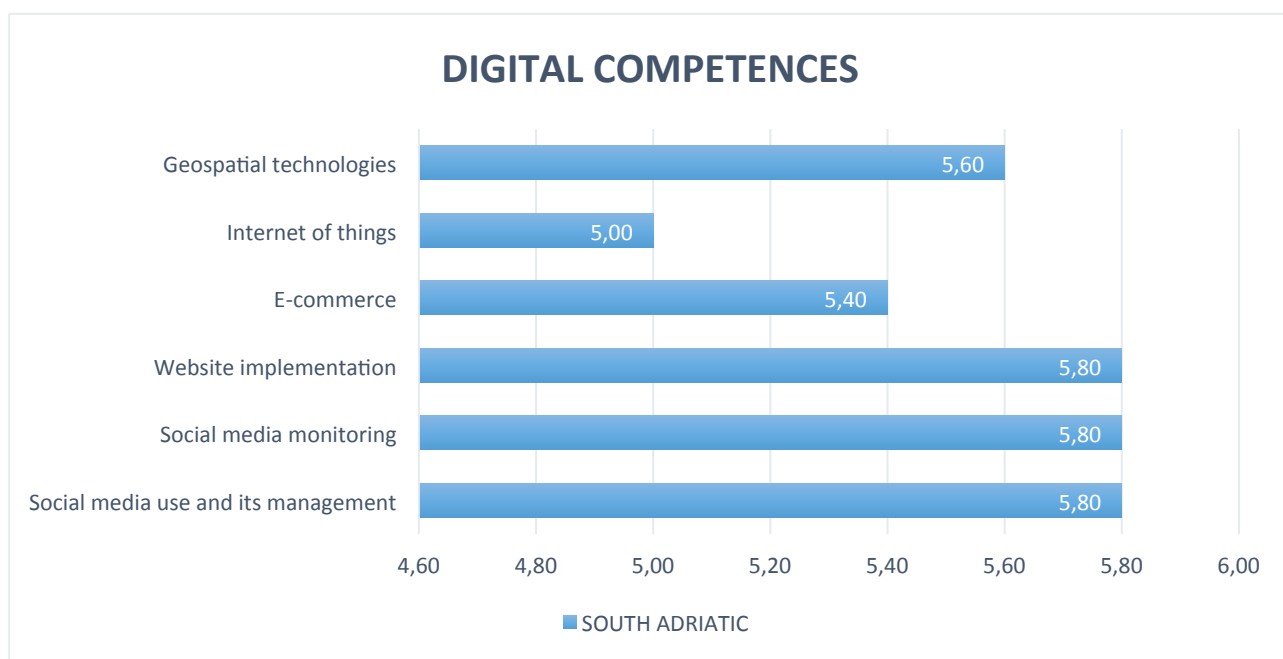
- *Activities*



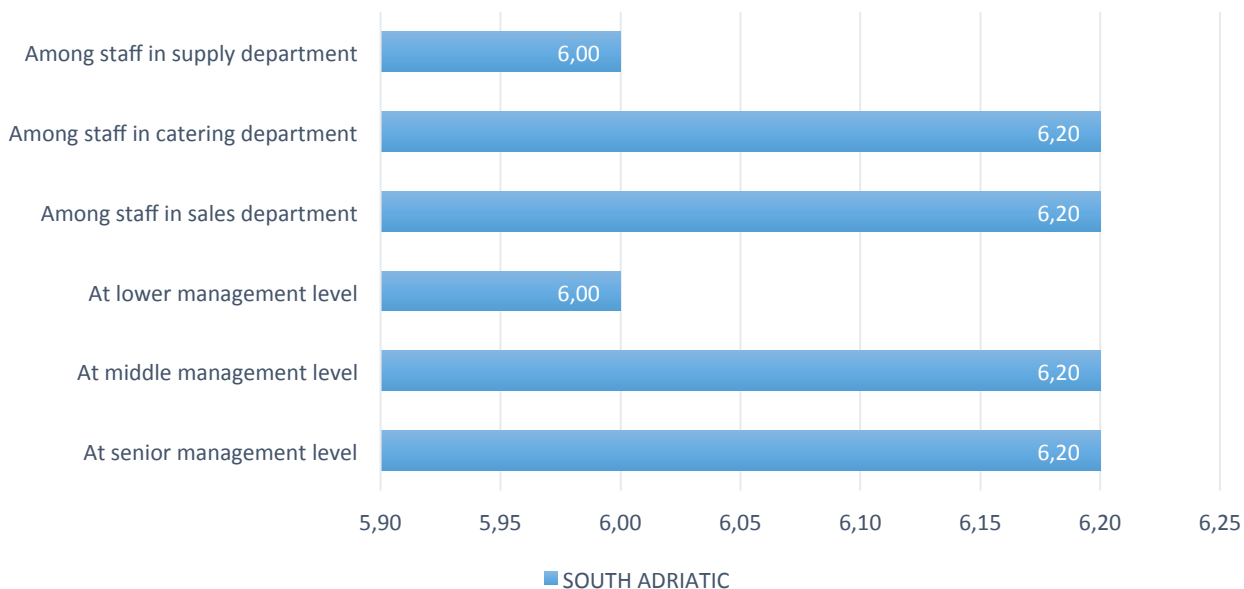
- *Source of destination information*



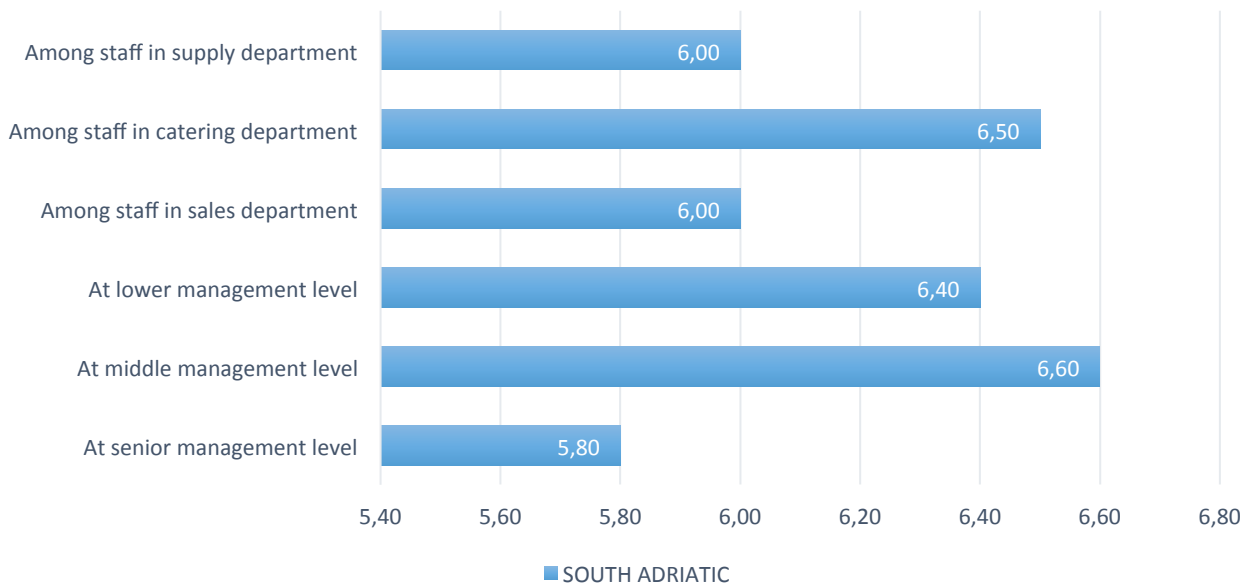
***b. GAPS AND NEEDS IN CAPACITY BUILDING PROCESSES (at CB Area level)***

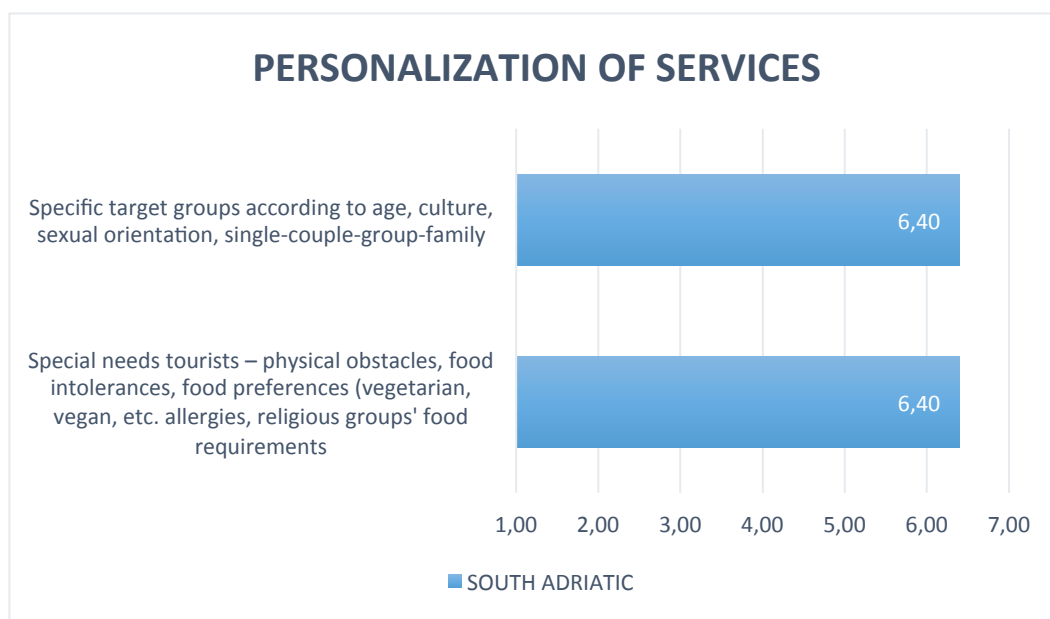
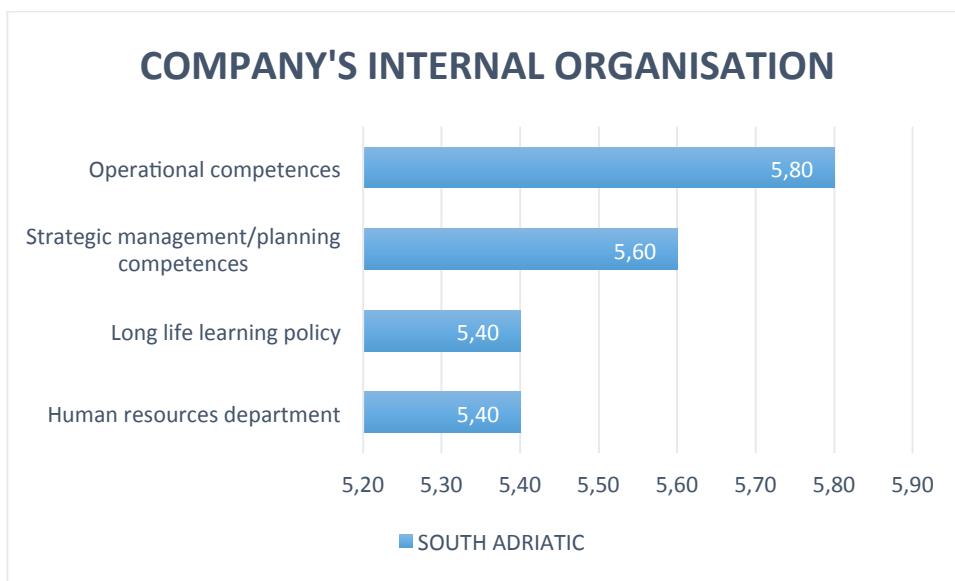


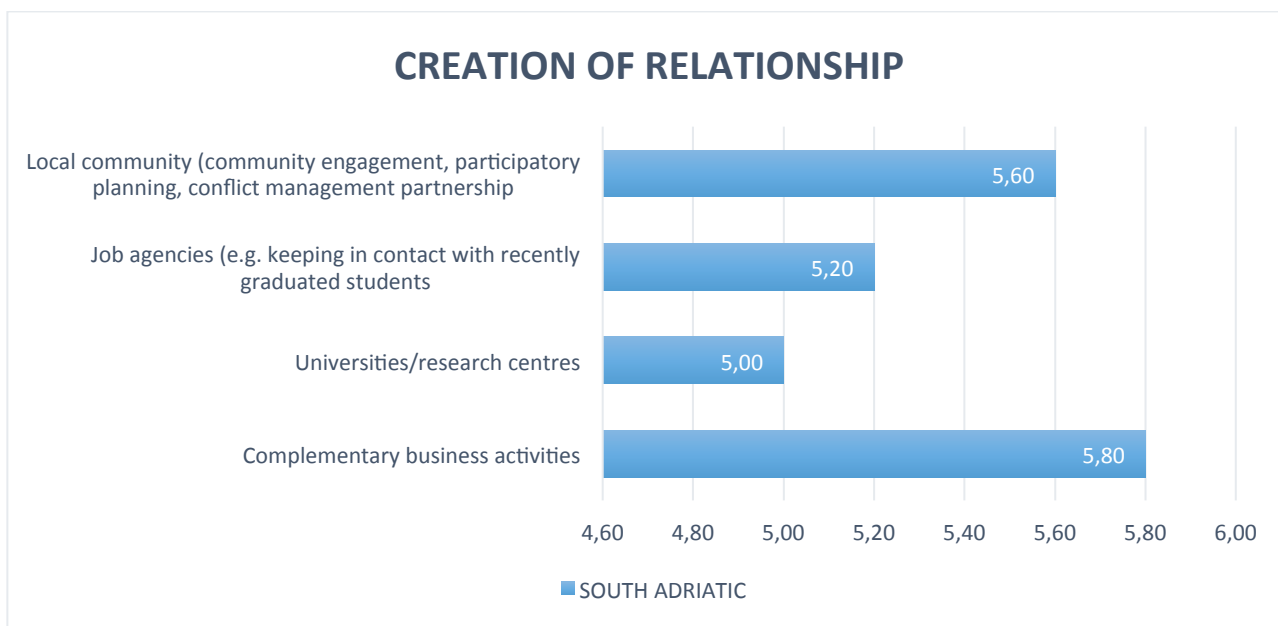
### COMPANY'S INTERNAL COMMUNICATION QUALITY



### KNOWLEDGE OF FOREIGN LANGUAGES

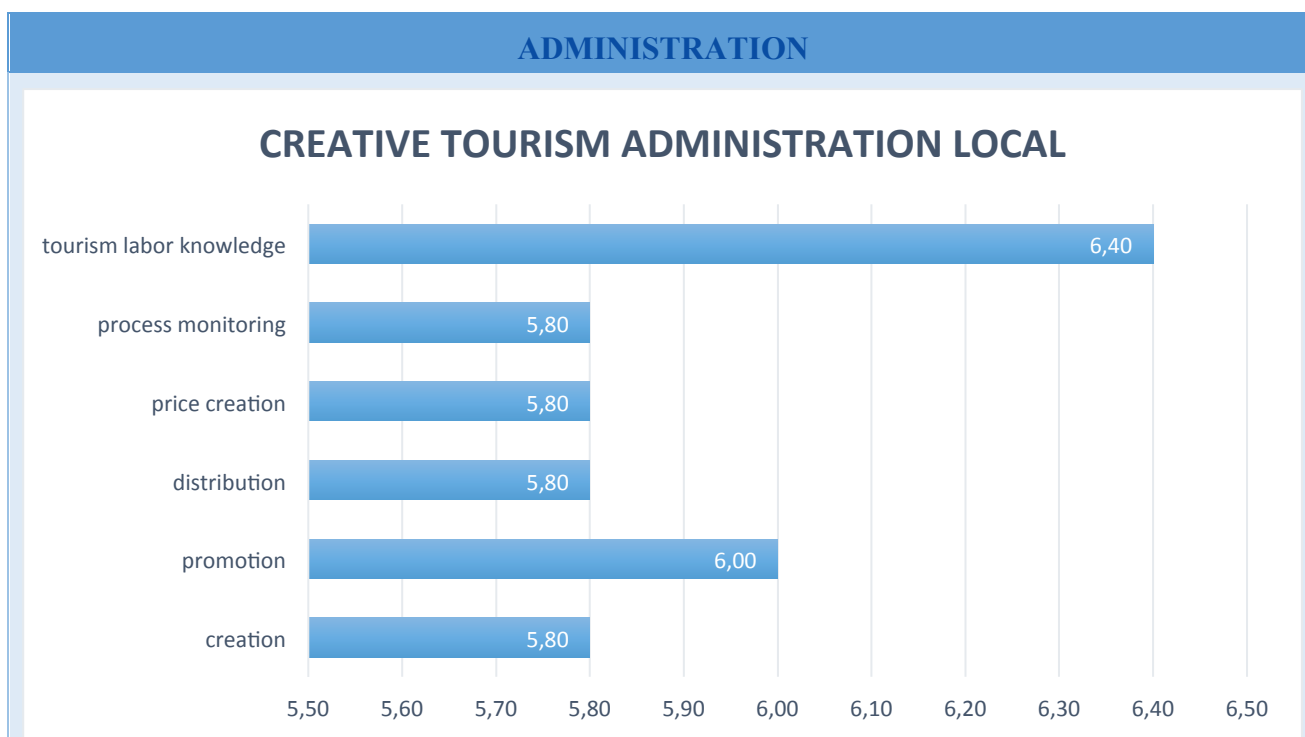




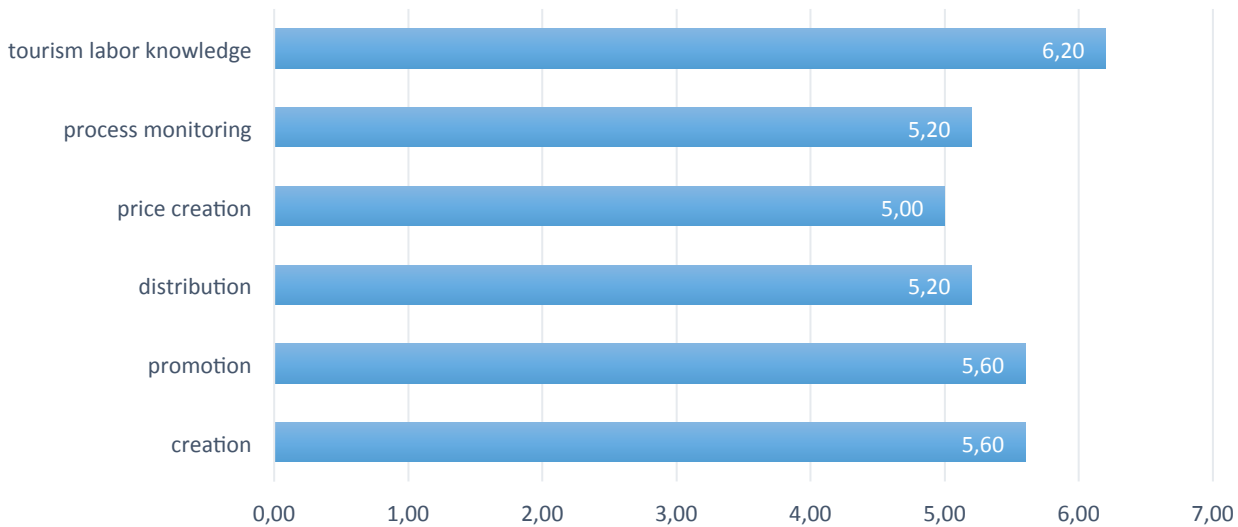


***c. IDENTIFICATION OF THE BUSINESS ECOSYSTEM OF THE CHOSEN PILOT AREA***

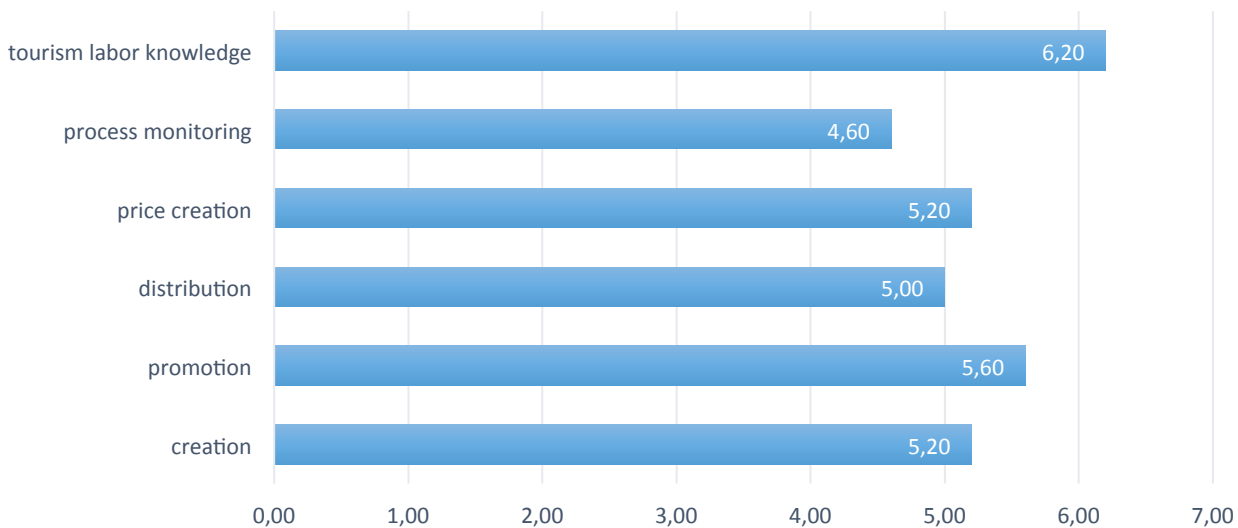
- *Creative tourism*



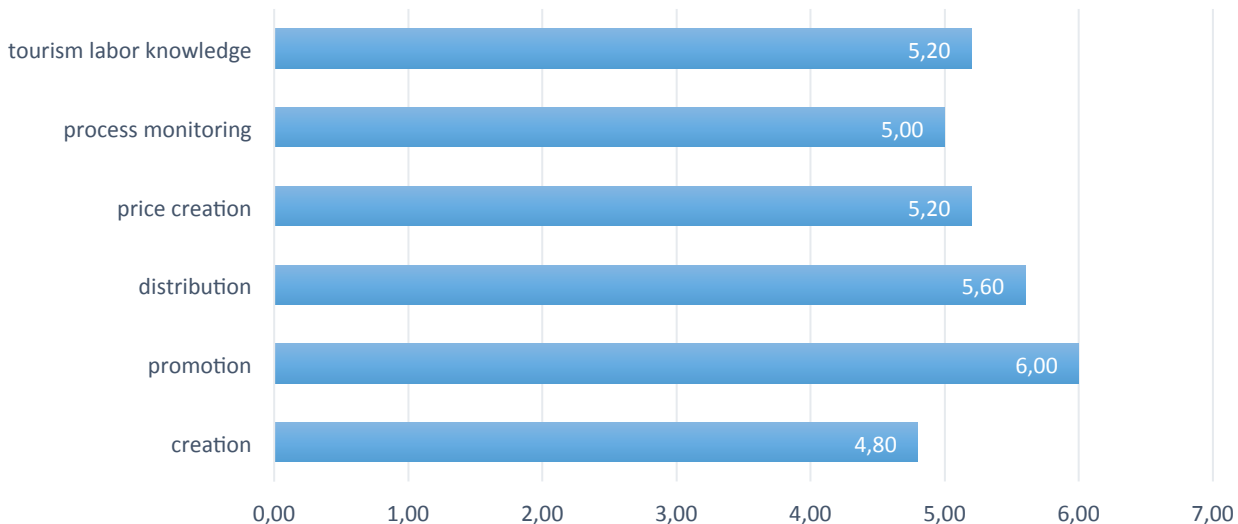
### CREATIVE TOURISM ADMINISTRATION REGIONAL



### CREATIVE TOURISM ADMINISTRATION NATIONAL

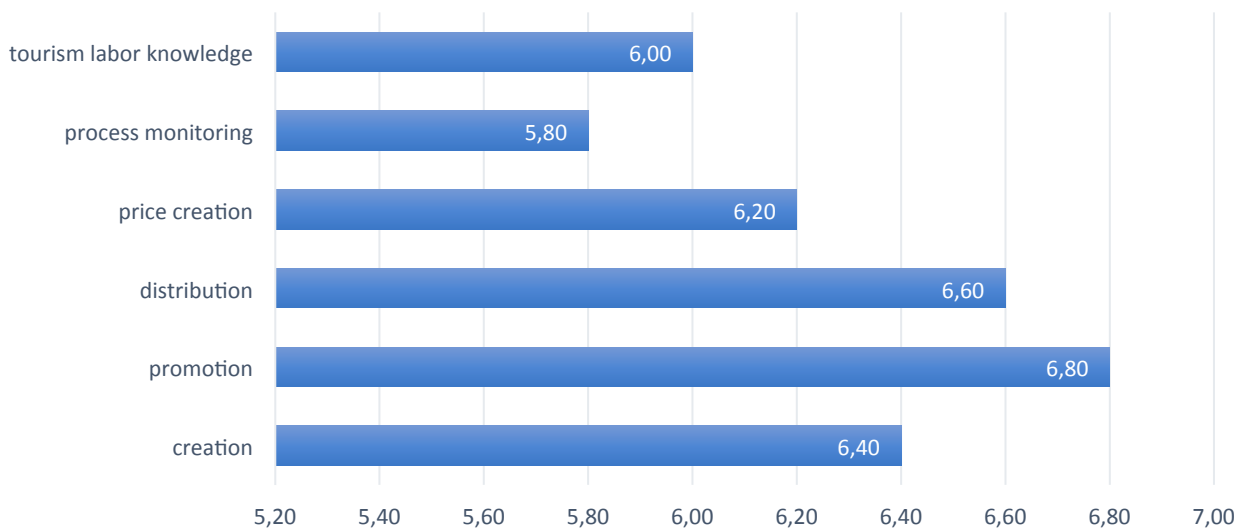


### CREATIVE TOURISM ADMINISTRATION INTERNATIONAL



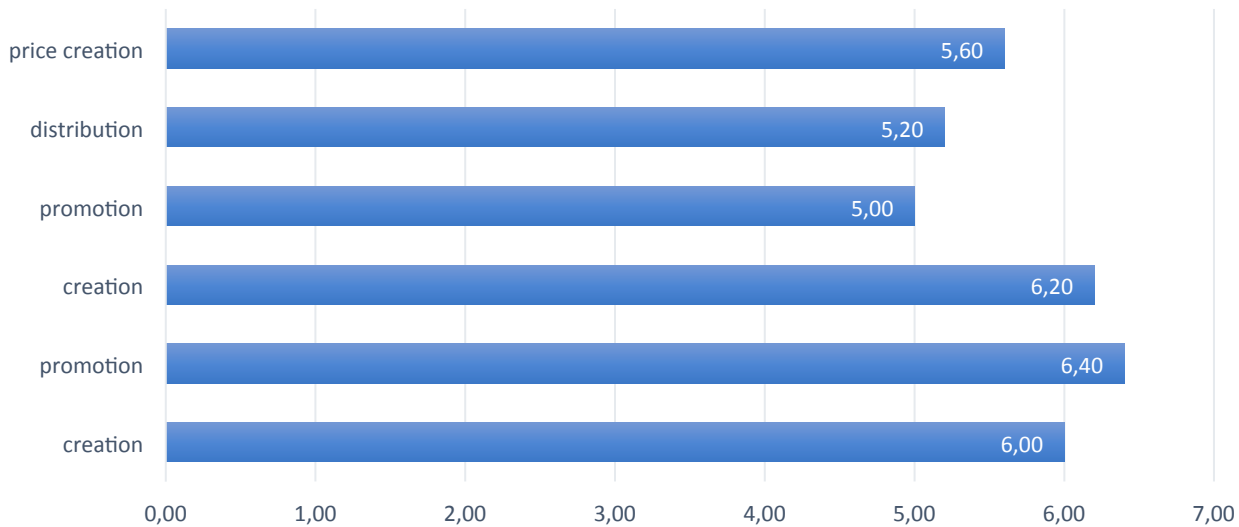
### DESTINATION MANAGEMENT ORGANISATIONS

#### CREATIVE TOURISM DMO LOCAL

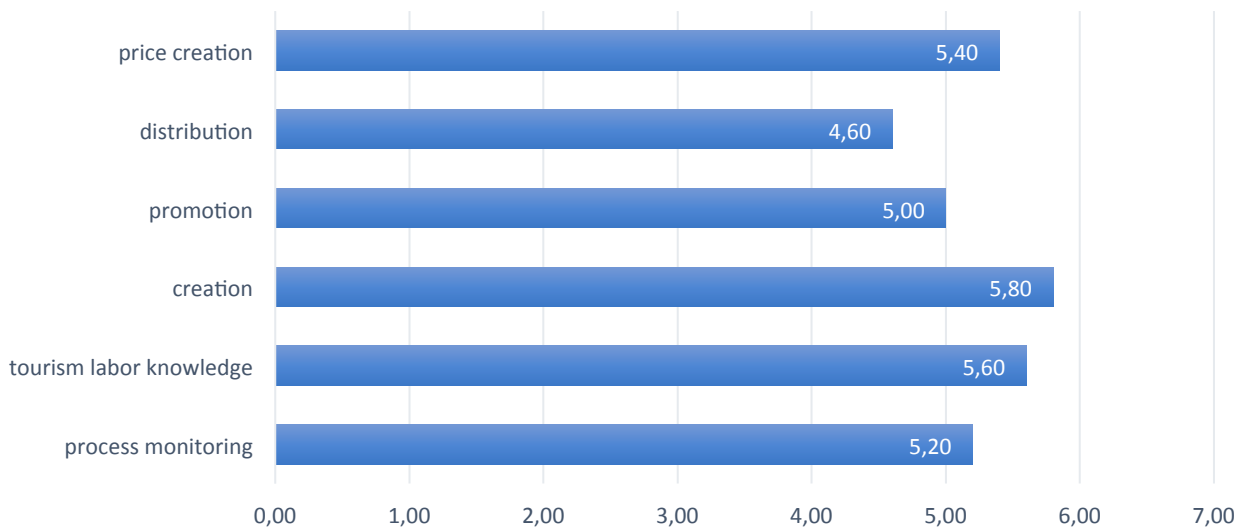


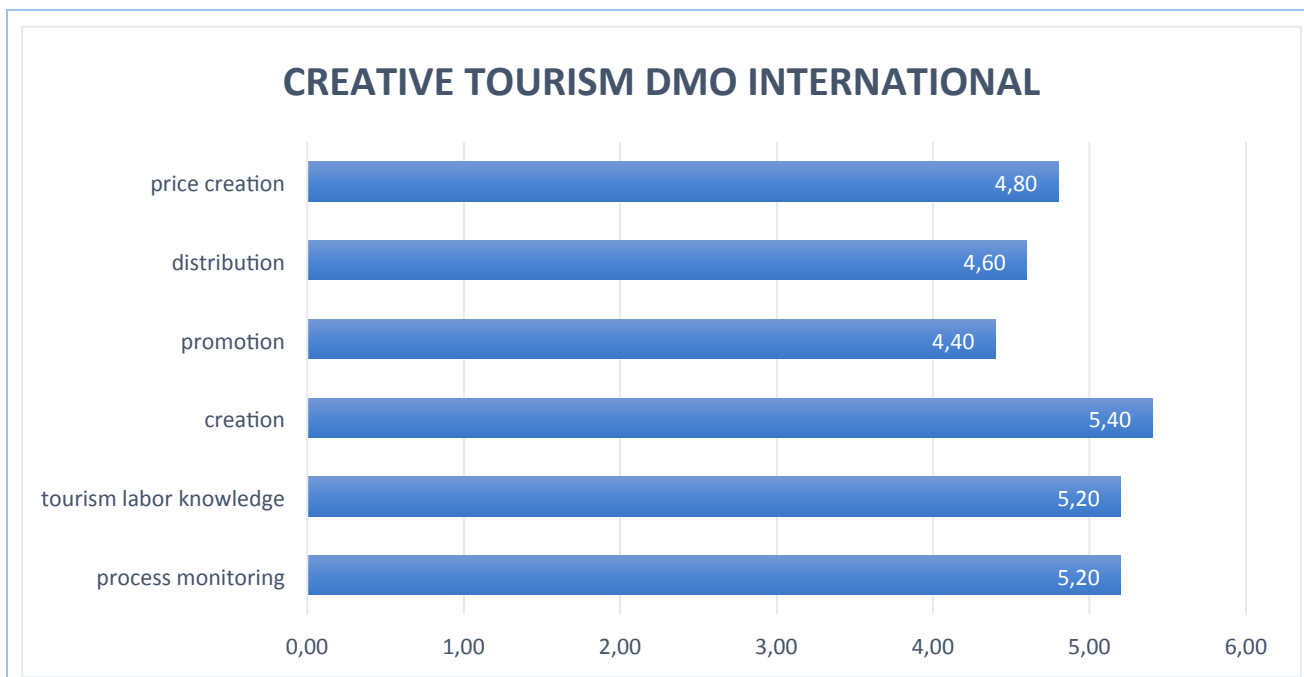


### CREATIVE TOURISM DMO REGIONAL

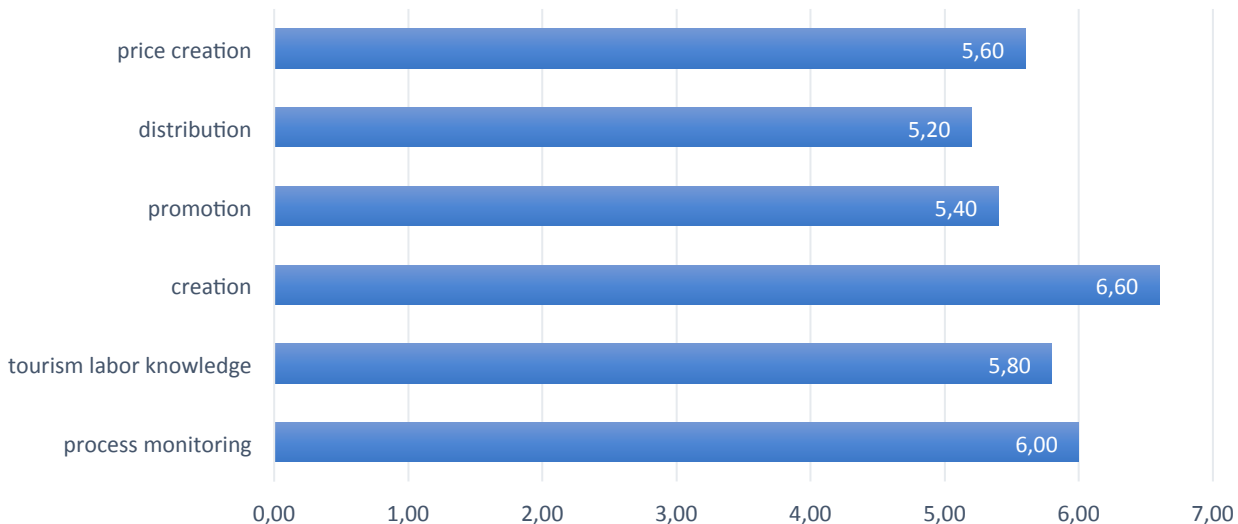


### CREATIVE TOURISM DMO NATIONAL

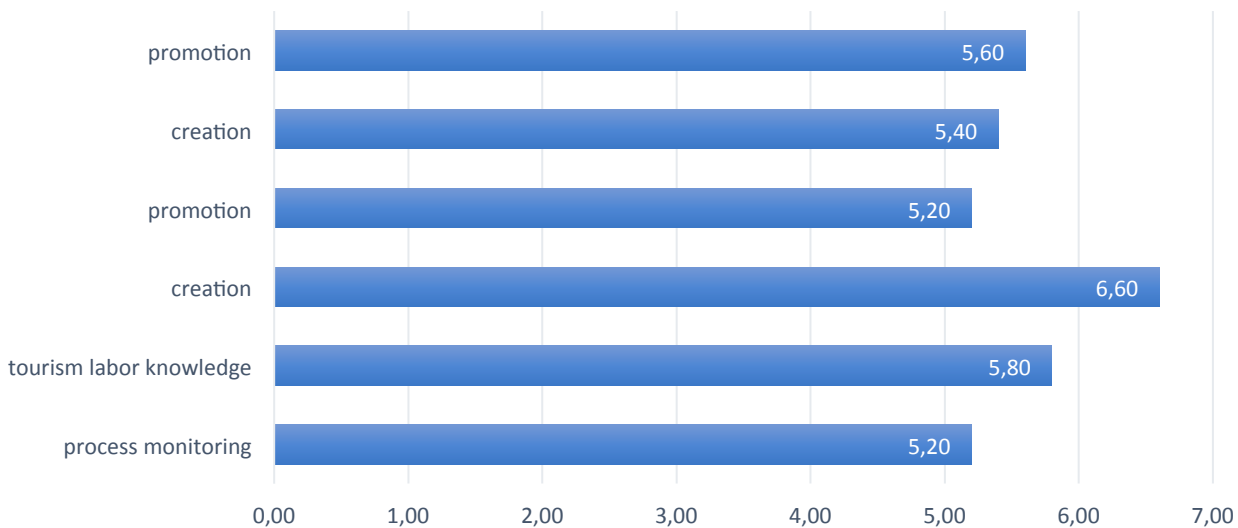


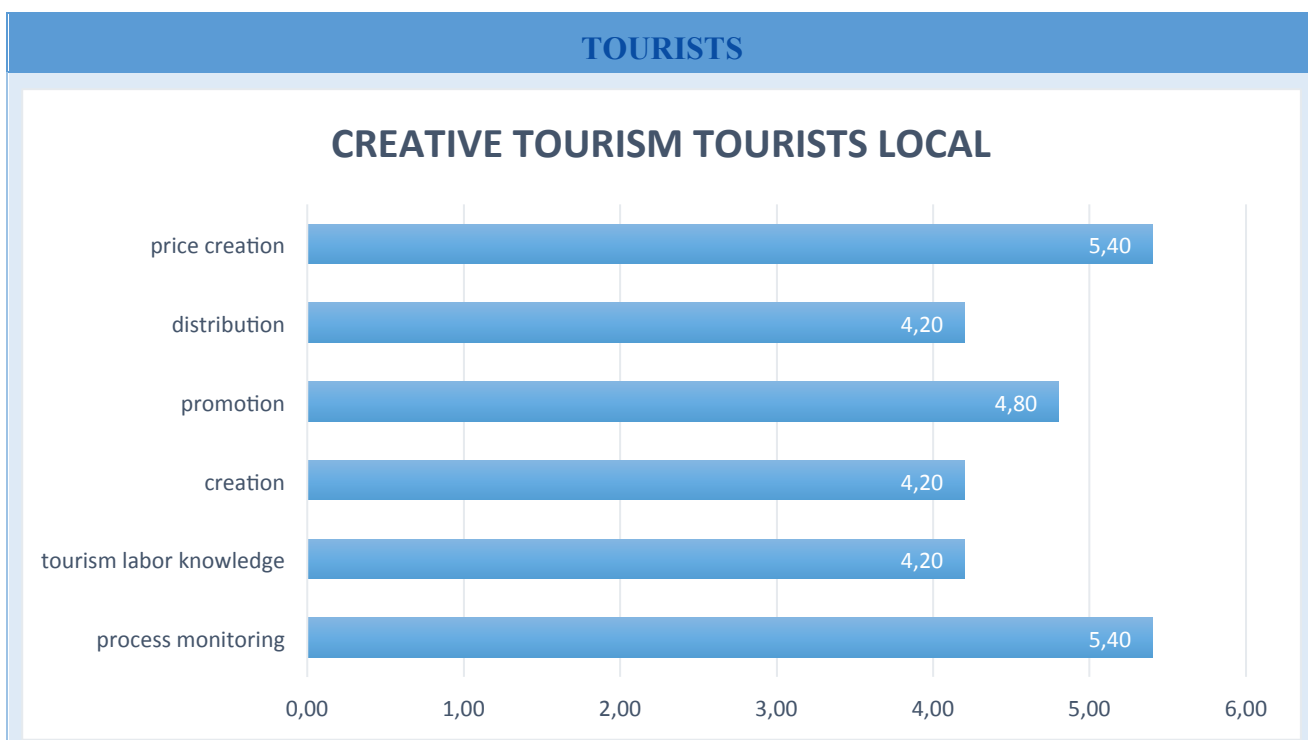
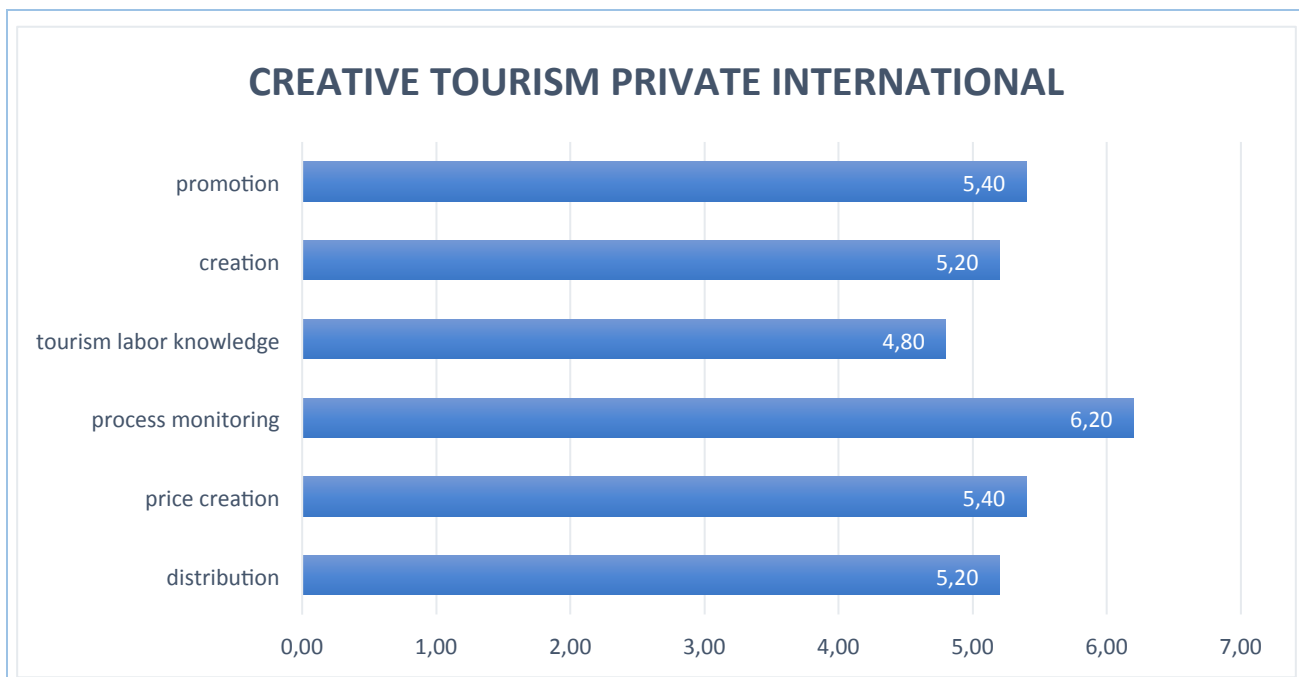


### CREATIVE TOURISM PRIVATE REGIONAL

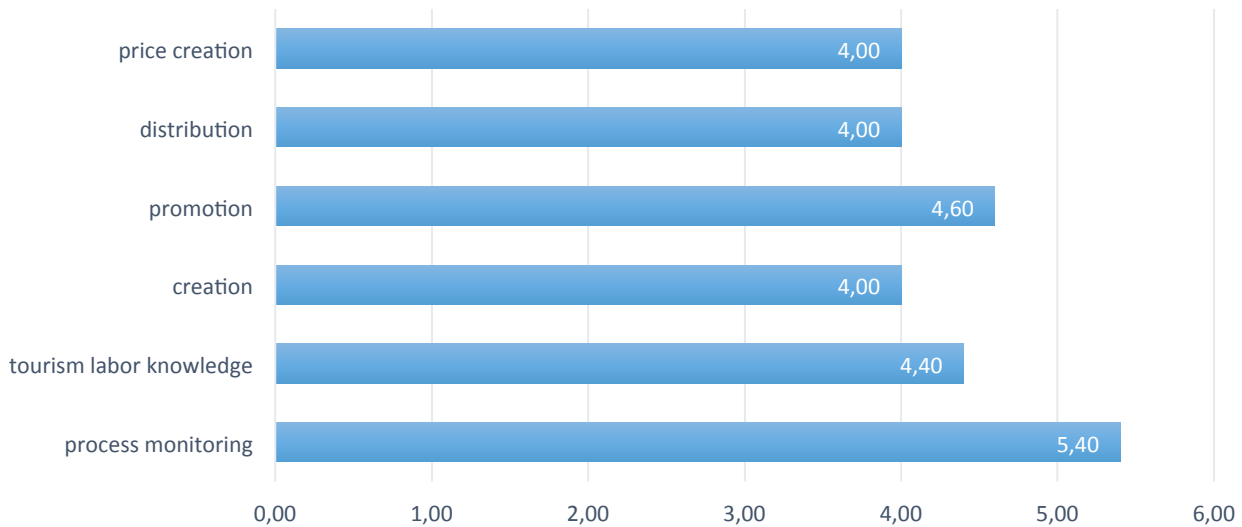


### CREATIVE TOURISM PRIVATE NATIONAL

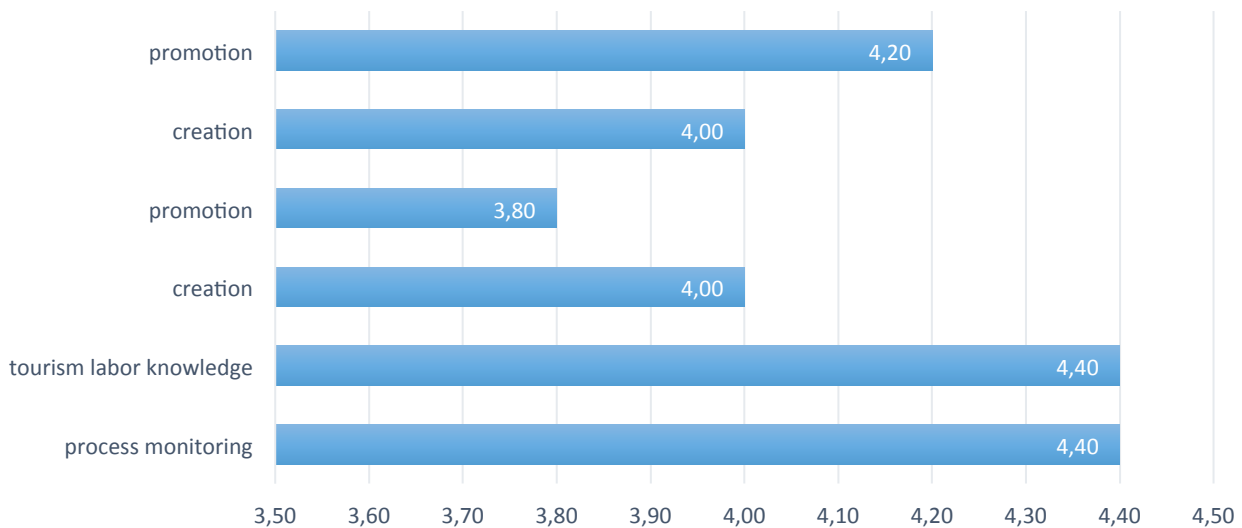




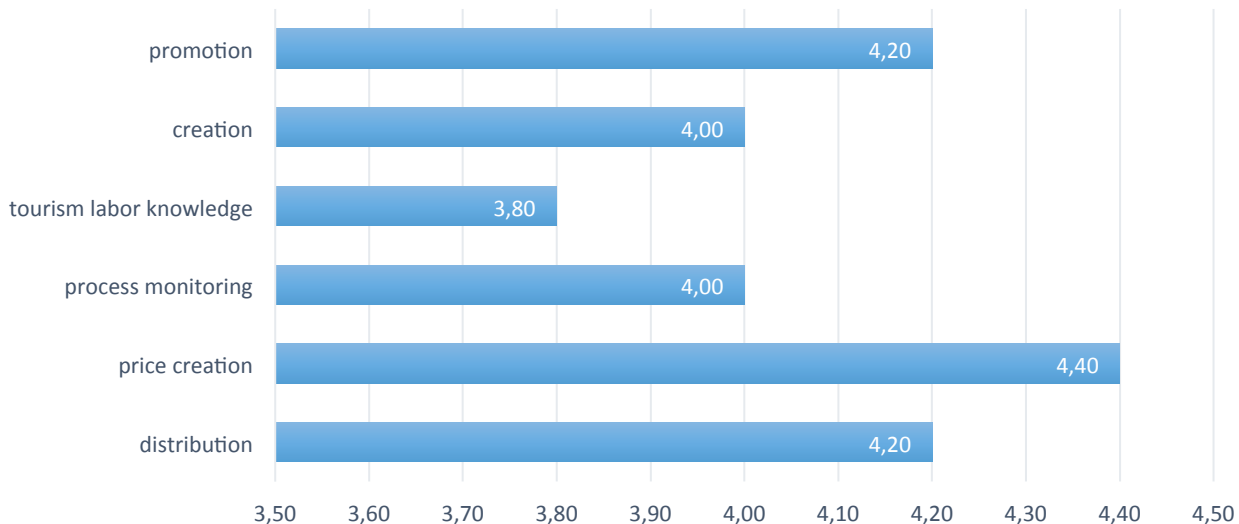
### CREATIVE TOURISM TOURISTS REGIONAL



### CREATIVE TOURISM TOURISTS NATIONAL

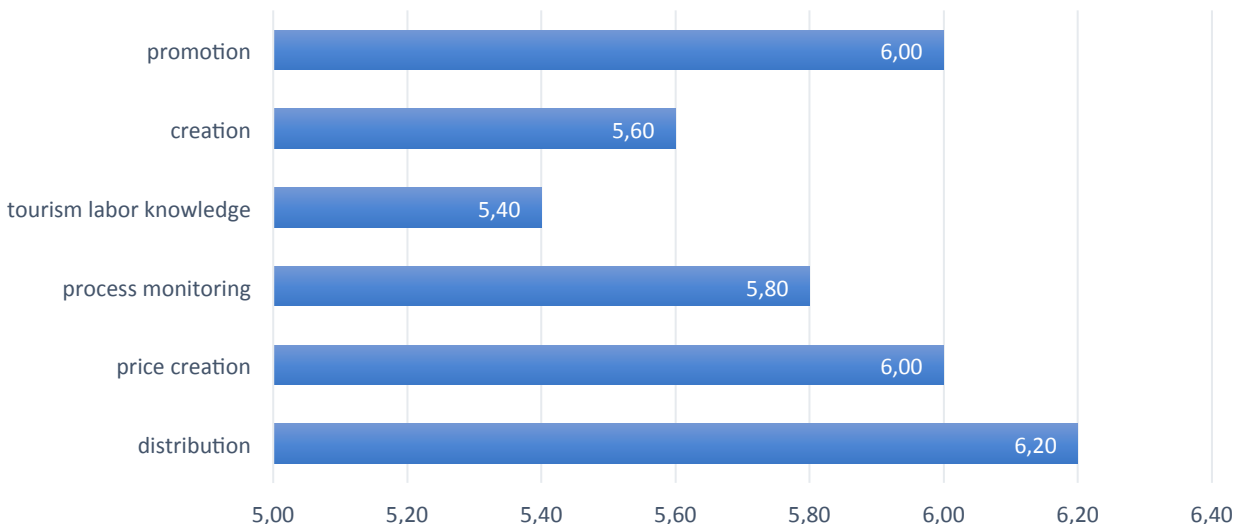


### CREATIVE TOURISM TOURISTS INTERNATIONAL

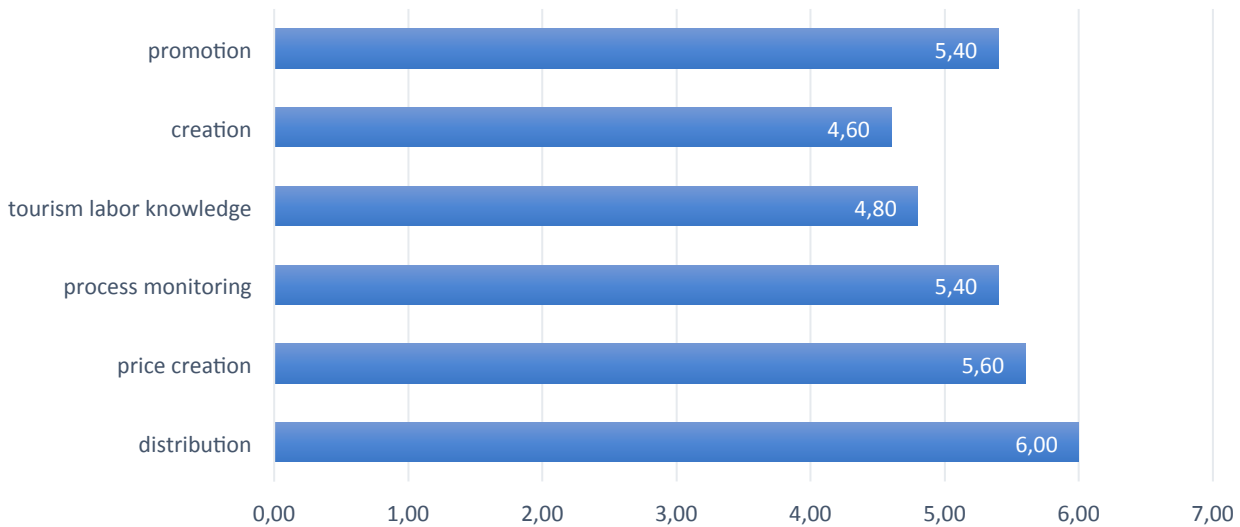


### RESIDENTS

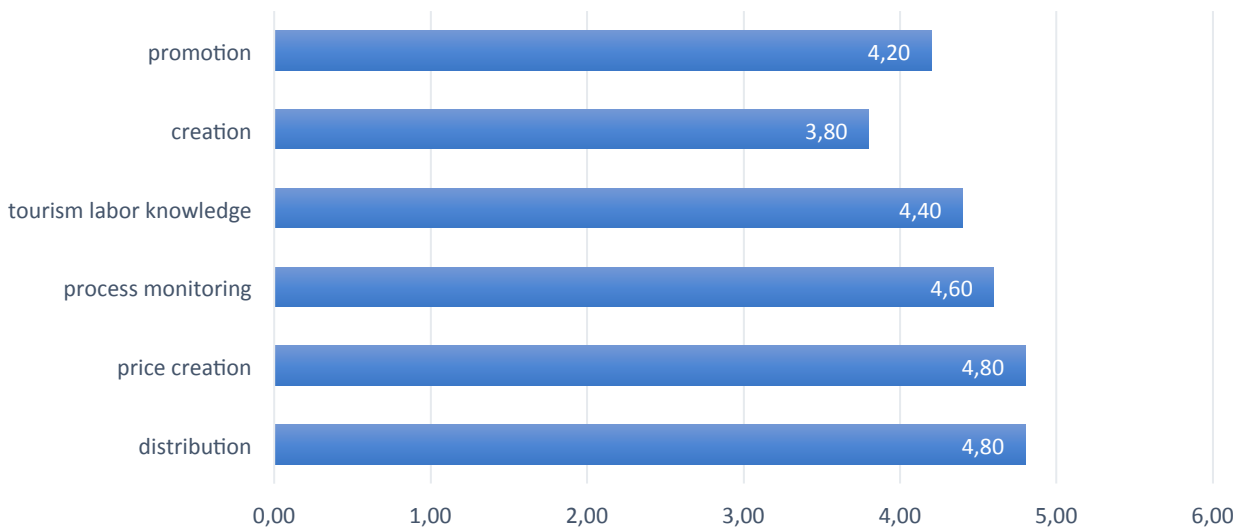
#### CREATIVE TOURISM RESIDENTS LOCAL

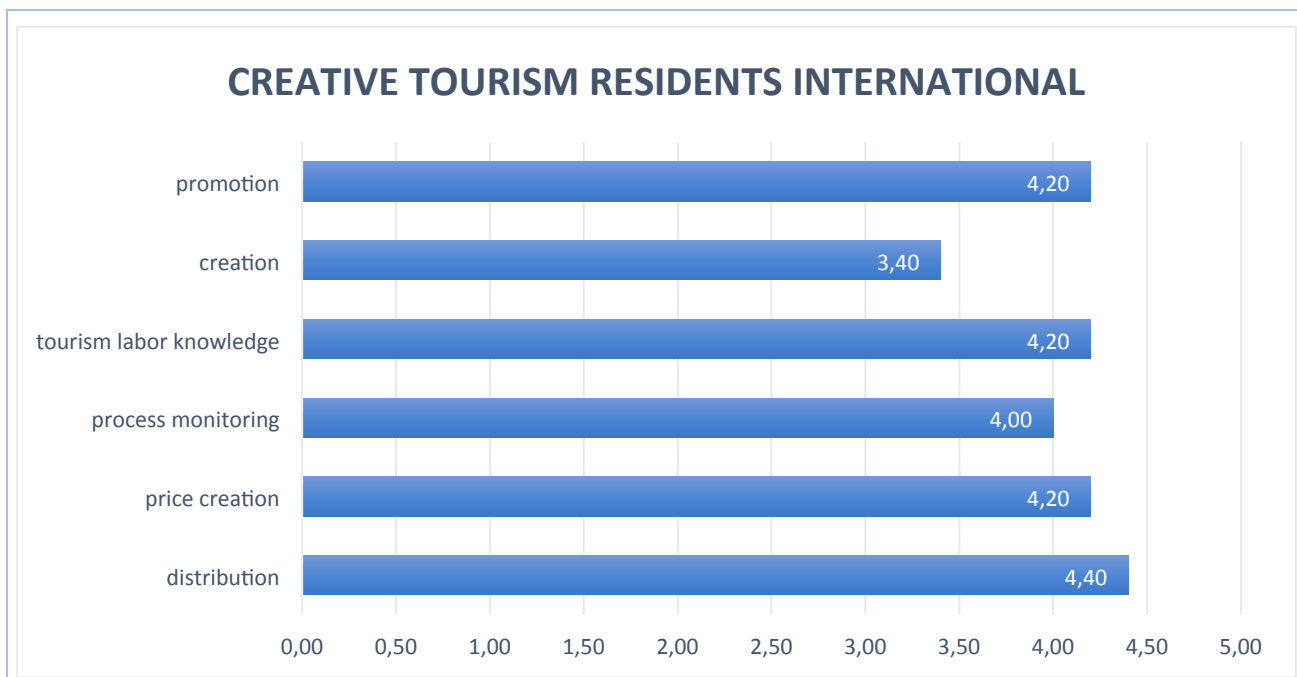


### CREATIVE TOURISM RESIDENTS REGIONAL



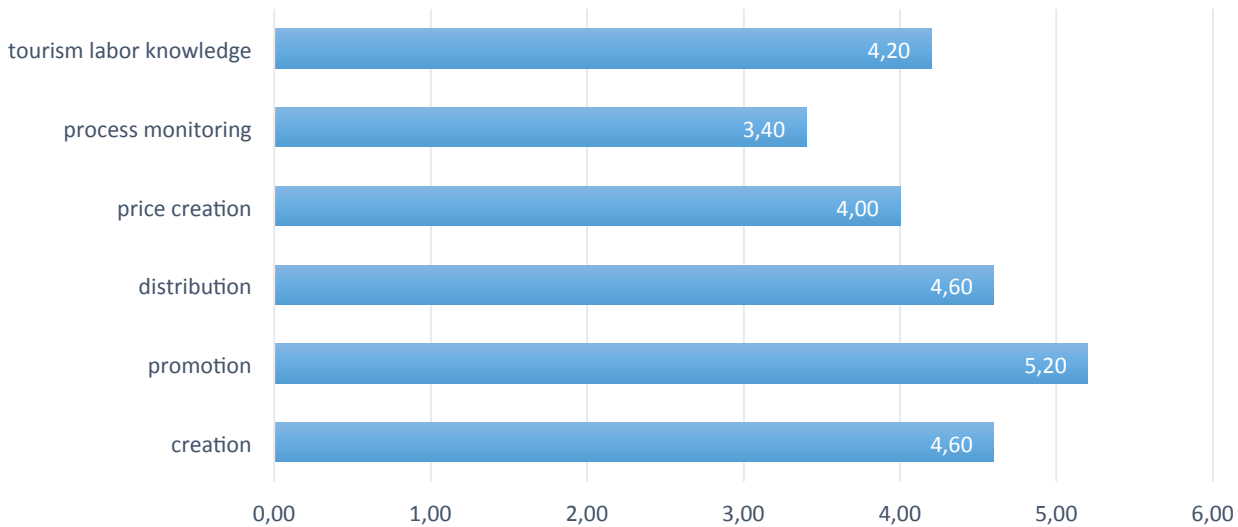
### CREATIVE TOURISM RESIDENTS NATIONAL



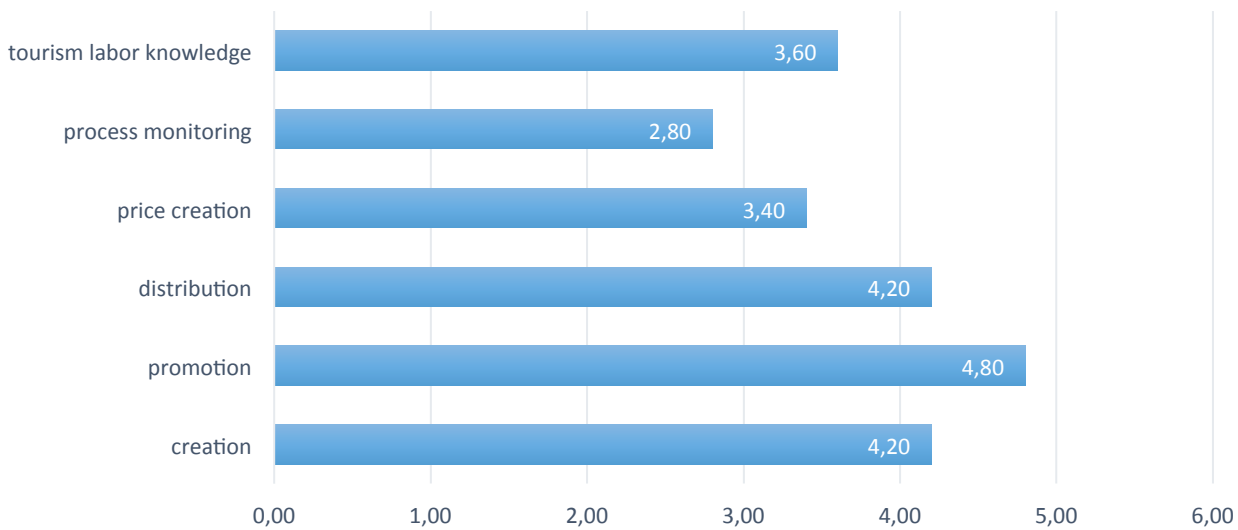




### CREATIVE TOURISM CIVIL SECTOR REGIONAL

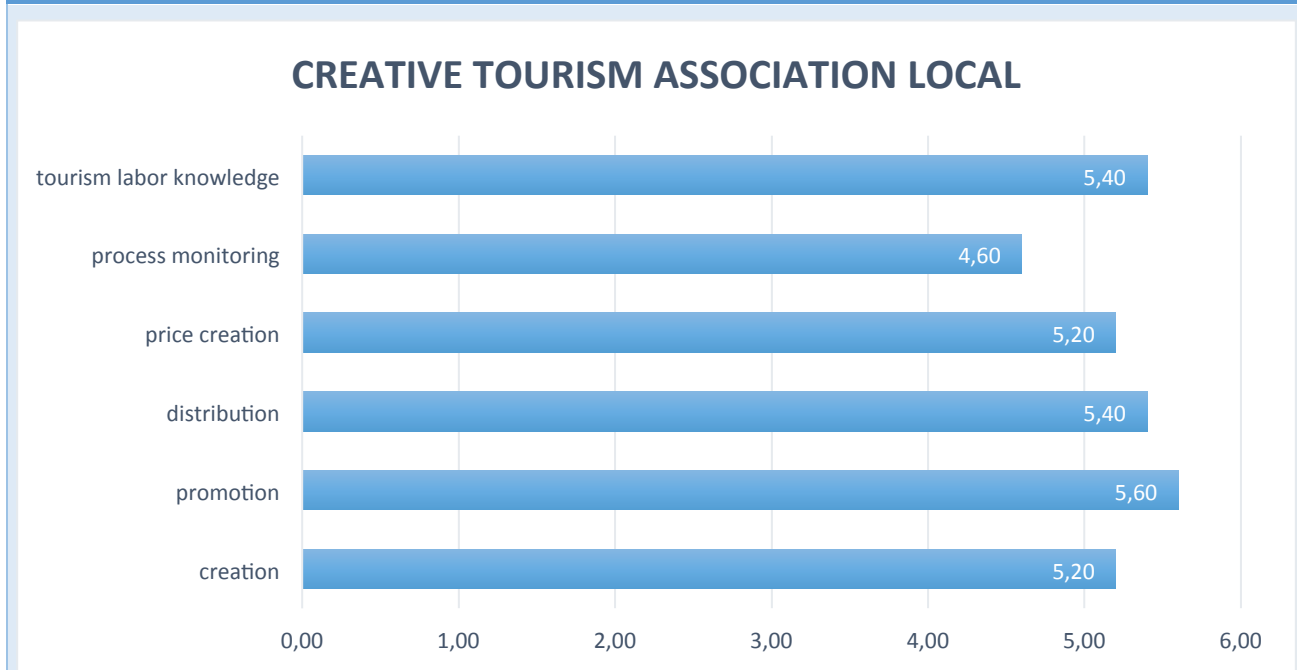


### CREATIVE TOURISM CIVIL SECTOR NATIONAL

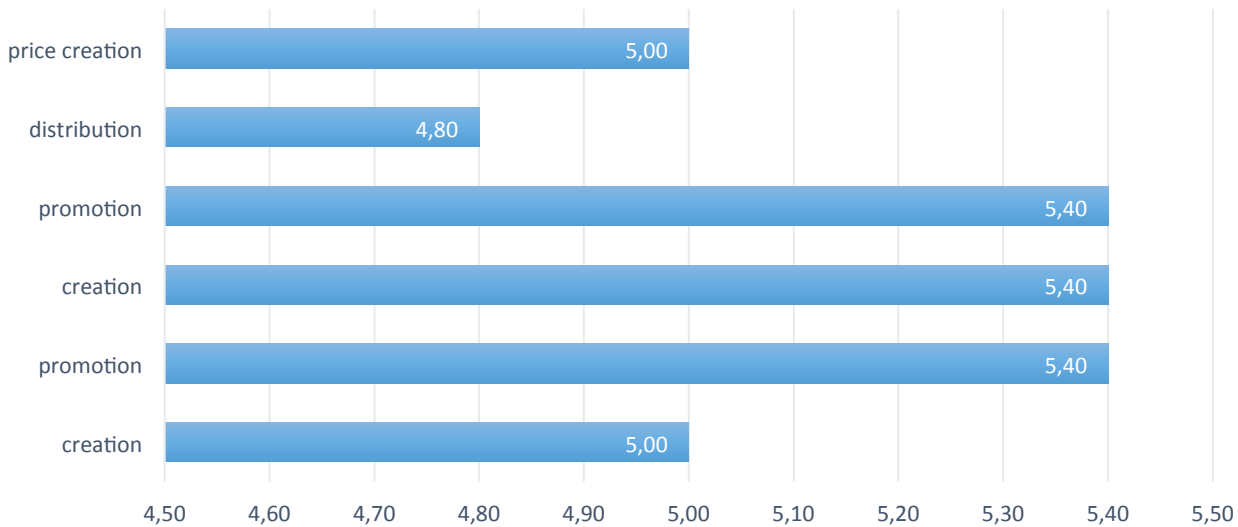




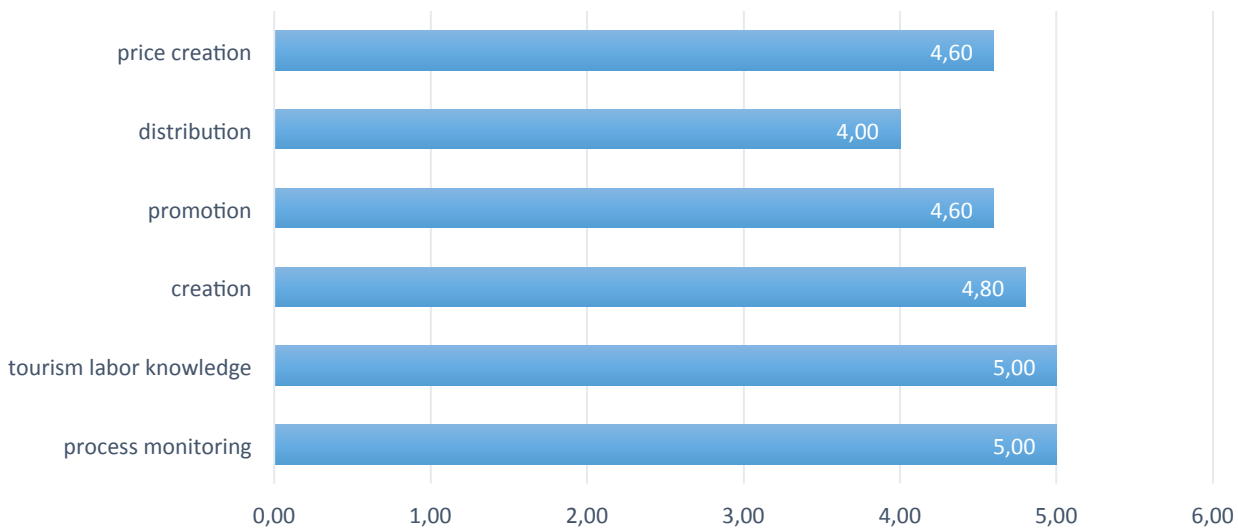
## ASSOCIATIONS/ORGANIZATIONS RELATED TO CULTURAL AND NATURAL HERITAGE OF THE AREA

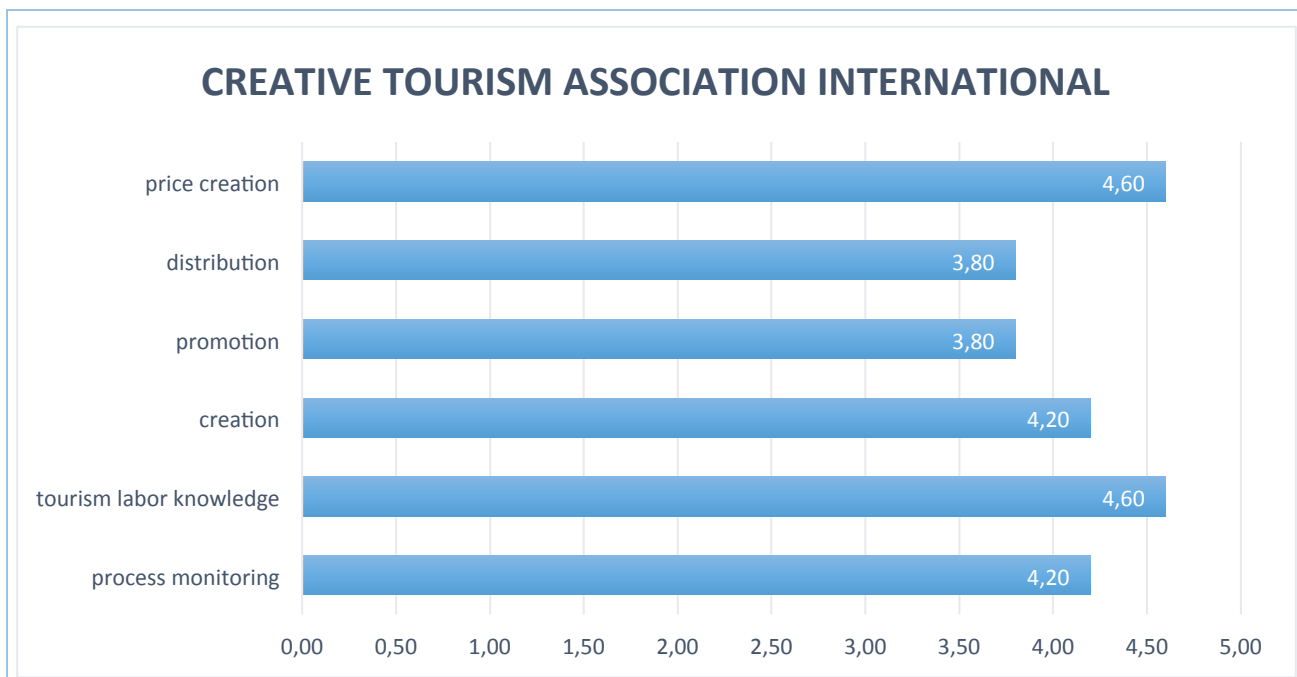


### CREATIVE TOURISM ASSOCIATION REGIONAL

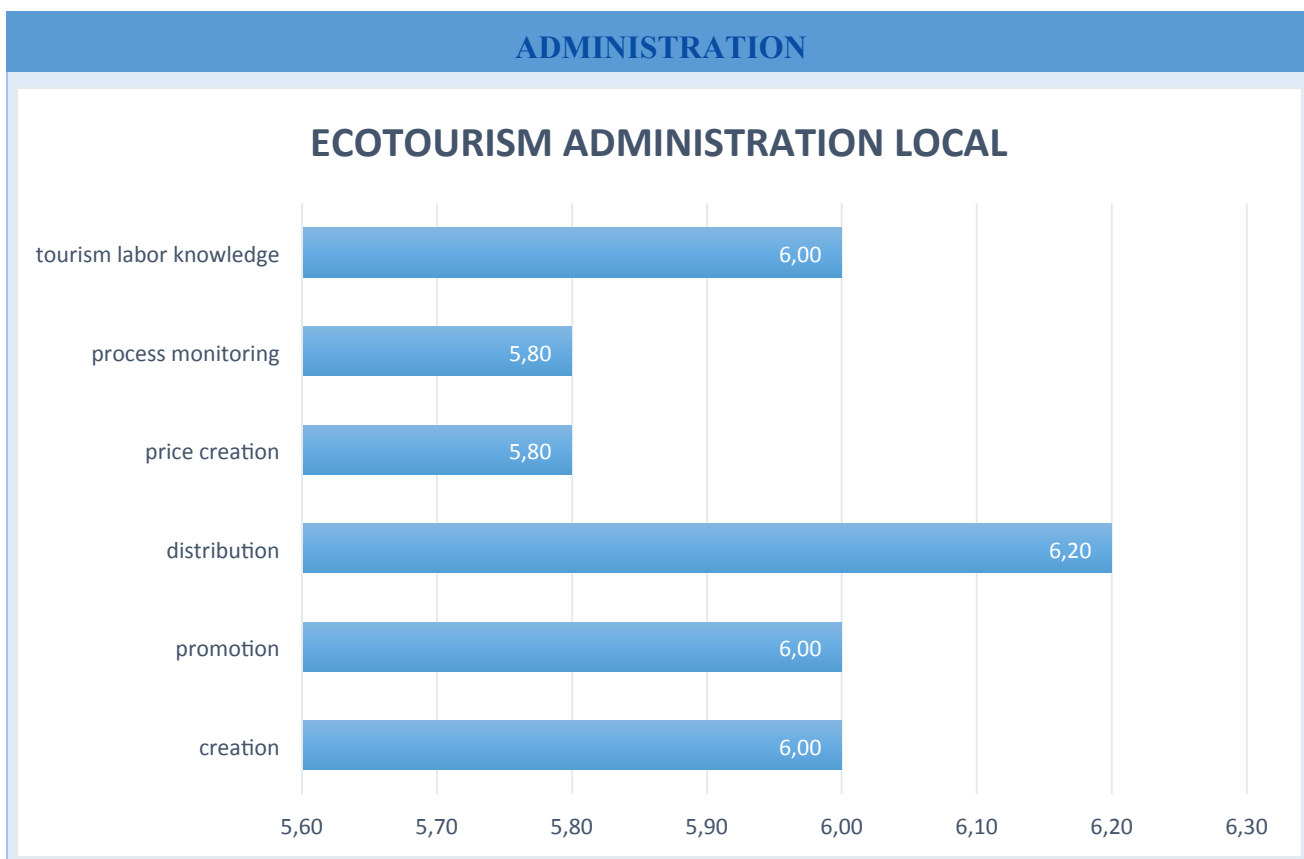


### CREATIVE TOURISM ASSOCIATION NATIONAL

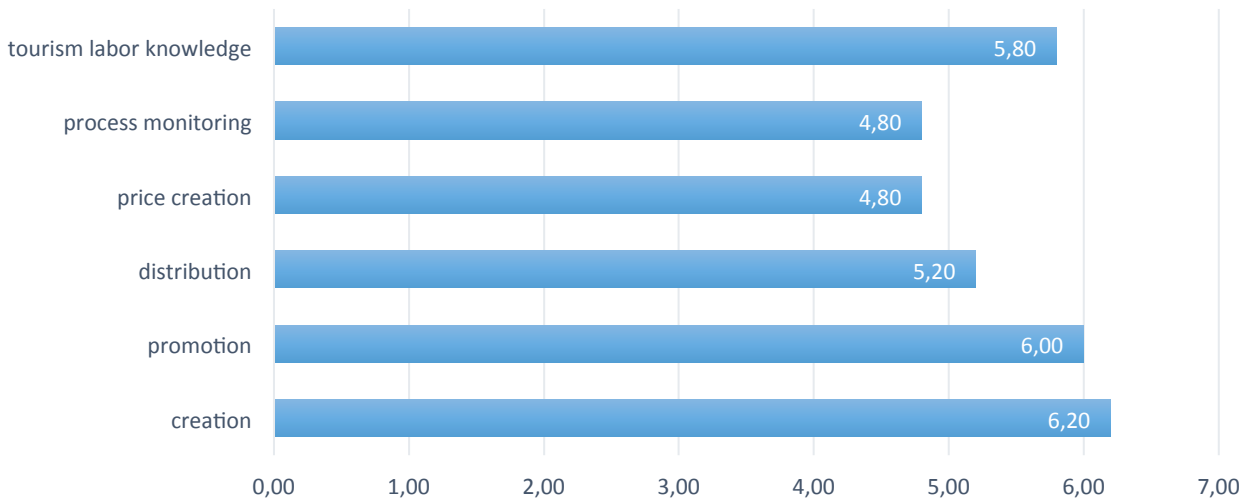




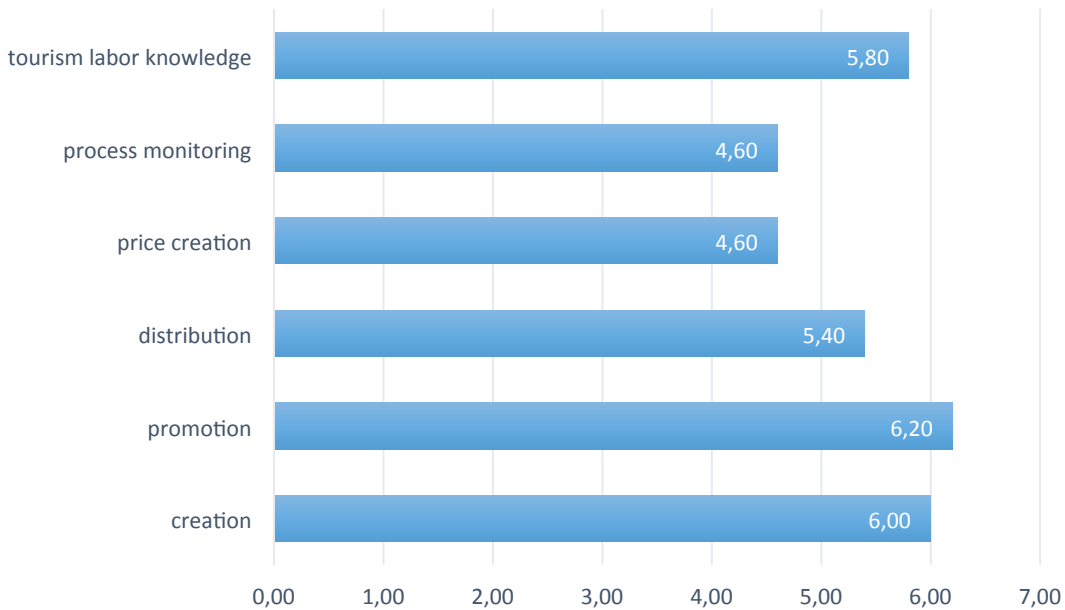
- *Eco tourism*

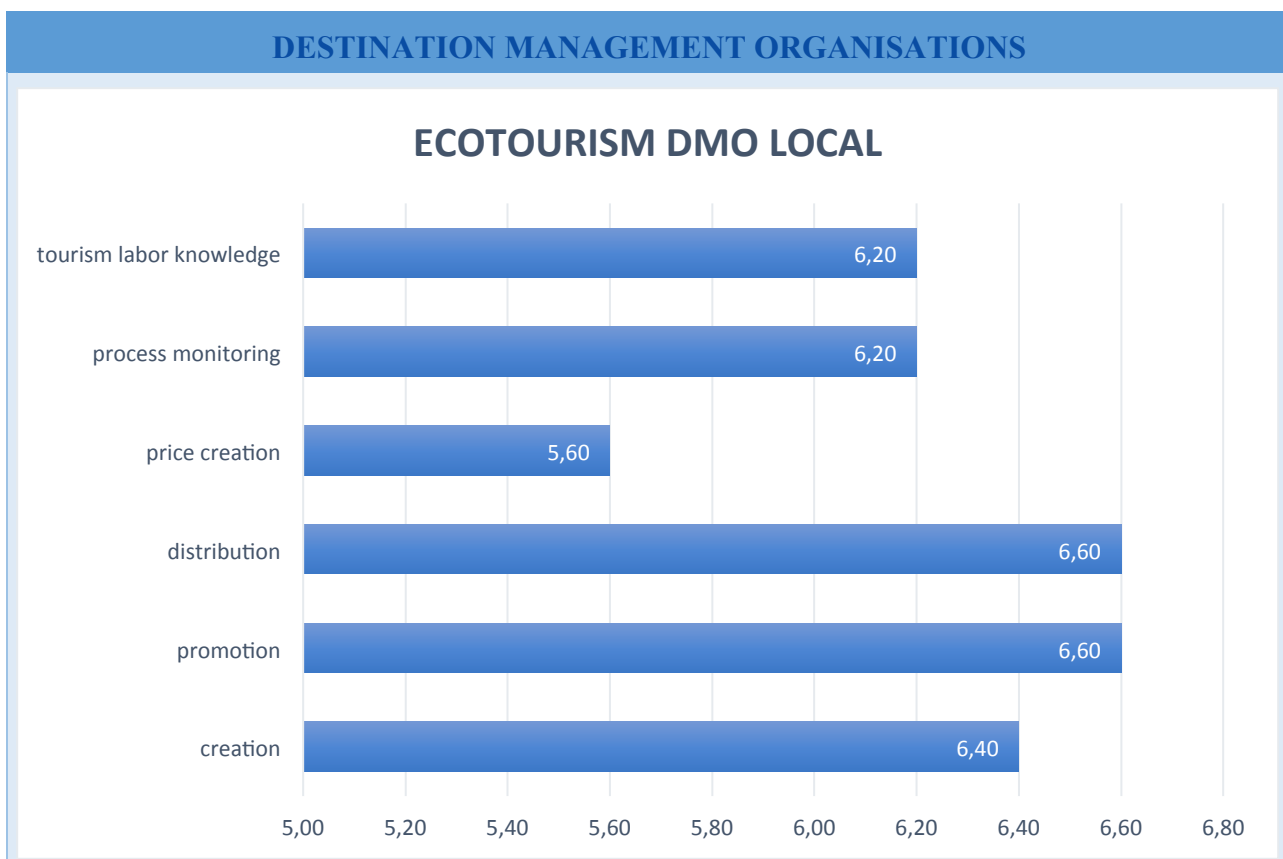
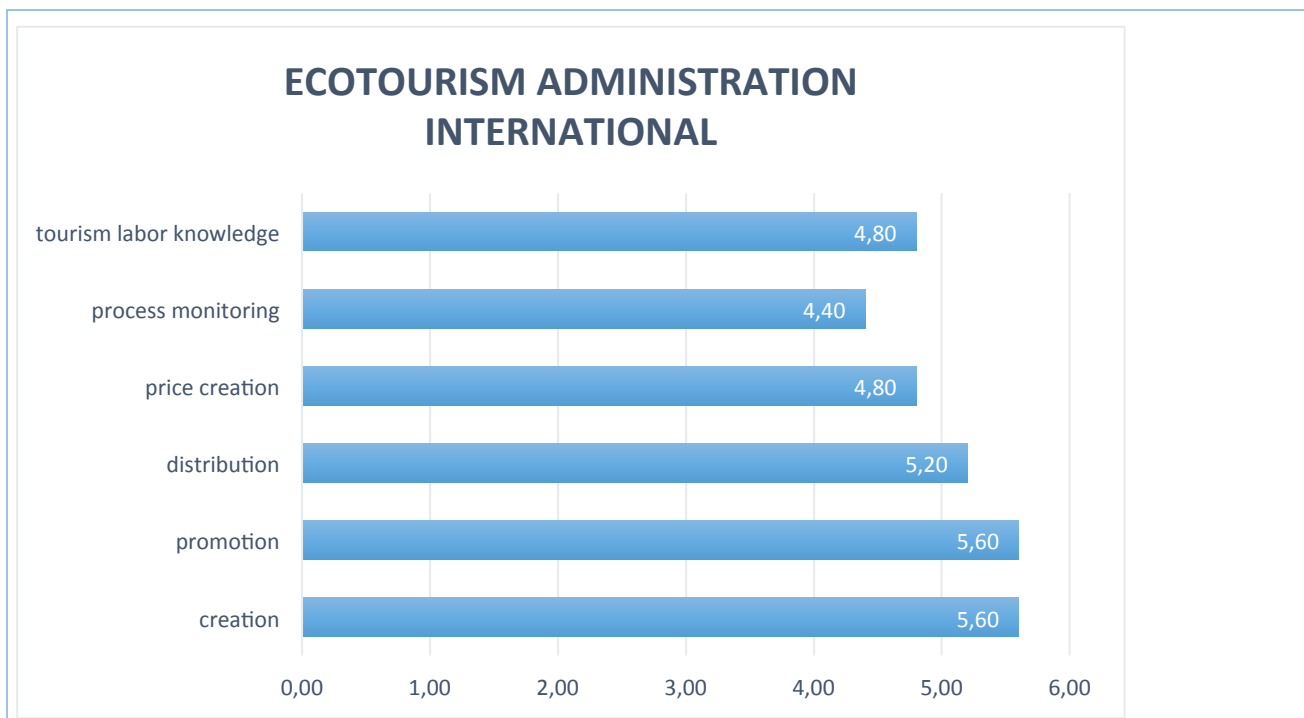


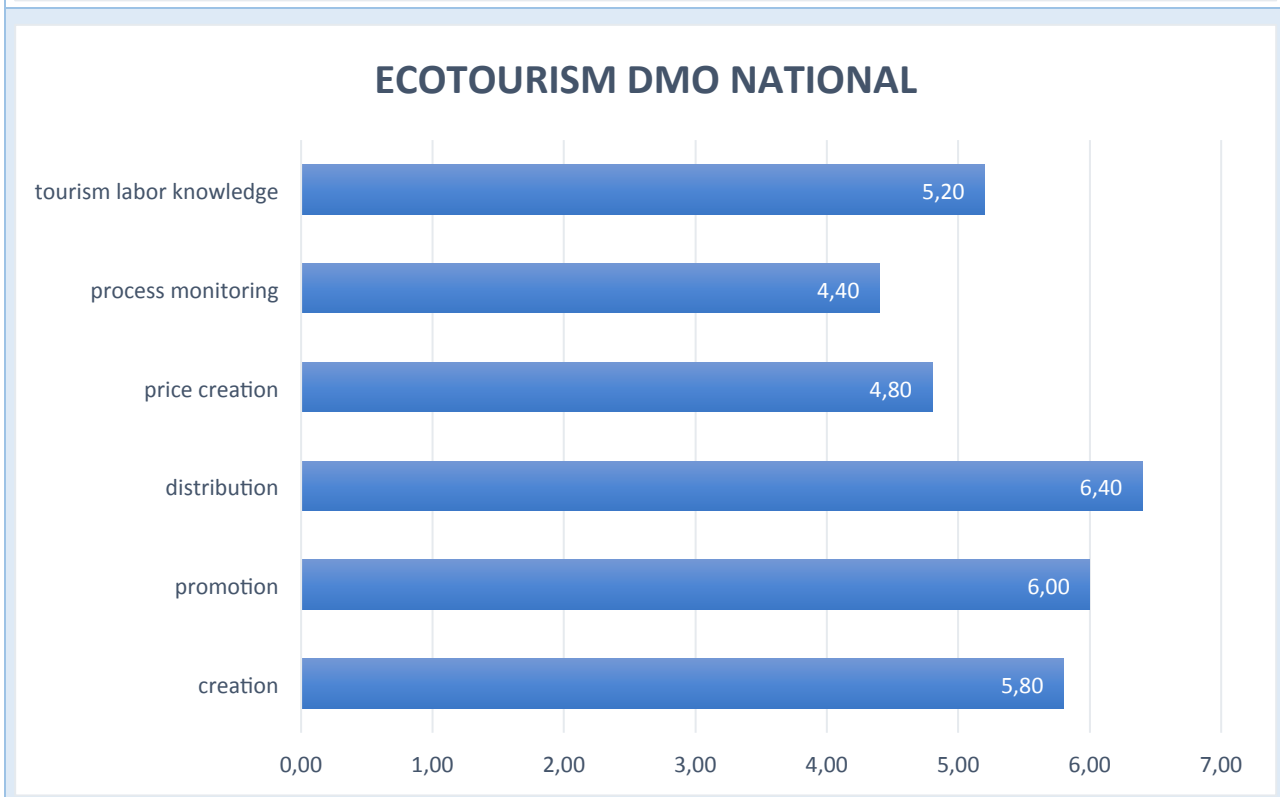
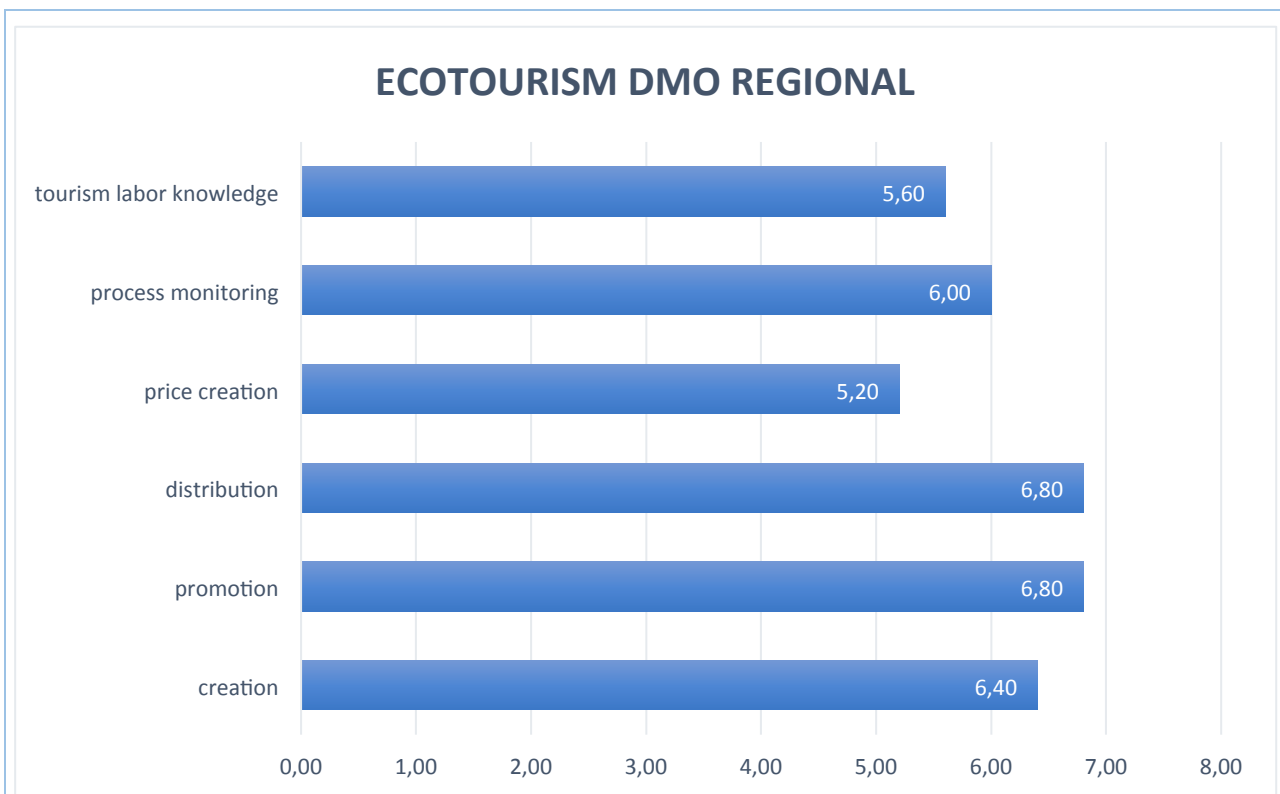
### ECOTOURISM ADMINISTRATION REGIONAL

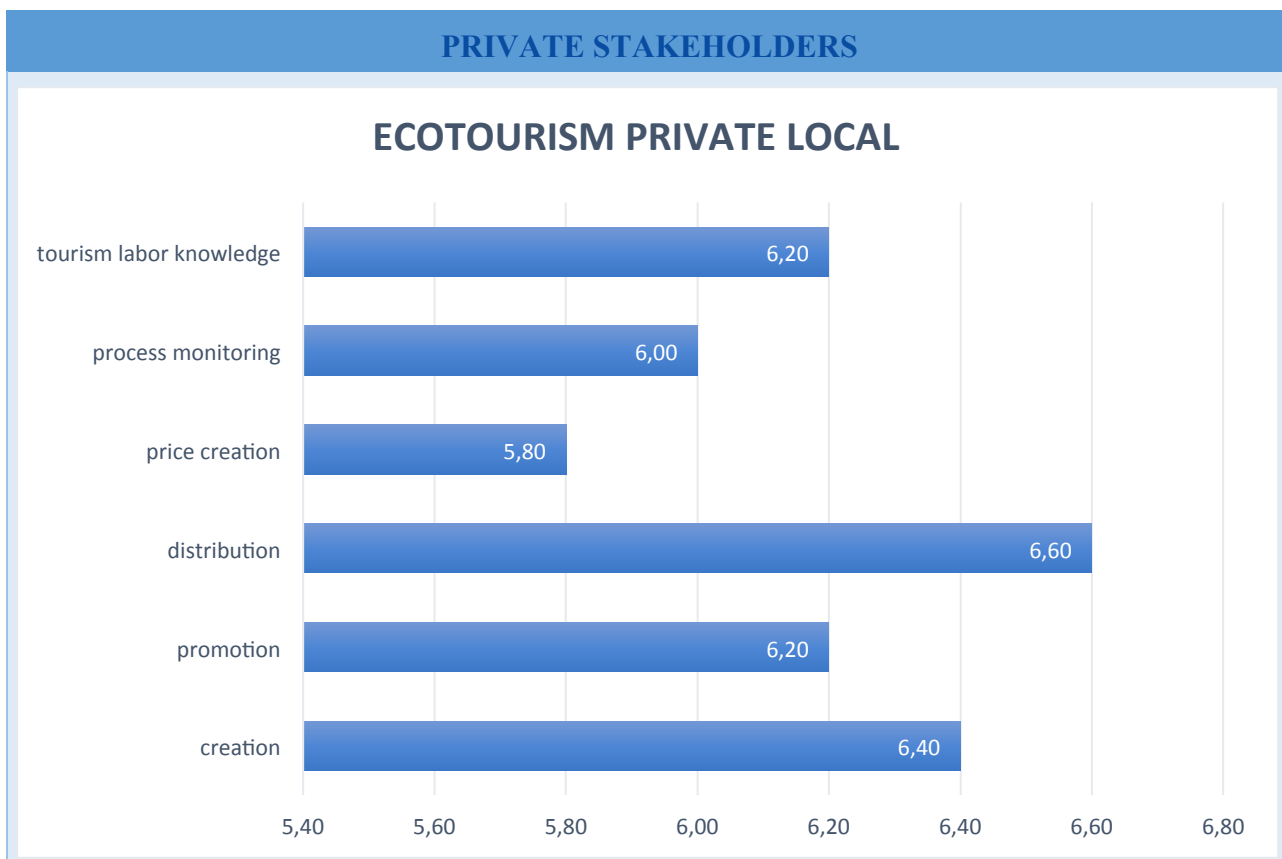
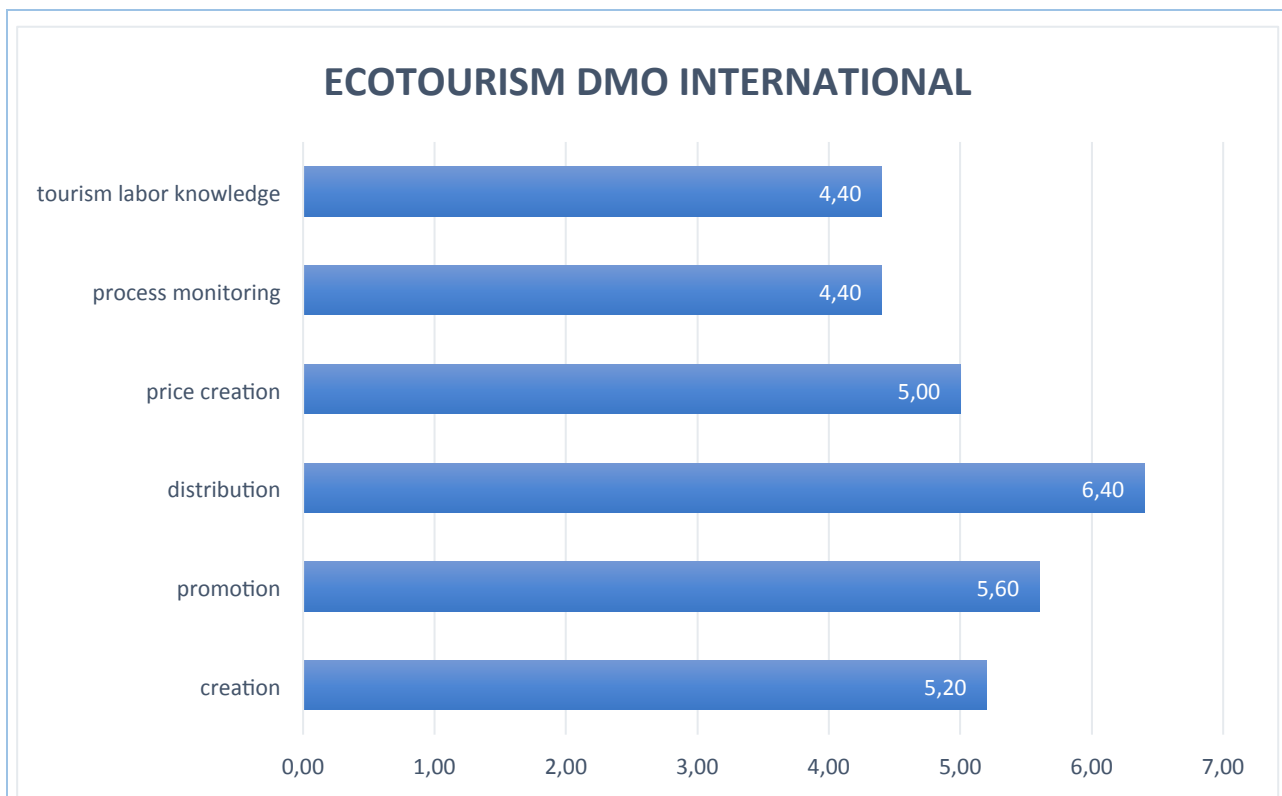


### ECOTOURISM ADMINISTRATION NATIONAL



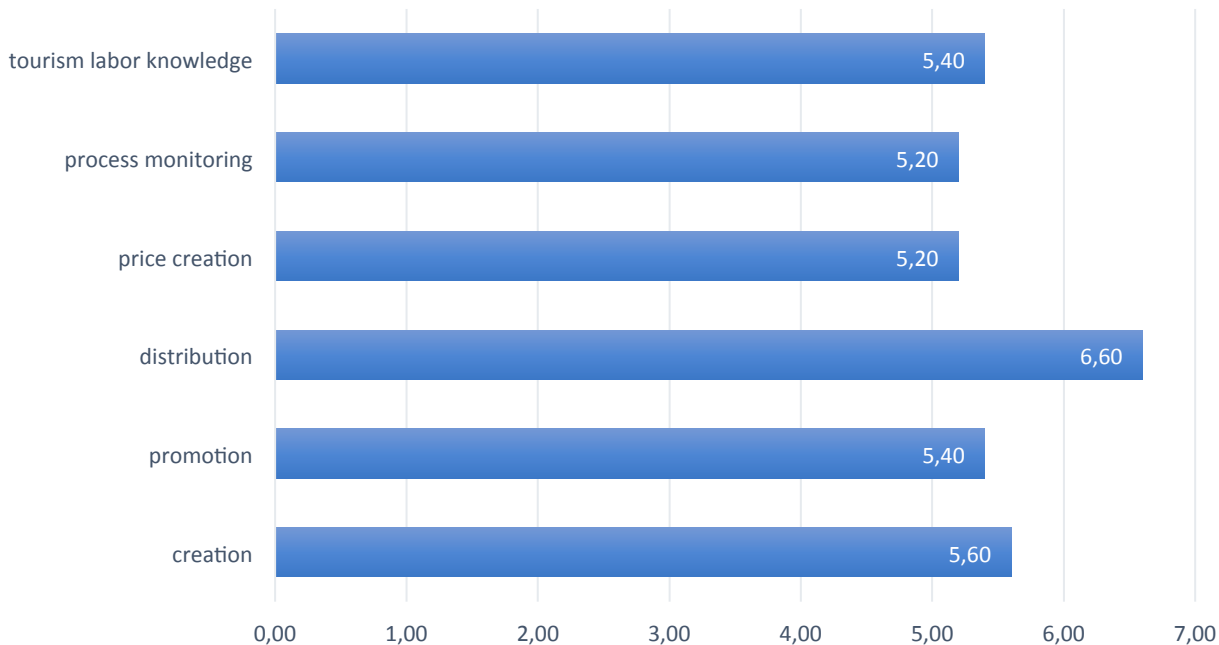




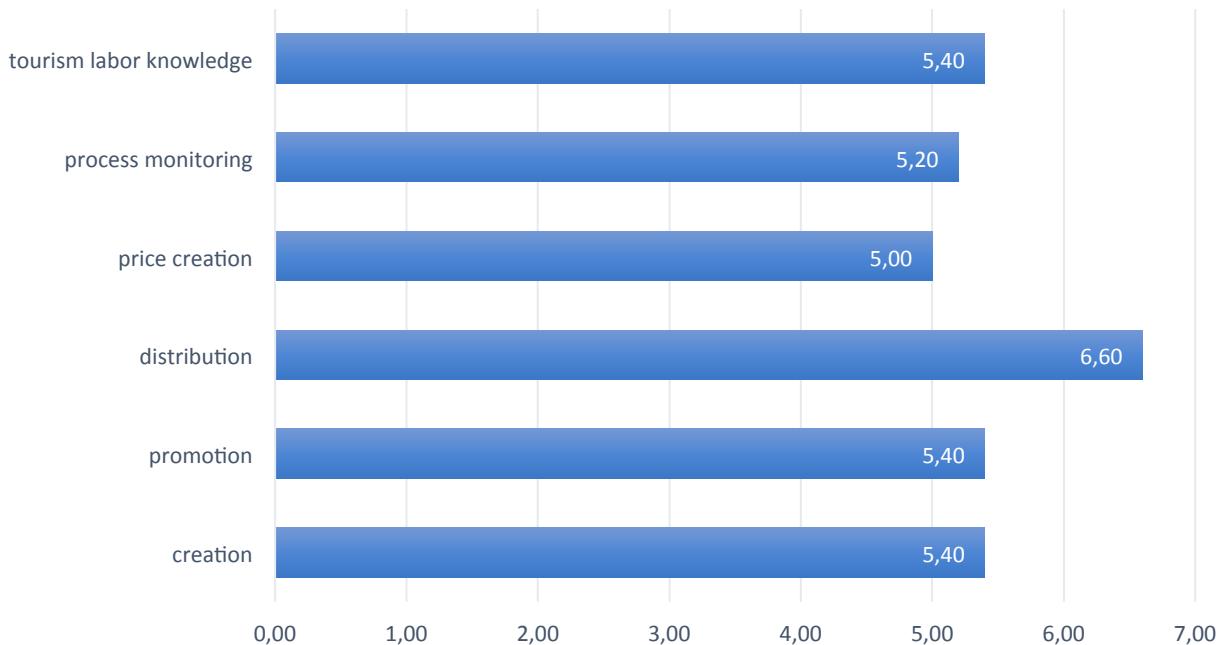


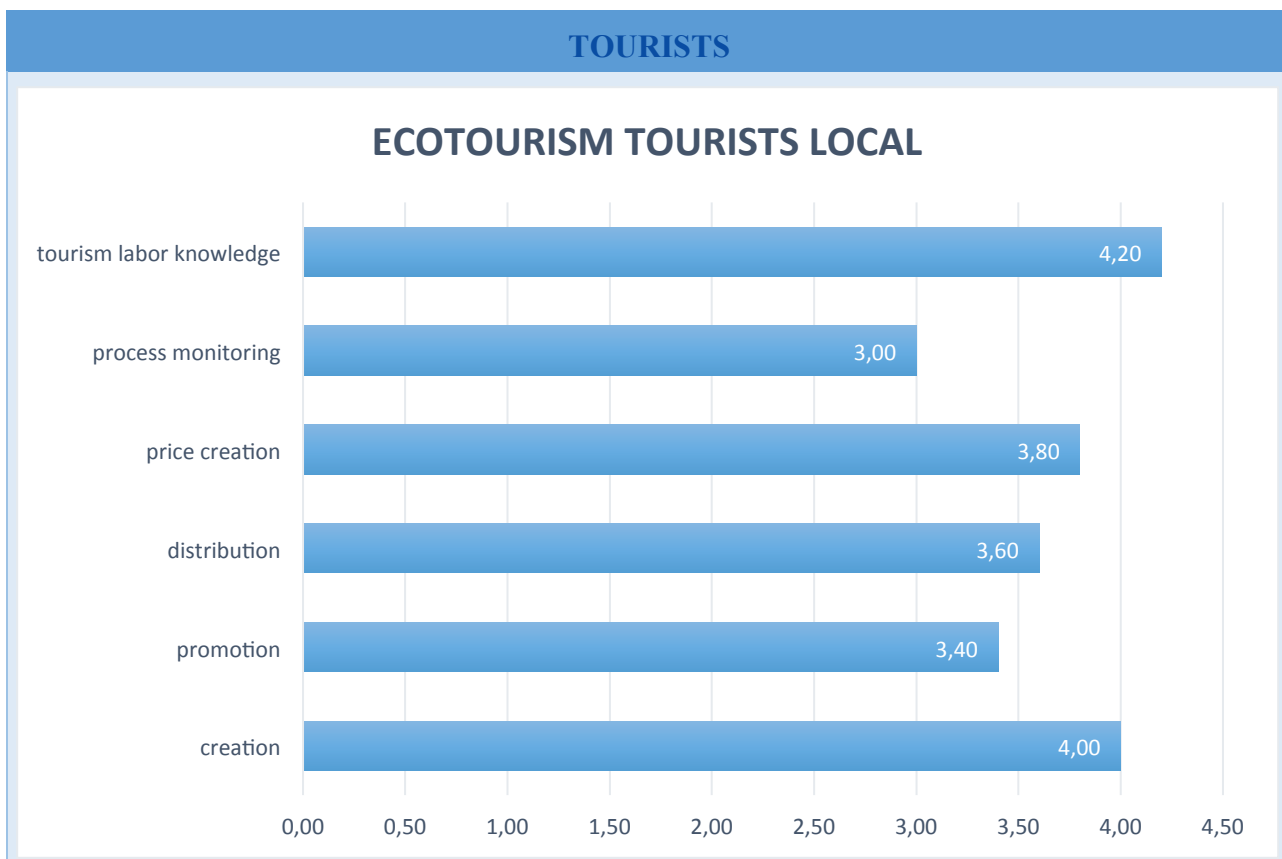
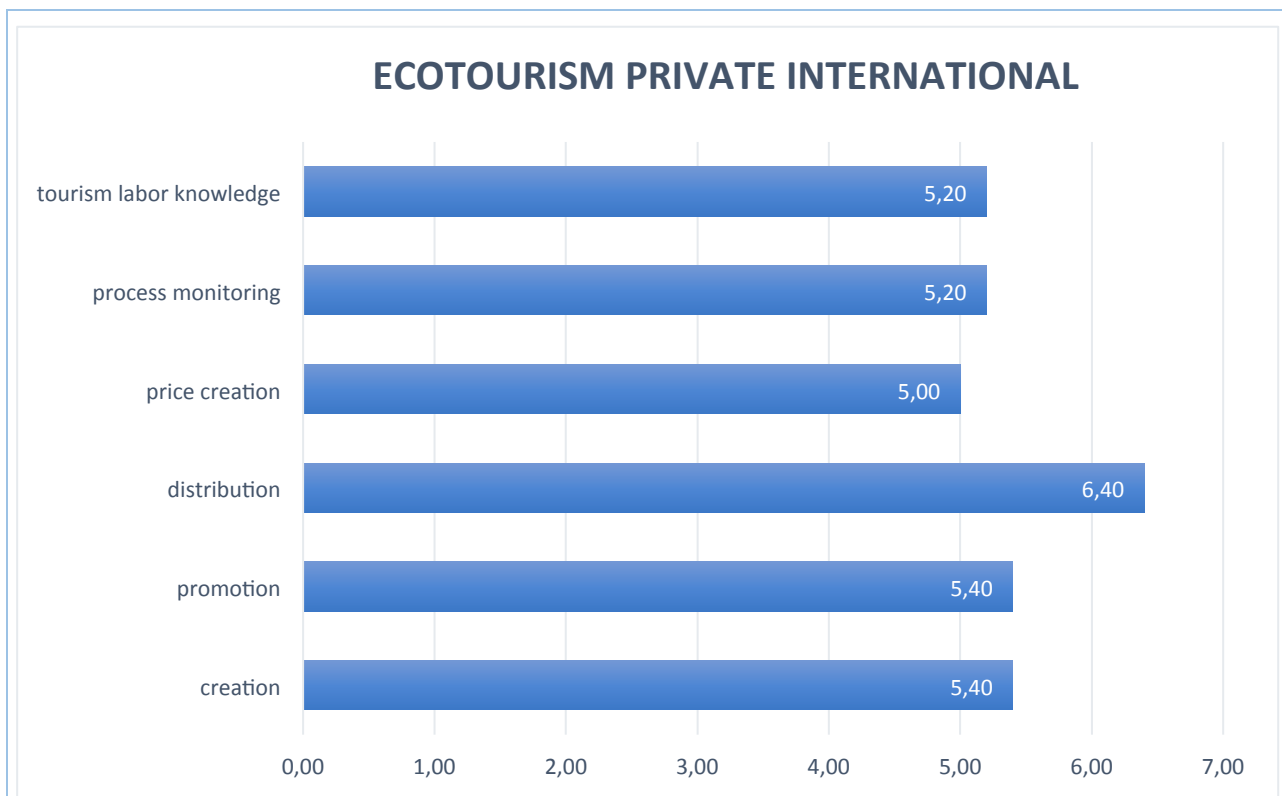


### ECOTOURISM PRIVATE REGIONAL

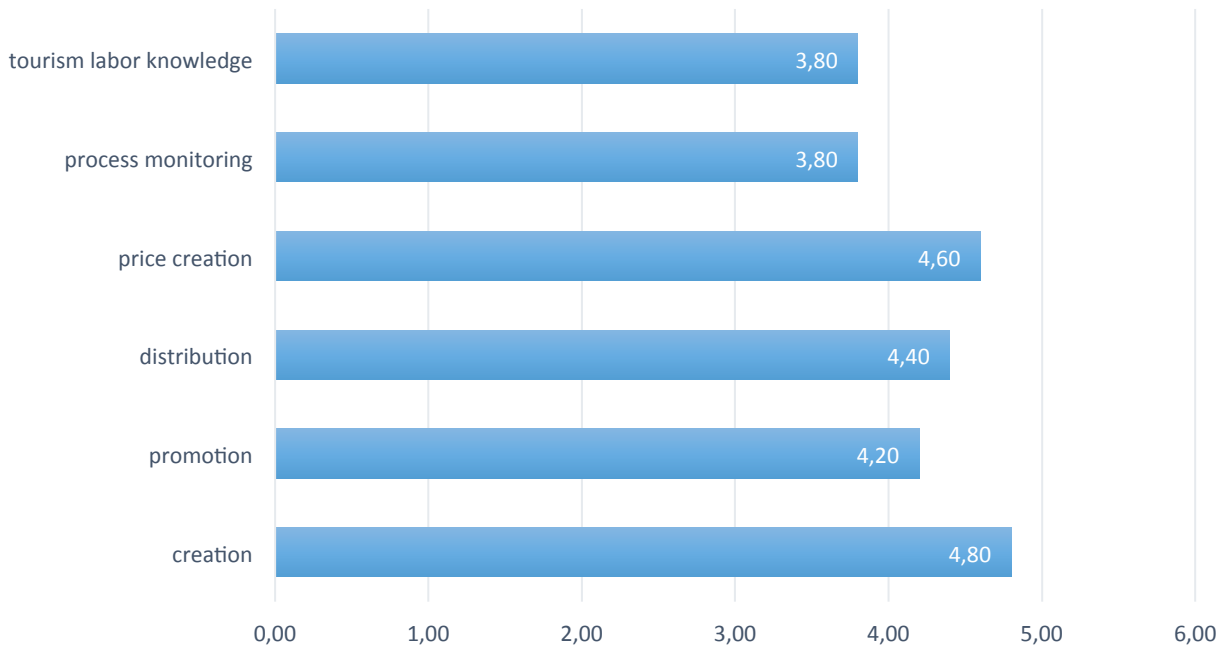


### ECOTOURISM PRIVATE NATIONAL

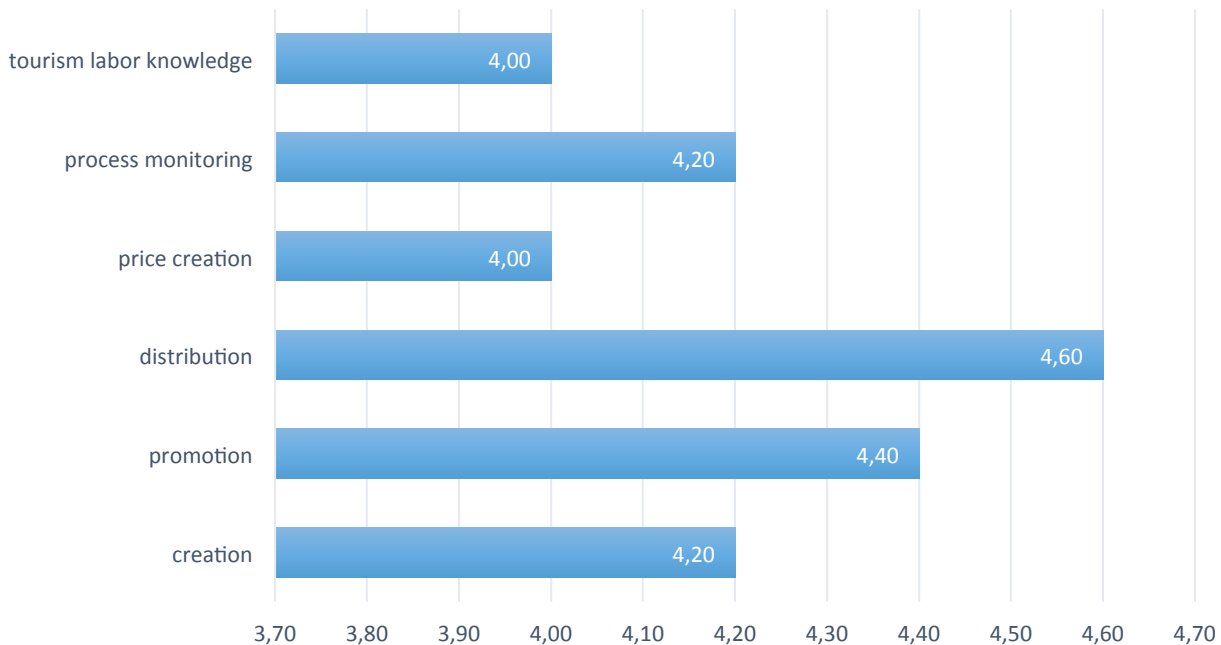


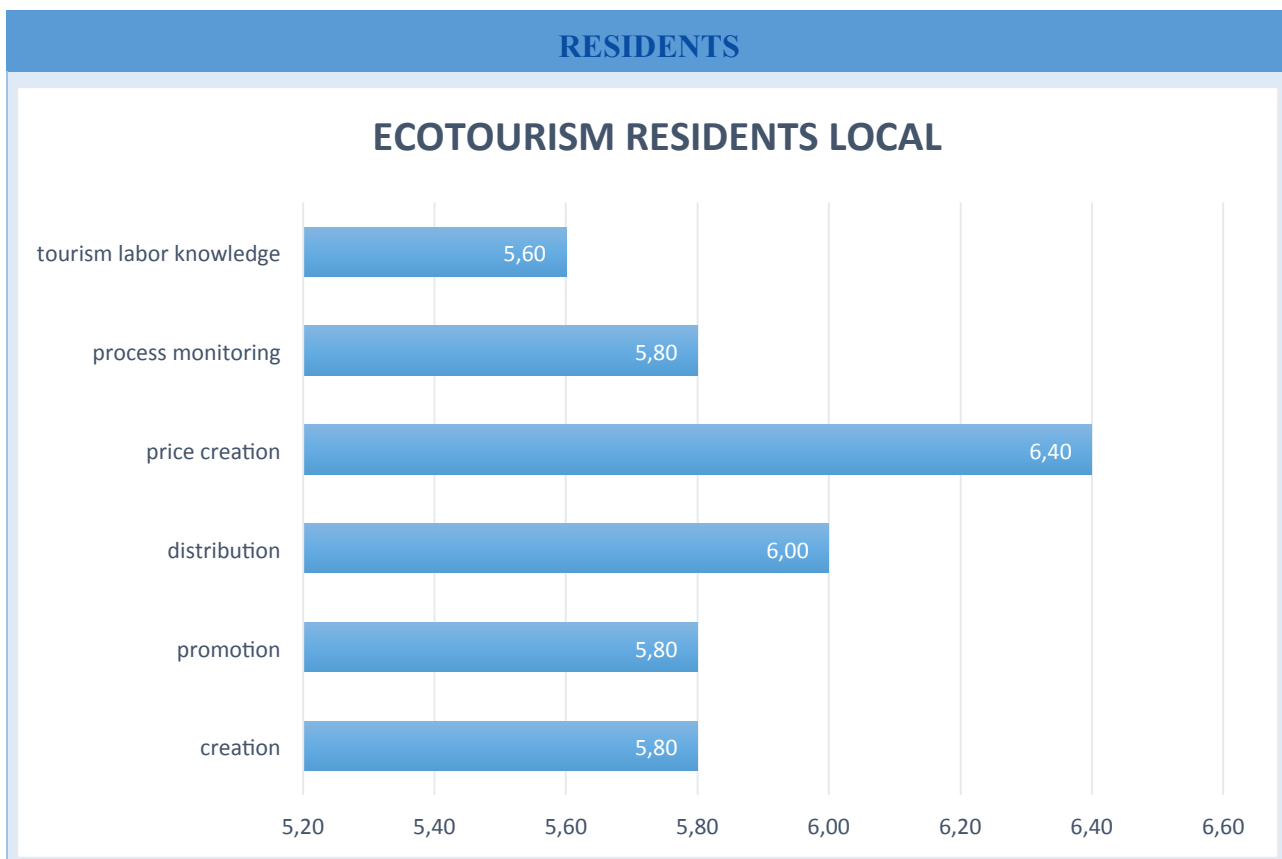


### ECOTOURISM TOURISTS REGIONAL

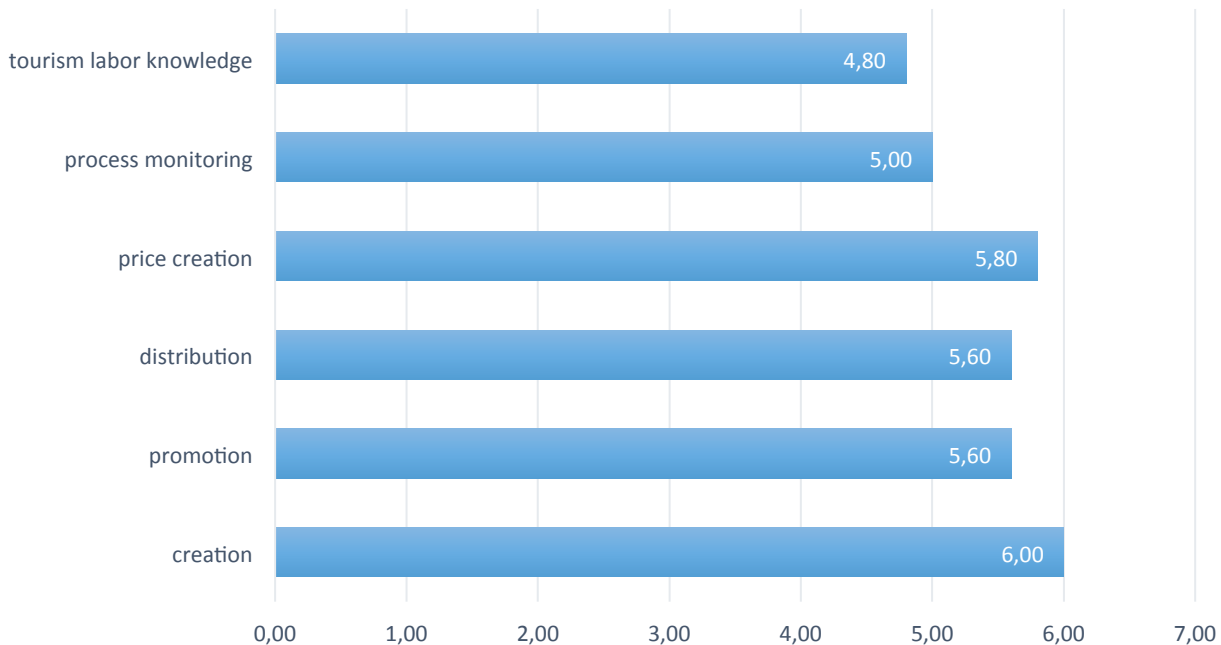


### ECOTOURISM TOURISTS NATIONAL

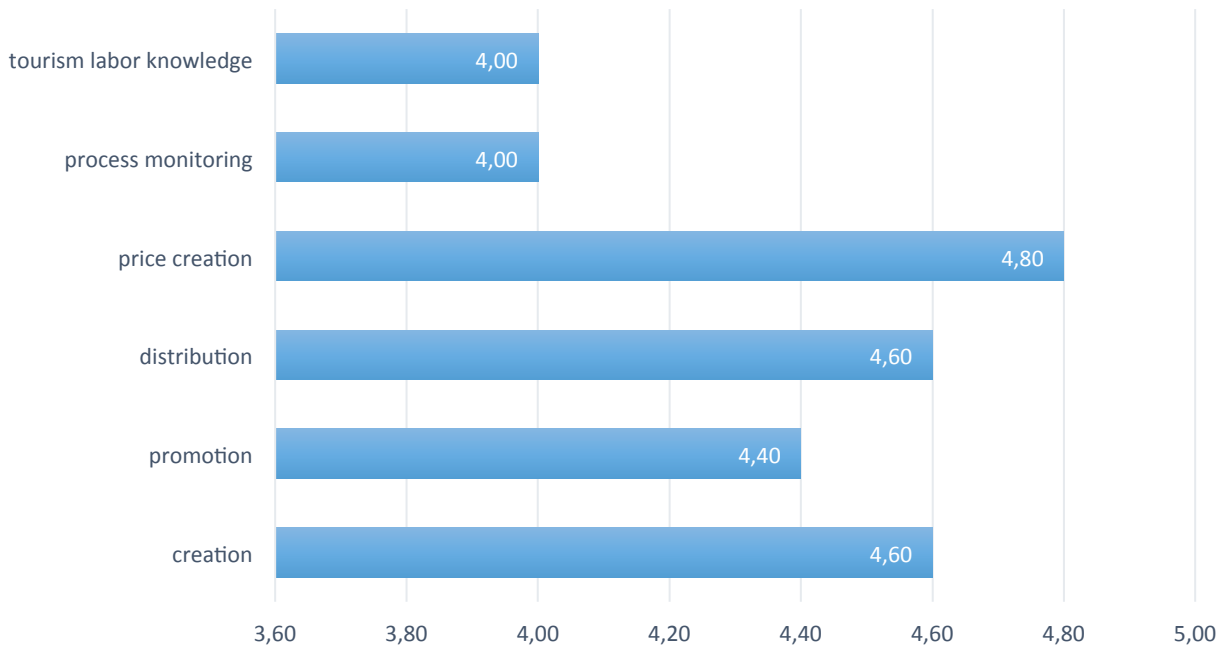


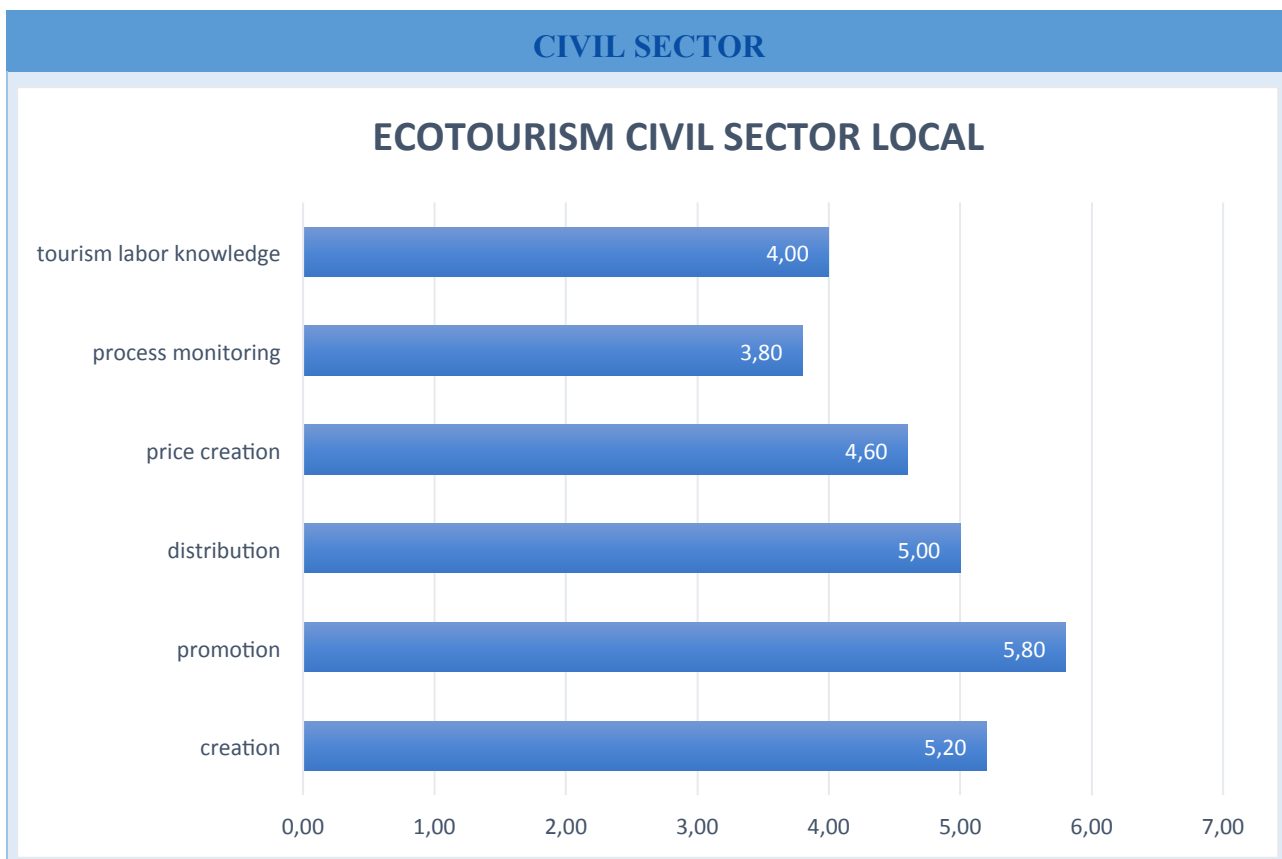
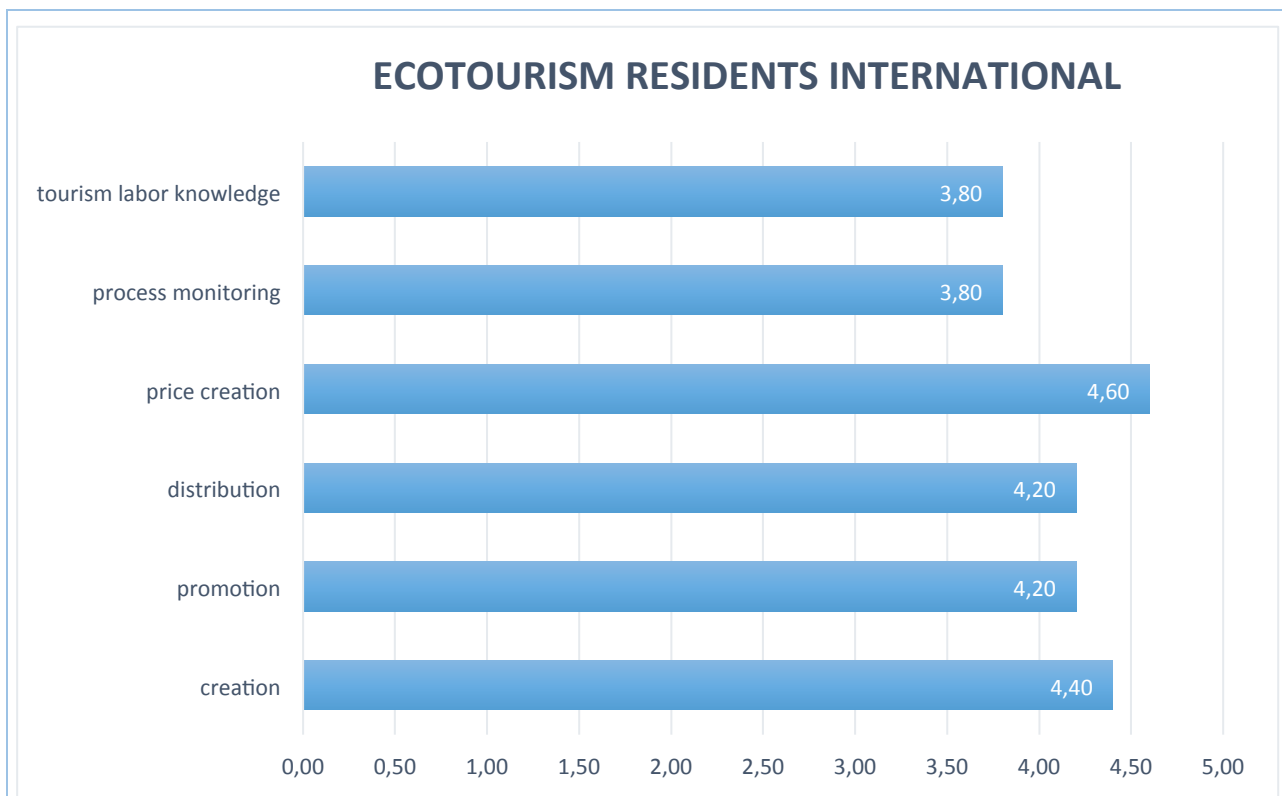


### ECOTOURISM RESIDENTS REGIONAL

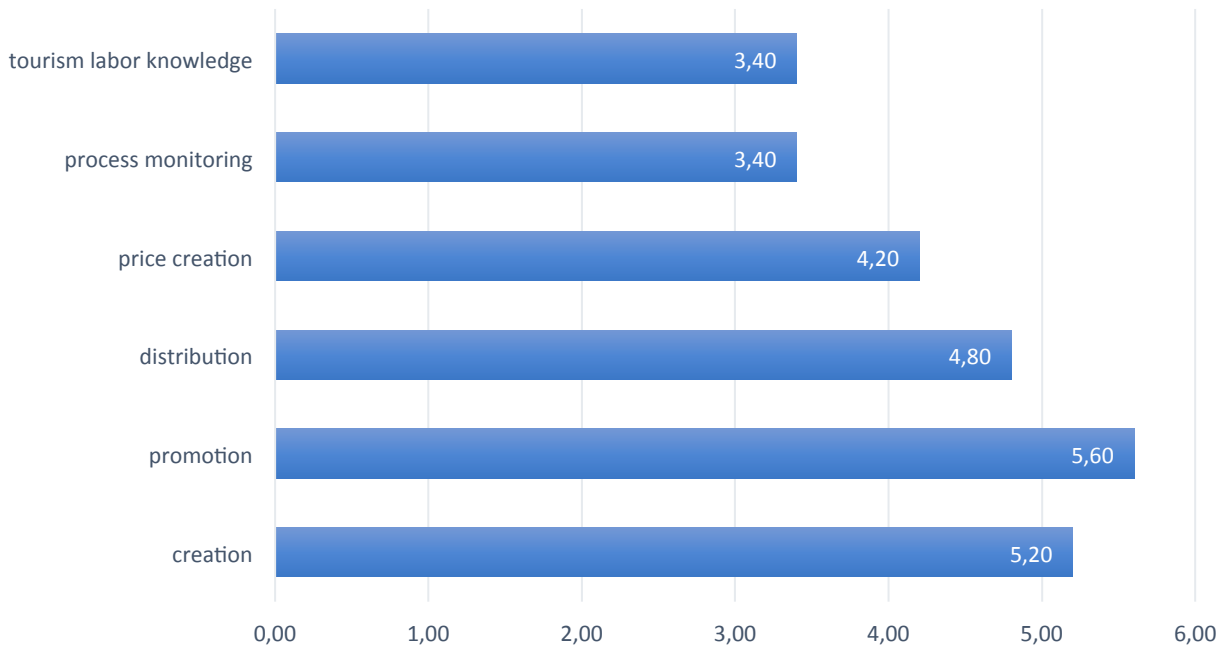


### ECOTOURISM RESIDENTS NATIONAL

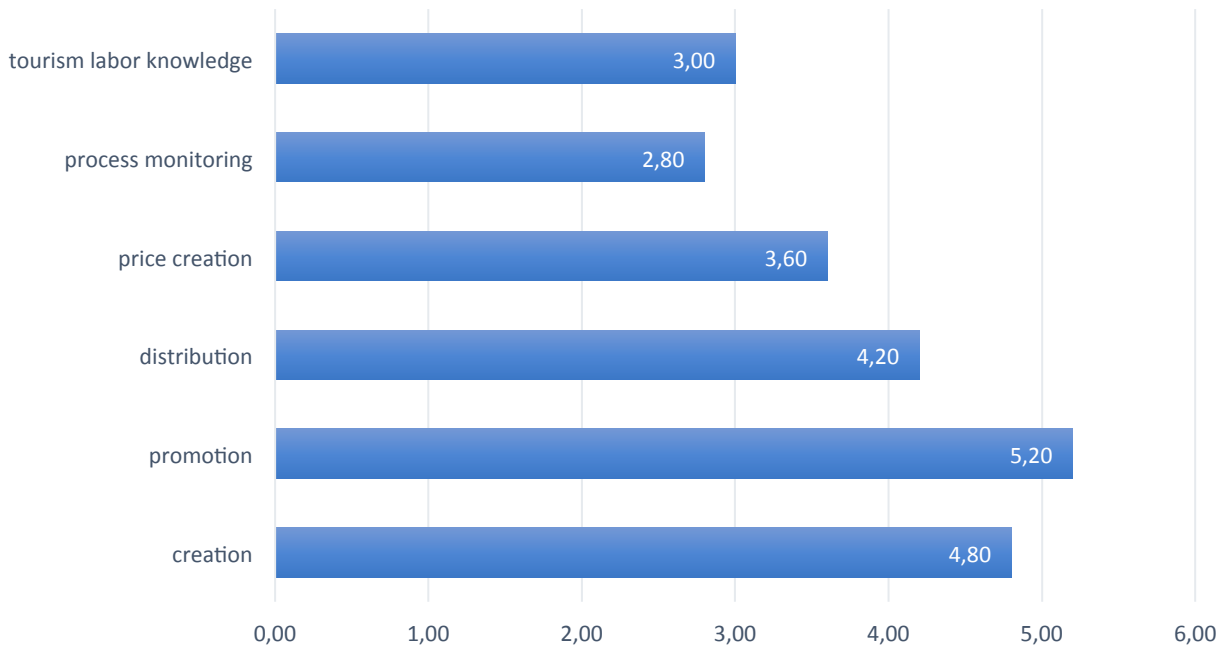


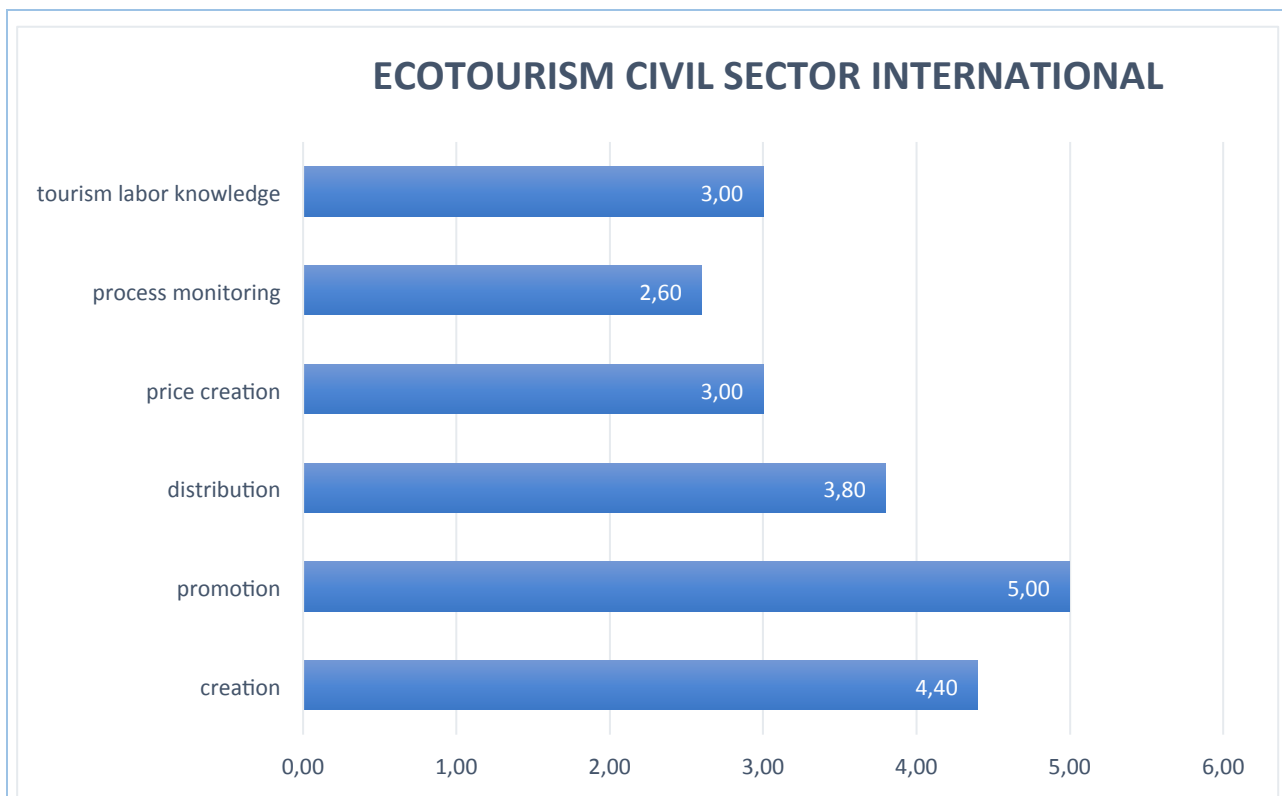


### ECOTOURISM CIVIL SECTOR REGIONAL



### ECOTOURISM CIVIL SECTOR NATIONAL



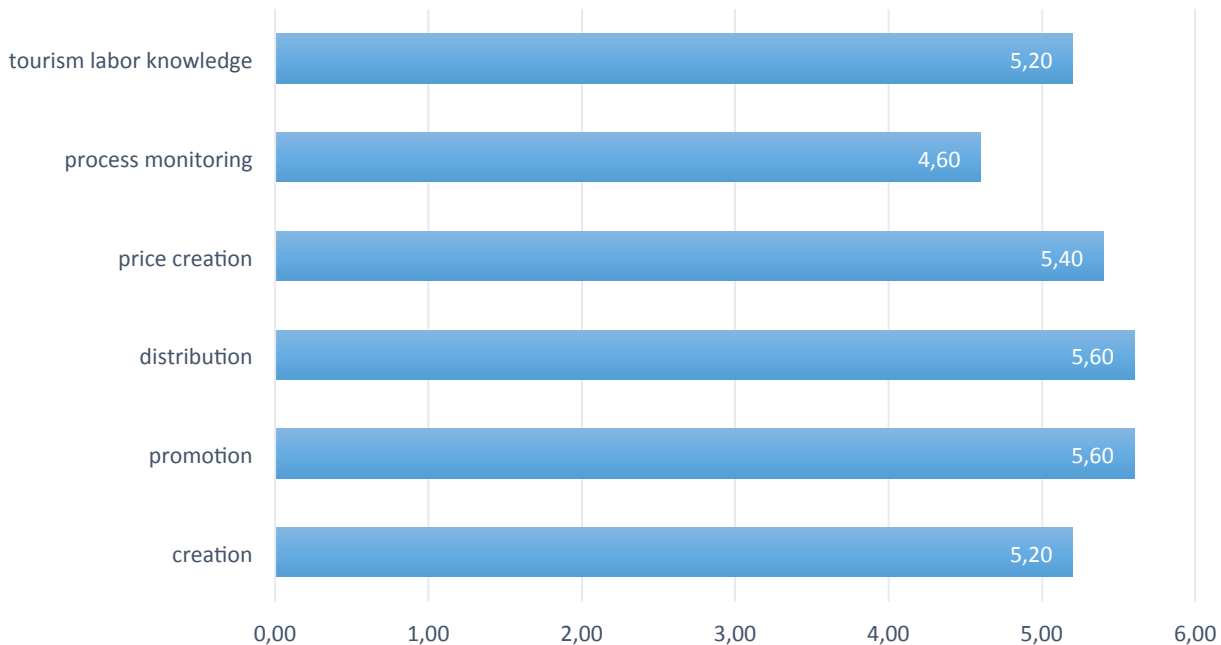


## ASSOCIATIONS/ORGANIZATIONS RELATED TO CULTURAL AND NATURAL HERITAGE OF THE AREA

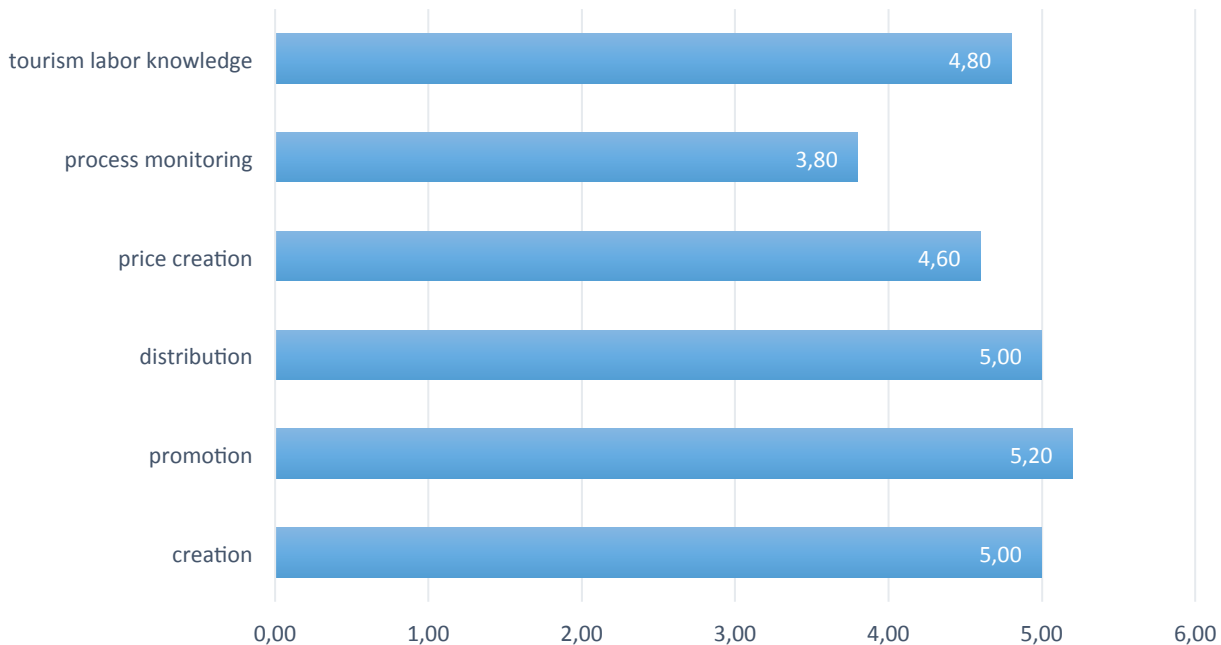


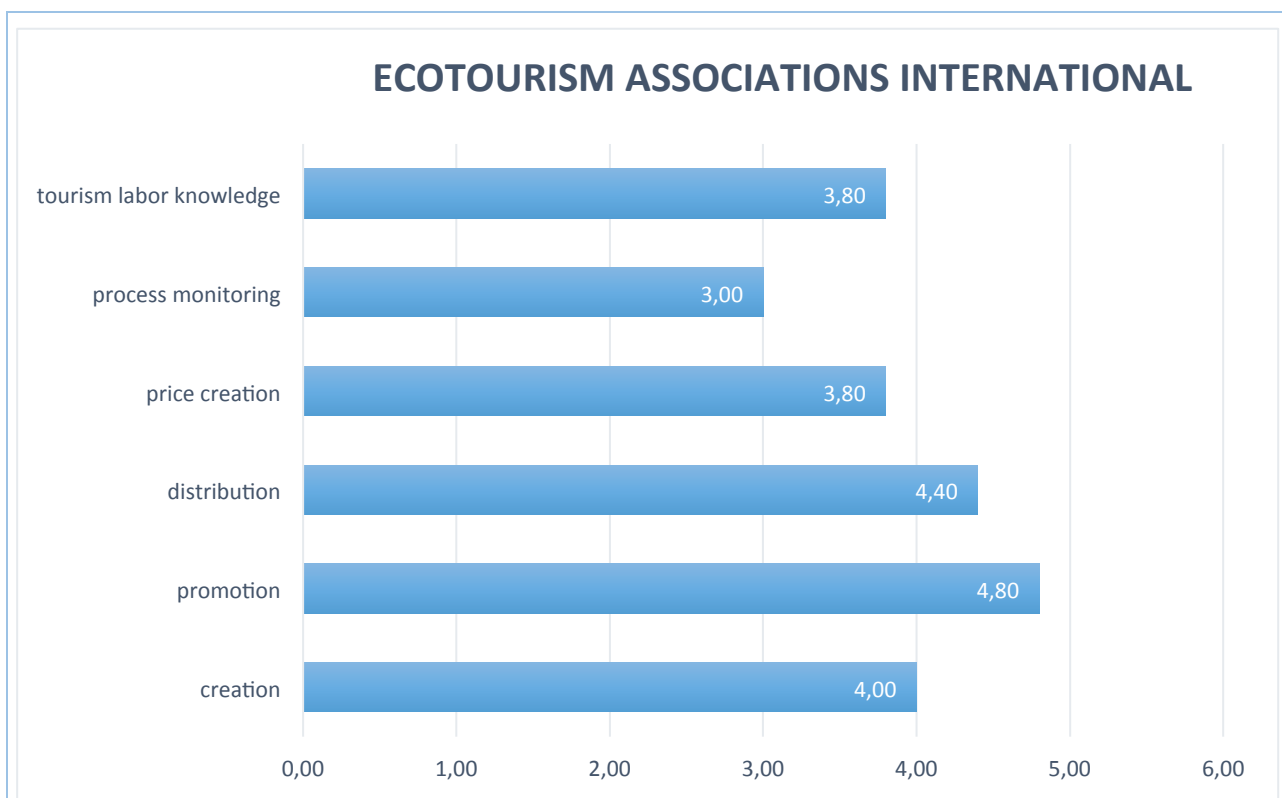


### ECOTOURISM ASSOCIATIONS REGIONAL

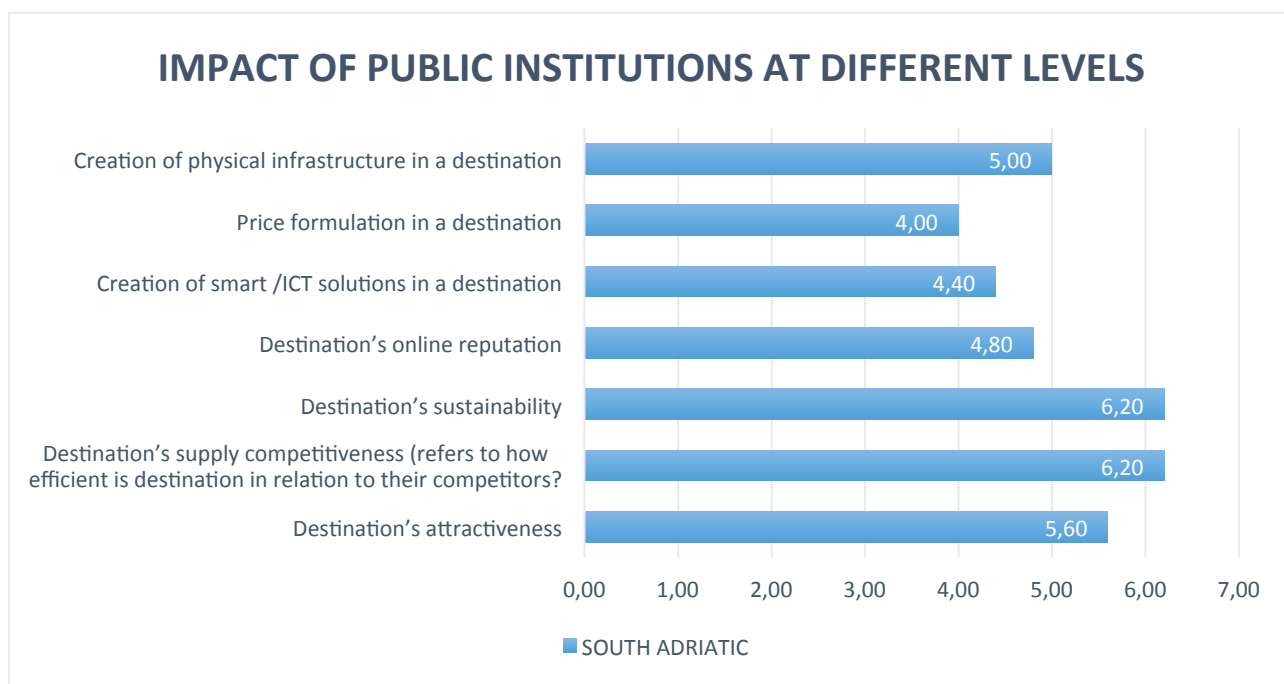


### ECOTOURISM ASSOCIATIONS NATIONAL

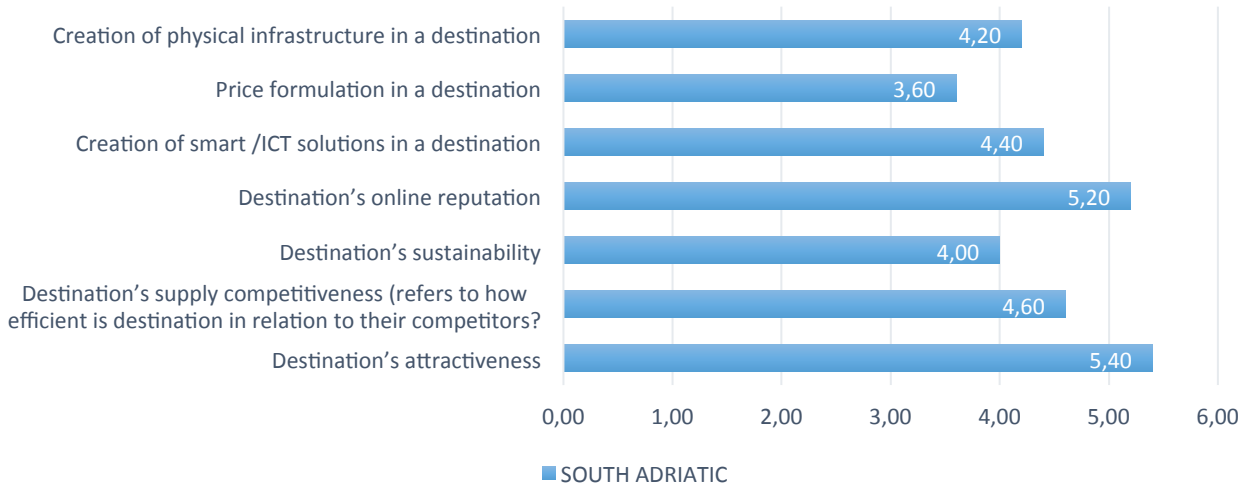




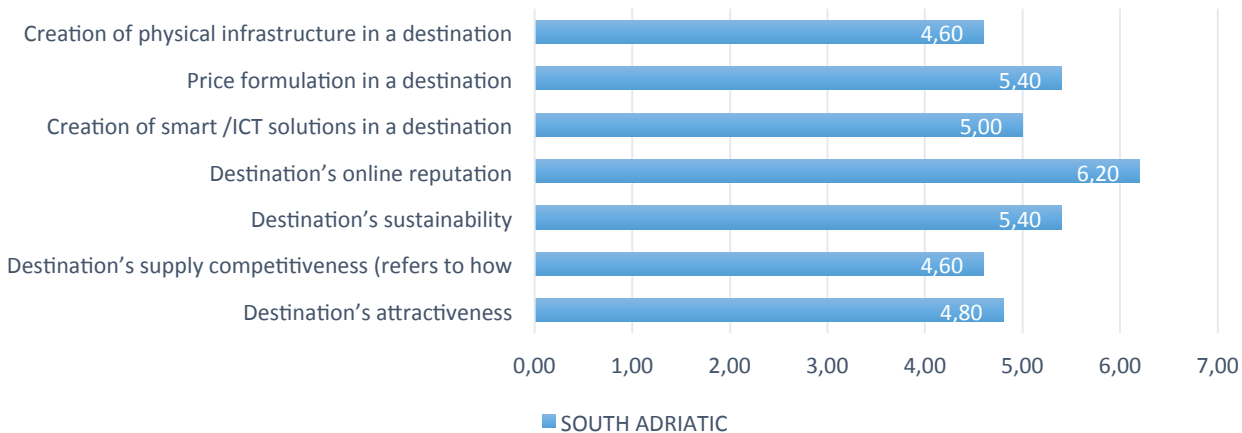
- *Impact of stakeholders*

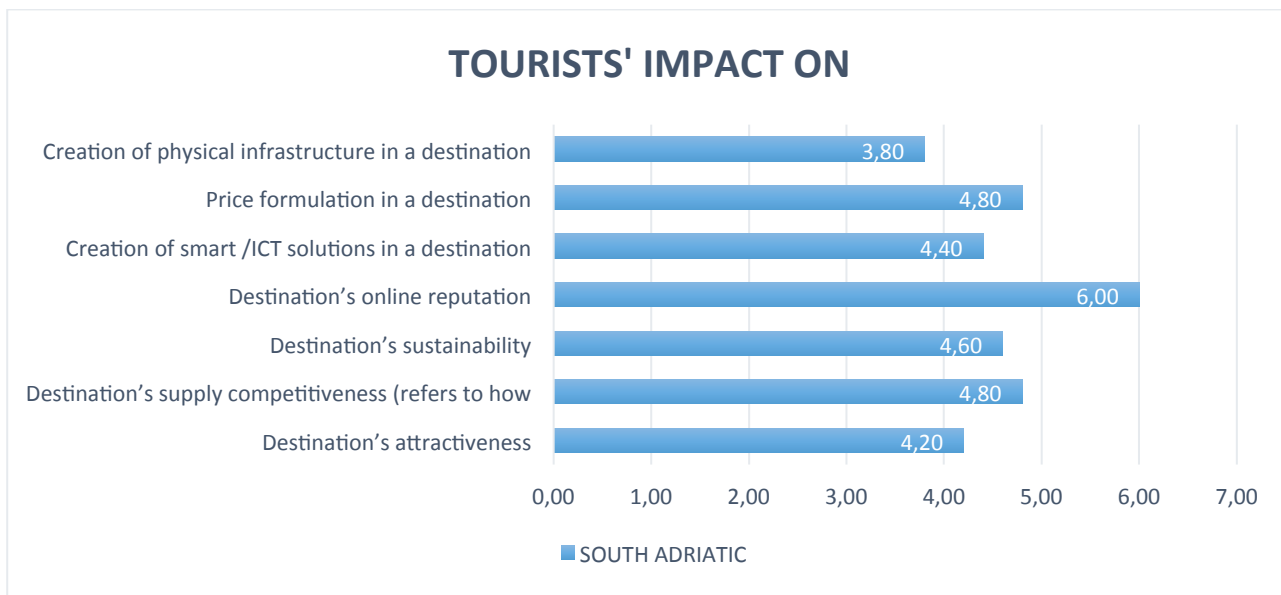


### DMO'S IMPACT ON



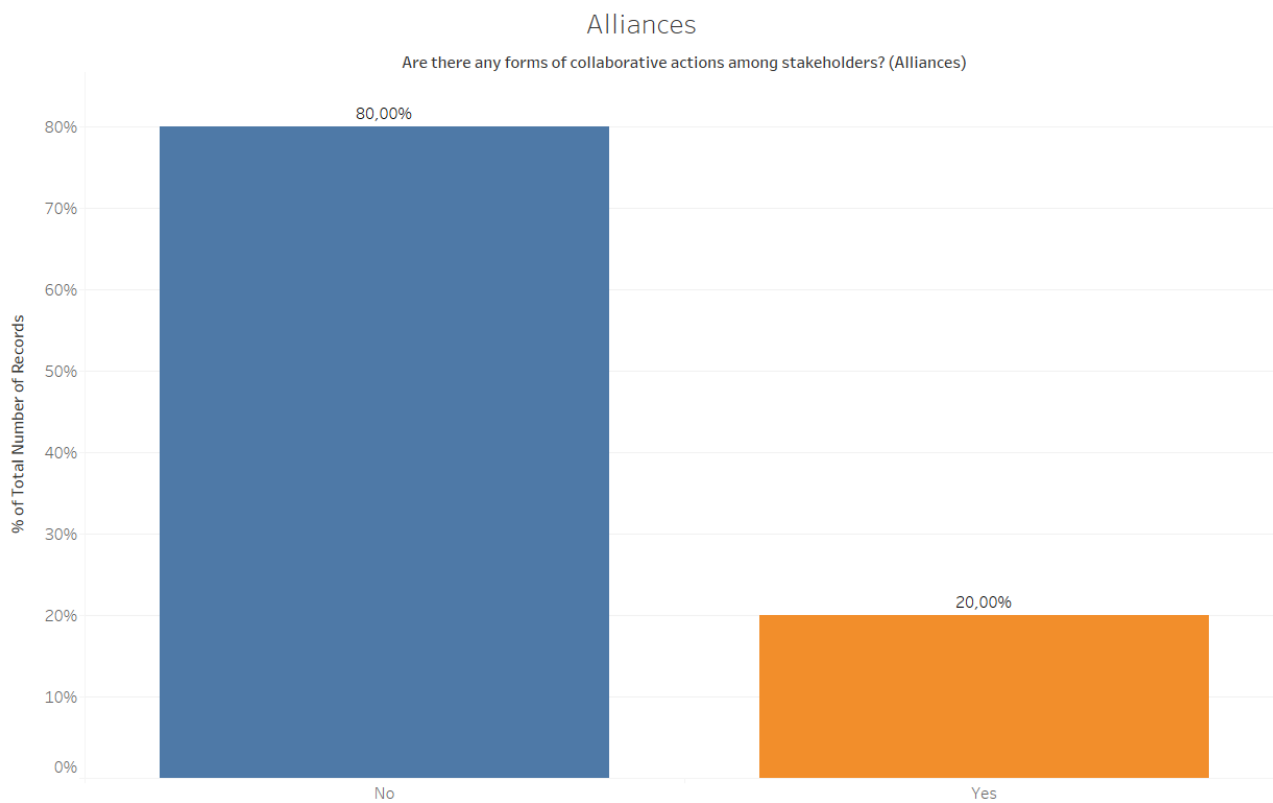
### PRIVATE STAKEHOLDERS' IMPACTS ON



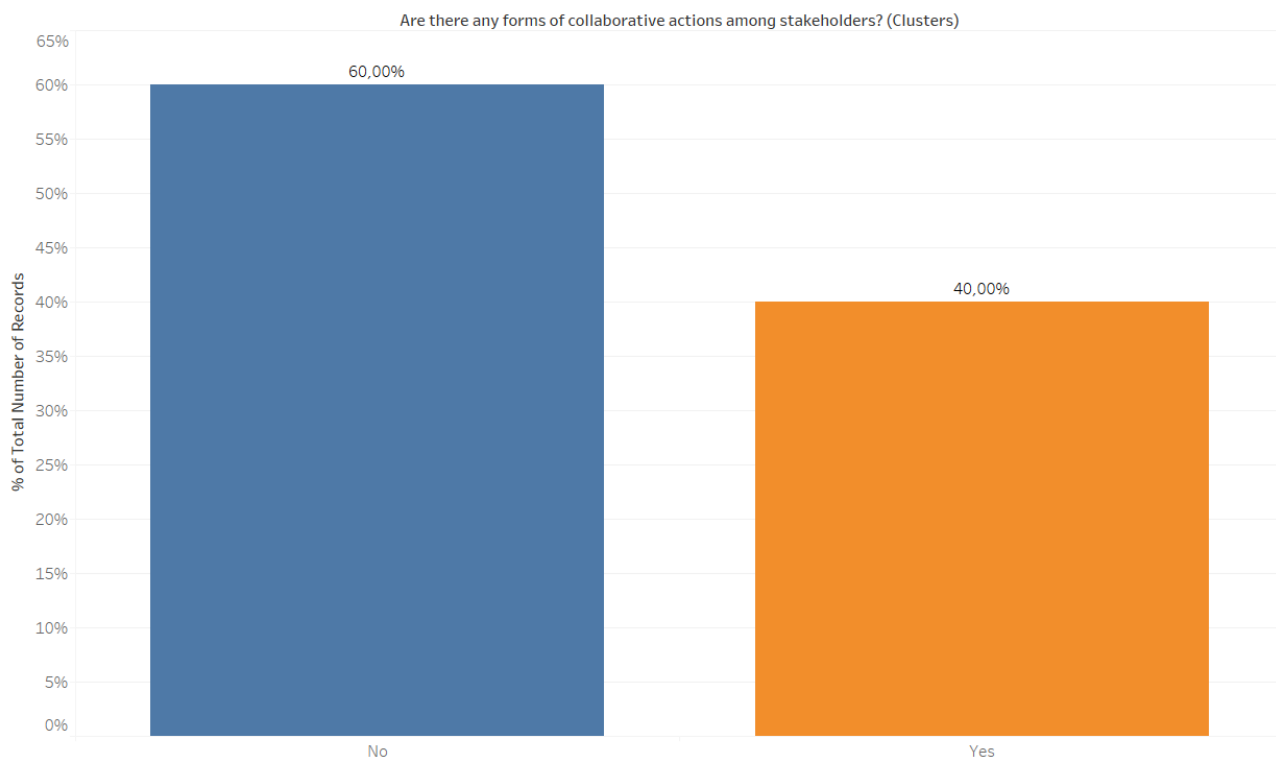


- *Collaborative actions*

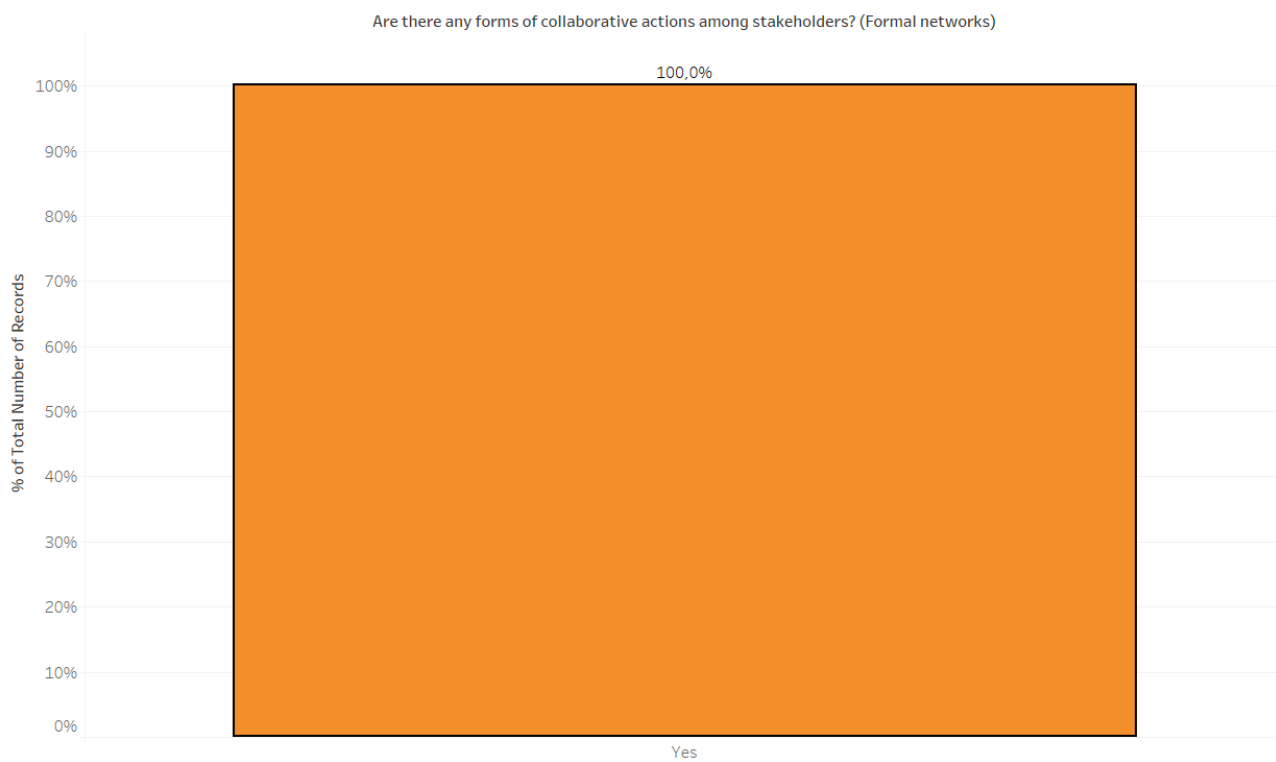
Are there any forms of collaborative actions among stakeholders?



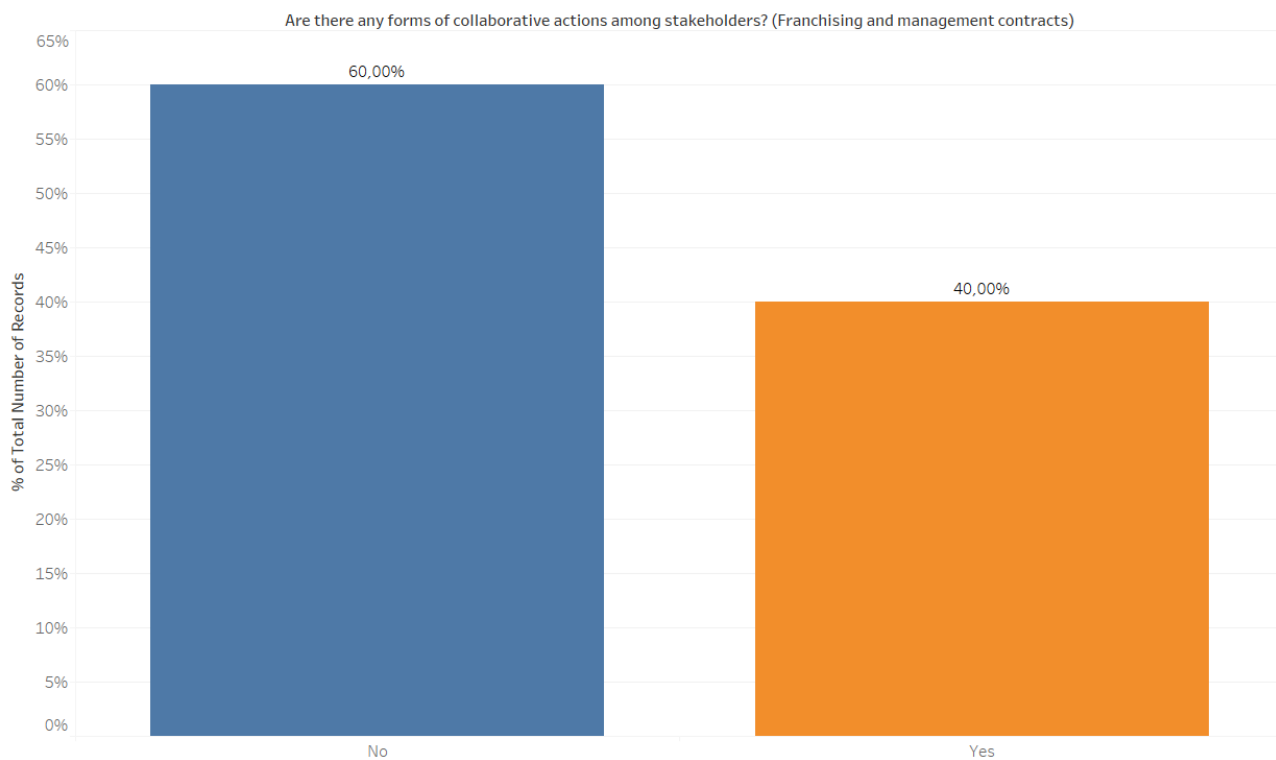
### Clusters



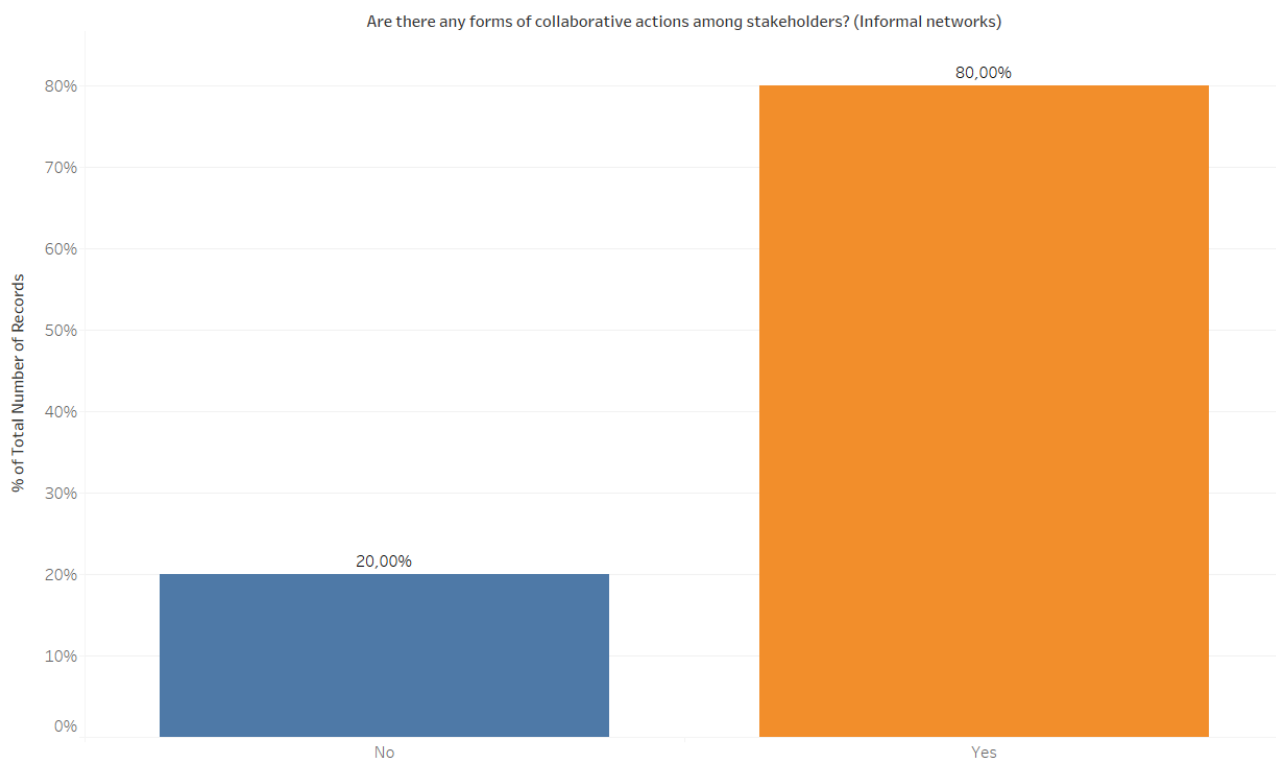
### Formal Networks



### Franchising and management contracts

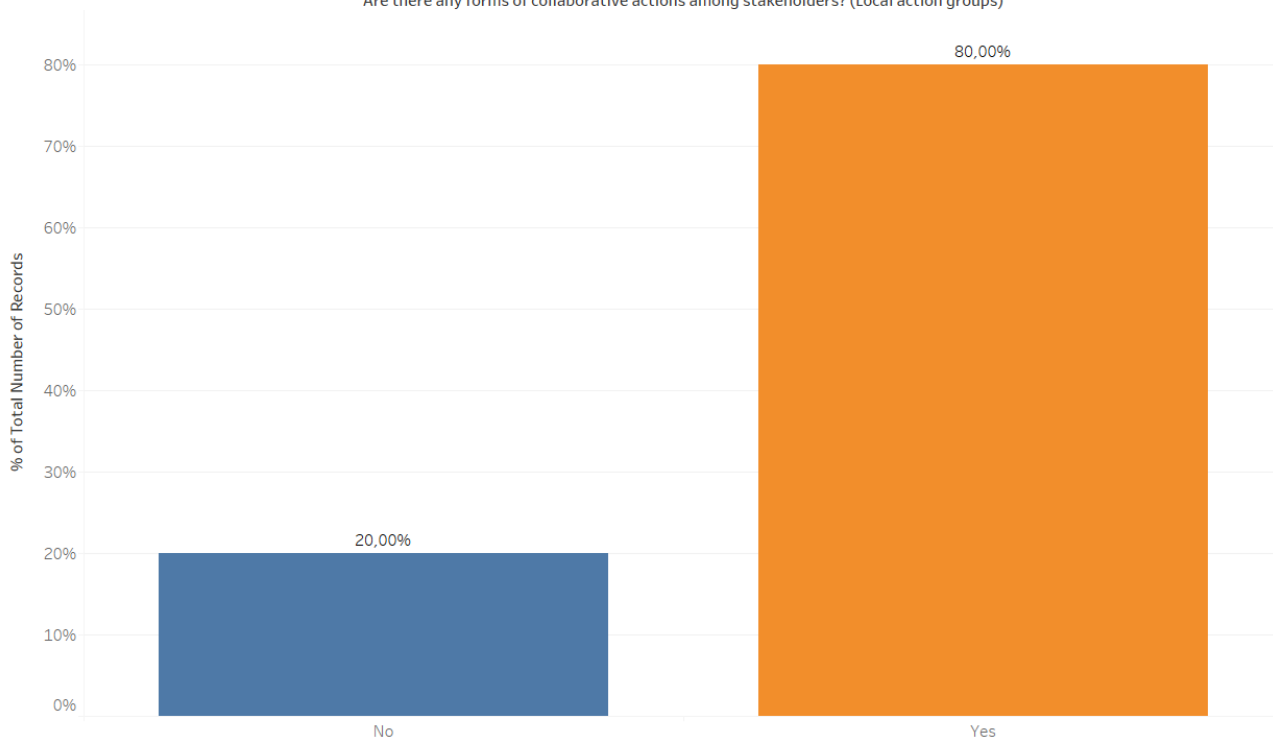


### Informal Networks



### Local action groups

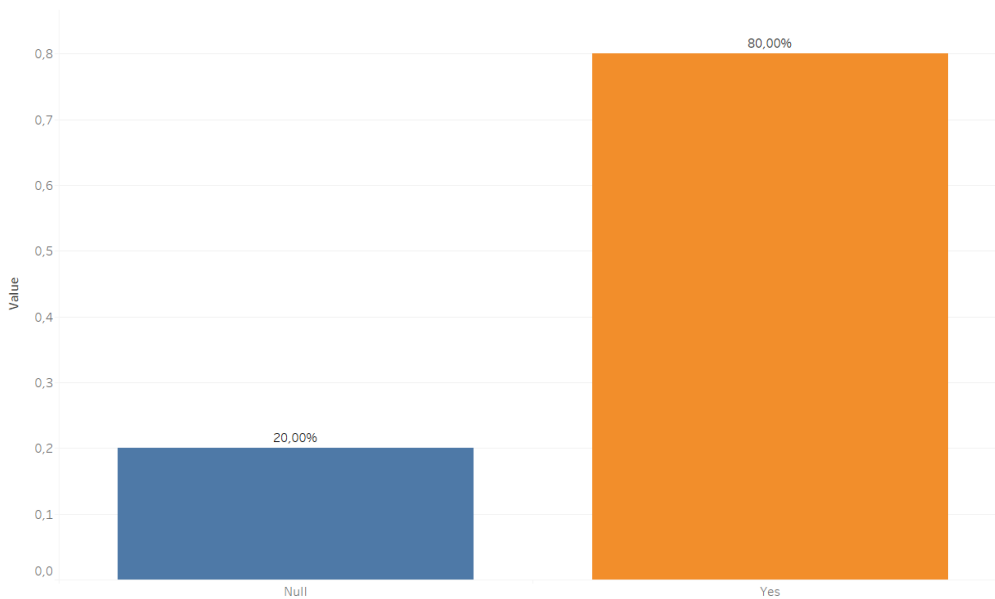
Are there any forms of collaborative actions among stakeholders? (Local action groups)



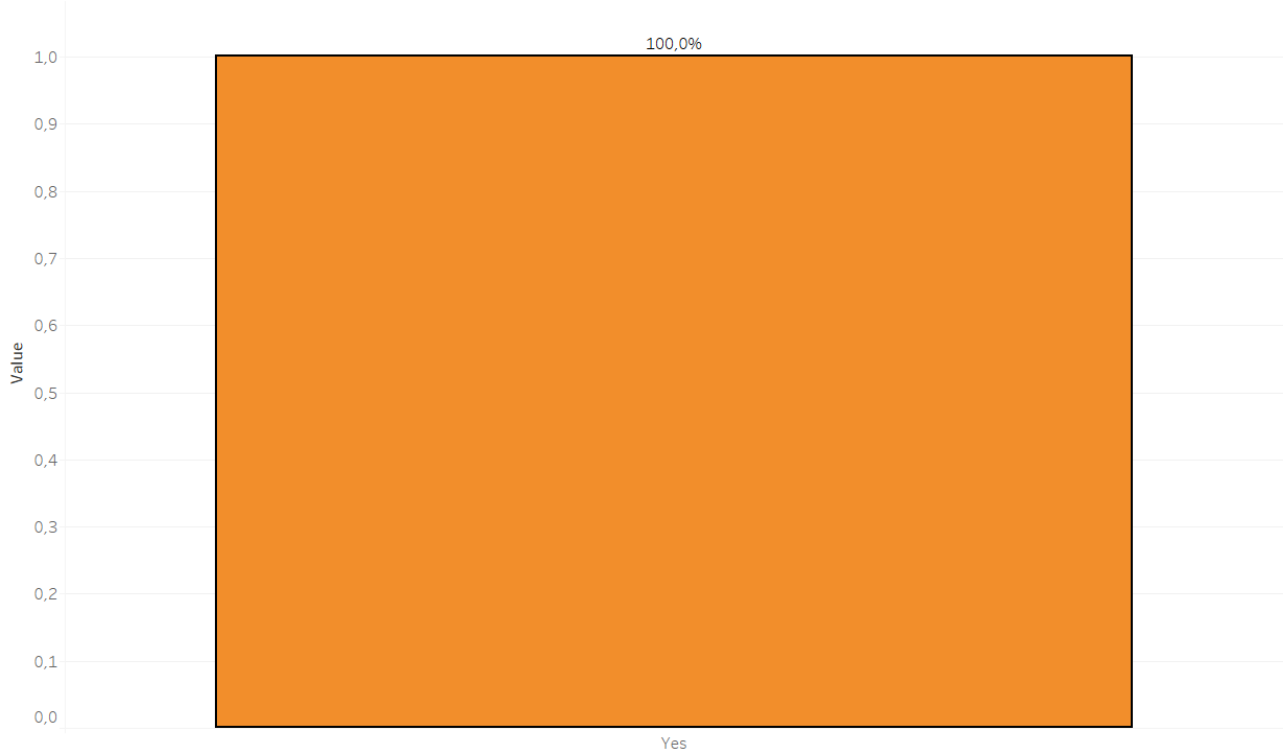
- **Common partners**

Who are the most common partners in the formal types of collaborative activities in your destination?

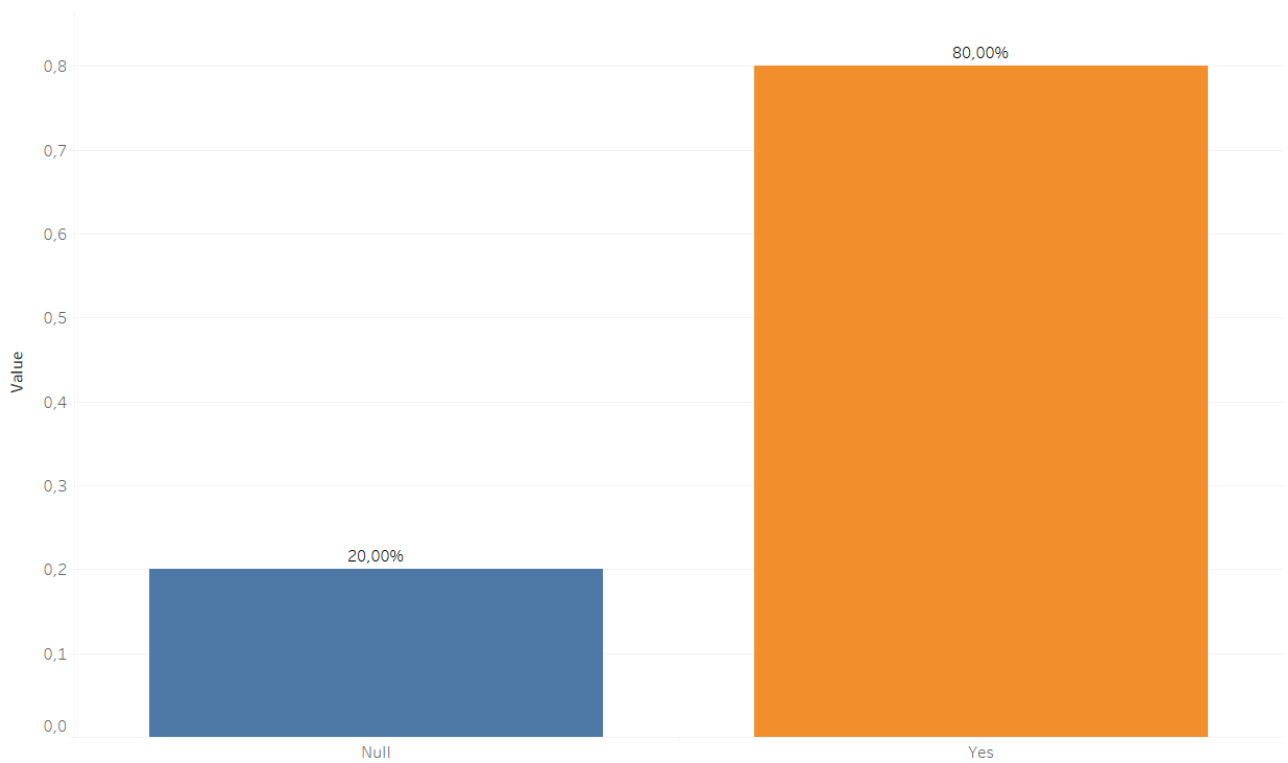
### Civil sector entities



### Local Administration

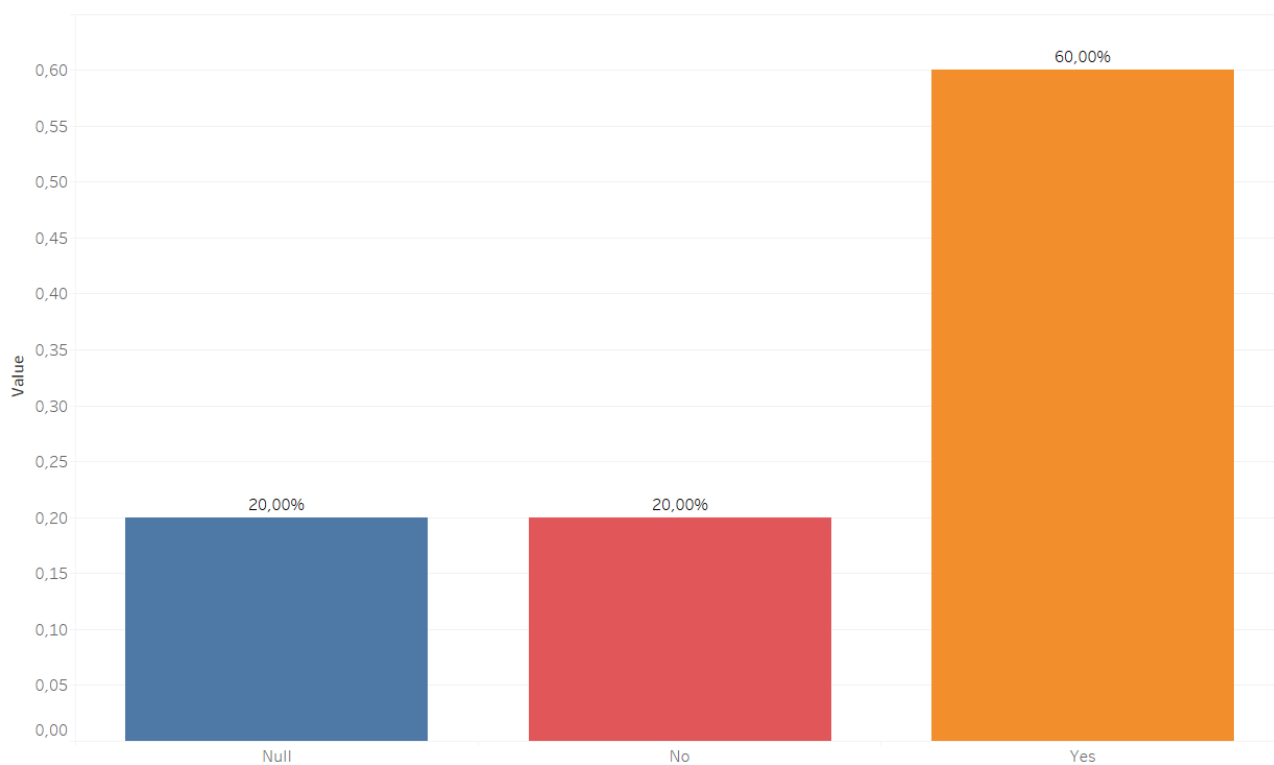


### Private entities

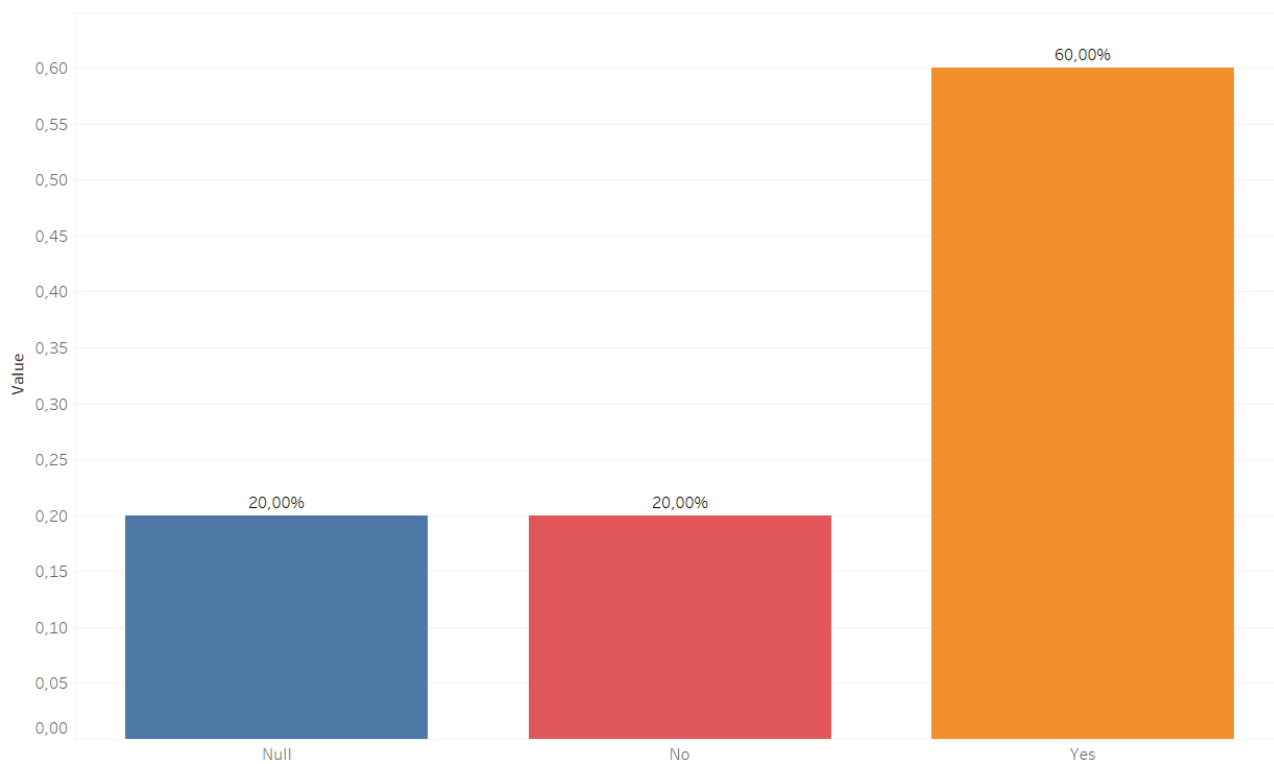




### Public Entities

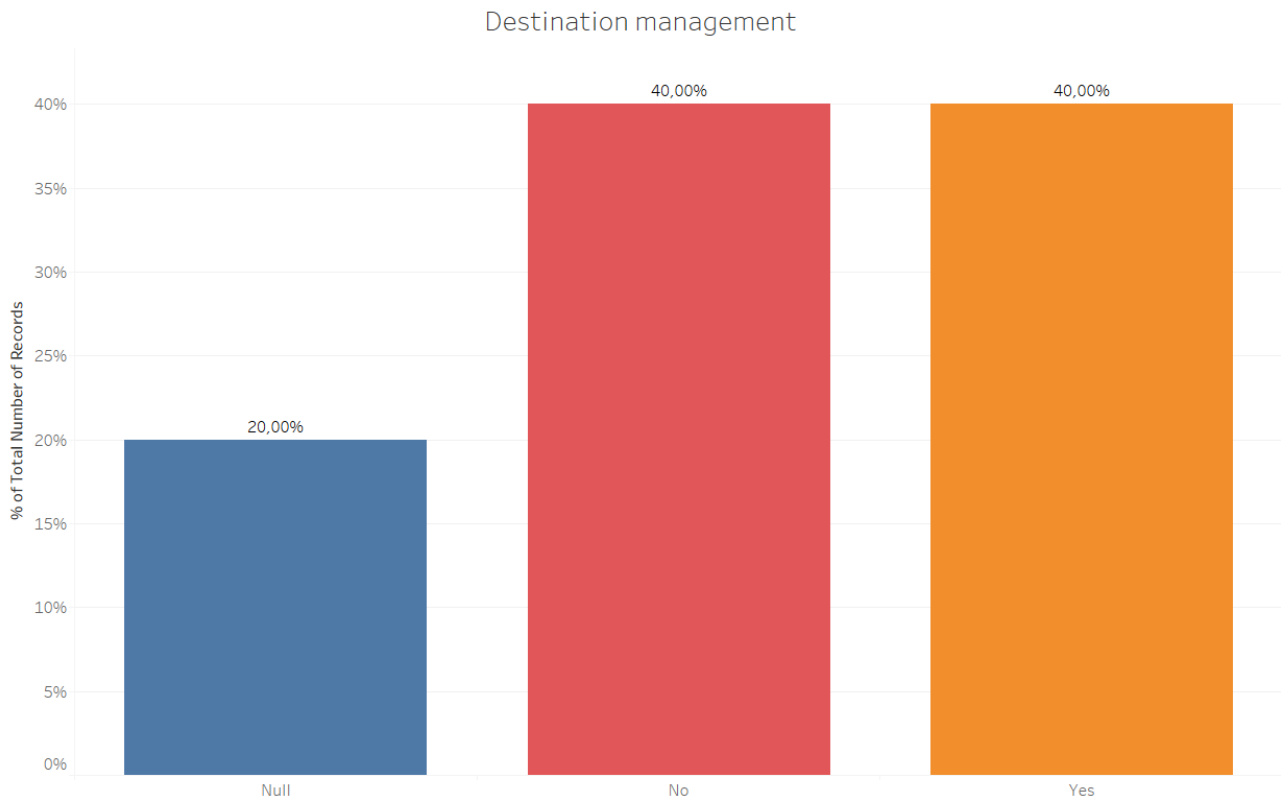


### Public Sector

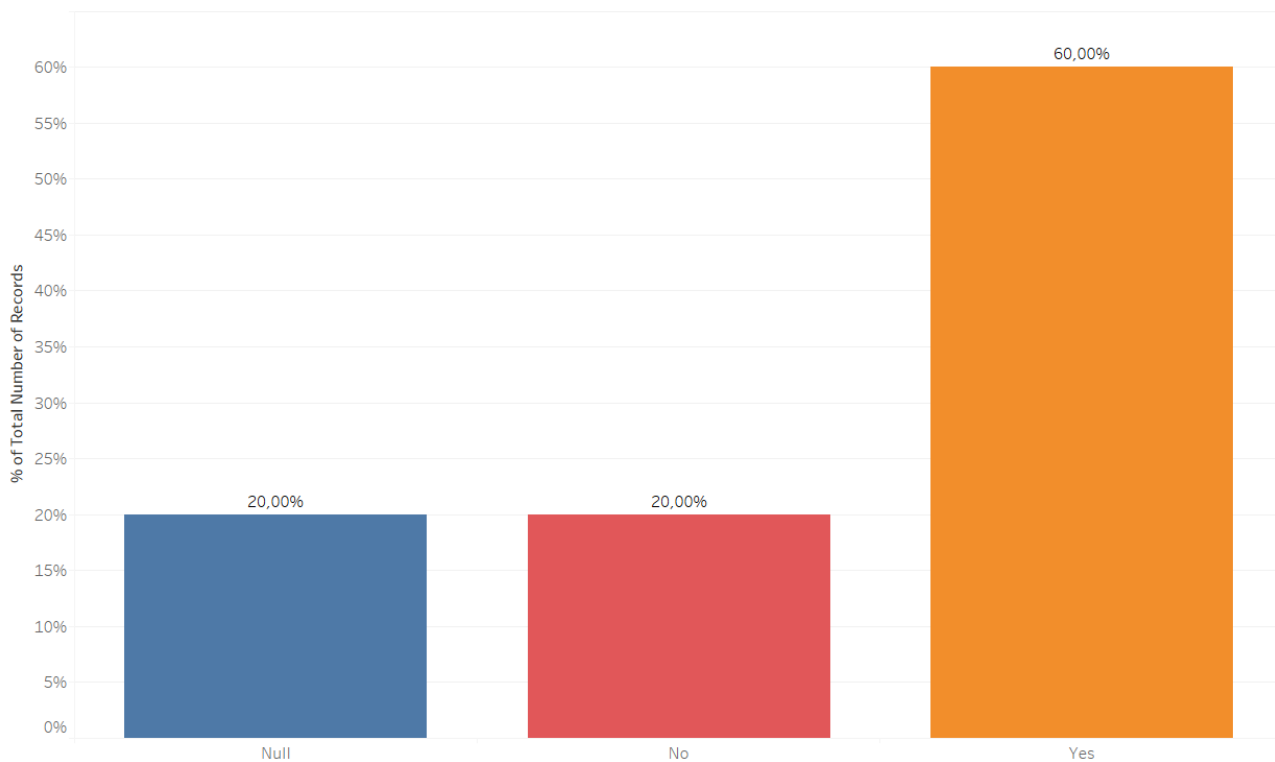


- *Types of activities*

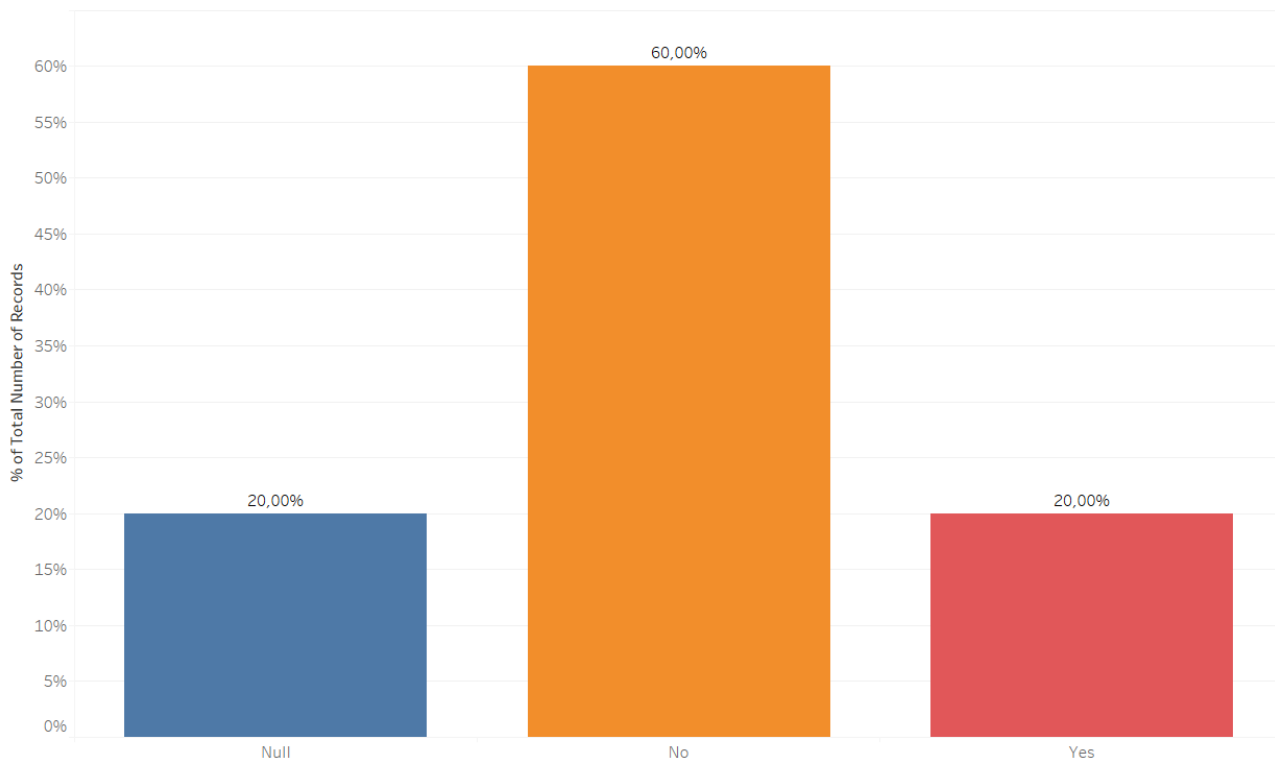
What types of activities are most commonly shared between different stakeholders?



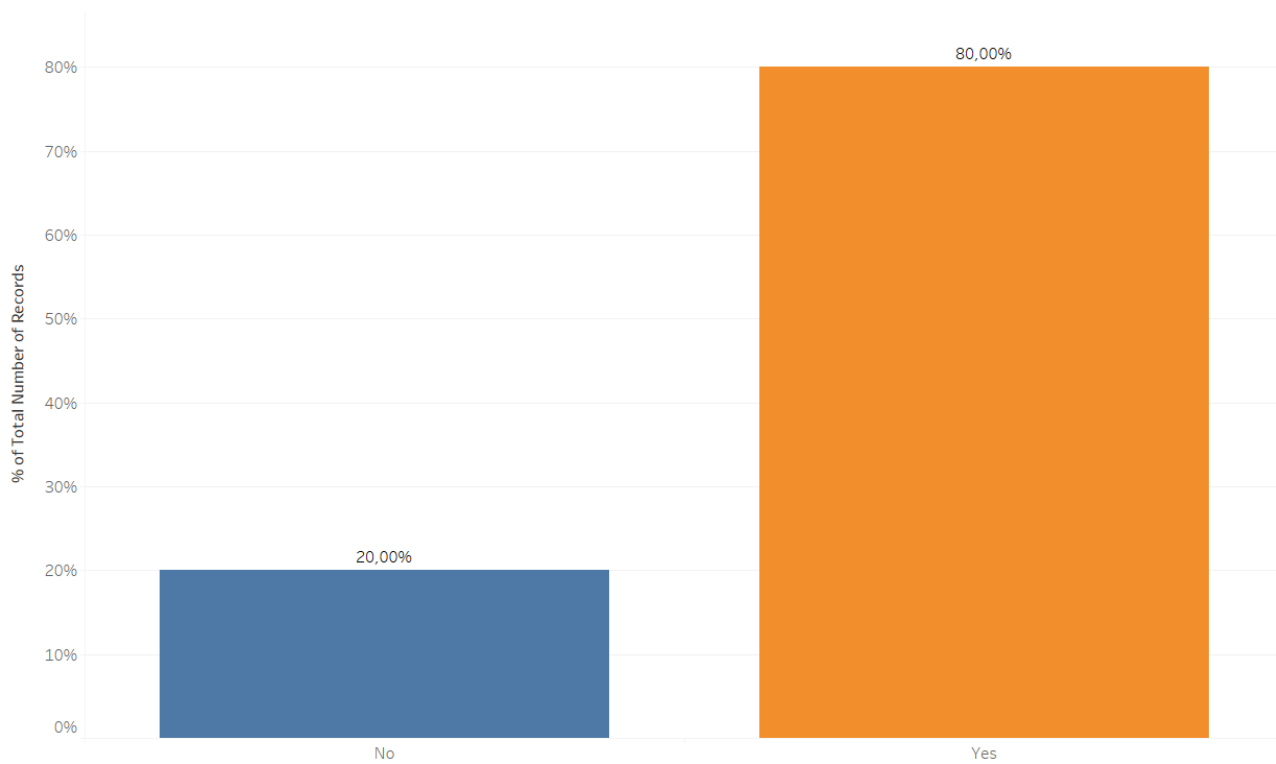
Creation of the products



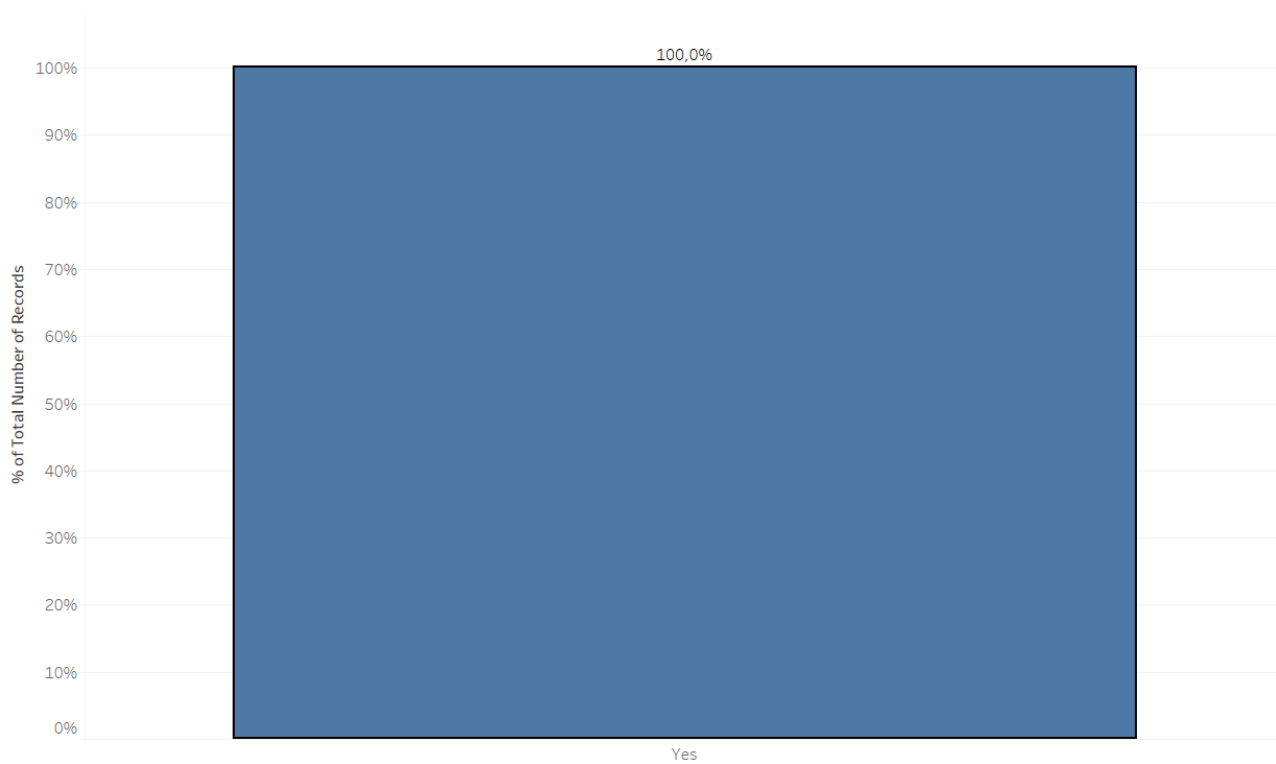
Monitoring the process of a products



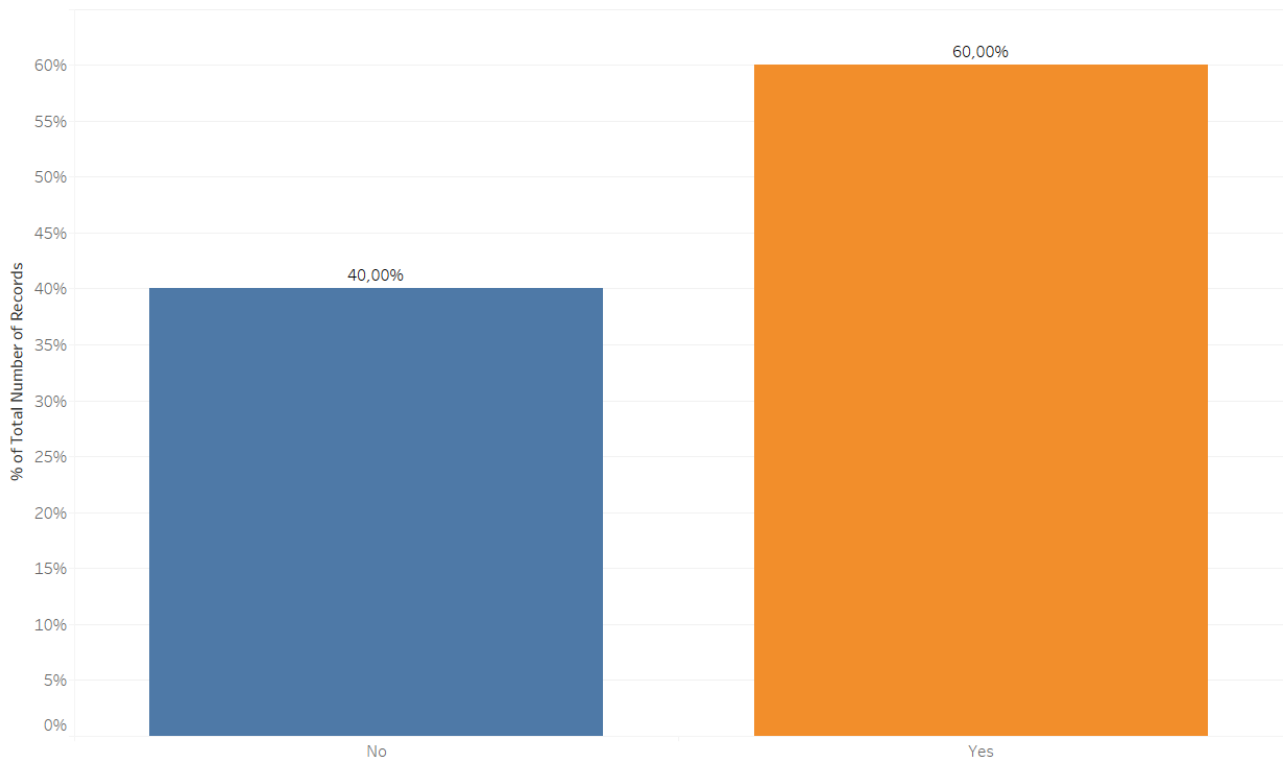
### Distribution of products



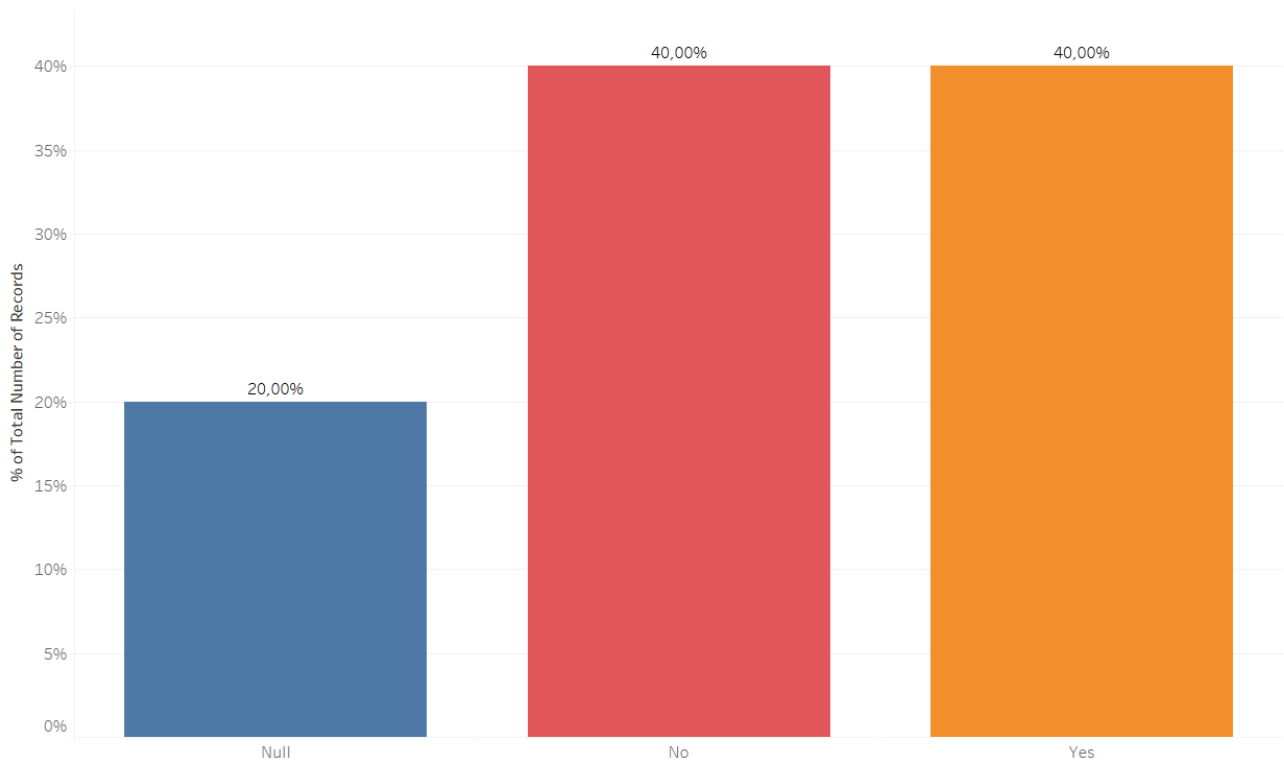
### Promotion of products



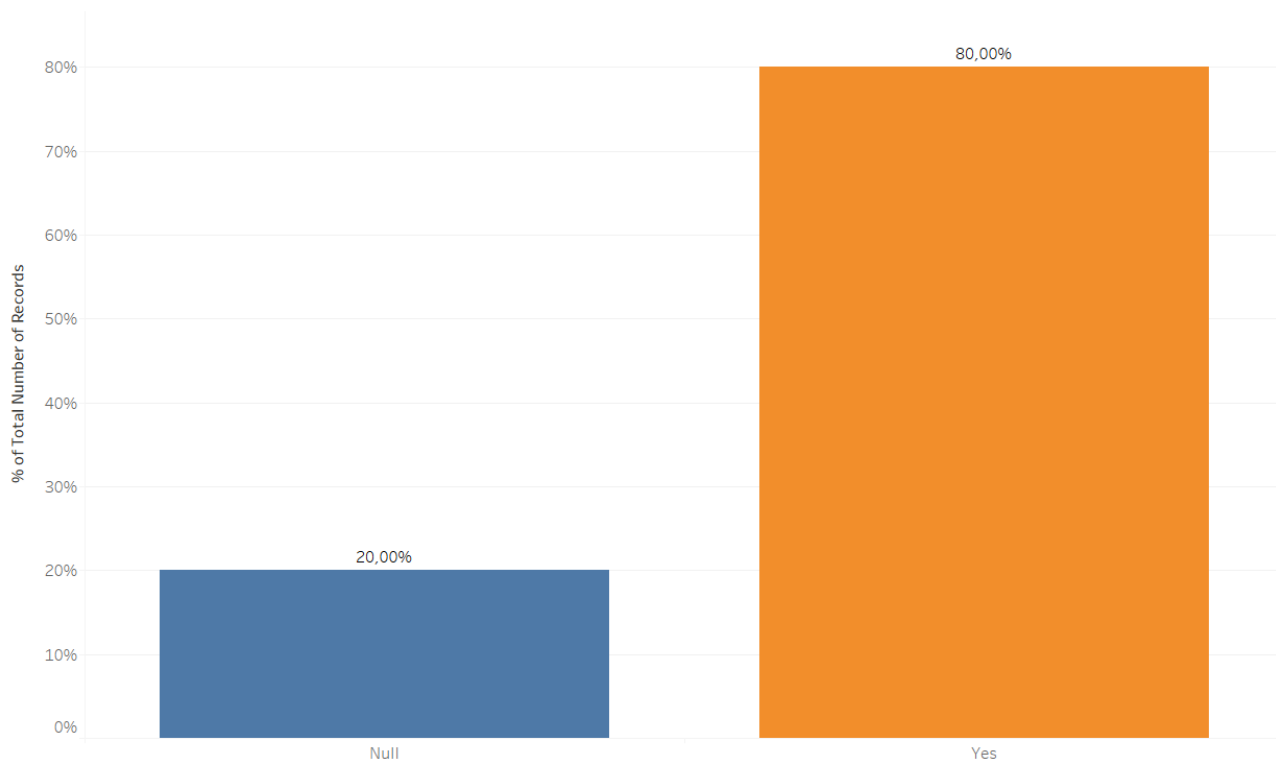
### Price creation of products



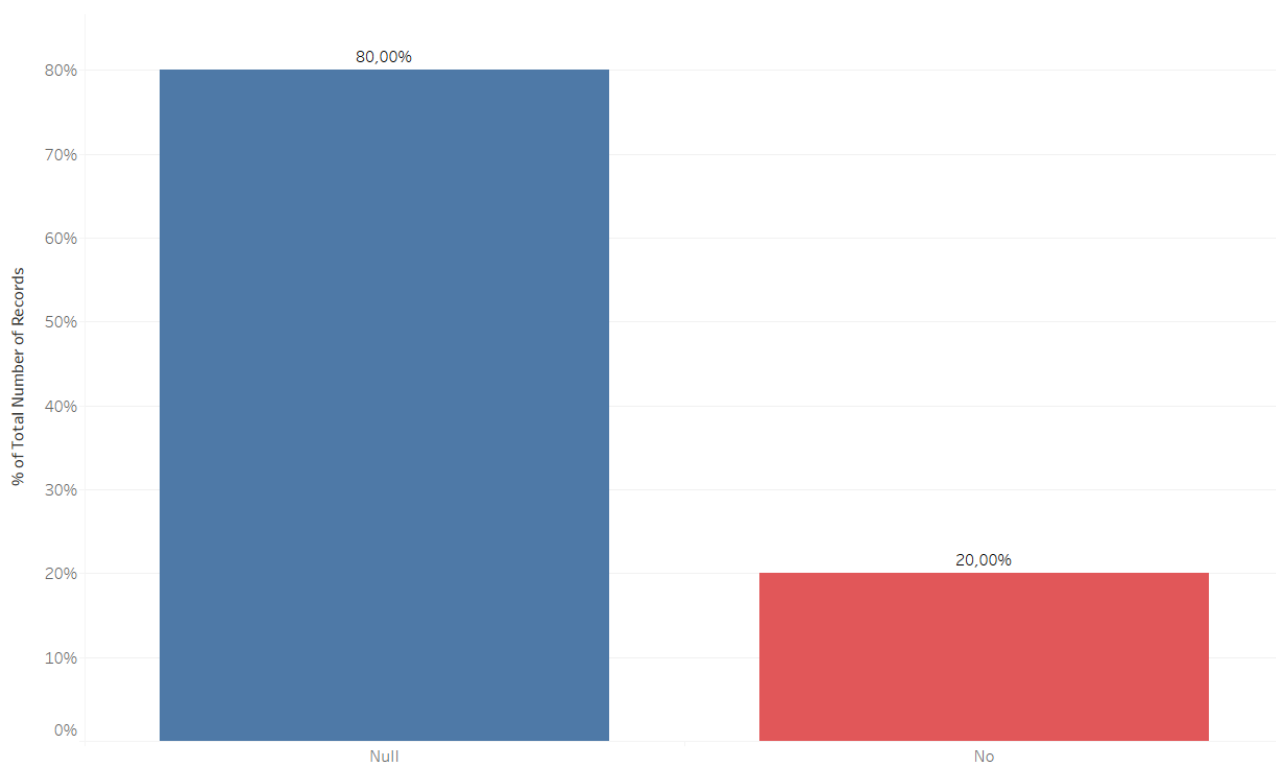
### ICT dissemination and implementation

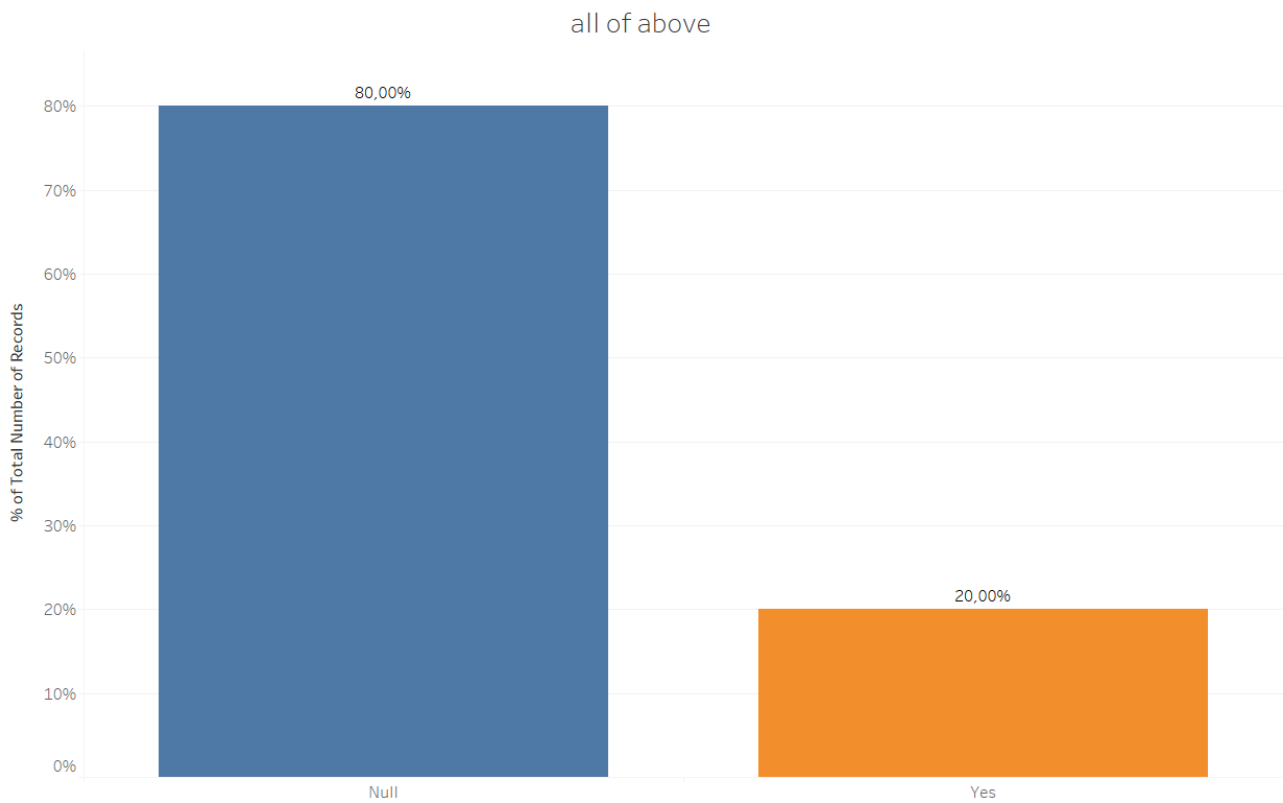


### Tourist labour knowledge enhancement

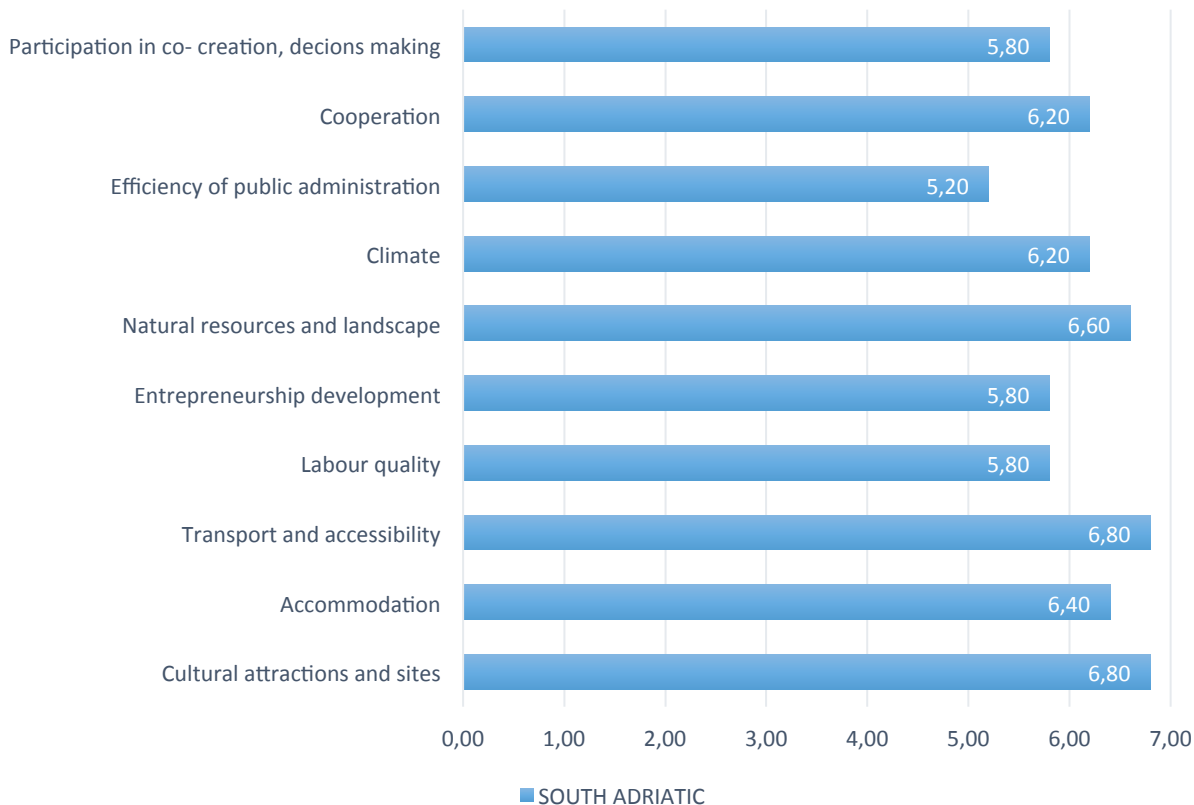


### None of above



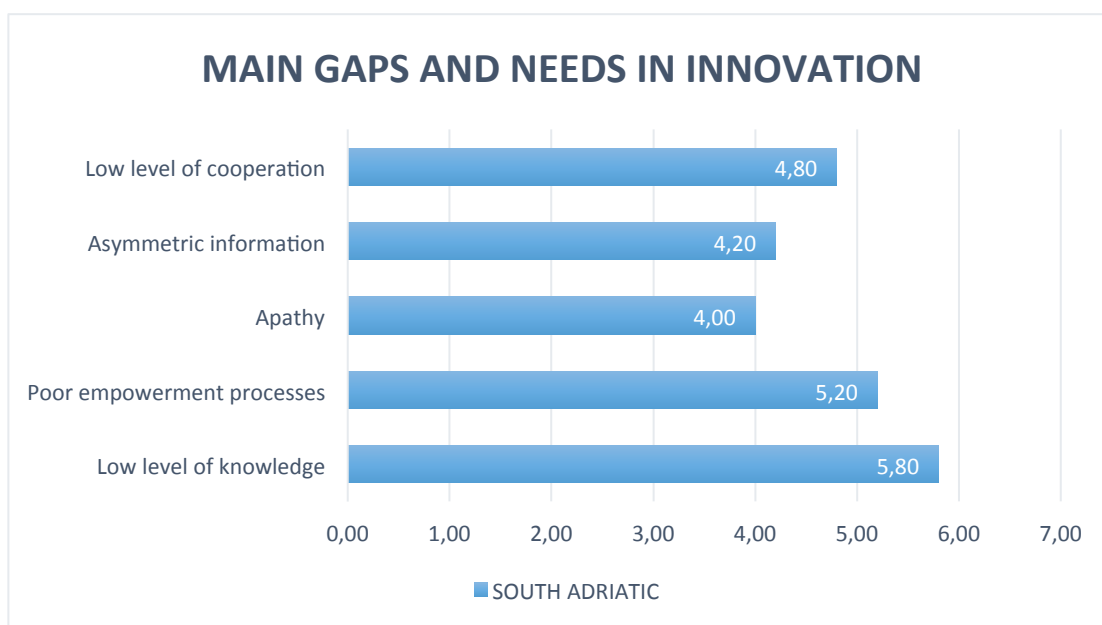
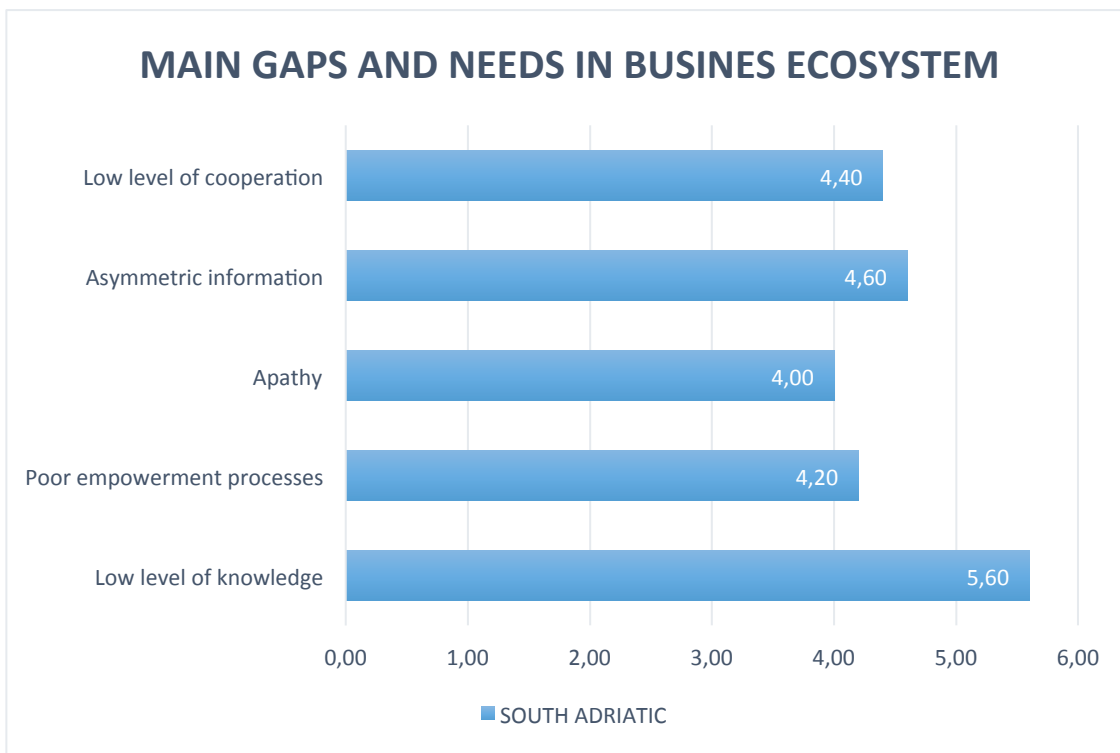


## ASSETS ANALYSIS





***d. GAPS AND NEEDS TOWARDS INNOVATION OF THE PILOT AREA'S BUSINESS ECOSYSTEM***



## *e. POTENTIALS OF THE PILOT AREA'S BUSINESS ECOSYSTEM*

### *6. Conclusion: Gaps and needs*

The outputs point out that the main gaps and needs toward innovations in terms of knowledge, skills, services and infrastructure that are addressed in the interviews are of middle importance in the LAG 5 area.

In addition:

Among stakeholders addressed, creative and eco-tourism are not differentiated.

DMOs in the region has limited capabilities both financial and organisational to manage the destinations but the new law regulating the work of DMOs could support the process.

There is a lack of institutional support of private business in the region (only LAG5 and local development agency KORA in Korcula).

Main motive for tourists visiting the area are cultural and natural heritage (“sea and sun” only in full season); manmade attractions are now limited to cultural attractions (museums and similar) and need to expand in other segment (visitors centres, interpretation centres,..).

ECO tourism is focused completely on local agricultural producers.

Tourist are arriving with cars or by plane. Ferries and speed boats are type of local transportation from Split or Dubrovnik (international airports and ports) to the area. Train has no importance as the train system in Croatia is outdated

### References

1. *LAG – 5 Local development strategy 2014-2020*
2. *The Town of Korcula Tourism Development Strategy*
3. *Dubrovnik – Neretva County Tourism Development Strategy 2012-2022*
4. *Croatian Bureau of Statistics (www.dzs.hr)*



# BLUTOURSYSTEM

Istria Region – Report on interview results

## ANALYSIS OF INTERVIEWS

Activity

### 3.2. ELABORATING A PARTICIPATED ANALYSIS OF BUSINESS ECOSYSTEM NEEDS, GAPS AND POTENTIALS

#### 3.2.2. Tracks for interviews and Report on interview

<b>DELIVERABLE SUMMARY</b>	
<b>PROJECT INFORMATION</b>	
<b>Project acronym:</b>	BLUTOURSYSTEM
<b>Project title:</b>	Knowledge platform, skills and creative synergies for blue tourism ecosystem development
<b>Project ID:</b>	10042761
<b>Starting date:</b>	01.01.2018.
<b>Ending date:</b>	30.06.2019.
<b>Lead partner organisation:</b>	Ca' Foscari University of Venice – Department of Economics
<b>Name of representative:</b>	Bugliese Michele
<b>Project manager:</b>	Jan Van der Borg
<b>Quality manager</b>	Raffaella Lioce
<b>E-mail:</b>	blutour@unive.it
<b>Telephone number:</b>	+390412348211
<b>DELIVERABLE INFORMATION</b>	
<b>Title of the deliverable:</b>	Track for interviews
<b>WP no. / activity related to the deliverable:</b>	WP3/3.2.2.track for interviews
<b>Type (internal/restricted/public):</b>	Internal
<b>WP leader:</b>	Ca' Foscari University of Venice – Department of Economics
<b>Activity leader:</b>	Region of Istria
<b>Participating partner(s):</b>	All partners
<b>Author:</b>	Region of Istria
<b>E-mail:</b>	anica.cernjul@istra-istria.hr
<b>Telephone number:</b>	+385 (52) 351 530
<b>DELIVERY DEADLINE</b>	
<b>Date of the delivery:</b>	30.11.2018.

## Document references

deliverable: **3.2.2 Tracks for interviews and Report on interview**

### Credits

edited by: Anica Dobran Černjul, PARTNER no. 3 Region of Istria  
External expert Kristina Afrić Rakitovac, associate professor,  
Juraj Dobrila University of Pula, Faculty of Economics and Tourism “Dr.  
Mijo Mirković”

elaborated by: External expert Kristina Afrić Rakitovac, associate professor,  
Juraj Dobrila University of Pula, Faculty of Economics and Tourism “Dr.  
Mijo Mirković”  
Anica Dobran Černjul,  
PARTNER no. 3 Region of Istria

reviews by: QPM

approved by: Steering Committee

### Scope:

The scope of this document is to create an analysis of the results of questionnaire per Region of Istria

For public dissemination: Yes

## *1. Table of contents*

<i>2. Pilot area description</i> .....	<i>3</i>
<i>3. Panel of stakeholders interviewed</i> .....	<i>6</i>
<i>4. Stakeholders addressed</i> .....	<i>6</i>
<i>5. Outcomes from the interviews</i> .....	<i>7</i>
<i>6. Conclusion: Gaps and needs</i> .....	<i>69</i>
<i>References</i> .....	<i>70</i>

## 2. Pilot area description

Istria Region is the westernmost county of the Republic of Croatia. It is situated in the largest peninsula of the Adriatic Sea. Its area is 2.820 km<sup>2</sup> (triangle Dragonja, Kamenjak, Učka).

**Figure 1: Istria Region – the westernmost county in Croatia**



Source: Explore Istra – Istria, official tourism portal, [www.istra.hr](http://www.istra.hr)

According to the population census realized in 2011, Istria has 208.055 inhabitants. The cost length is 445 km. There are three rivers: Mirna, Dragonja and Raša. Istria Region is considered as the largest green oasis of the North Adriatic. The coast and the islands are covered with pine woods and easily recognizable green macchia. The basic characteristic of the climate of the Istrian peninsula is given by the Mediterranean climate.

Along the coast, it gradually changes towards the continent and it passes into continental, due to cold air circulating from the mountains and due to the vicinity of the Alps.

The administrative Centre of the region is Pazin, with 8.638 inhabitants, while the largest economic, financial, social, educational and cultural center is Pula – Pola with 57.460 inhabitants. There are 10 towns and 30 municipalities. The Istria Region is the second most developed region in Croatia, after the capital city Zagreb. According to the Croatian Chamber of Commerce, the GDP per c. in 2015 was 13.225 EUR, i.e. 25% above the Croatian average. The most important economic sectors, regarding the number of economic subjects and financial indicators, are manufacturing industry, tourism and trade generating almost 70 % of the total revenues. In the field of industry, the most developed branches are shipbuilding, production of construction material (lime, cement, brick,

stone), tobacco products, furniture, electric machines and appliances, parts for the automobile industry, glass, processing metals, plastic, wood, textile, and the production of food. Great attention has been given to the revitalization of agriculture in the previous few years, which marked a significant improvement in wine and olive growing and in the system of organic food production. There are more than 20 entrepreneurial business zones.

Istria is the most visited tourist region in Croatia, realizing about one third of all tourist arrivals and overnights in Croatia. Out of 10 most visited towns in Croatia, 5 are situated in the region (Rovinj, Poreč, Umag, Medulin and Pula). Tourism is considered as one of the most perspective economic sector in the County with significant potential multiplicative impact on the whole economy. In the last few years there were significant investments towards increasing the quality of accommodation (in hotels, apartments, camp, villas, etc.). Many selective forms of tourism are offered, e.g. nautical, sports, congress, cultural, rural, health, gastronomic, etc. promoting Istria as one of the most attractive destination in Croatia. (Croatian Chambers of Commerce, [www.hgk.hr](http://www.hgk.hr))

Figure 2: **TOURIST OVERNIGHTS AND ARRIVALS IN ISTRIA IN 2016 AND 2017**

Month	Overnights		Arrivals	
	2016	2017	2016	2017
1	66.329	75.709	17.356	21.544
2	88.320	95.355	32.749	35.734
3	258.466	161.467	81.673	58.269
4	516.439	816.241	163.316	246.782
5	1.512.910	1.268.754	333.662	294.073
6	2.868.242	4.063.479	496.911	698.468
7	6.575.130	7.284.991	977.204	1.063.619
8	7.529.672	7.900.997	1.005.406	1.031.070
9	3.094.767	3.075.718	466.747	456.978
10	449.412	492.681	122.642	127.568
11	76.779	94.769	28.699	31.660
12	91.767	96.315	36.809	38.253
<b>Total</b>	<b>23.128.233</b>	<b>25.426.476</b>	<b>3.763.174</b>	<b>4.104.018</b>

Source: Croatian Bureau of Statistics ([www.dzs.hr](http://www.dzs.hr))

The number of visitors and overnights in Istria is constantly increasing, as indicated in Figure 2. The average length of stay in the region is also increasing, from 6.5 day in 2016 to 6.9 days in 2017. As in other Croatian regions, there is a very high level of seasonality resulting from very high concentration of tourist arrivals and overnights in just five months (August, July and September, followed by June and May).

The main strategic development document is the Tourism Master Plan of tourism development for the Istria Region 2015-2025. There are various project related with tourism development and promotion: Parenzana, KulTourSpirit, Istra Inspirit, Istra Outdoor, Eco Domus, Istria – Bike&Bed, etc.



### *3. Panel of stakeholders interviewed*

The analysis has involved eight key stakeholders from the Region of Istria, Croatia:

1. Maistra Hospitality Group, Rovinj
2. Uniline Ltd., Pula
3. Istrian regional tourism agency IRTA, Pula
4. Public institution Kamenjak, Premantura
5. National park Brijuni
6. Faculty of Economics and Tourism “Dr. Mijo Mirković”, Juraj Dobrila University of Pula
7. Croatian Chamber of Economy, Pula County Chamber, Pula
8. Croatian Chamber of Crafts and Trades, Regional Chamber of Istria, Pula

### *4. Stakeholders addressed*

The questionnaires were sent to nine key stakeholders from the Region of Istria, Croatia:

1. Maistra Hospitality Group, Rovinj
2. Uniline Ltd., Pula
3. Istrian regional tourism agency, Pula
4. Public institution Kamenjak, Premantura
5. National park Brijuni
6. Faculty of Economics and Tourism “Dr. Mijo Mirković”, Juraj Dobrila University of Pula
7. Croatian Chamber of Economy, Pula County Chamber, Pula
8. Croatian Chamber of Crafts and Trades, Regional Chamber of Istria, Pula
9. Hotel San Rocco, Brtonigla

Eight stakeholders joined the research and they sent us filled questionnaires.

## 5. Outcomes from the interviews

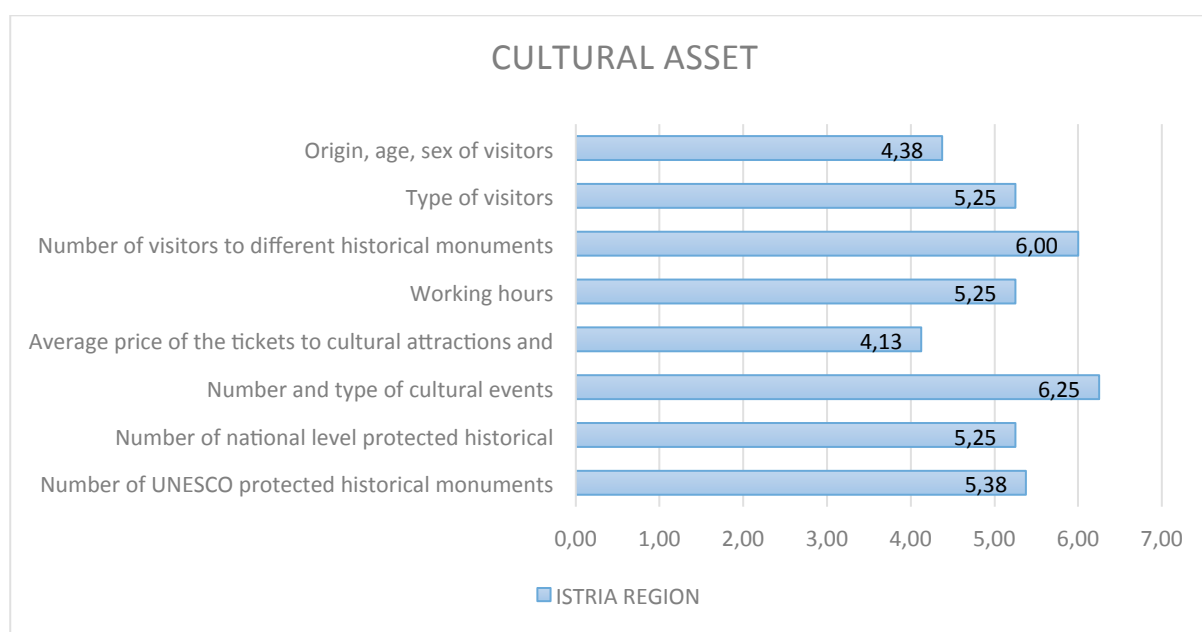
### a. SUGGESTIONS FOR THE CALIBRATION OF THE SMART CROSS BORDER DATA SYSTEM (SCBDS) AND THE CREATION OF NEW INDICATORS

#### Attractions

To which extent you find important information about following indicators: (scale 1-7, 1-not important, 7-extremly important)?

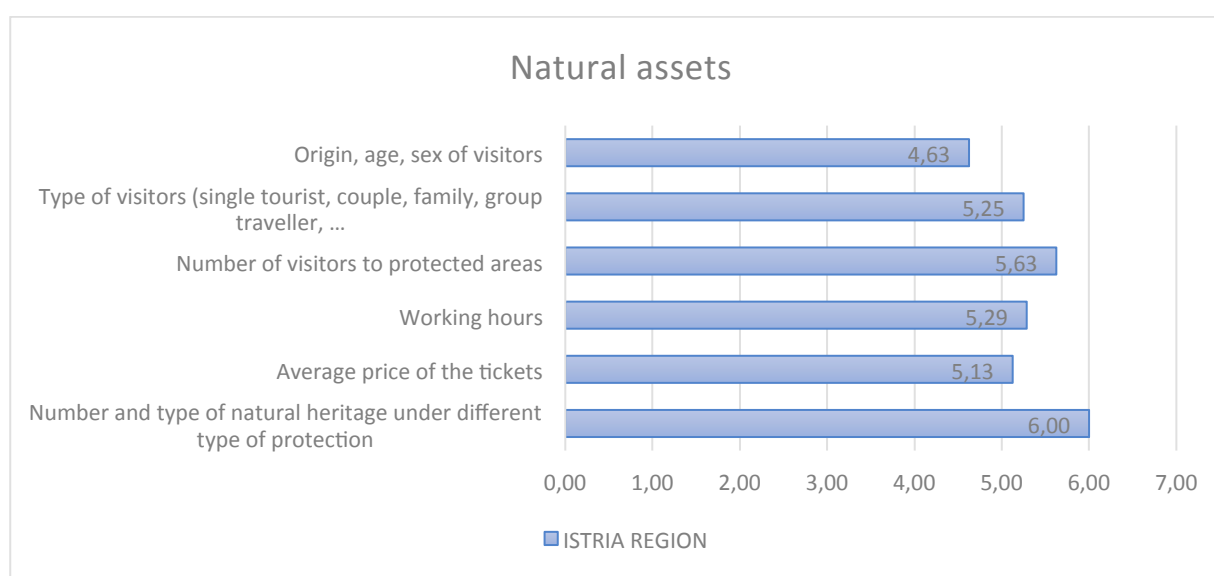
Cultural assets	Arithmetic mean
Number of UNESCO protected historical monuments	5.38
Number of national level protected historical monuments	5.25
Number and type of cultural events	6.25
Average price of the tickets to cultural attractions and events	4.13
Working hours	5.25
Number of visitors to different historical monuments and heritage	6.00
Type of visitors (single tourist, couple, family, group traveller, ...)	5.25
Origin, age, sex of visitors	4.38

The most important information regarding cultural assets is related to the number and type of cultural events, followed by the number of visitors to different historical monuments and heritage and number of UNESCO protected historical monuments.



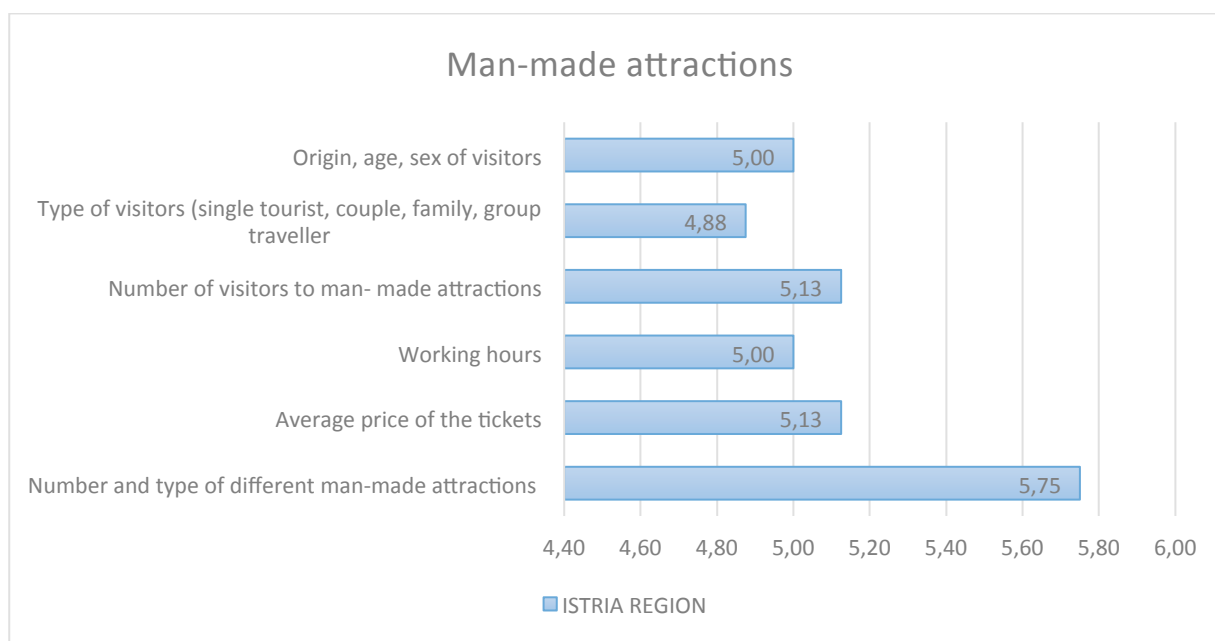
<b>Natural assets</b>	<b>Arithmetic mean</b>
Number and type of natural heritage under different type of protection	<b>6.00</b>
Average price of the tickets (where available)	<b>5.13</b>
Working hours	<b>5.29</b>
Number of visitors to protected areas (with payed tickets)	<b>5.63</b>
Type of visitors (single tourist, couple, family, group traveller, ...)	<b>5.25</b>
Origin, age, sex of visitors	<b>4.63</b>

The most important information regarding natural assets is related to the number and type of natural heritage under different type of protection, followed by the working hours and types of visitors.



<b>Man-made attractions</b>	<b>Arithmetic mean</b>
Number and type of different man-made attractions (theme and entertainment parks, thematic routes and tracks, etc.)	<b>5.75</b>
Average price of the tickets	<b>5.13</b>
Working hours	<b>5.00</b>
Number of visitors to man- made attractions (with payed tickets)	<b>5.13</b>
Type of visitors (single tourist, couple, family, group traveller, ...)	<b>4.88</b>
Origin, age, sex of visitors	<b>5.00</b>

The most important information regarding man-made attractions is related to the number and type of different man-made attractions, followed by the average price of tickets and number of visitors to man-made attractions.



### *Accessibility*

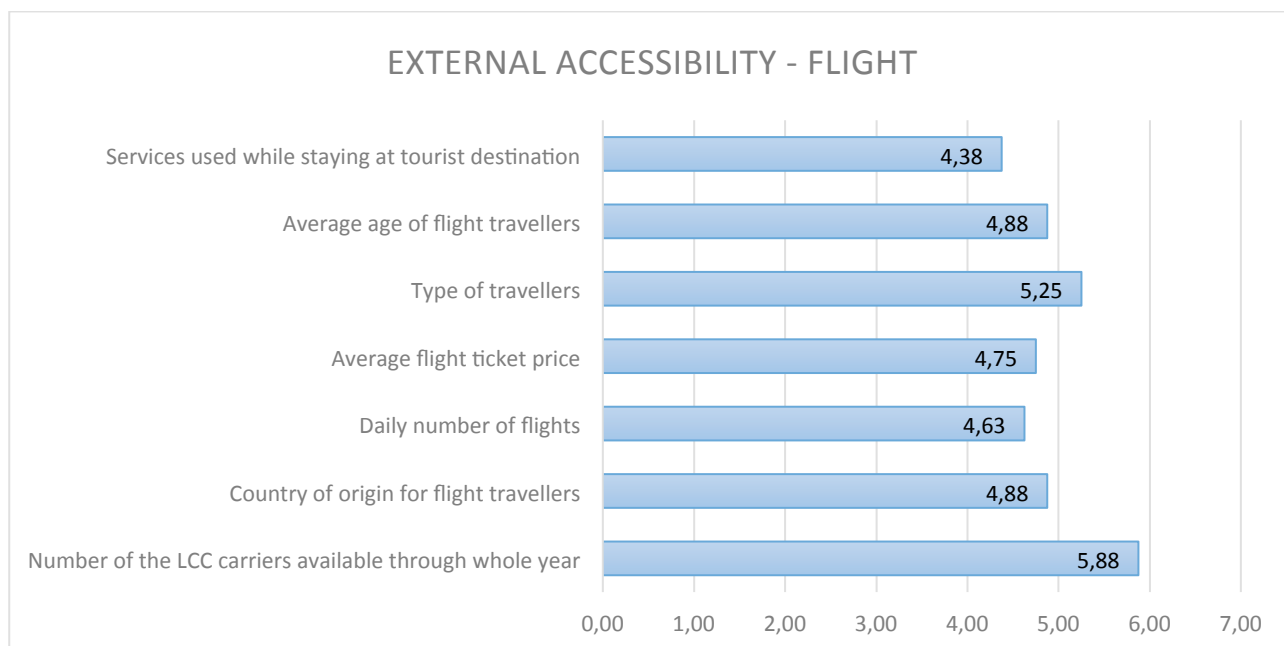
To which extent you find important information about following indicators: (scale 1-7, 1-not important, 7-extremely important)?

#### **EXTERNAL ACCESSIBILITY**

##### **External accessibility - Airplane traffic**

<b>Airplane traffic to/from Istria</b>	<b>Arithmetic mean</b>
Number of the LCC carriers available through whole year	<b>5.88</b>
Country of origin for flight travellers	<b>4.88</b>
Daily number of flights	<b>4.63</b>
Average flight ticket price (monthly review)	<b>4.75</b>
Type of travellers (single tourist, couple, family, group traveller...)	<b>5.25</b>
Average age of flight travellers	<b>4.88</b>
Services used while staying at tourist destination	<b>4.38</b>
Other	-

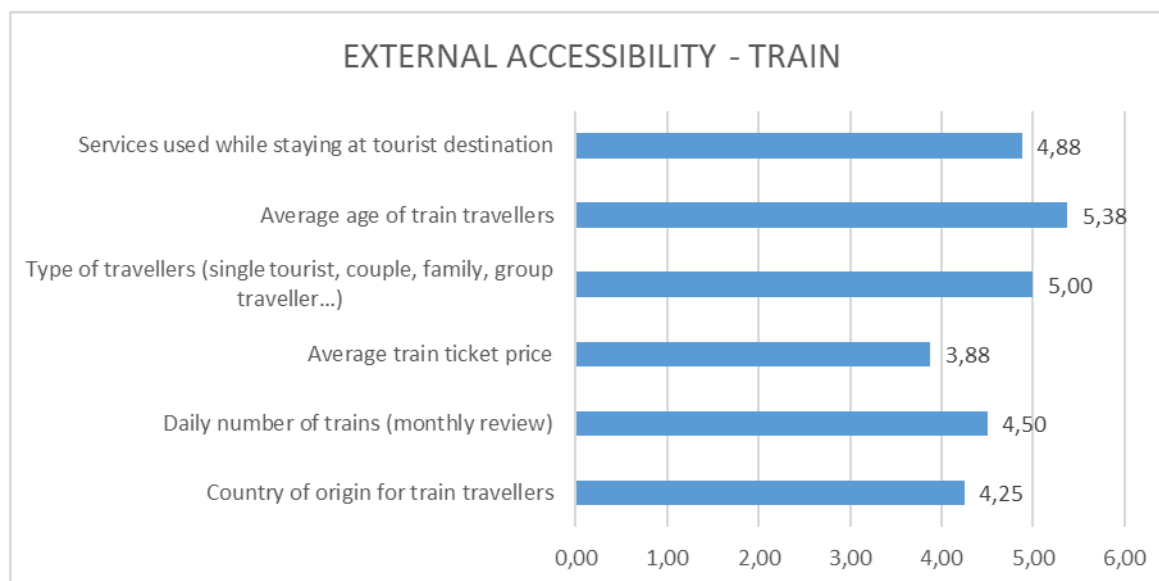
The most important information regarding airplane traffic to/from Istria are related to the number of the LCC carriers available through whole year, followed by the type of travellers, country of origin for flight travellers and average age of flight travellers.



### External accessibility - Train traffic

<b>Train traffic to/from Istria</b>	<b>Arithmetic mean</b>
Country of origin for train travellers	4.25
Daily number of trains (monthly review)	4.50
Average train ticket price	3.88
Type of travellers (single tourist, couple, family, group traveller...)	5.00
Average age of train travellers	5.38
Services used while staying at tourist destination	4.88
Other	-

The most important information regarding train traffic to/from Istria are related the average age of train travellers, followed by the type of travellers and services used while staying at tourist destination.



### External accessibility - Ship/Ferry traffic

<b>Ship/Ferry traffic from/to Istria</b>	<b>Arithmetic mean</b>
Country of origin for ship/ferry travellers	<b>4.63</b>
Daily number of traveller ships/ferries (monthly review)	<b>5.38</b>
Average ship/ferry ticket price	<b>5.00</b>
Type of travellers (single tourist, couple, family, group traveller...)	<b>5.00</b>
Average age of travellers	<b>5.13</b>
Services used while staying at tourist destination	<b>5.25</b>
Country of origin for ship/ferry travellers	<b>4.75</b>
Other	-

The most important information regarding ship/Ferry traffic from/to Istria is related to daily number of traveller ships/ferries (monthly review), followed by the services used while staying at tourist destination and the average age of travellers.

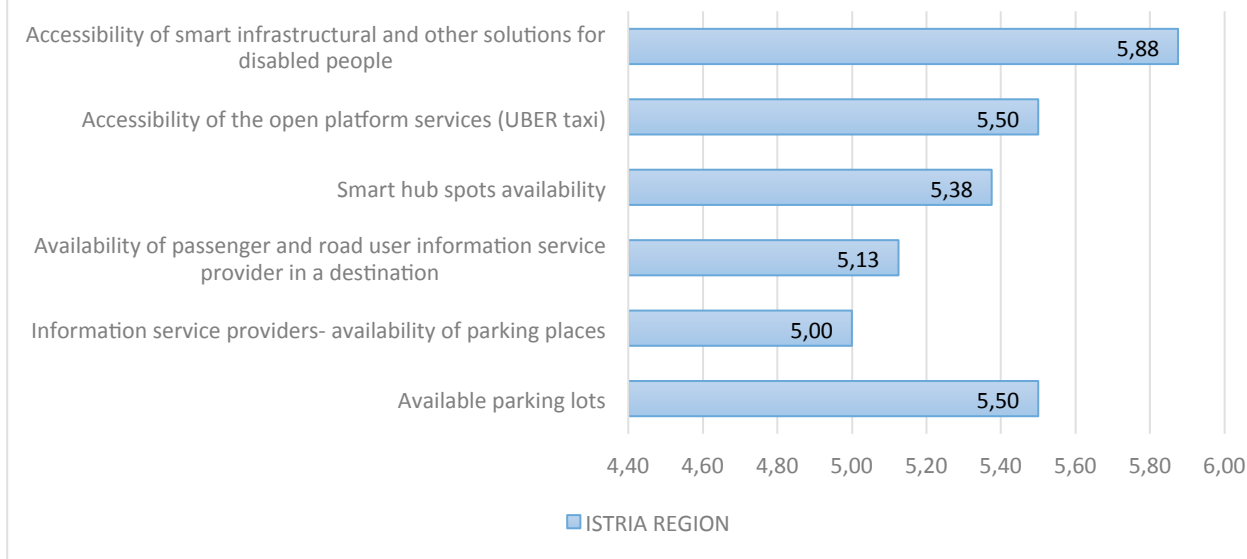


### INTERNAL ACCESSIBILITY (smart solutions)

Indicator	Arithmetic mean
Available parking lots	<b>5.50</b>
Information service providers- availability of parking places (smart parking)	<b>5.00</b>
Availability of passenger and road user information service provider in a destination	<b>5.13</b>
Smart hub spots availability (for cars, bikes etc.) in the destination	<b>5.38</b>
Accessibility of the open platform services (UBER taxi)	<b>5.50</b>
Accessibility of smart infrastructural and other solutions for disabled people	<b>5.88</b>
Other	-

The most important information regarding internal accessibility (smart solutions) is related to accessibility of smart infrastructural and other solutions for disabled people, followed by accessibility of the open platform services (UBER taxi) and available parking lots.

### INTERNAL ACCESSIBILITY - SMART SOLUTION



### *Amenities*

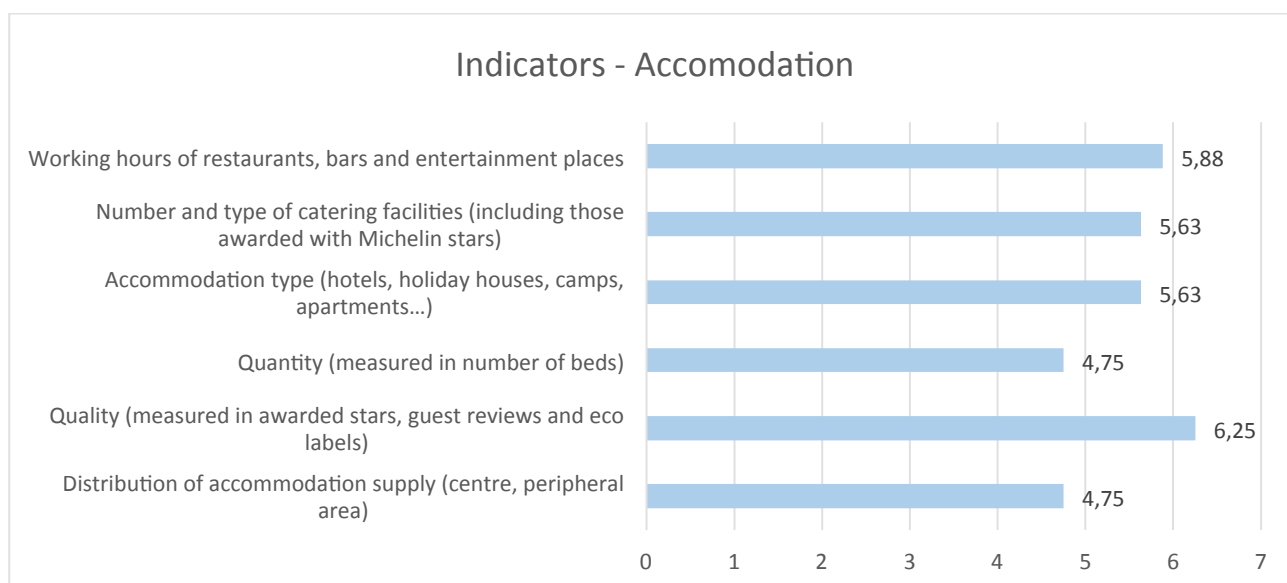
To which extent you find important information about following indicators: (scale 1-7, 1-not important, 7-extremely important)?

#### AMENITIES (ACCOMMODATION/CATERING)

Indicator	Arithmetic mean
Distribution of accommodation supply (centre, peripheral area)	<b>4.75</b>
Quality (measured in awarded stars, guest reviews and eco labels)	<b>6.25</b>
Quantity (measured in number of beds)	<b>4.75</b>
Accommodation type (hotels, holiday houses, camps, apartments...)	<b>5.63</b>
Number and type of catering facilities (including those awarded with Michelin stars)	<b>5.63</b>
Working hours of restaurants, bars and entertainment places	<b>5.88</b>
Other _____	-

The most important information regarding amenities (accommodation/catering) is their quality (measured in awarded stars, guest reviews and eco labels), followed by working hours of restaurants, bars and entertainment places and accommodation type (hotels, holiday houses, camps, apartments...) and the number and type of catering facilities (including those awarded with Michelin stars).



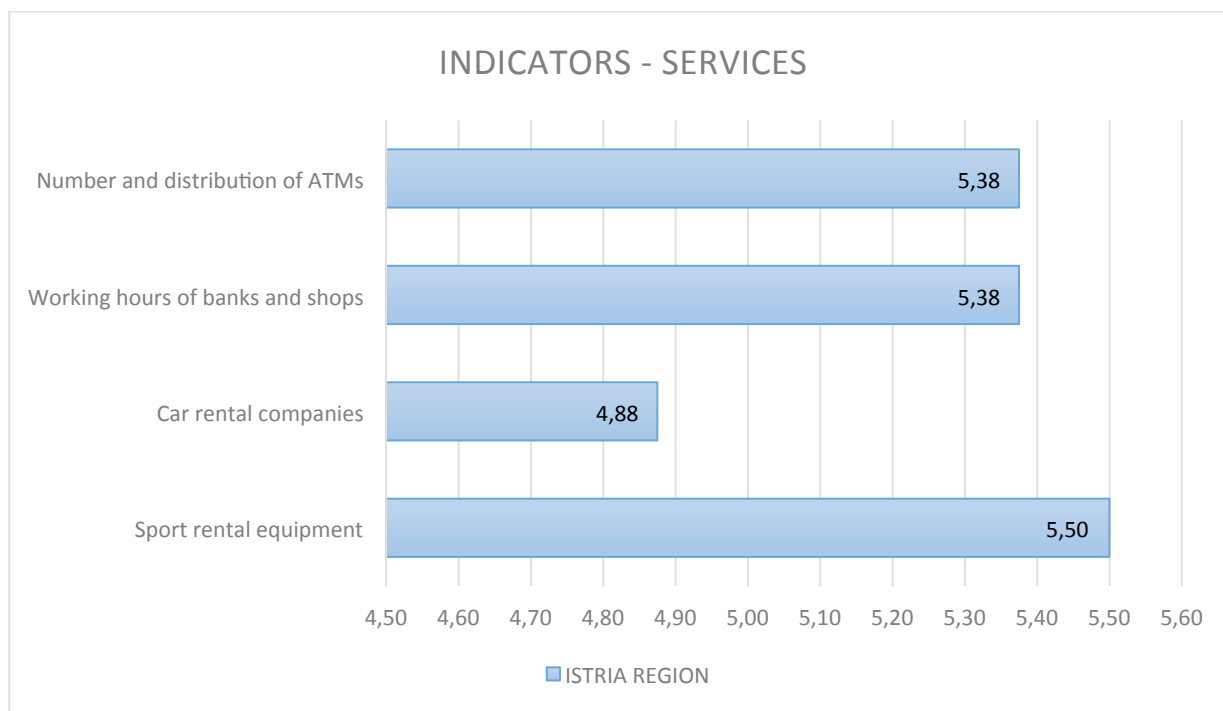


### *Ancillary services*

To which extent you find important information about following indicators: (scale 1-7, 1-not important, 7-extremly important)?

<b>Indicator</b>	<b>Arithmetic mean</b>
Sport rental equipment (bikes, kayaks, boats, ...)	<b>5.50</b>
Car rental companies	<b>4.88</b>
Working hours of banks and shops	<b>5.38</b>
Number and distribution of ATMs	<b>5.38</b>
Other	-

The most important information regarding ancillary services is the sport rental equipment, followed by the working hours of banks and shops and the number and distribution of ATMs.



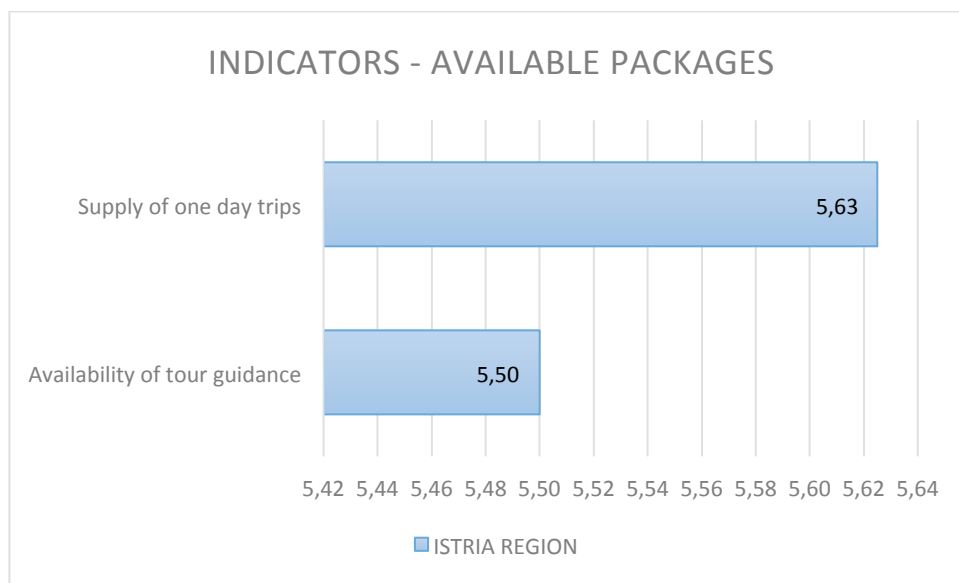
### *Available packages*

To which extent you find important information about following indicators: (scale 1-7, 1-not important, 7-extremly important)?

#### **V. AVAILABLE PACKAGES**

<b>Indicator</b>	<b>Arithmetic mean</b>
Availability of tour guidance	<b>5.50</b>
Supply of one day trips	<b>6.63</b>
Other	-

The most important information regarding available packages is supply of tour guidance.



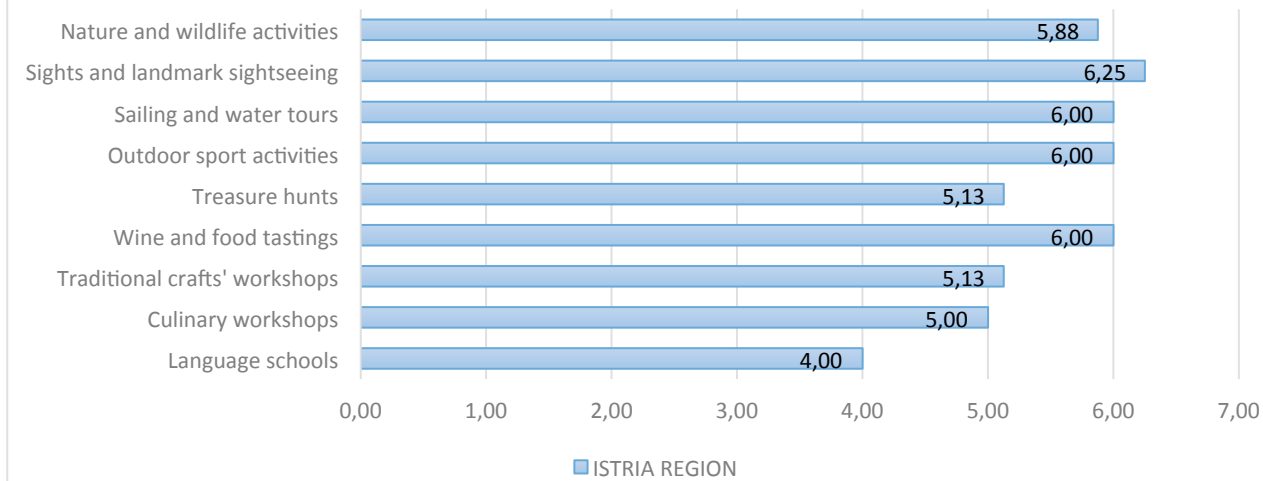
### *Activities*

To which extent you find important information about following indicators: (scale 1-7, 1-not important, 7-extremly important)?

<b>Number and type of special (creative) activities for tourists</b>	<b>Arithmetic mean</b>
Language schools	<b>4.00</b>
Culinary workshops	<b>5.00</b>
Traditional crafts' workshops	<b>5.13</b>
Wine and food tastings	<b>6.00</b>
Treasure hunts	<b>5.13</b>
Outdoor sport activities	<b>6.00</b>
Sailing and water tours	<b>6.00</b>
Sights and landmark sightseeing	<b>6.25</b>
Nature and wildlife activities	<b>5.88</b>
Other	-

The most important information regarding special (creative) activities for tourists are sights and landmark sightseeing, followed by wine and food tastings, outdoor sport activities and sailing and water tours.

### NUMBER AND TYPE OF SPECIAL (CREATIVE) ACTIVITIES

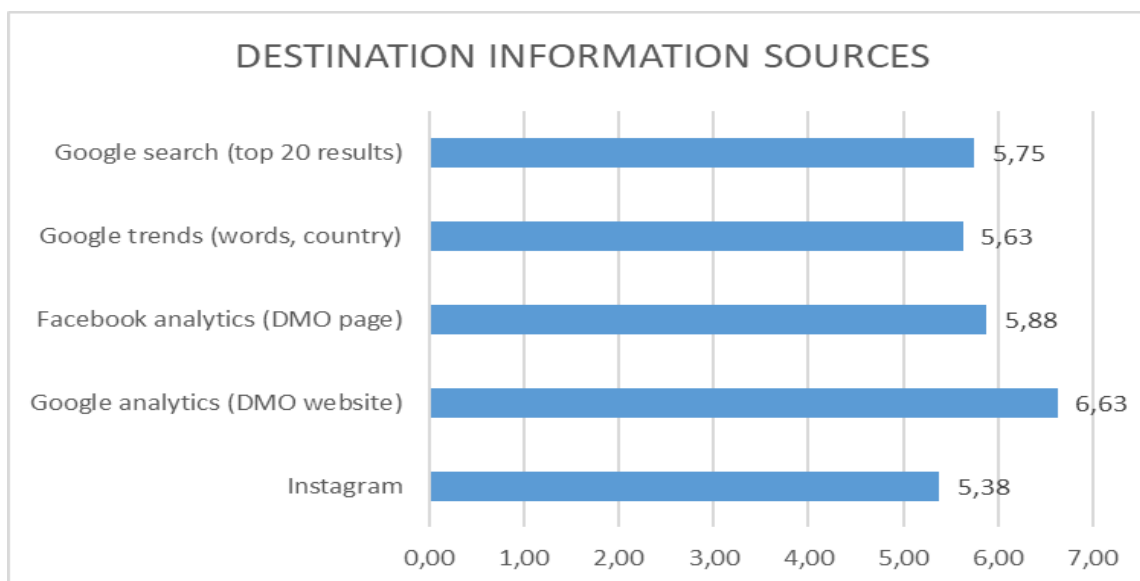


### Source of destination information

To which extent you find important information about following indicators: (scale 1-7, 1-not important, 7-extremely important)?

Destination information from	Arithmetic mean
Instagram	5.38
Google analytics (DMO website)	6.63
Facebook analytics (DMO page)	5.88
Google trends (words, country)	5.63
Google search (top 20 results)	5.75
Other	-

The most important information regarding sources of destination information are Google analytics (DMO website), followed by Facebook analytics (DMO page) and Google search (top 20 results).

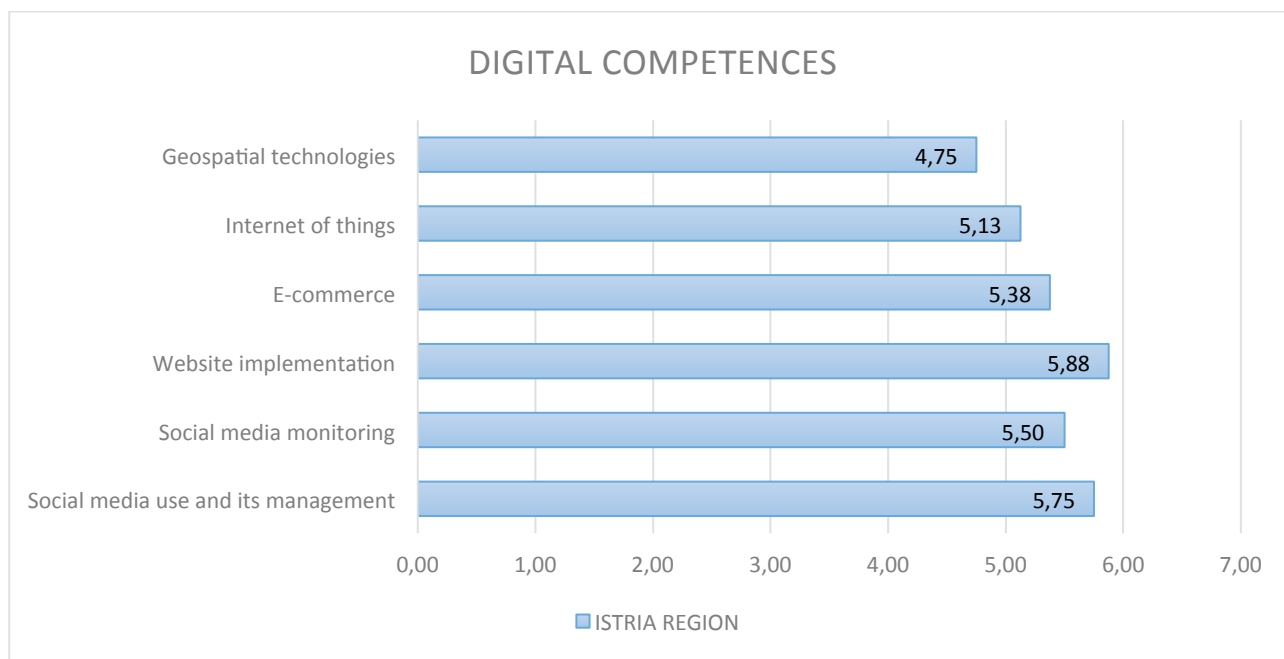


***b. GAPS AND NEEDS IN CAPACITY BUILDING PROCESSES (at CB Area level)***

According to the stakeholder's activity/operative field and considering this operative field in the whole CB area, which are the main gaps and needs in capacity building processes? This means, what are the topics in which the stakeholders feel themselves more lacking and unprepared/incompetent and thus in which they feel to need more training?

<b>Digital competences</b>	<b>Arithmetic mean</b>
Social media use and its management	<b>5.75</b>
Social media monitoring	<b>5.50</b>
Website implementation	<b>5.88</b>
E-commerce	<b>5.38</b>
Internet of things	<b>5.13</b>
Geospatial technologies	<b>4.75</b>
Other	-

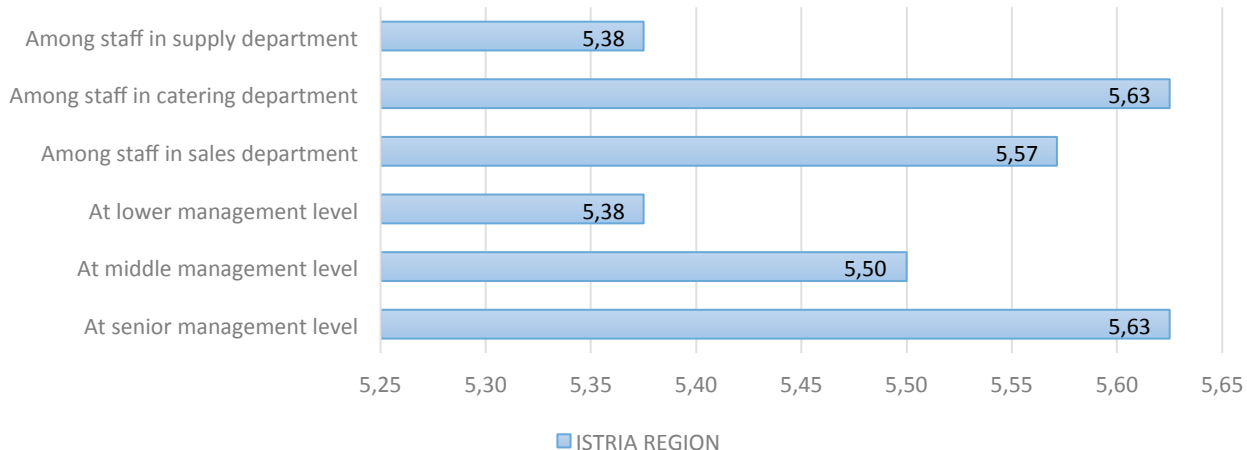
In the contexts of digital competences, the examinees feel mostly incompetent regarding website implementation, social media use and its management and social media monitoring.



<b>Company's internal communication quality</b>	<b>Arithmetic mean</b>
At senior management level	<b>5.63</b>
At middle management level	<b>5.50</b>
At lower management level	<b>5.38</b>
Among staff in sales department	<b>5.57</b>
Among staff in catering department	<b>5.63</b>
Among staff in supply department	<b>5.38</b>
Other	-

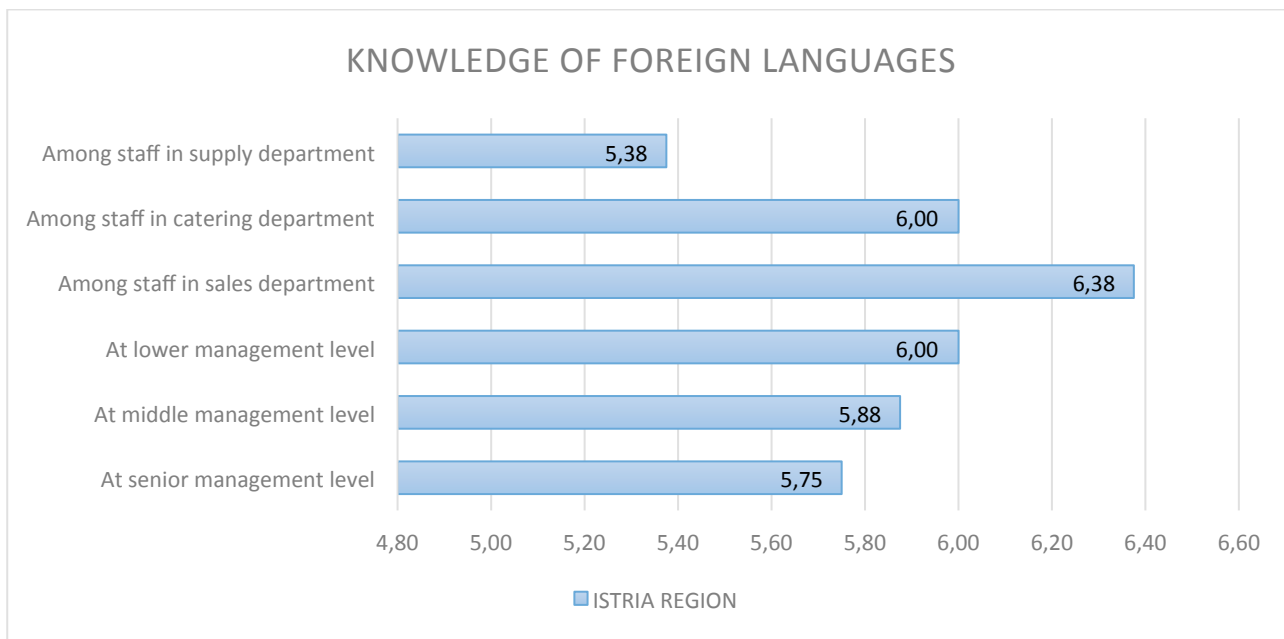
In the contexts of company's internal communication quality, the examinees recognise biggest gaps related to communication quality at senior management level, among staff in catering department and among staff in sales department.

### COMPANY'S INTERNAL COMMUNICATION QUALITY



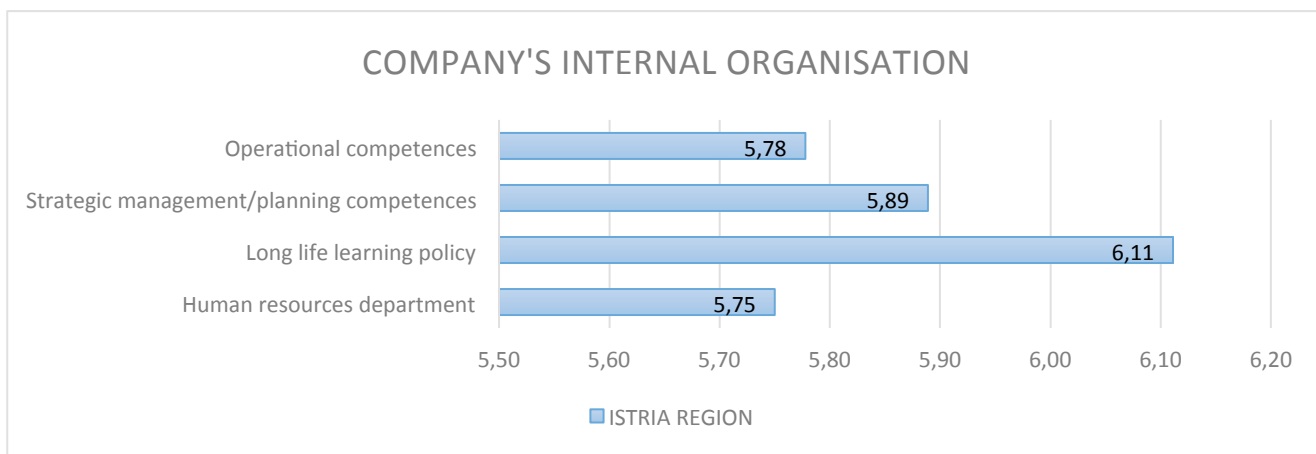
<b>Knowledge of foreign languages</b>	<b>Arithmetic mean</b>
At senior management level	<b>5.75</b>
At middle management level	<b>5.88</b>
At lower management level	<b>6.00</b>
Among staff in sales department	<b>6.38</b>
Among staff in catering department	<b>6.13</b>
Among staff in supply department	<b>5.38</b>
Other	-

Regarding knowledge of foreign languages, examinees recognise biggest needs in capacity building among staff in sales department, then among staff in catering department and at lower management level.



<b>Company's internal organisation</b>	<b>Arithmetic mean</b>
Human resources department	<b>5.75</b>
Long life learning policy	<b>6.11</b>
Strategic management/planning competences	<b>5.89</b>
Operational competences	<b>5.78</b>
Other	-

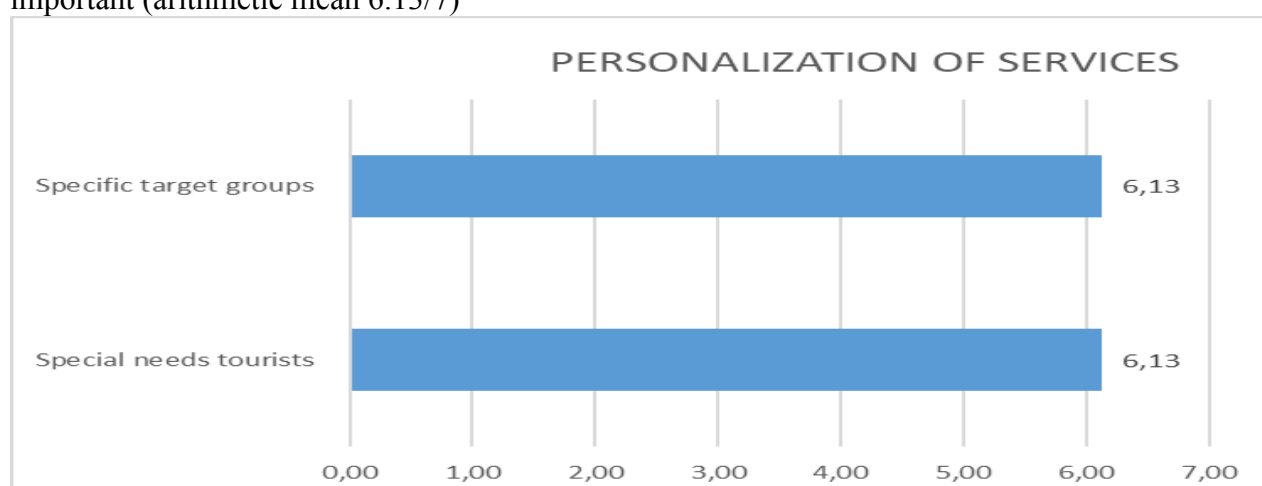
Regarding company's internal organisation, the main need in capacity building process is related to long life learning policy.





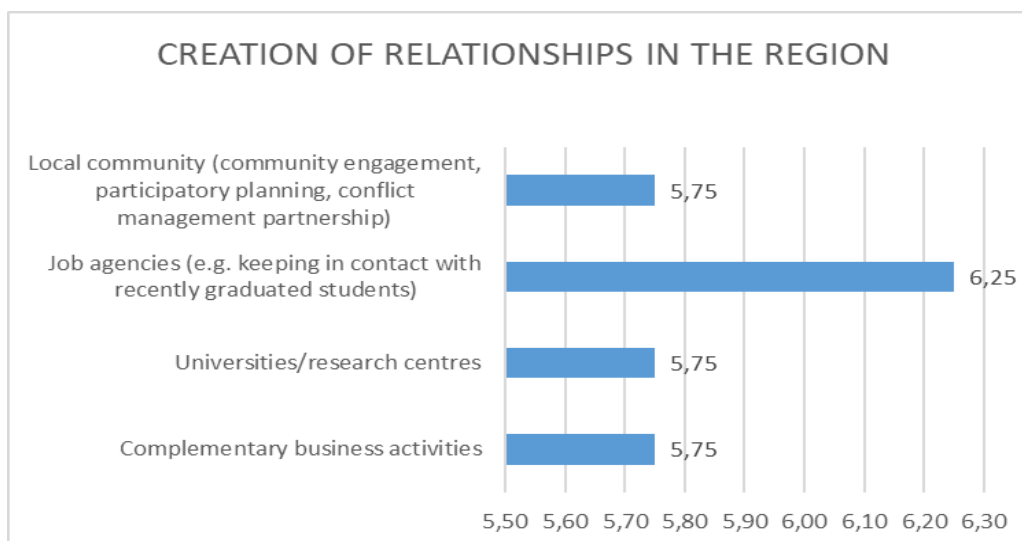
<b>Personalisation of the service according to tourist targets</b>	<b>Arithmetic mean</b>
Special needs tourists – physical obstacles, food intolerances, food preferences (vegetarian, vegan, etc.), allergies, religious groups' food requirements (kosher, halal...)	<b>6.13</b>
Specific target groups according to age, culture, sexual orientation, single-couple-group-family	<b>6.13</b>
Other	-

Regarding personalisation of the service according to tourist targets, both offered answers, i.e. special needs tourists – physical obstacles, food intolerances, food preferences (vegetarian, vegan, etc.), allergies, religious groups' food requirements (kosher, halal...) and specific target groups according to age, culture, sexual orientation, single-couple-group-family were recognised as very important (arithmetic mean 6.13/7)



<b>Creation of relationships with</b>	<b>Arithmetic mean</b>
Complementary business activities	<b>5.75</b>
Universities/research centres	<b>5.75</b>
Job agencies (e.g. keeping in contact with recently graduated students)	<b>6.25</b>
Local community (community engagement, participatory planning, conflict management partnership)	<b>5.75</b>
Other	-

In the context of creation of relationship with different stakeholders in the Istria Region, the examinees consider as the most important the relations with job agencies.



### ***c. IDENTIFICATION OF THE BUSINESS ECOSYSTEM OF THE CHOSEN PILOT AREA***

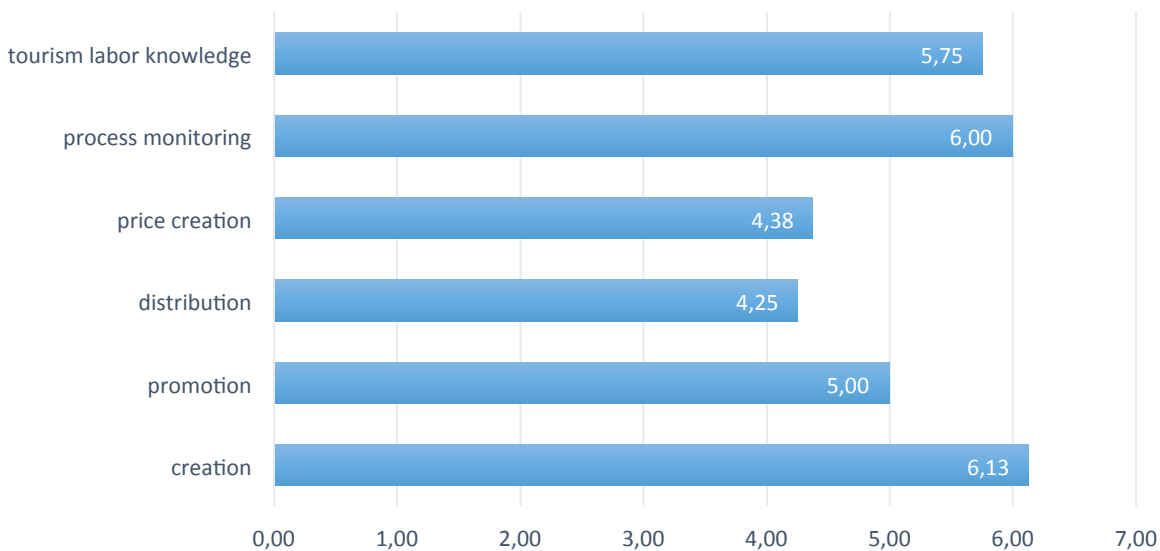
#### ***Creative tourism***

Which are the most important tourism stakeholders involved in creation of products/activities within eco-tourism and creative tourism activities in the Istria Region? Please rate their importance according to influence towards eco-tourism and creative tourism (Order the answers from 1 to 7 where 1 is not important and 7 is extremely important)

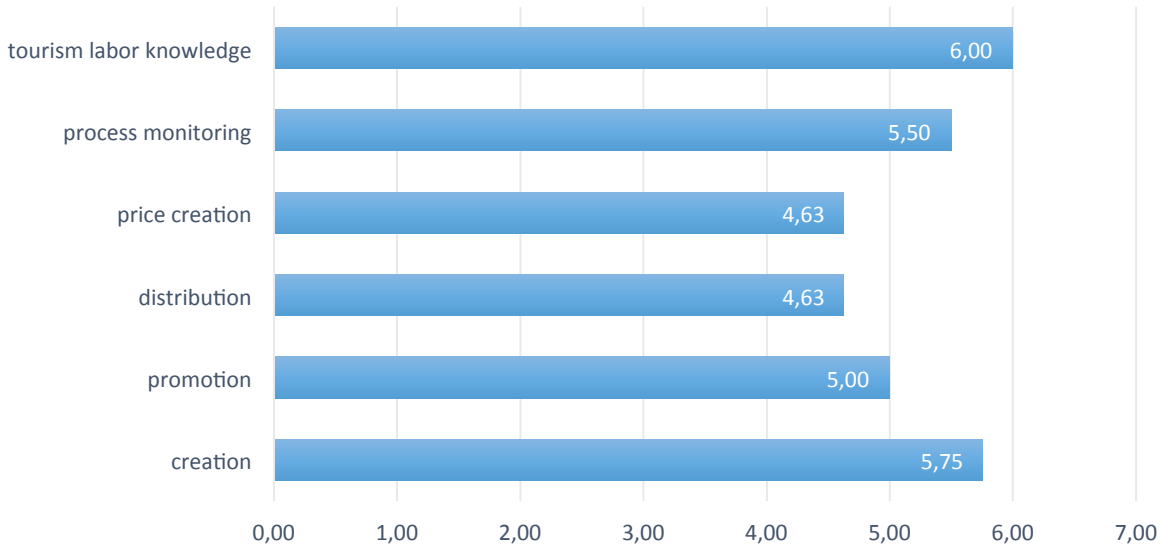
The examinees consider, as regarding the role of **administration in creation of products and services within creative tourism** in the Istria Region, at the local level its role is most important in creation/enhancement of products/activities; at regional level in tourism labour knowledge enhancement, at the national level tourism labour knowledge enhancement and at the international level in tourism labour knowledge enhancement.

## ADMINISTRATION

### CREATIVE TOURISM ADMINISTRATION LOCAL



### CREATIVE TOURISM ADMINISTRATION REGIONAL

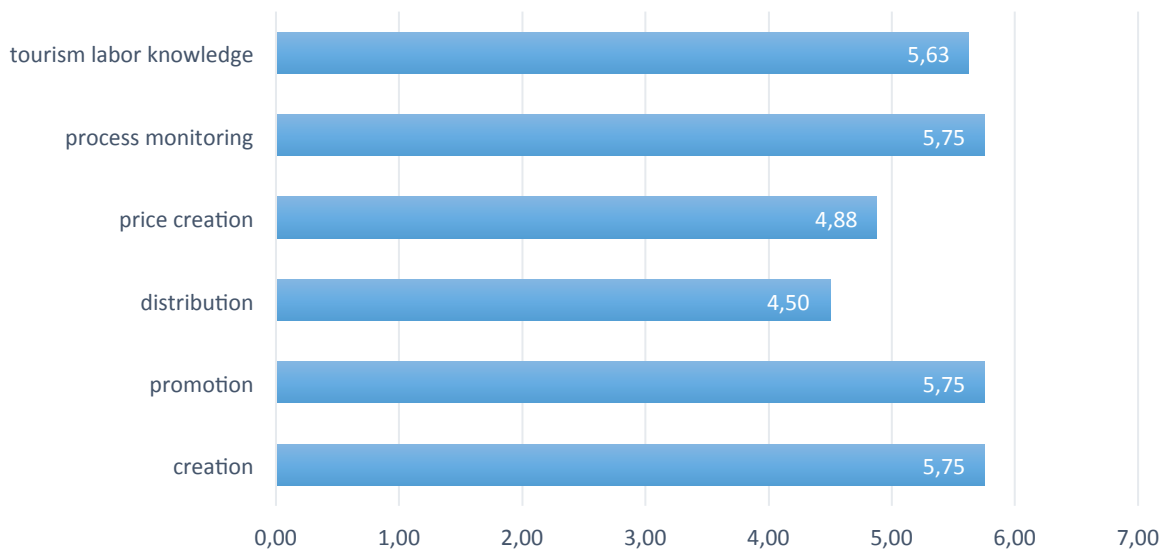




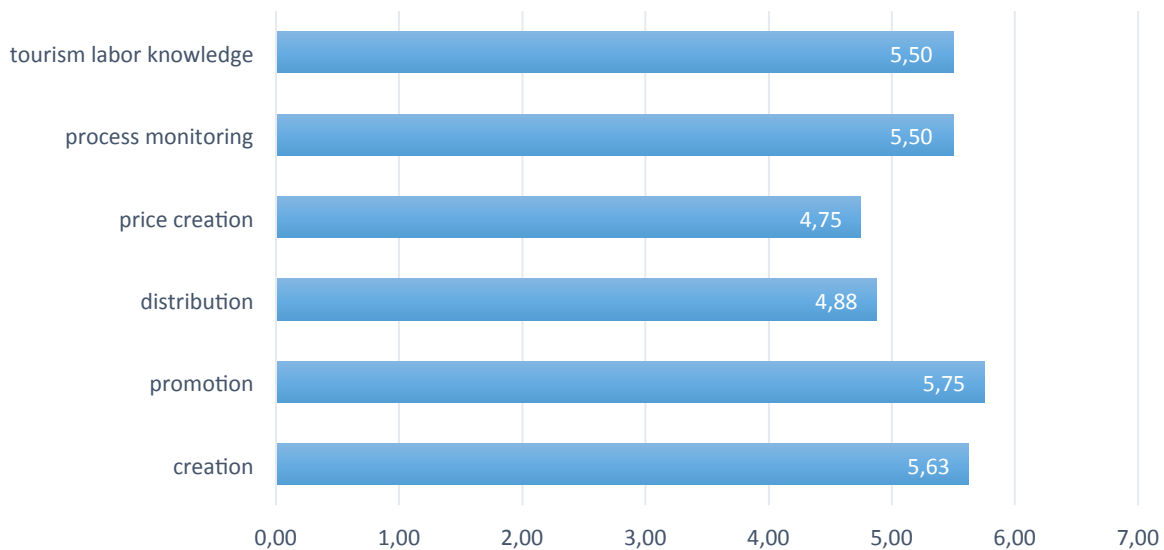
The examinees consider, as regarding the role of **destination management organisations in creation of products and services within creative tourism** in the Istria Region, at the local level its role is most important in creation/enhancement of products/activities, promotion /branding of products/activities and monitoring the process of a product creation and implementation; at regional level in promotion/branding of products/activities; at the national level in promotion/branding of products/activities and at the international level in promotion/branding of products/activities.

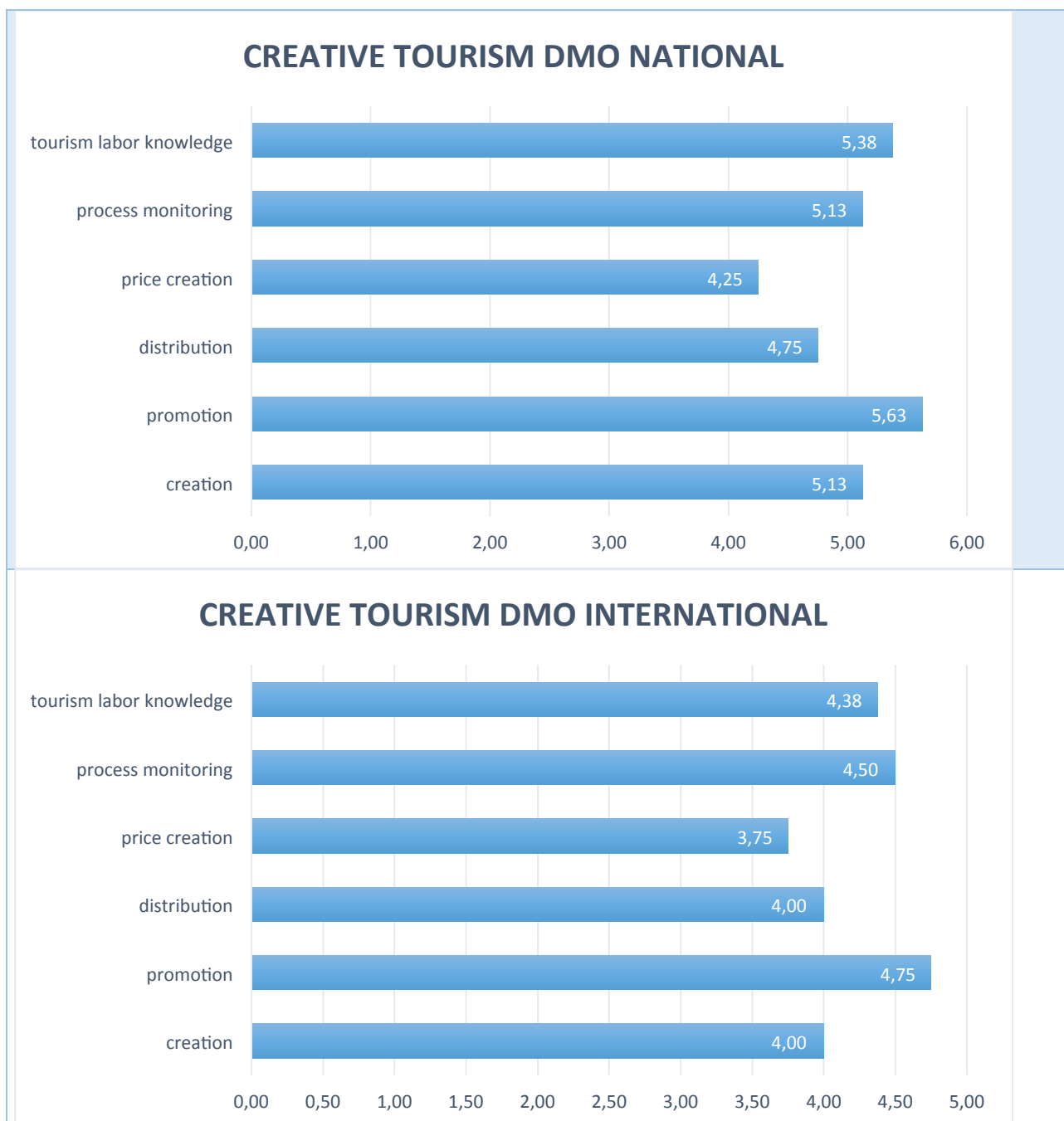
## DESTINATION MANAGEMENT ORGANISATIONS

### CREATIVE TOURISM DMO LOCAL



### CREATIVE TOURISM DMO REGIONAL

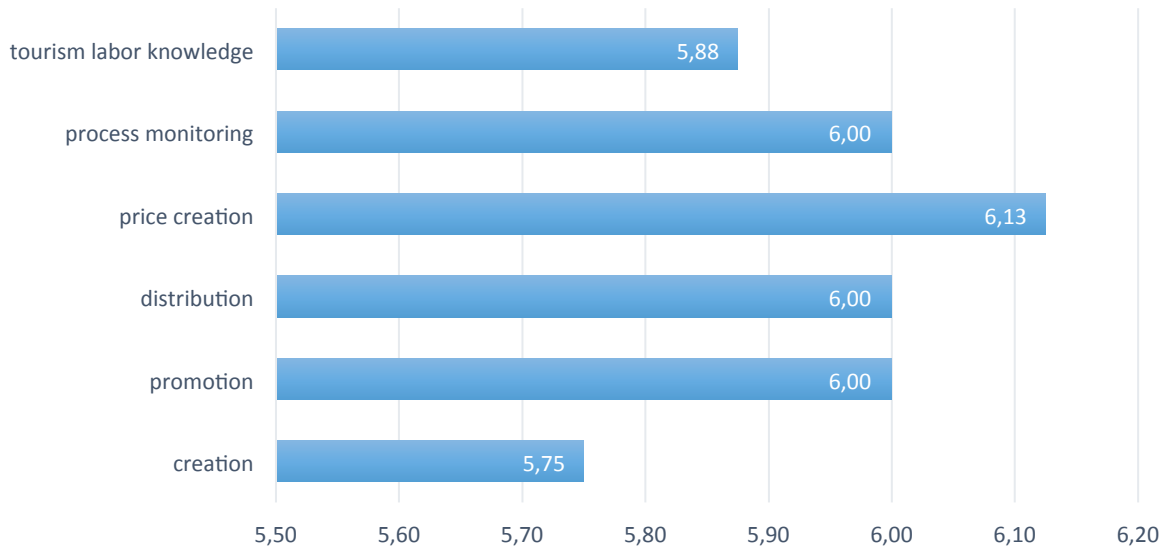




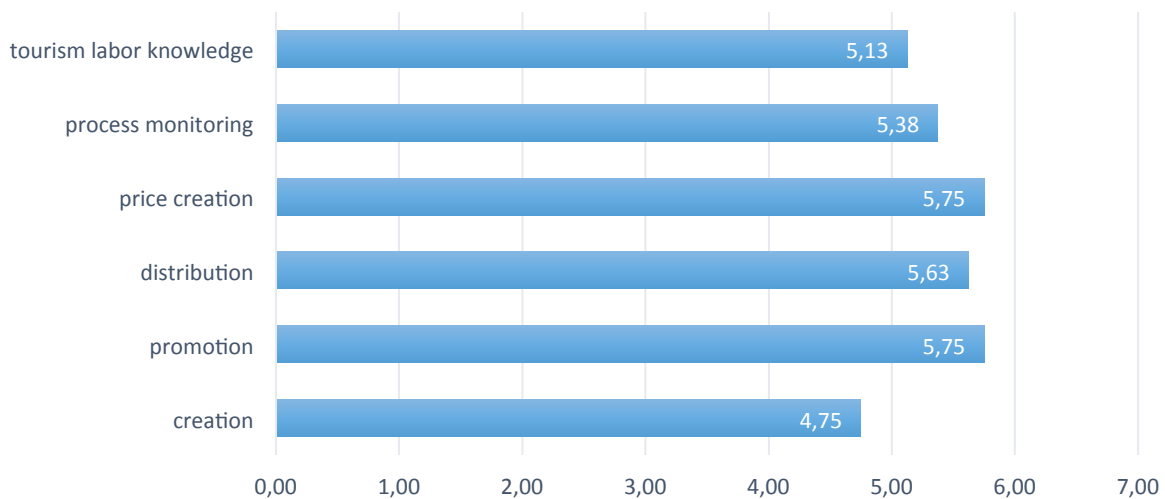
The examinees consider, as regarding the role of **private stakeholders in creation of products and services within creative tourism** in the Istria Region, at the local level their role is most important in price creation; at regional level in price creation and promotion/branding of products/activities; at the national level in promotion/branding of products/activities and at the international level in price creation and promotion/branding of products/activities.

## PRIVATE STAKEHOLDERS

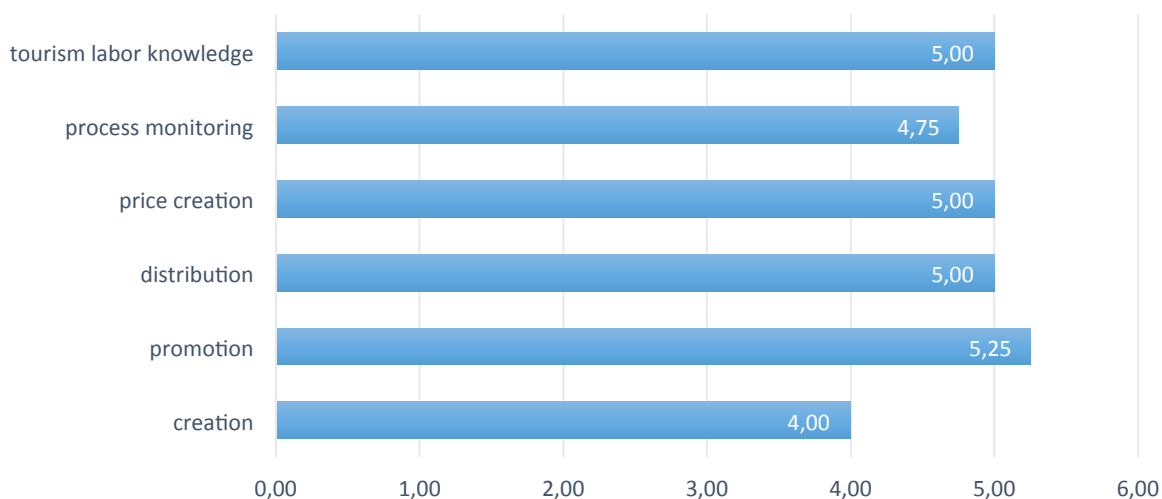
### CREATIVE TOURISM PRIVATE STAKEHOLDERS LOCAL



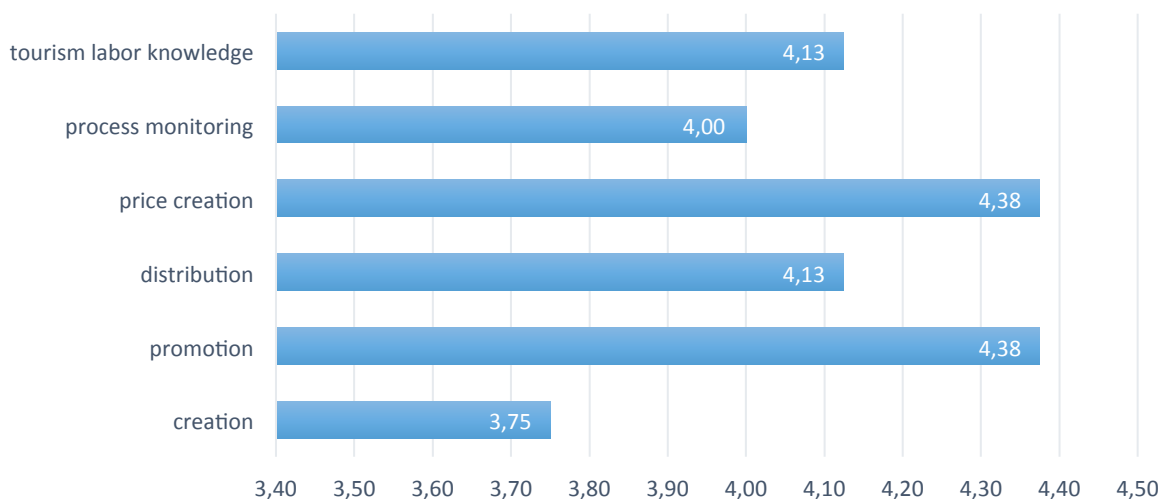
### CREATIVE TOURISM PRIVATE STAKEHOLDERS REGIONAL



### CREATIVE TOURISM PRIVATE STAKEHOLDERS NATIONAL



### CREATIVE TOURISM PRIVATE STAKEHOLDERS INTERNATIONAL

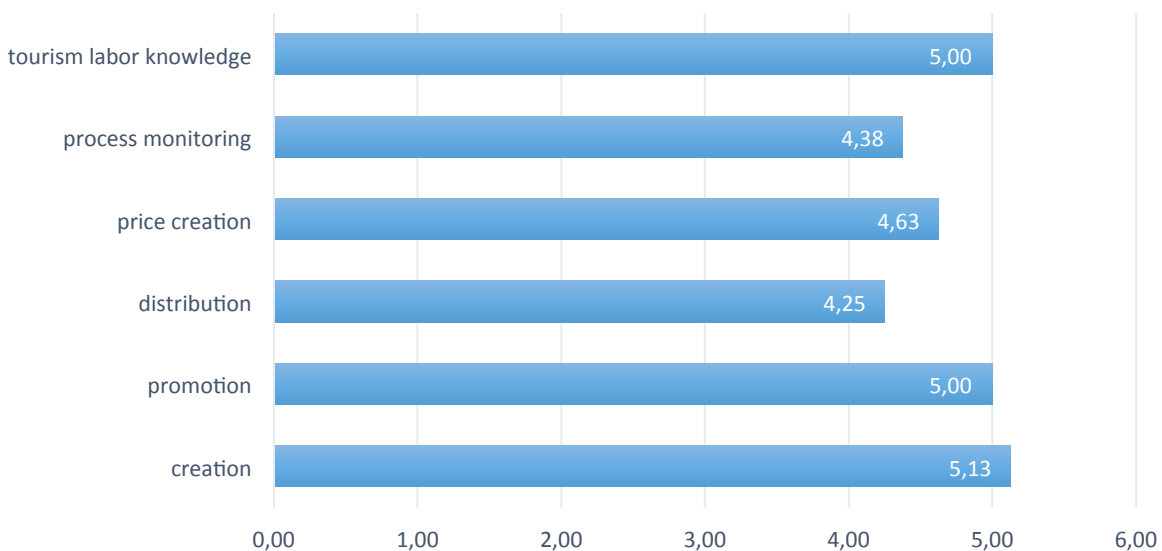


The examinees consider, as regarding the role of **tourists in creation of products and services within creative tourism** in the Istria Region, at the local level their role is most important in creation/enhancement of products/activities; at regional level, national and international level in promotion/branding of products/activities.

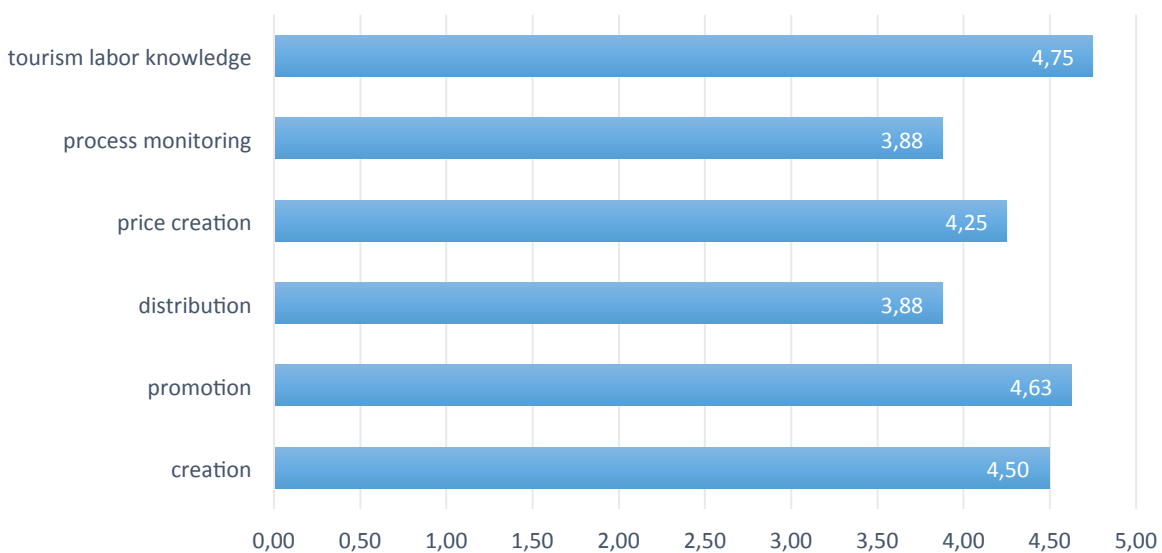


## TOURISTS

### CREATIVE TOURISM TOURISTS LOCAL



### CREATIVE TOURISM TOURISTS REGIONAL

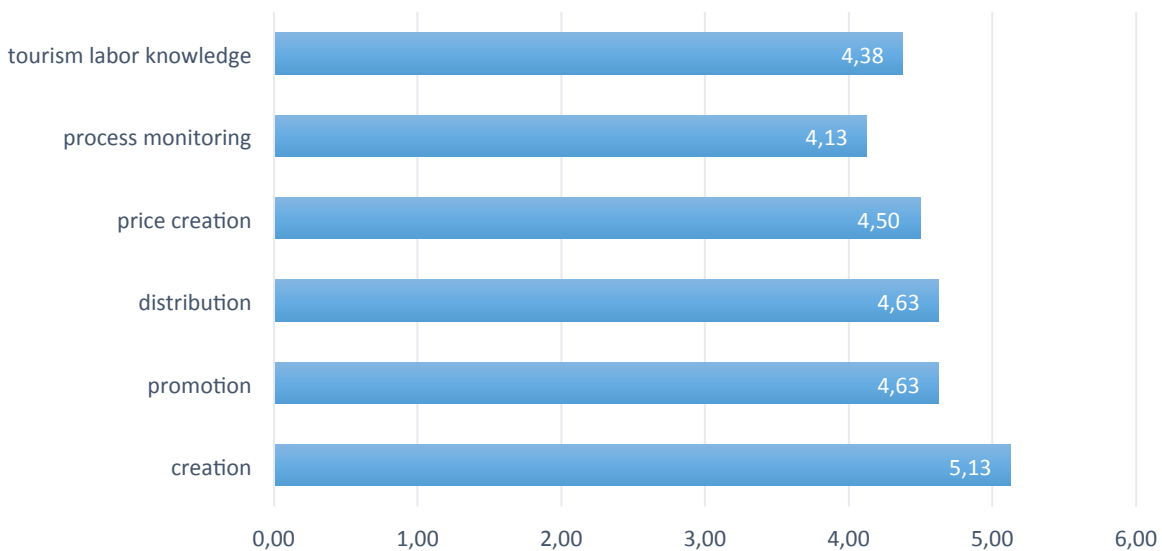




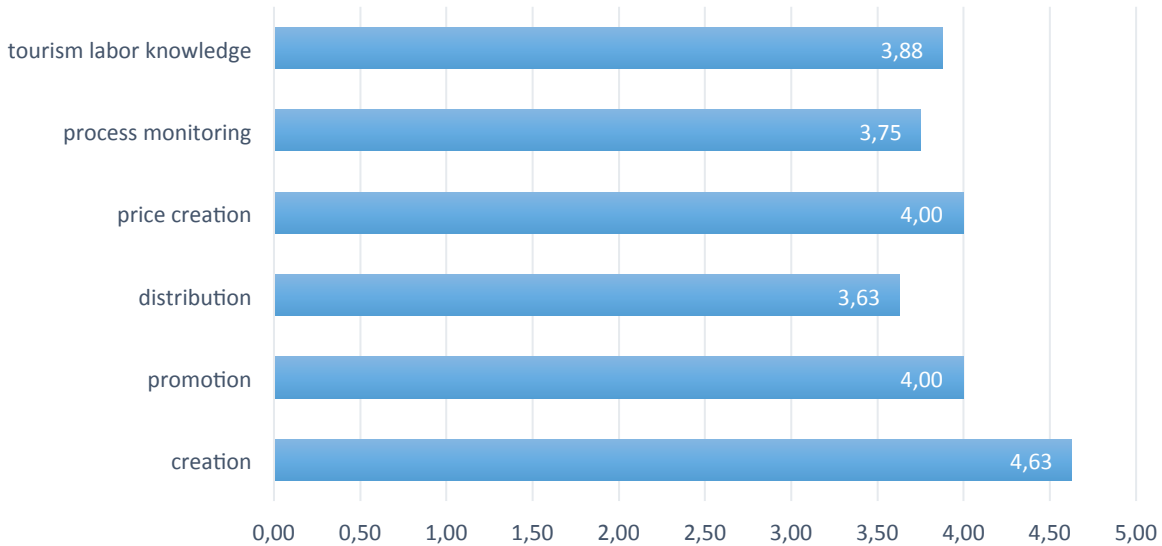
The examinees consider, as regarding the role of **residents in creation of products and services within creative tourism** in the Istria Region, at the local level their role is most important in creation/enhancement of products/activities; at regional level in creation/enhancement of products/activities; at the national level in promotion/branding of products/activities and creation/enhancement of products/activities and at the international level in promotion /branding of products/activities.

## RESIDENTS

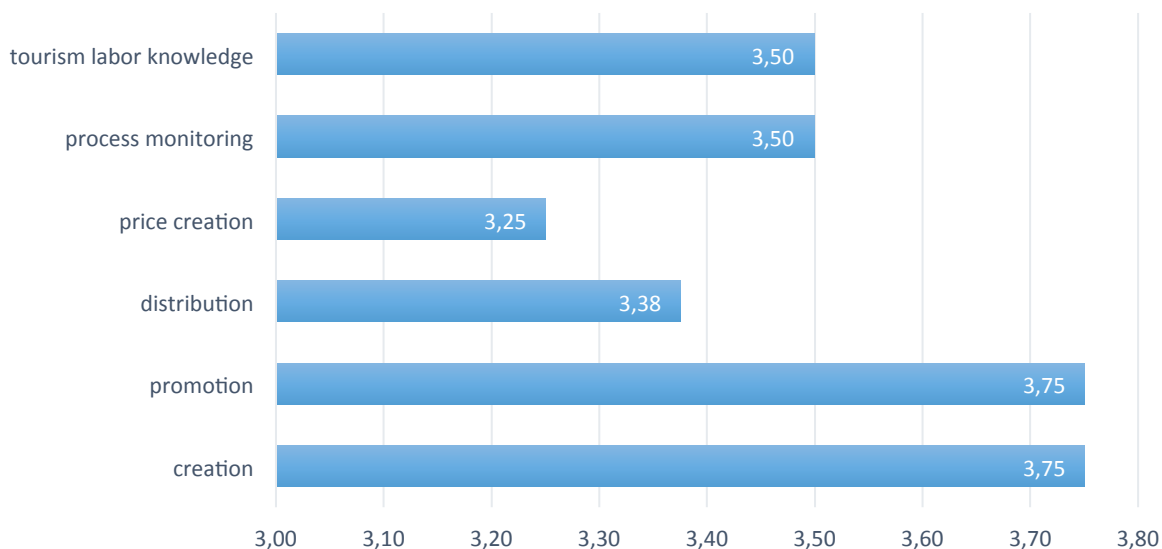
### CREATIVE TOURISM RESIDENTS LOCAL



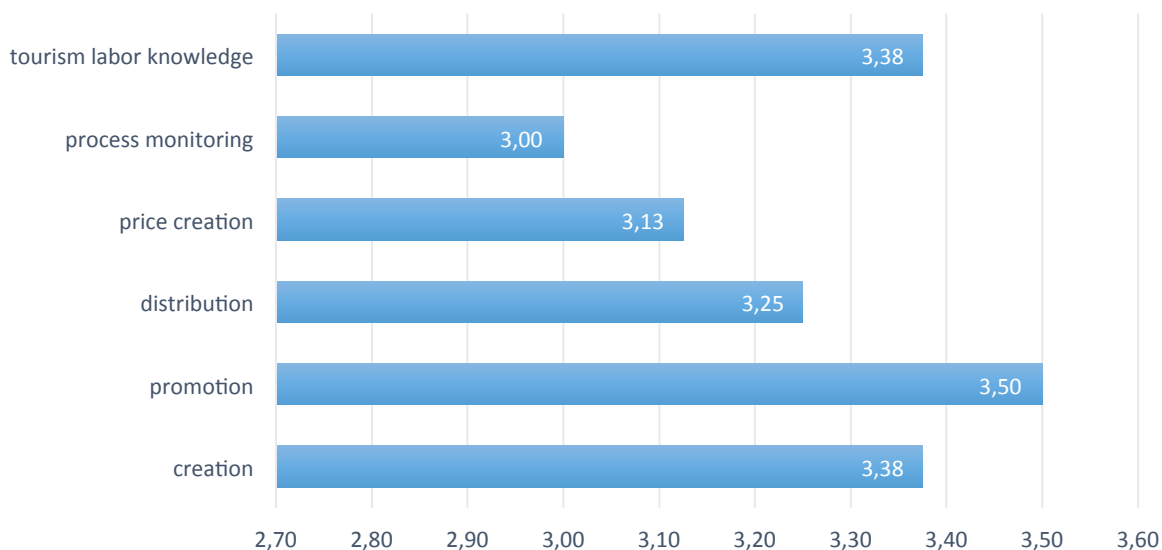
### CREATIVE TOURISM RESIDENTS REGIONAL



### CREATIVE TOURISM RESIDENTS NATIONAL



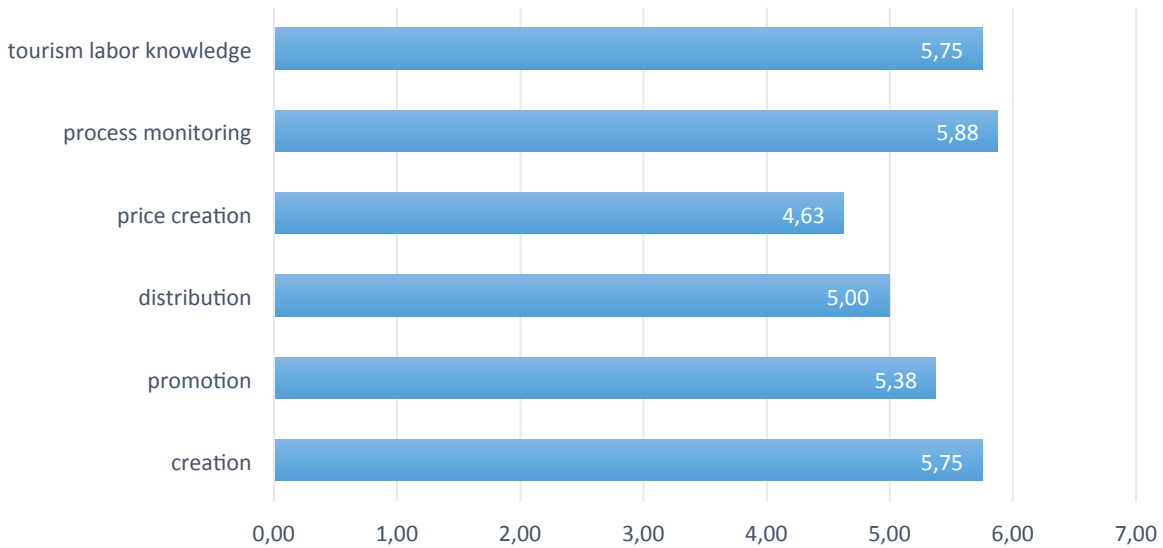
### CREATIVE TOURISM RESIDENTS INTERNATIONAL



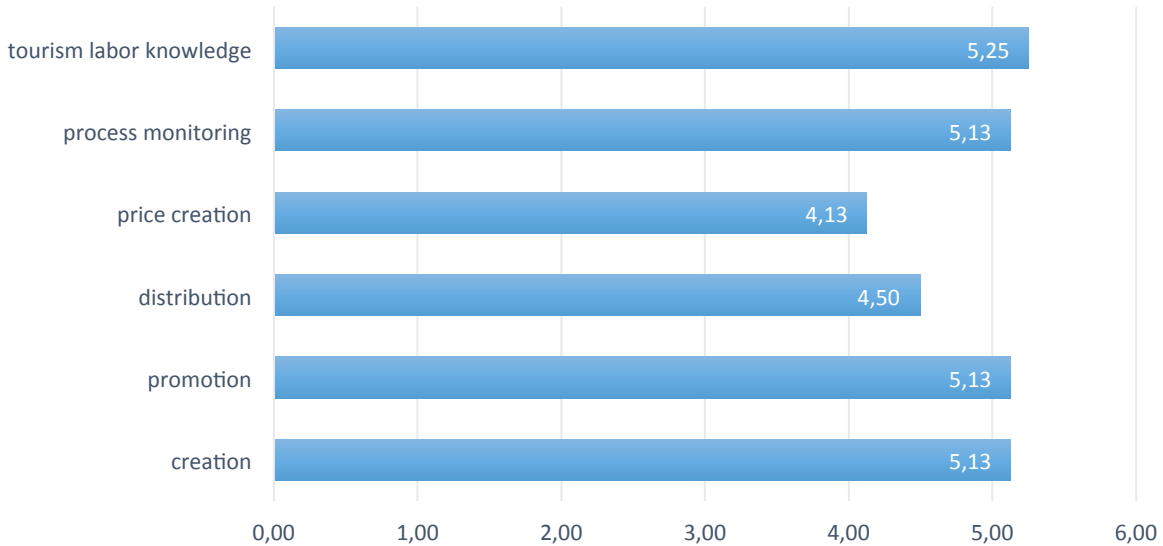
The examinees consider, as regarding the role of **the civil sector in creation of products and services within creative tourism** in the Istria Region, at the local level their role is most important in process monitoring; at regional level in tourism labour knowledge enhancement; at the national level in tourism labour knowledge enhancement and at the international level in tourism labour knowledge enhancement.

## CIVIL SECTOR

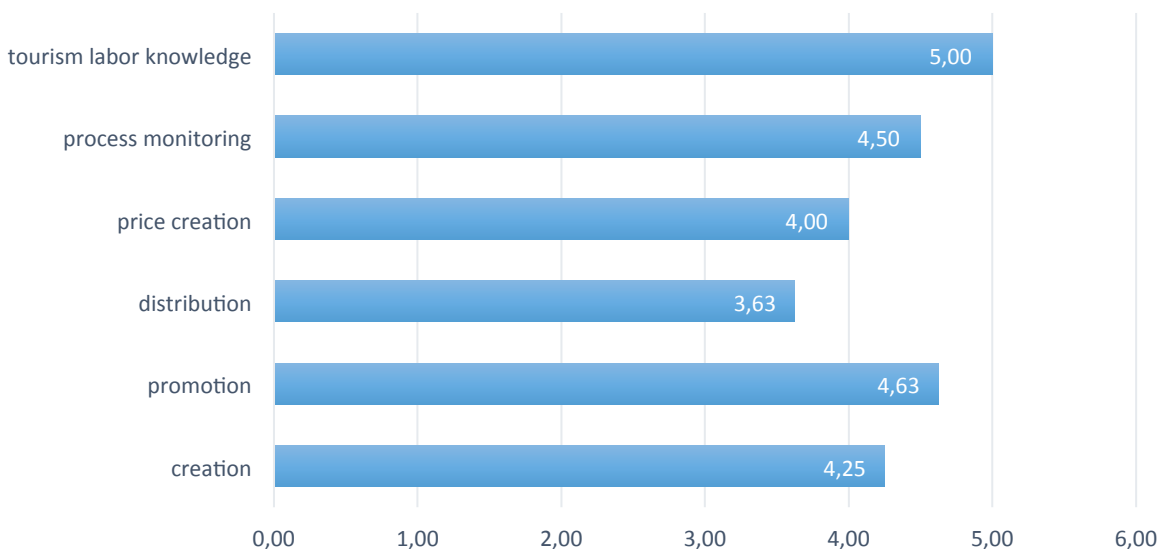
### CREATIVE TOURISM CIVIL SECTOR LOCAL



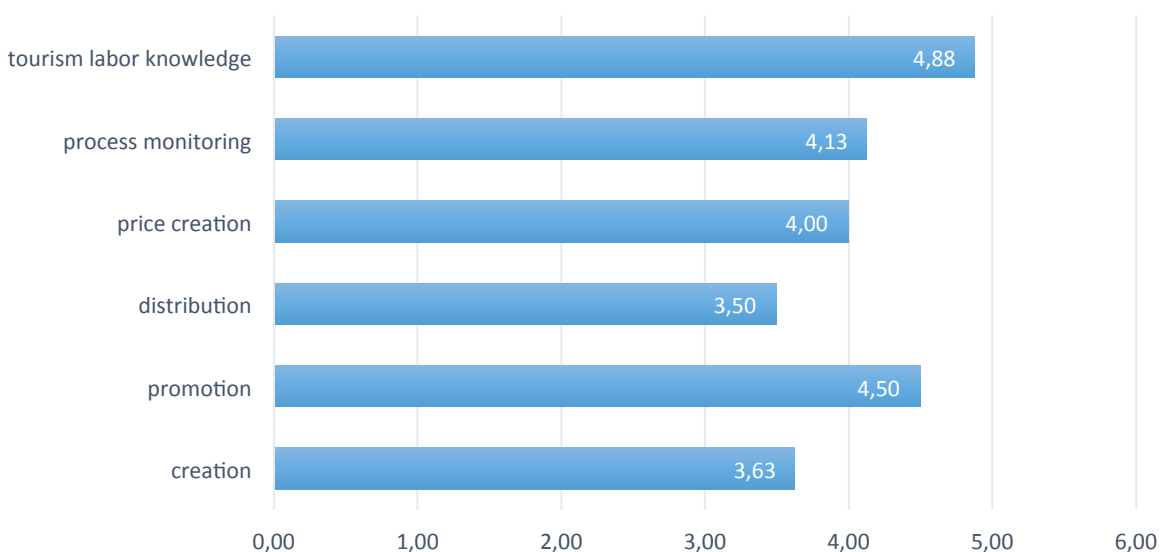
### CREATIVE TOURISM CIVIL SECTOR REGIONAL



### CREATIVE TOURISM CIVIL SECTOR NATIONAL



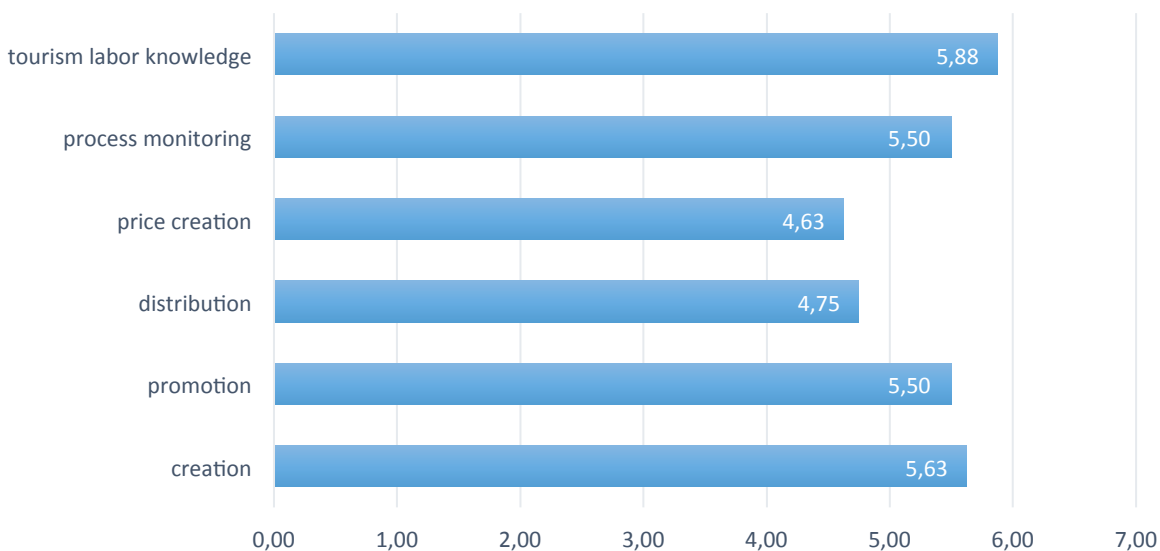
### CREATIVE TOURISM CIVIL SECTOR INTERNATIONAL



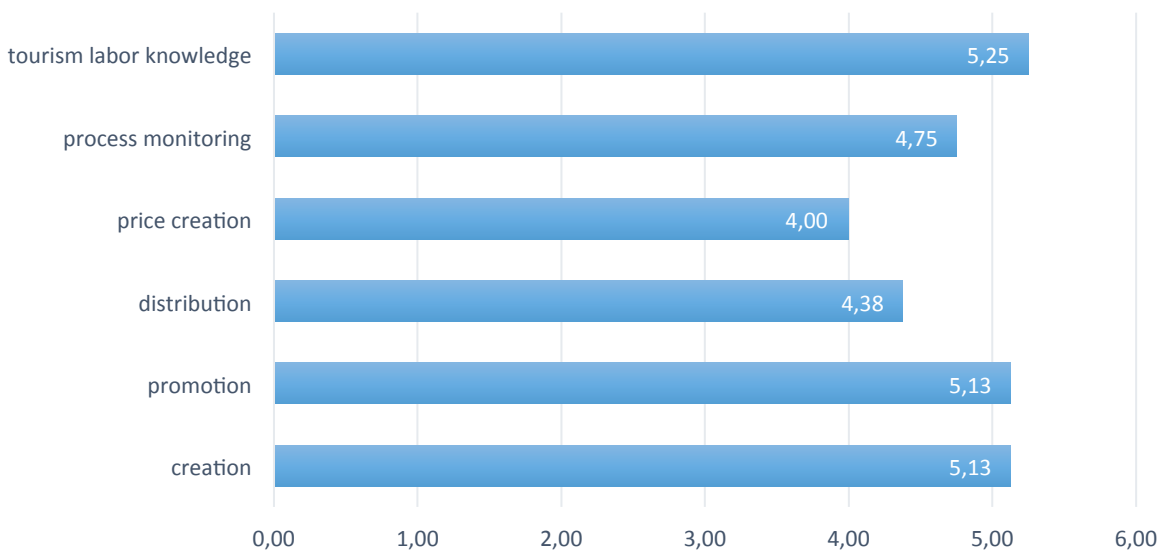
The examinees consider, as regarding the role of **associations/organizations related to cultural and natural heritage of the area in creation of products and services within creative tourism** in the Istria Region, at the local level their role is most important in tourism labour knowledge enhancement; at regional level in tourism labour knowledge enhancement; at the national level in tourism labour knowledge enhancement and at the international level in tourism labour knowledge enhancement as well.

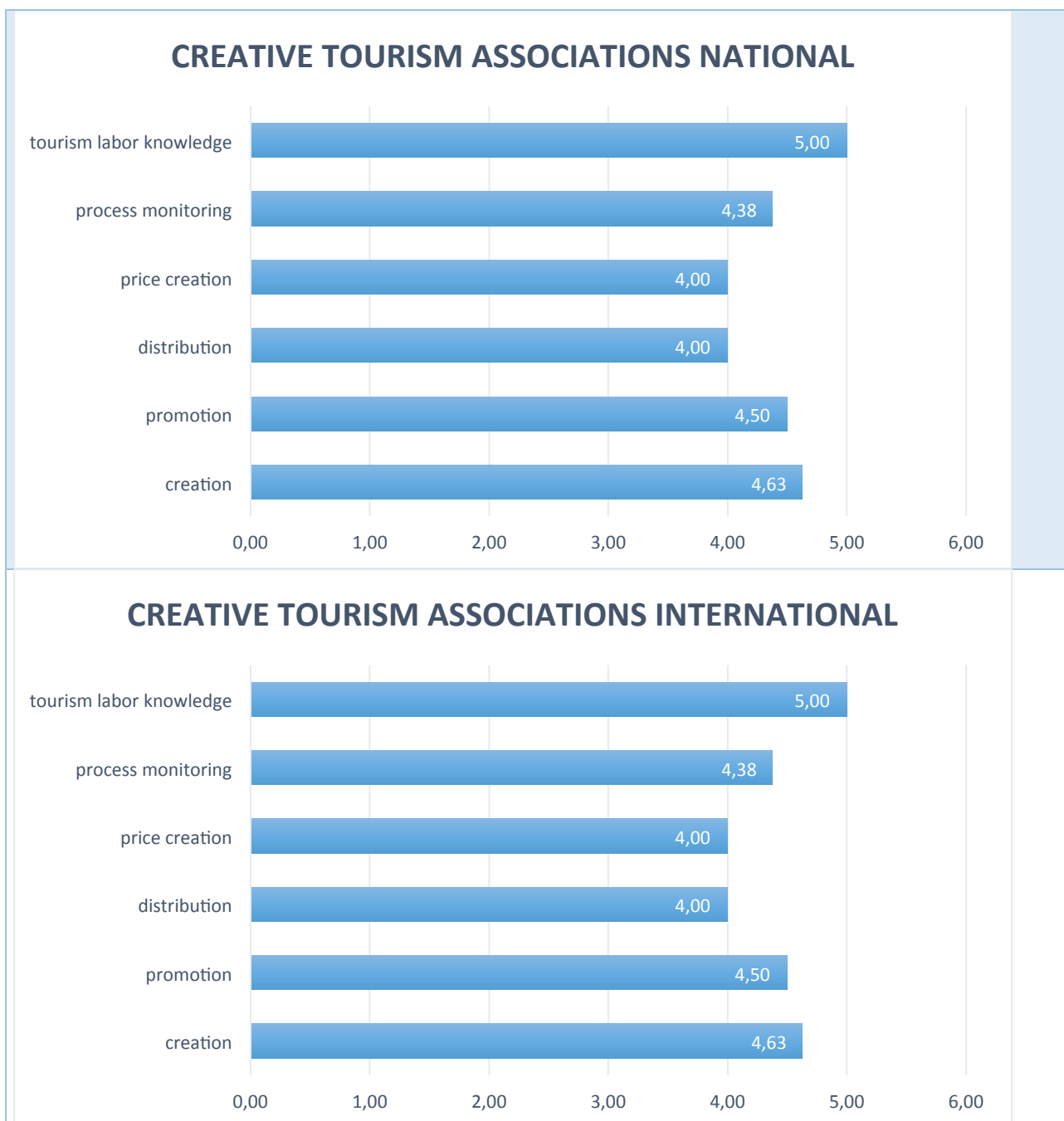
## ASSOCIATIONS

### CREATIVE TOURISM ASSOCIATIONS LOCAL



### CREATIVE TOURISM ASSOCIATIONS REGIONAL



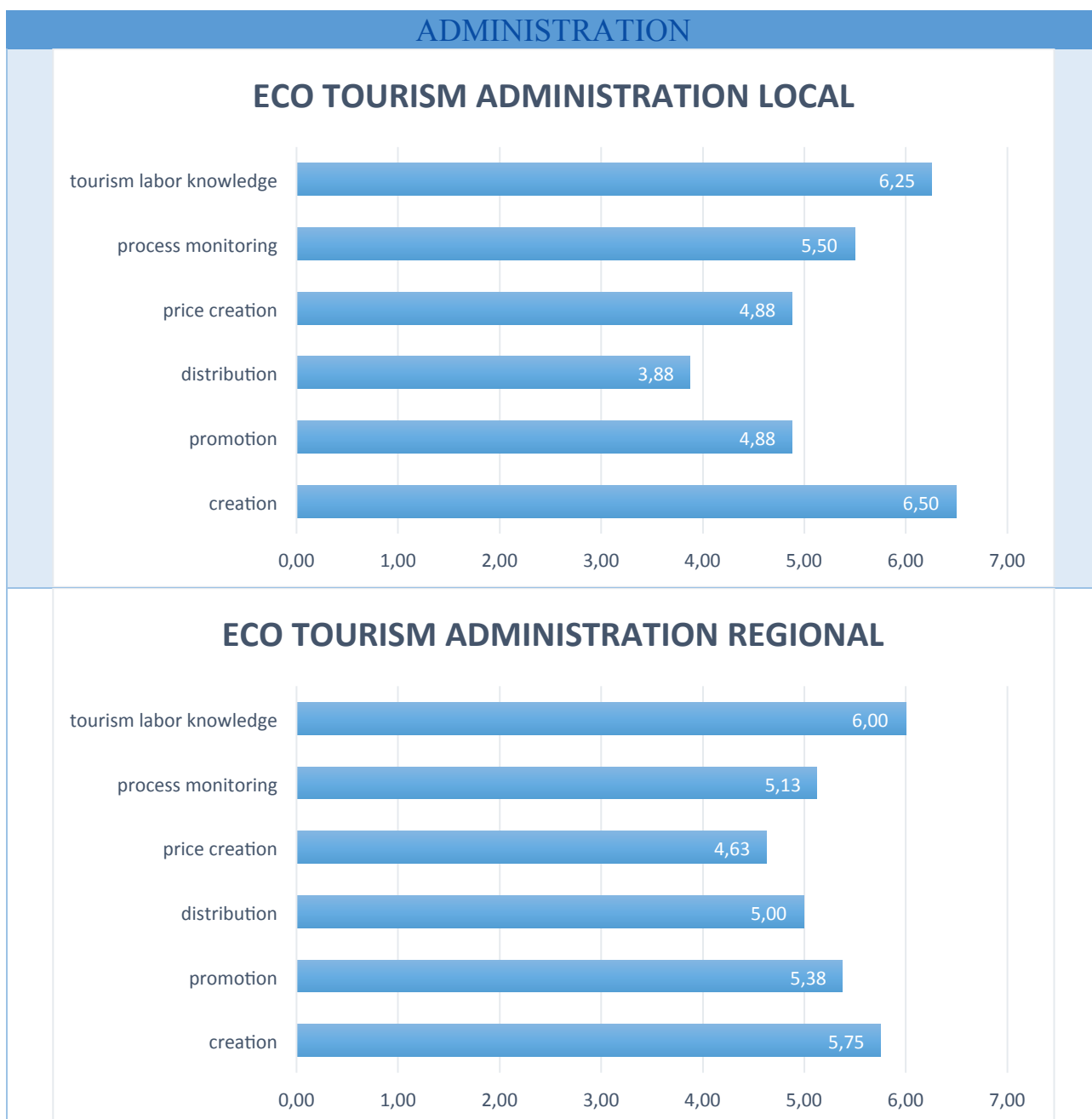


***Eco tourism***

Which are the most important tourism stakeholders involved in creation of products/activities within eco-tourism and creative tourism activities in the testing area? Please rate their importance according to influence towards eco-tourism and creative tourism (Order the answers from 1 to 7 where 1 is not important and 7 is extremely important)



The examinees consider, as regarding the role of **administration in creation of products and services within eco-tourism** in the Istria Region, at the local level its role is most important in creation/enhancement of products/activities; at regional level in tourism labour knowledge enhancement, at the national level tourism labour knowledge enhancement and at the international level in promotion/branding of products/activities.

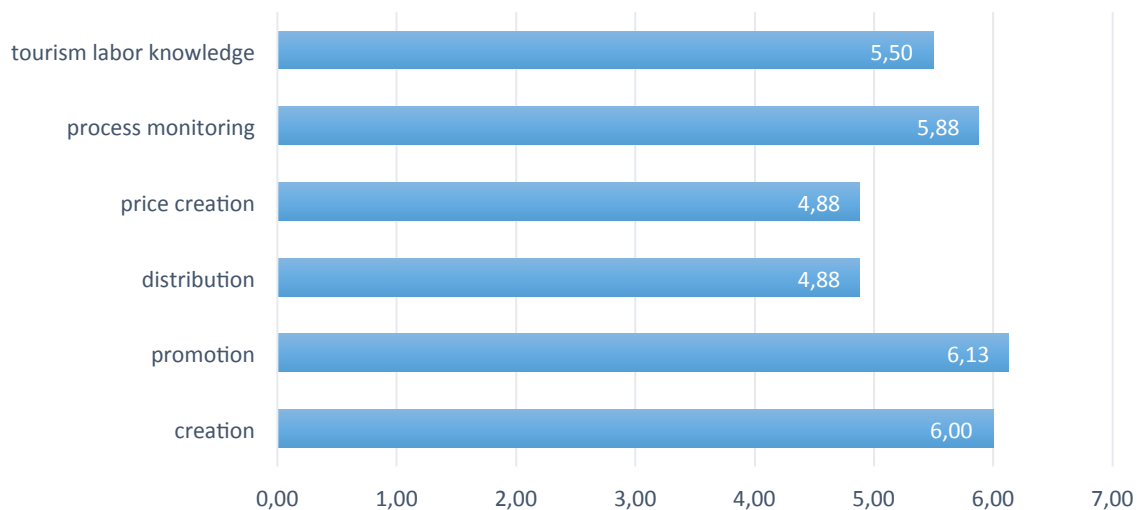




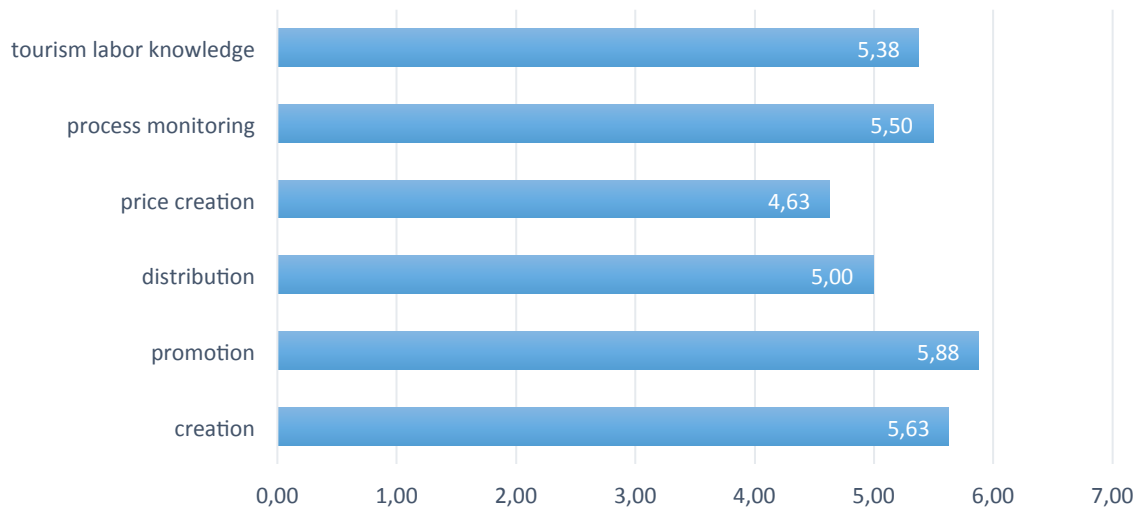
The examinees consider, as regarding the role of **destination management organisations in creation of products and services within eco-tourism** in the Istria Region, at the local level its role is most important in promotion/branding of products/activities; at regional level in promotion/branding of products/activities; at the national level in tourism labour knowledge enhancement and at the international level in promotion/branding of products/activities.

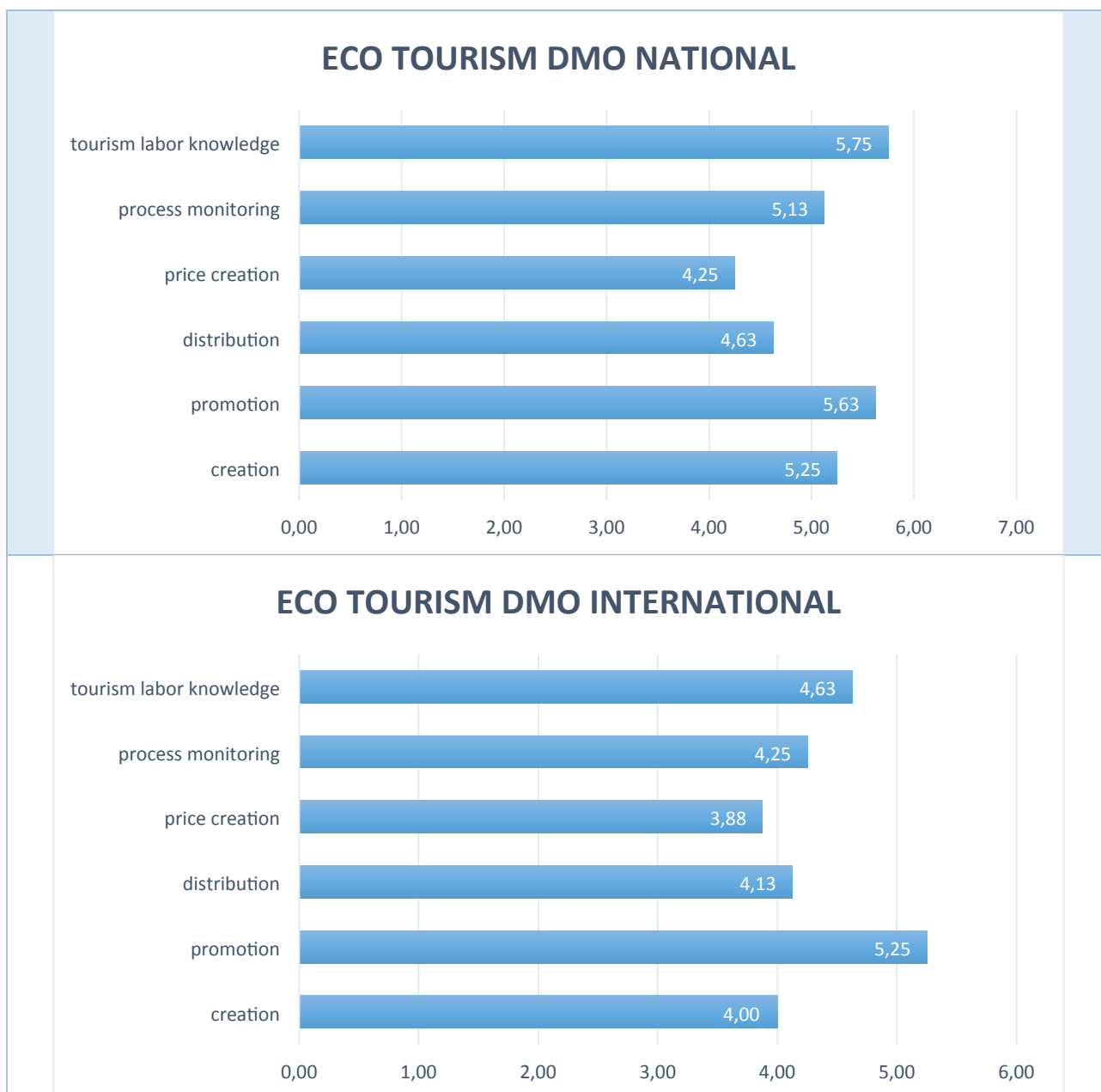
## DESTINATION MANAGEMENT ORGANISATIONS

### ECO TOURISM DMO LOCAL



### ECO TOURISM DMO REGIONAL

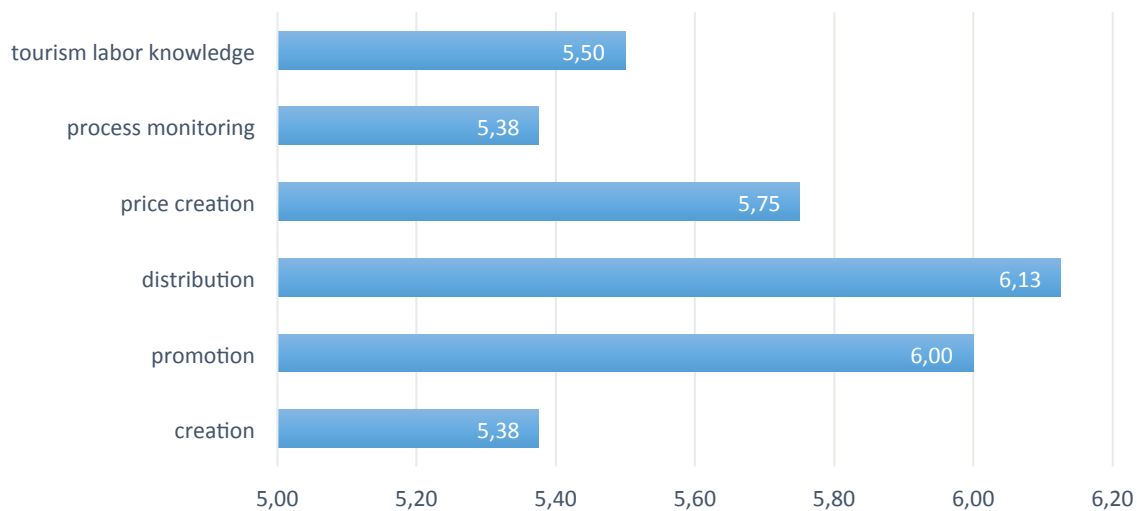




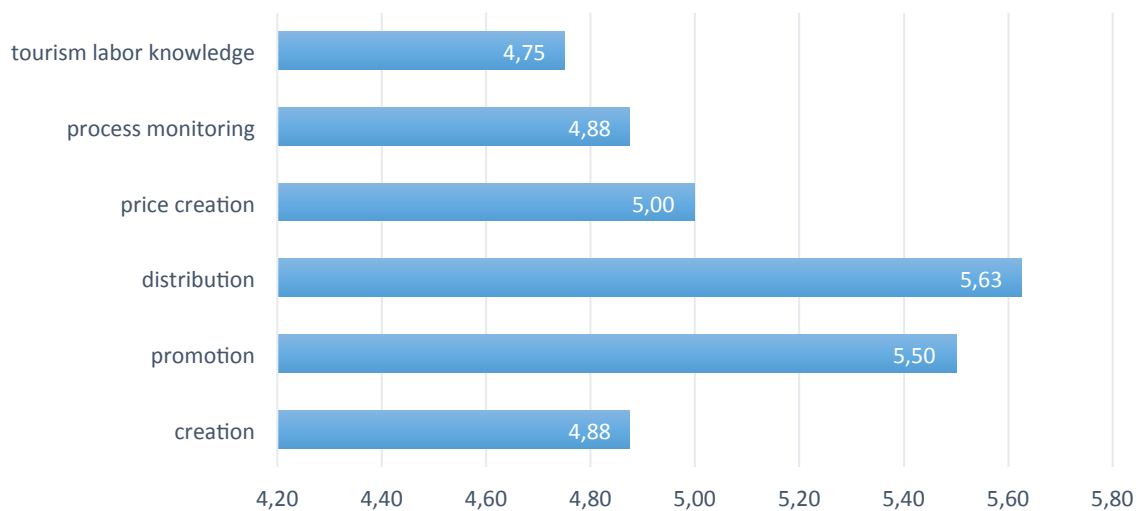
The examinees consider, as regarding the role of **private stakeholders in creation of products and services within eco-tourism** in the Istria Region, at the local level their role is most important in distribution/selling of products/activities; at regional level in distribution/selling of products/activities; at the national level in promotion/branding of products/activities and at the international level in promotion/branding of products/activities and distribution/selling of products/activities.

## PRIVATE STAKEHOLDERS

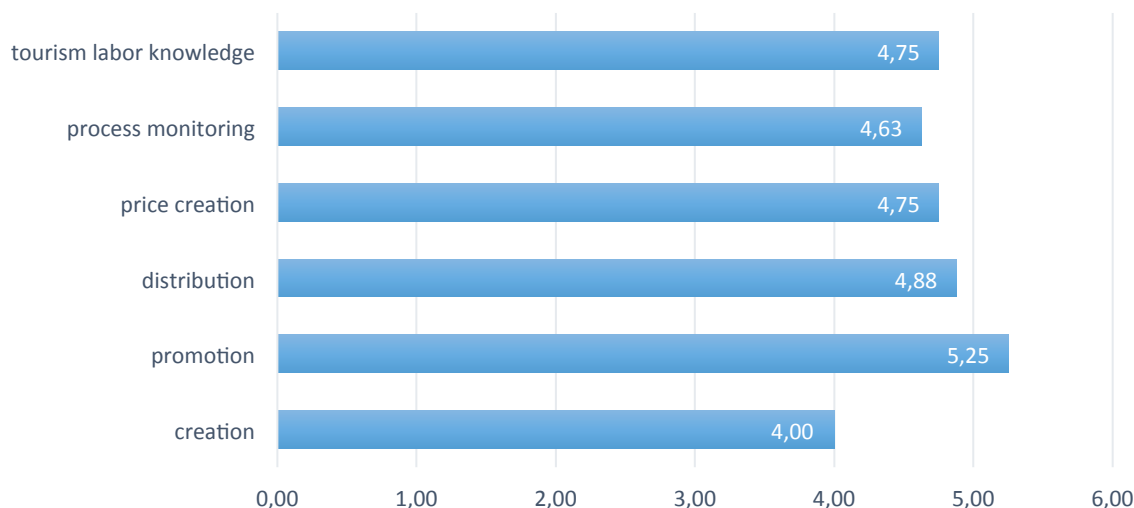
### ECO TOURISM PRIVATE STAKEHOLDERS LOCAL



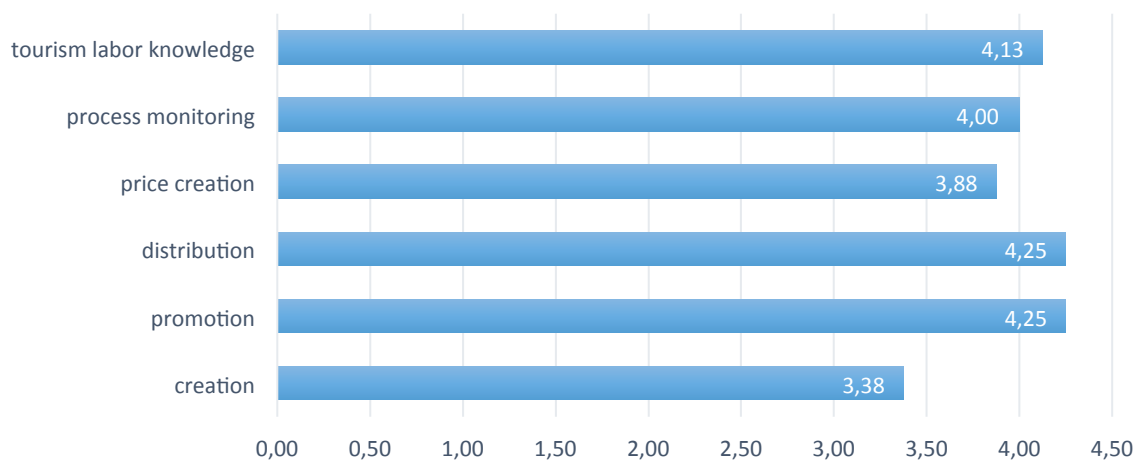
### ECO TOURISM PRIVATE STAKEHOLDERS REGIONAL



### ECO TOURISM PRIVATE STAKEHOLDERS NATIONAL



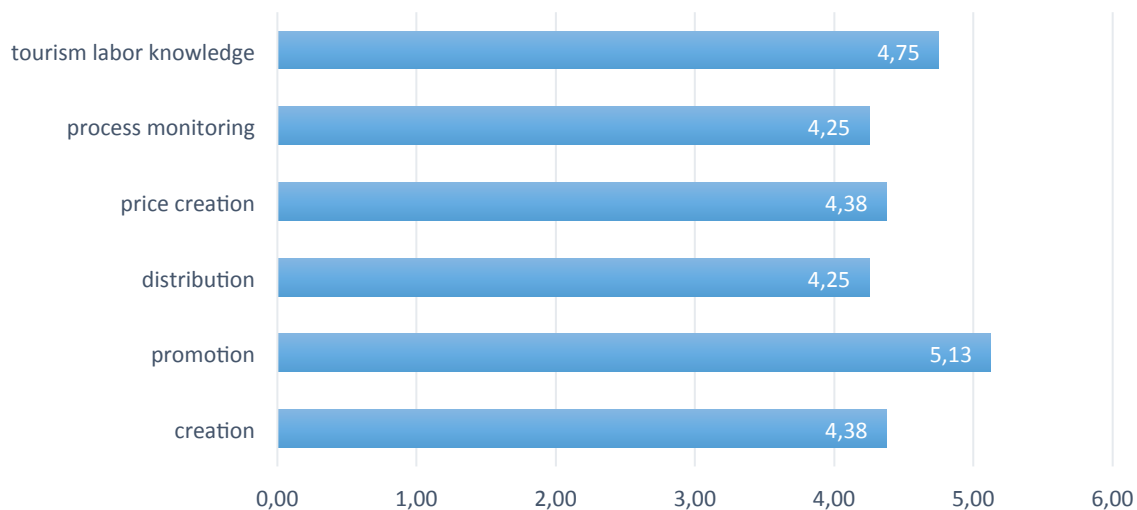
### ECO TOURISM PRIVATE STAKEHOLDERS INTERNATIONAL



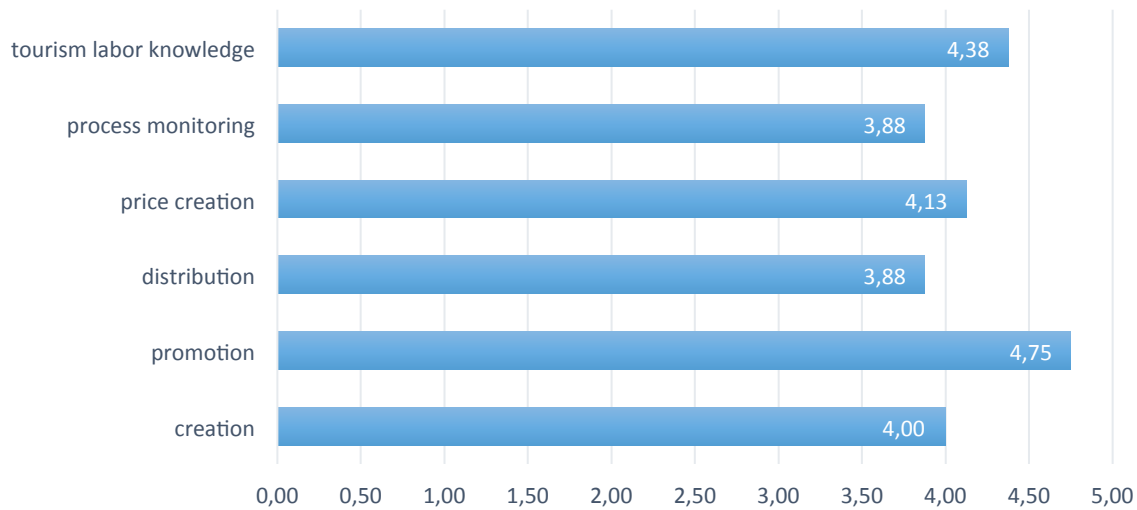
The examinees consider, as regarding the role of **tourists in creation of products and services within eco-tourism** in the Istria Region, at the local level their role is most important in promotion/branding of products/activities; at regional level in promotion/branding of products/activities; at the national level in promotion/branding of products/activities and at the international level in promotion /branding of products/activities as well.

## TOURISTS

### ECO TOURISM TOURISTS LOCAL



### ECO TOURISM TOURISTS REGIONAL



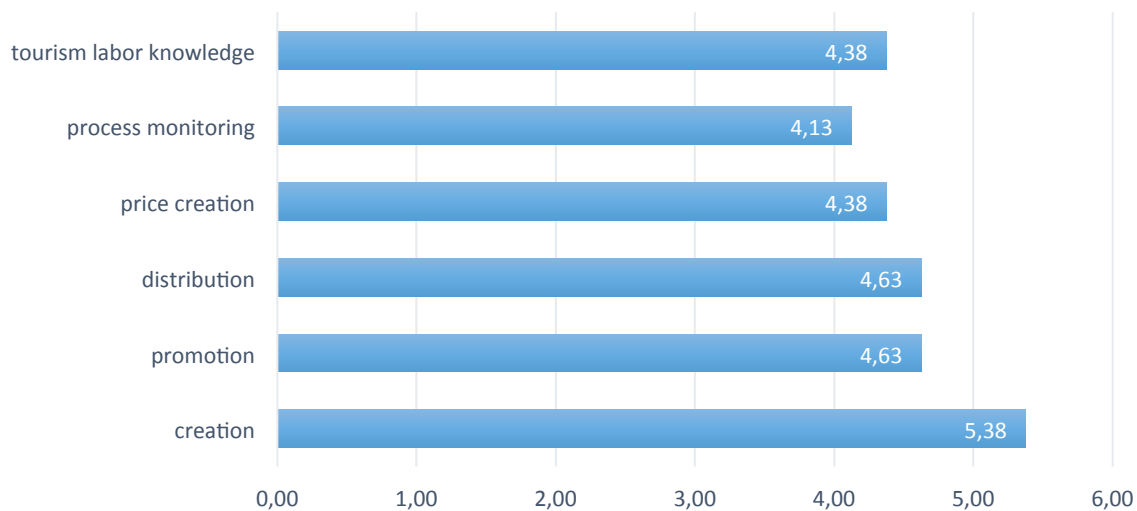


The examinees consider, as regarding the role of **residents in creation of products and services within eco-tourism** in the Istria Region, at the local level their role is most important in creation/enhancement of products/activities; at regional level in creation/enhancement of products/activities; at the national level in promotion/branding of products/activities and creation/enhancement of products/activities and at the international level in promotion/branding of products/activities.

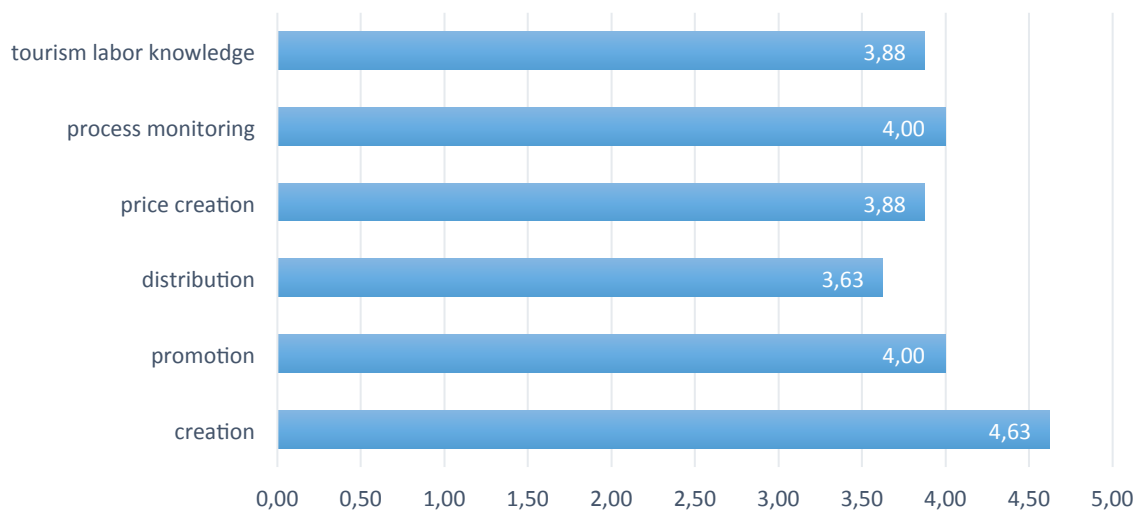


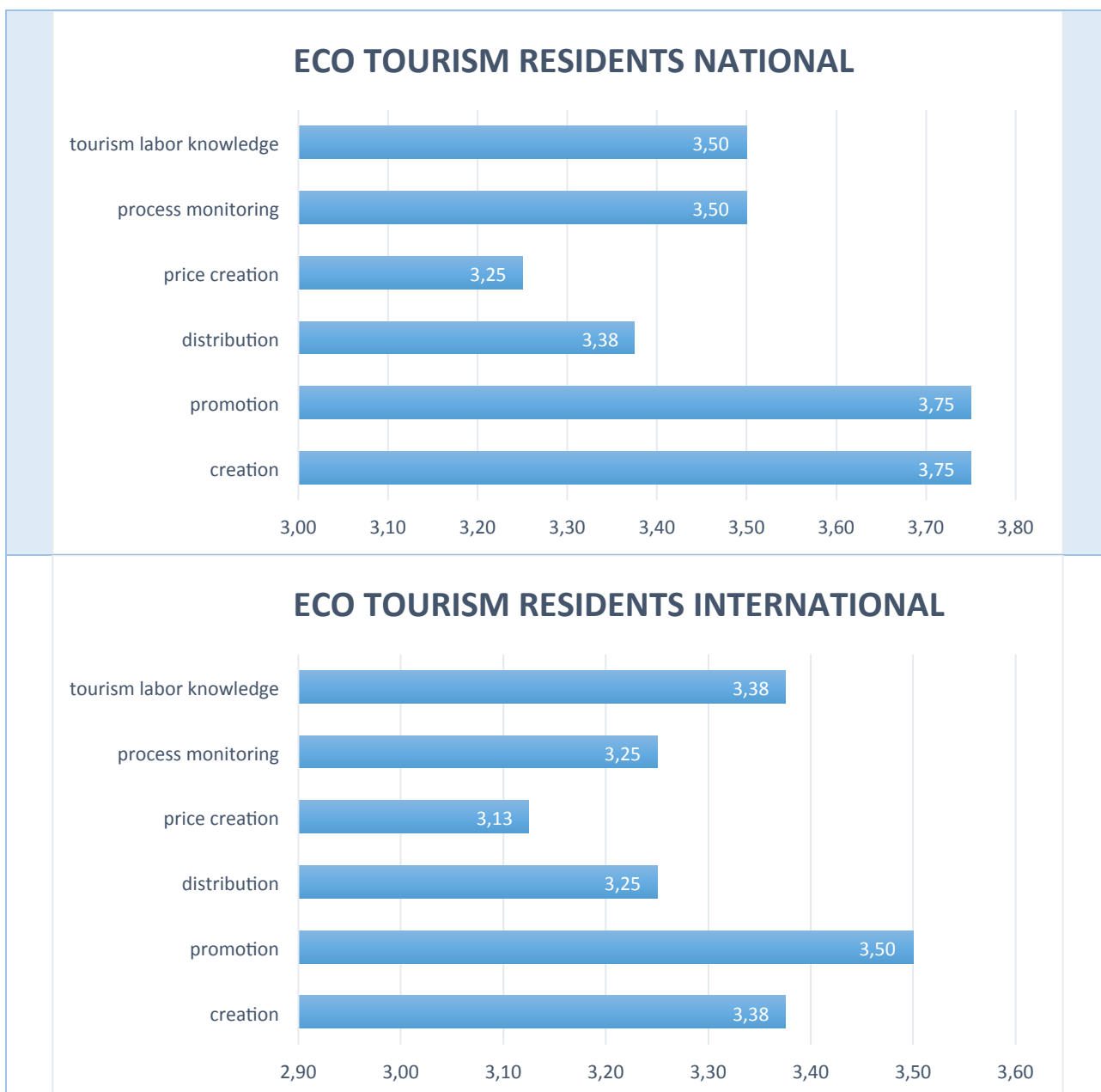
## RESIDENTS

### ECO TOURISM RESIDENTS LOCAL



### ECO TOURISM RESIDENTS REGIONAL

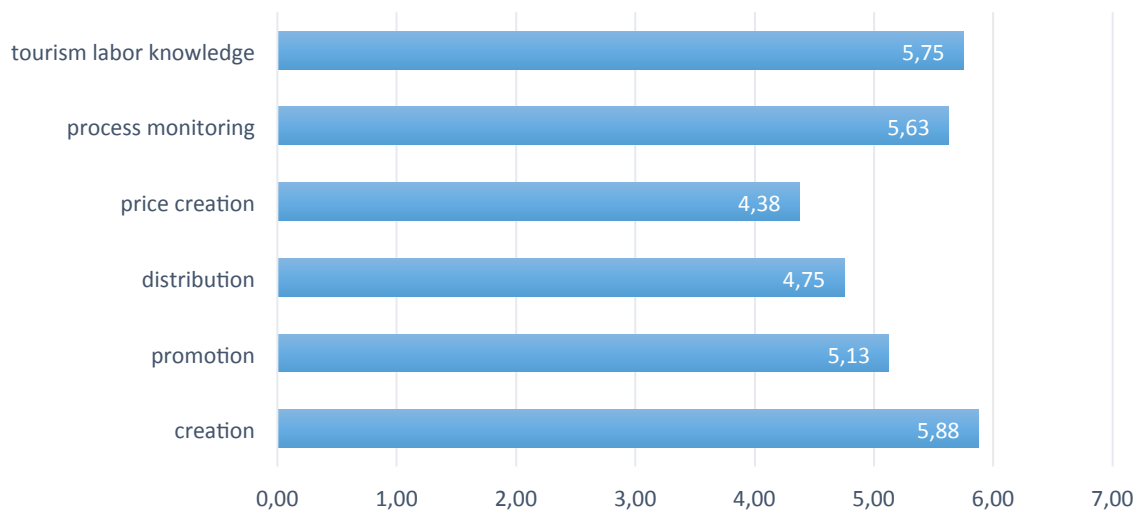




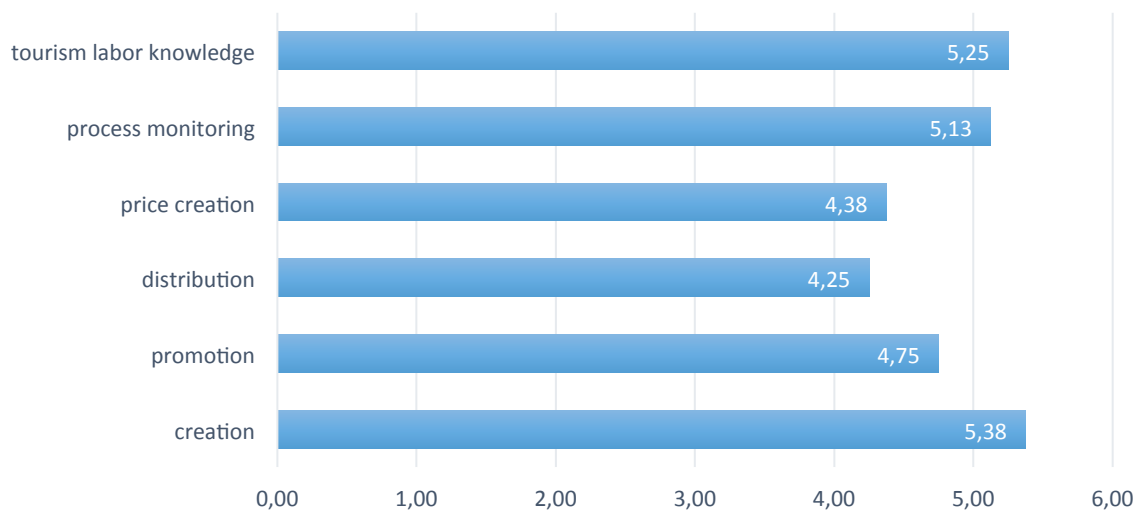
The examinees consider, as regarding the role of **the civil sector in creation of products and services within eco-tourism** in the Istria Region, at the local level their role is most important in creation/enhancement of products/activities; at regional level in creation/enhancement of products/activities; at the national level in tourism labour knowledge enhancement and at the international level in tourism labour knowledge enhancement.

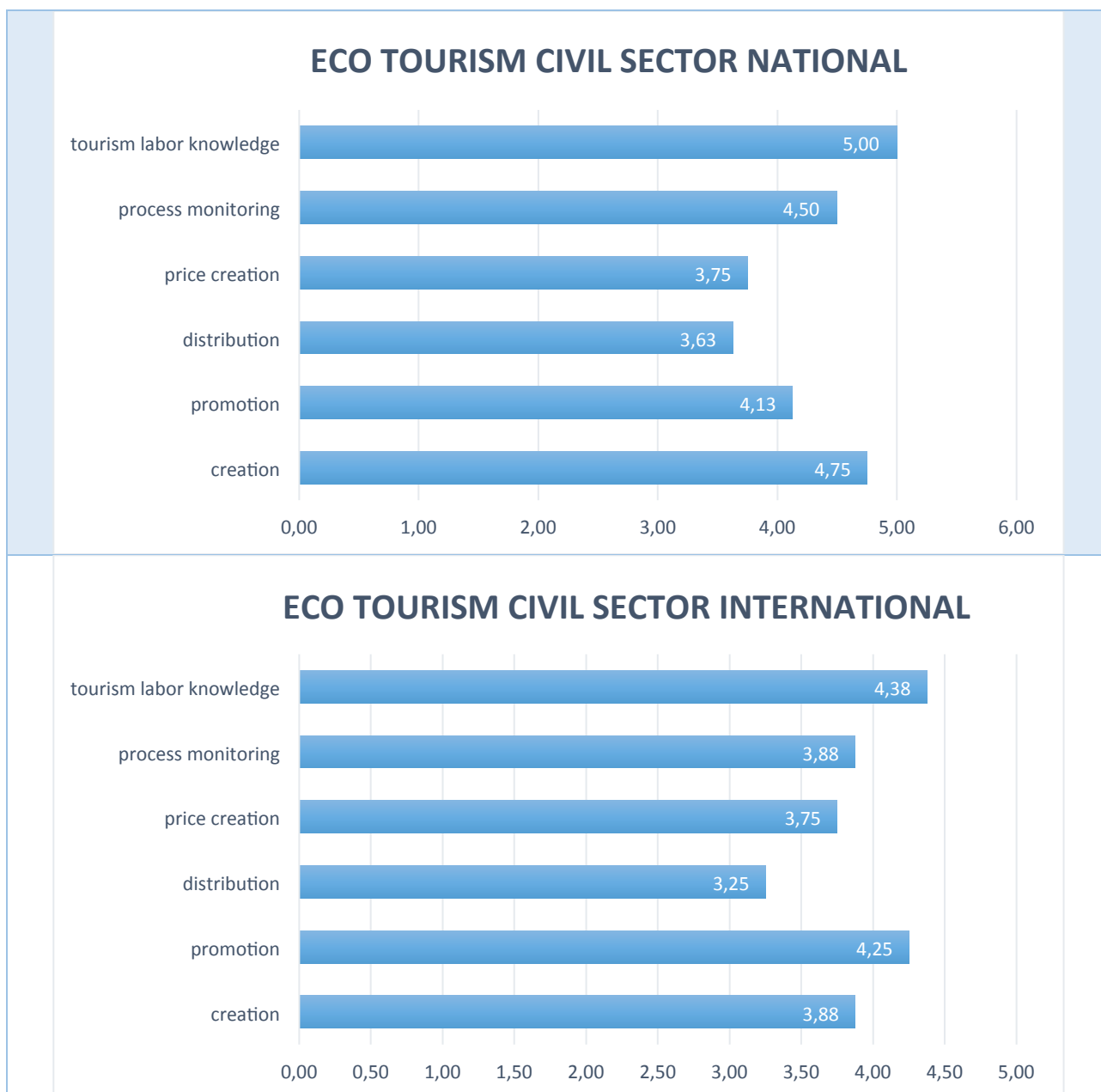
## CIVIL SECTORS

### ECO TOURISM CIVIL SECTOR LOCAL



### ECO TOURISM CIVIL SECTOR REGIONAL

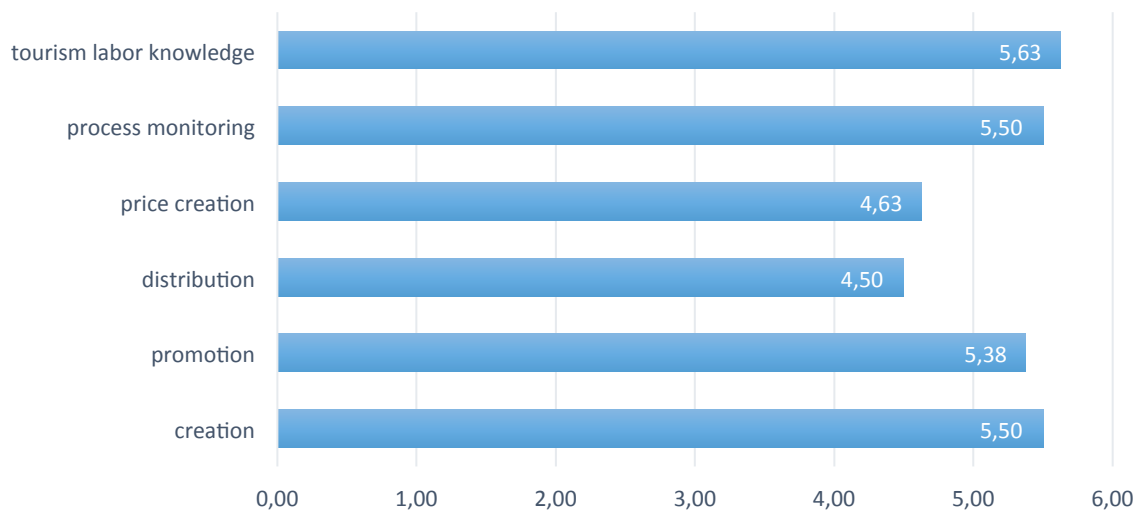




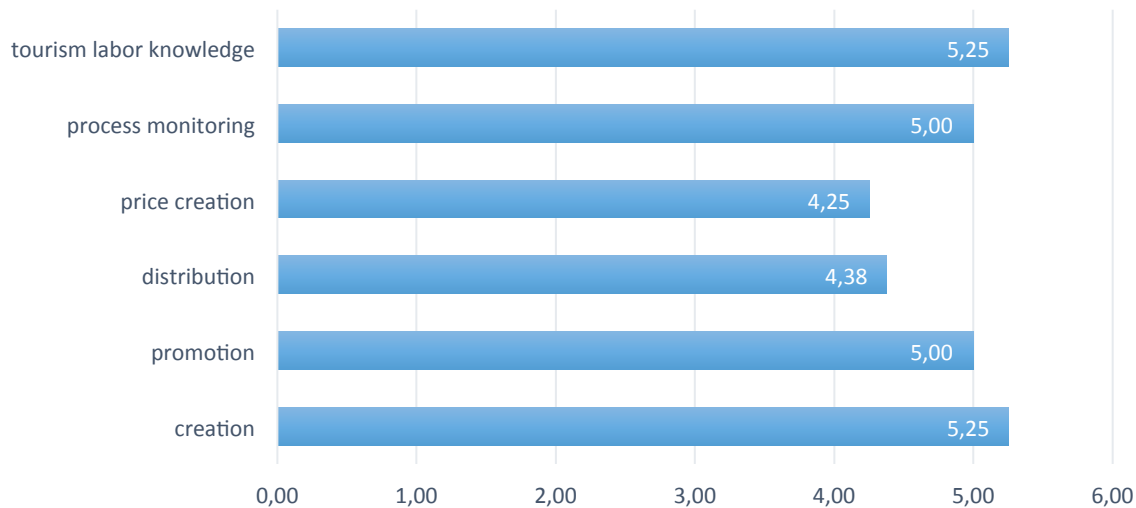
The examinees consider, as regarding the role of **associations/organizations related to cultural and natural heritage of the area in creation of products and services within eco-tourism** in the Istria Region, at the local level their role is most important in tourism labour knowledge enhancement; at regional level in creation/enhancement of products/activities tourism and labour knowledge enhancement; at the national level in tourism labour knowledge enhancement and at the international level in tourism labour knowledge enhancement.

## ASSOCIATIONS

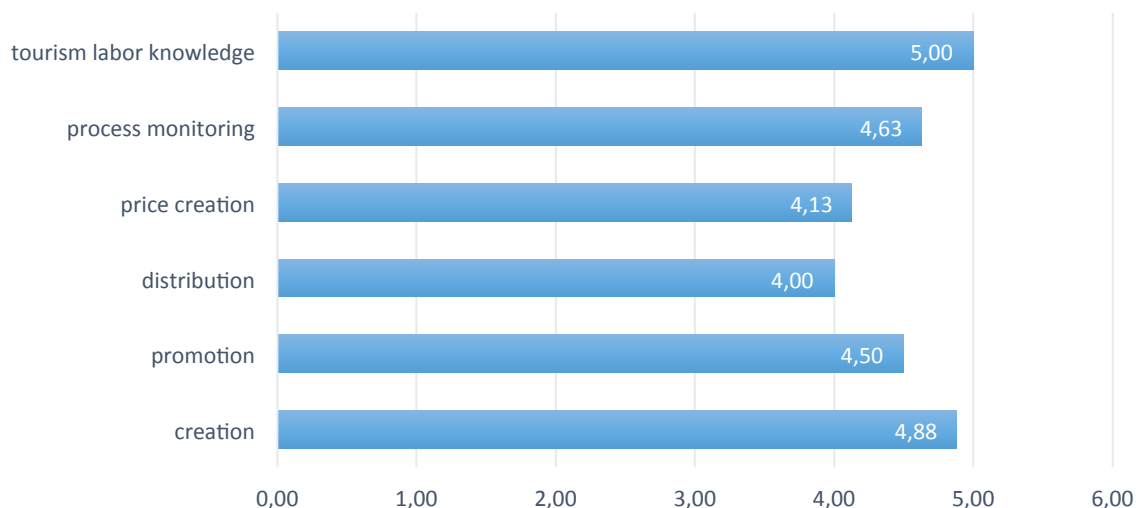
### ECO TOURISM ASSOCIATIONS LOCAL



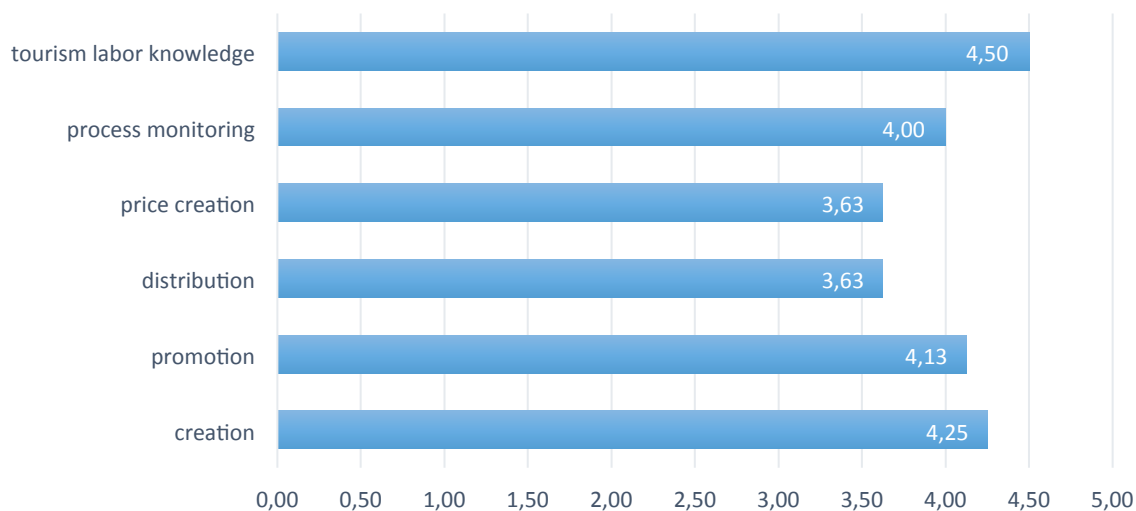
### ECO TOURISM ASSOCIATIONS REGIONAL



### ECO TOURISM ASSOCIATIONS NATIONAL



### ECO TOURISM ASSOCIATIONS INTERNATIONAL

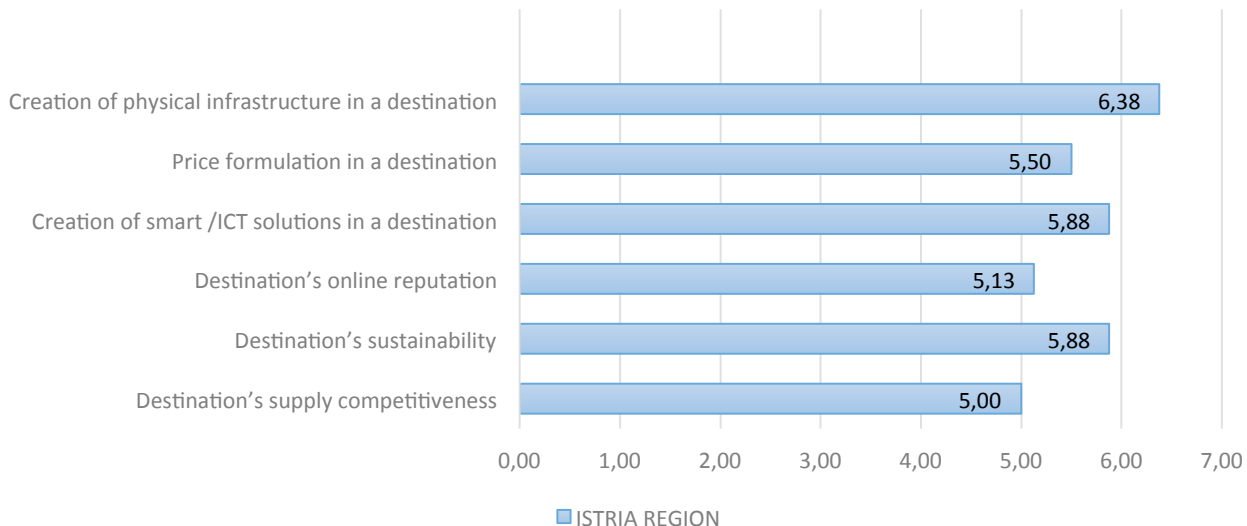


#### *Impact of stakeholders*

Please evaluate the level of impact of every aforementioned stakeholder according to following topics (from 1 to 7 where 1 means no impact at all and 7 means the highest impact)

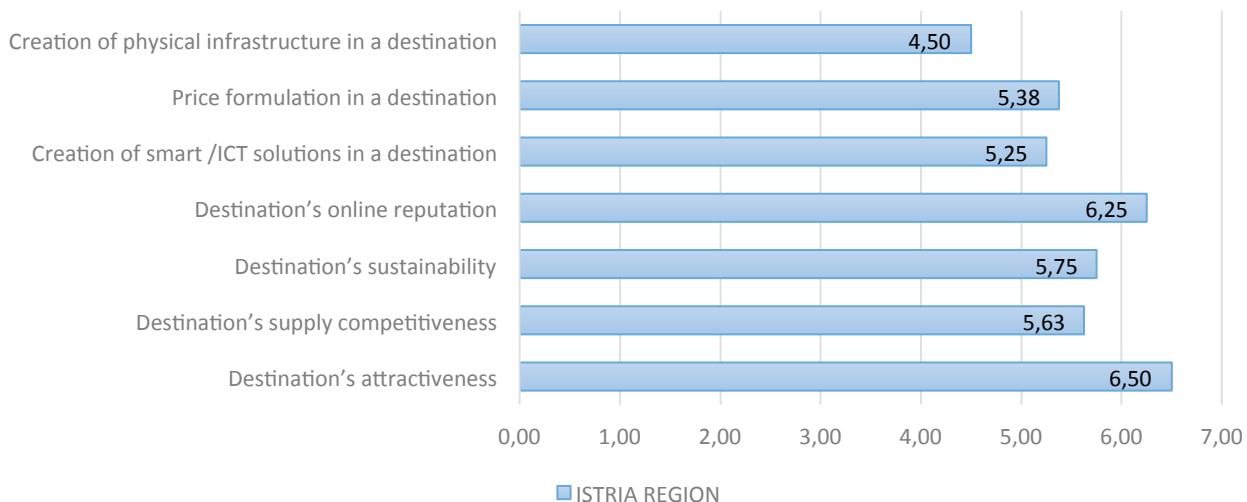
The stakeholders consider the highest impact of public institutions on the creation of physical infrastructure in a destination, followed by destination's sustainability and creation of smart /ICT solutions in the Istria Region.

### IMPACT OF PUBLIC INSTITUTIONS AT DIFFERENT LEVELS

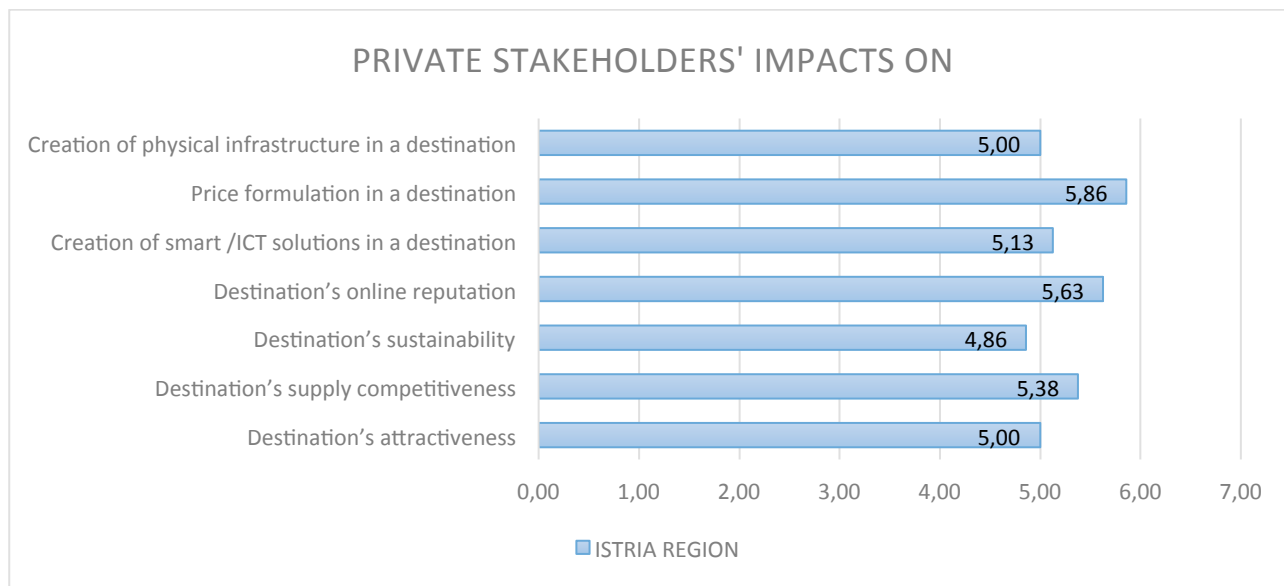


The stakeholders consider the highest DMO's impact on destination's attractiveness (refers to an extent destination's assets satisfy the visitors' needs), followed by and destination's online reputation (refers to online public opinions using various forms of social media) and destination's sustainability (refers to the optimal development of a destination from the business, society and eco systems points of view).

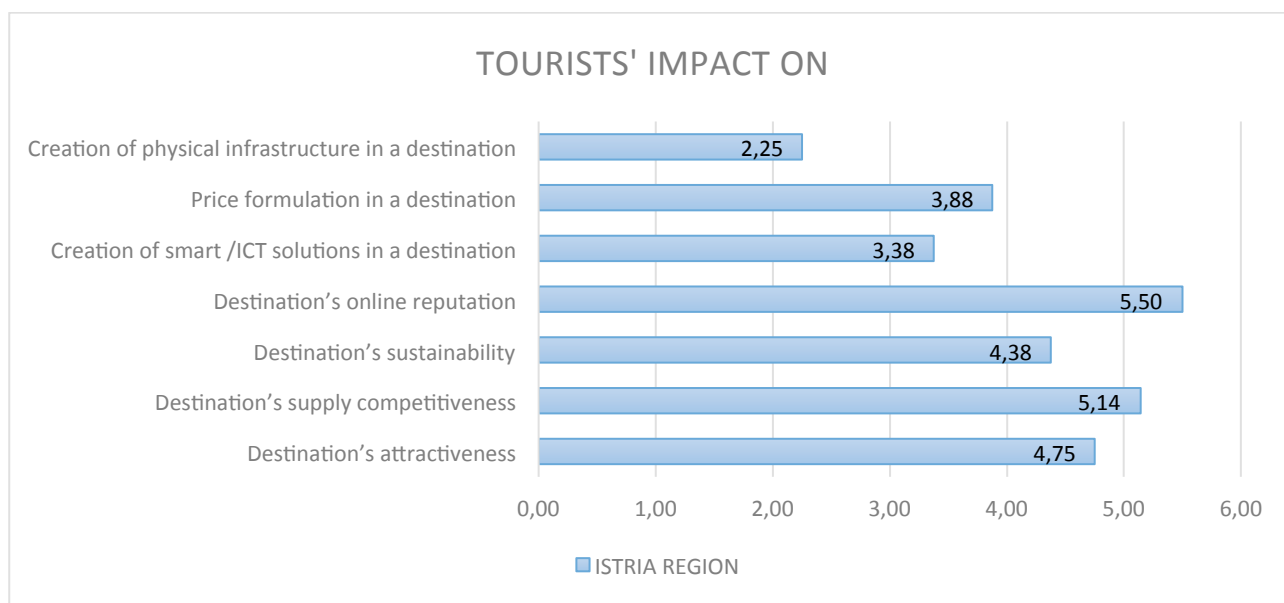
### DMO'S IMPACT ON



The stakeholders consider the highest private stakeholders' impact on price formulation in a destination, followed by destination's online reputation (refers to online public opinions using various forms of social media) and destination's supply competitiveness (refers to how efficient is destination in relation to their competitors).



The stakeholders consider the highest tourists' impact on destination's online reputation (refers to online public opinions using various forms of social media) followed by destination's supply competitiveness (refers to how efficient is destination in relation to their competitors).

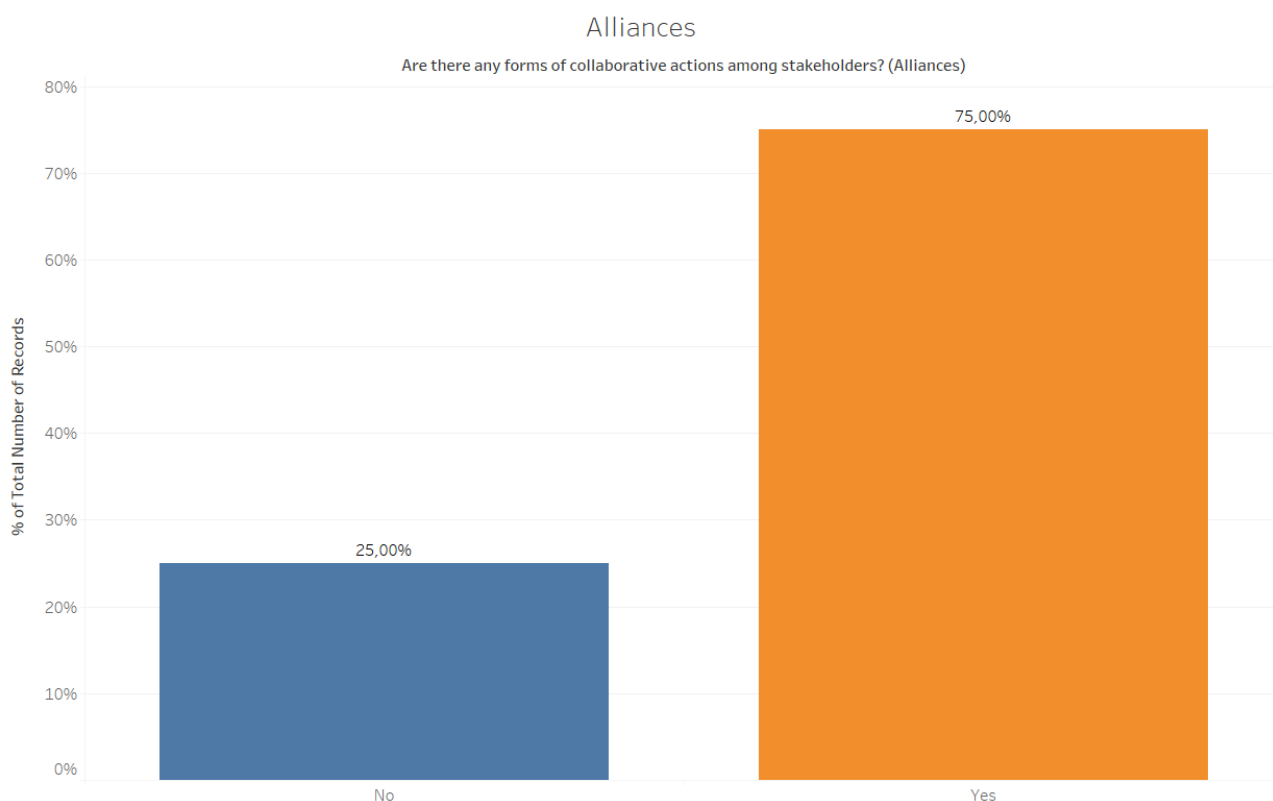




### *Collaborative actions*

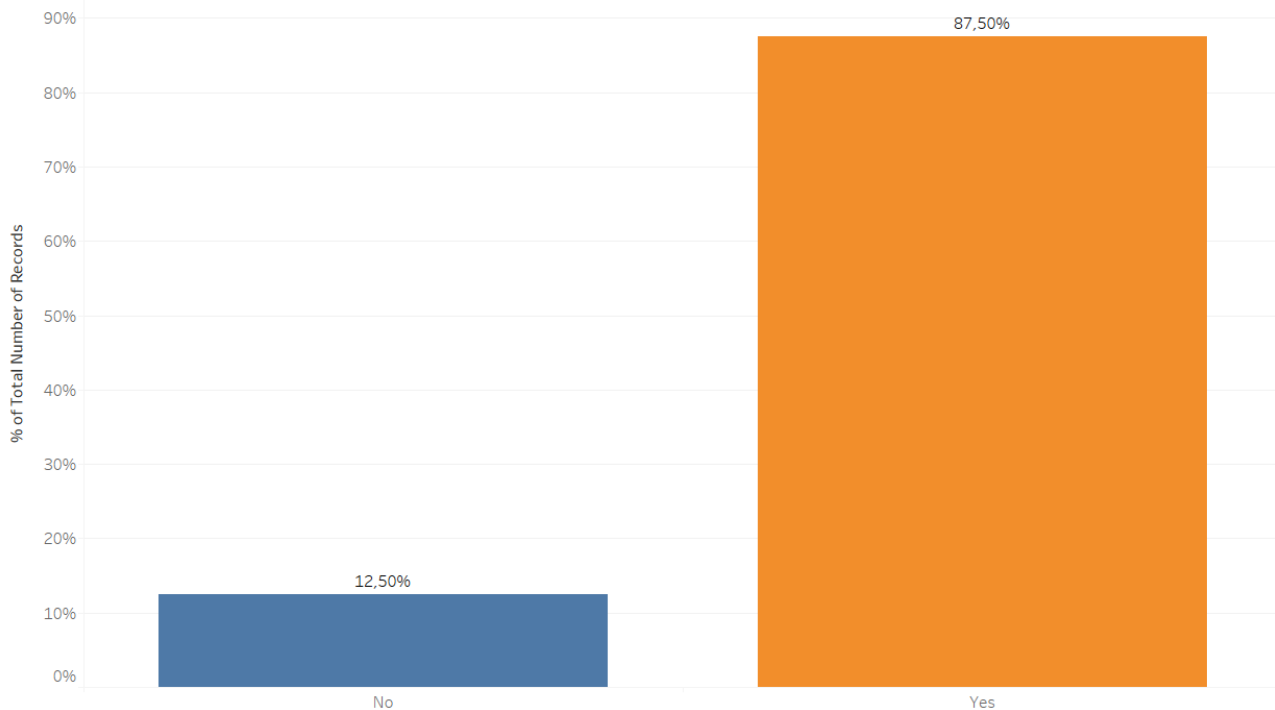
Are there any forms of collaborative actions among stakeholders?

The examinees confirmed the existence of various forms of collaborative actions among stakeholders in the Istria Region. The most significant forms are: local action groups and informal networks (recognised by all examinees), then followed by formal networks, clusters, alliances and franchising and management contracts.



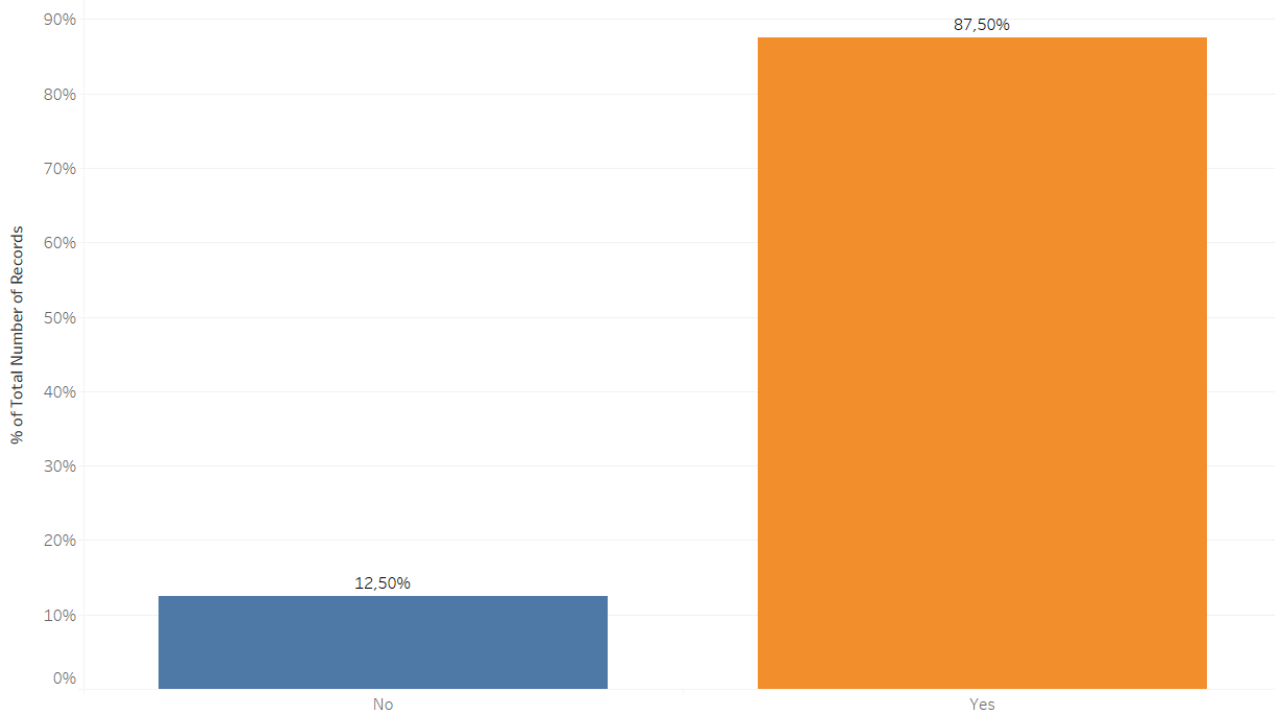
### Clusters

Are there any forms of collaborative actions among stakeholders? (Clusters)



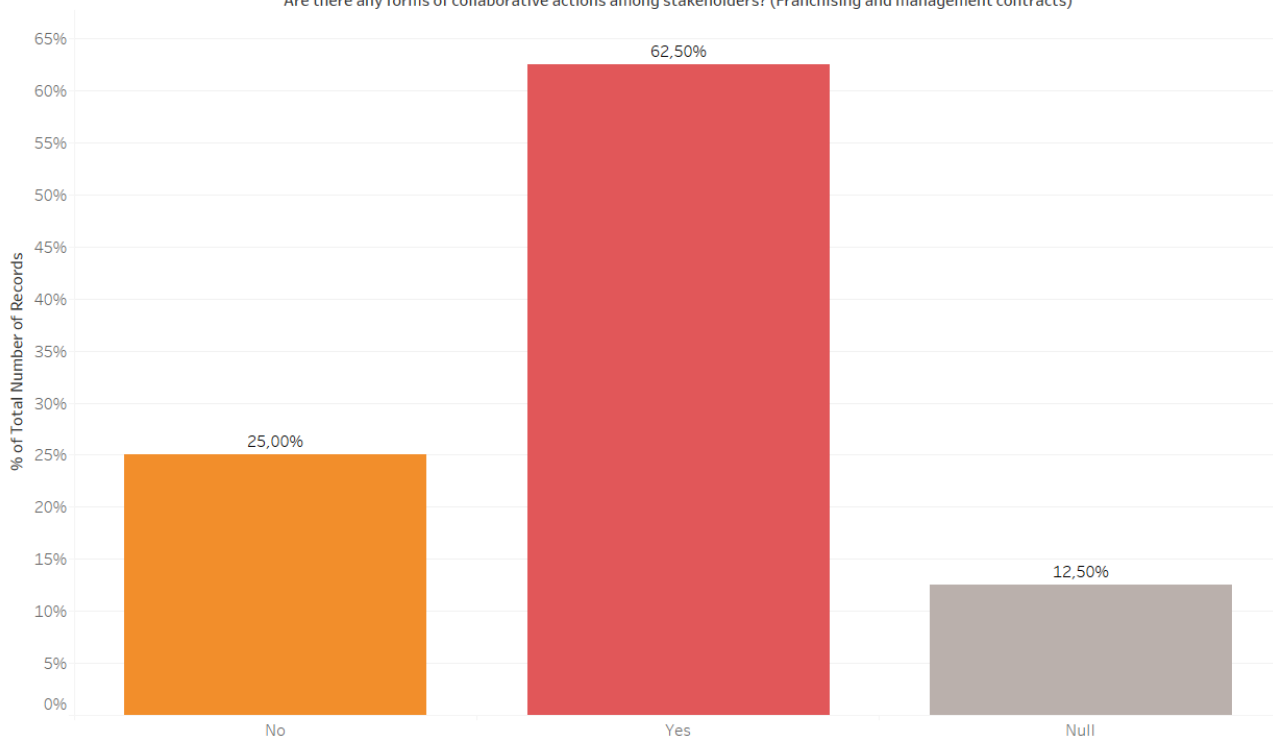
### Formal Networks

Are there any forms of collaborative actions among stakeholders? (Formal networks)



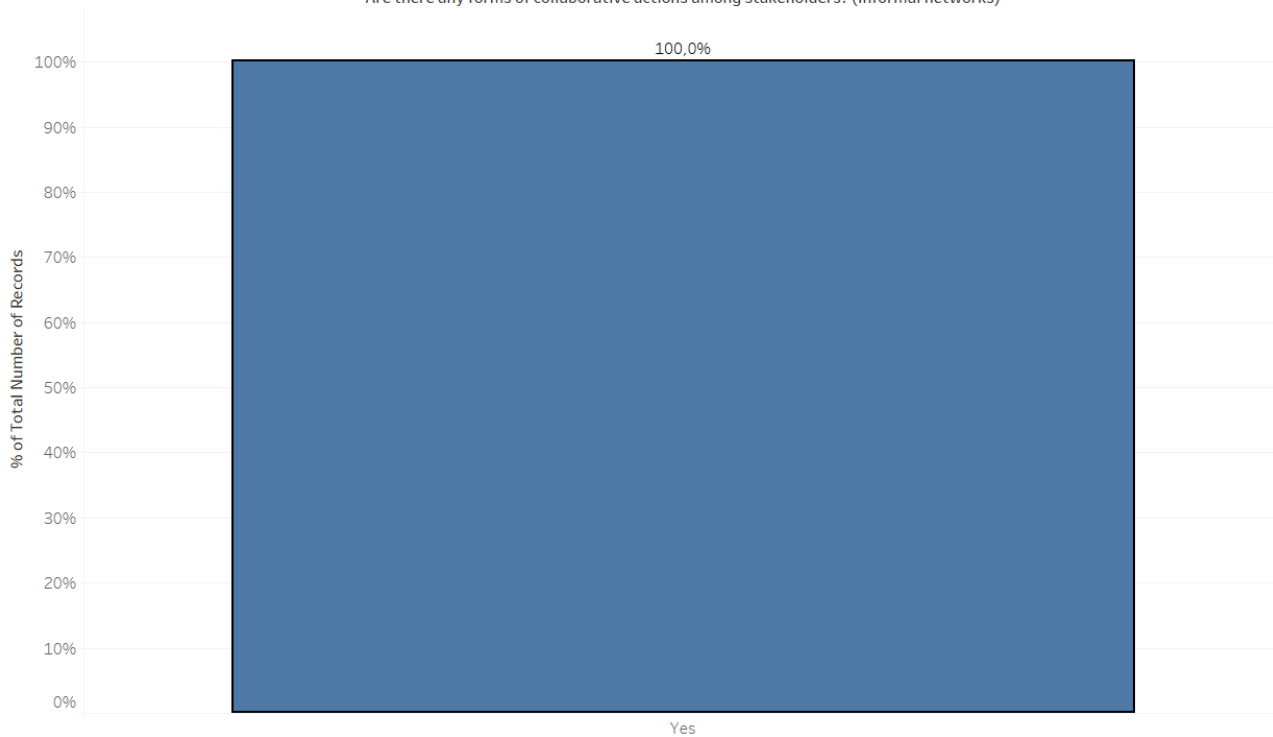
### Franchising and management contracts

Are there any forms of collaborative actions among stakeholders? (Franchising and management contracts)



### Informal Networks

Are there any forms of collaborative actions among stakeholders? (Informal networks)



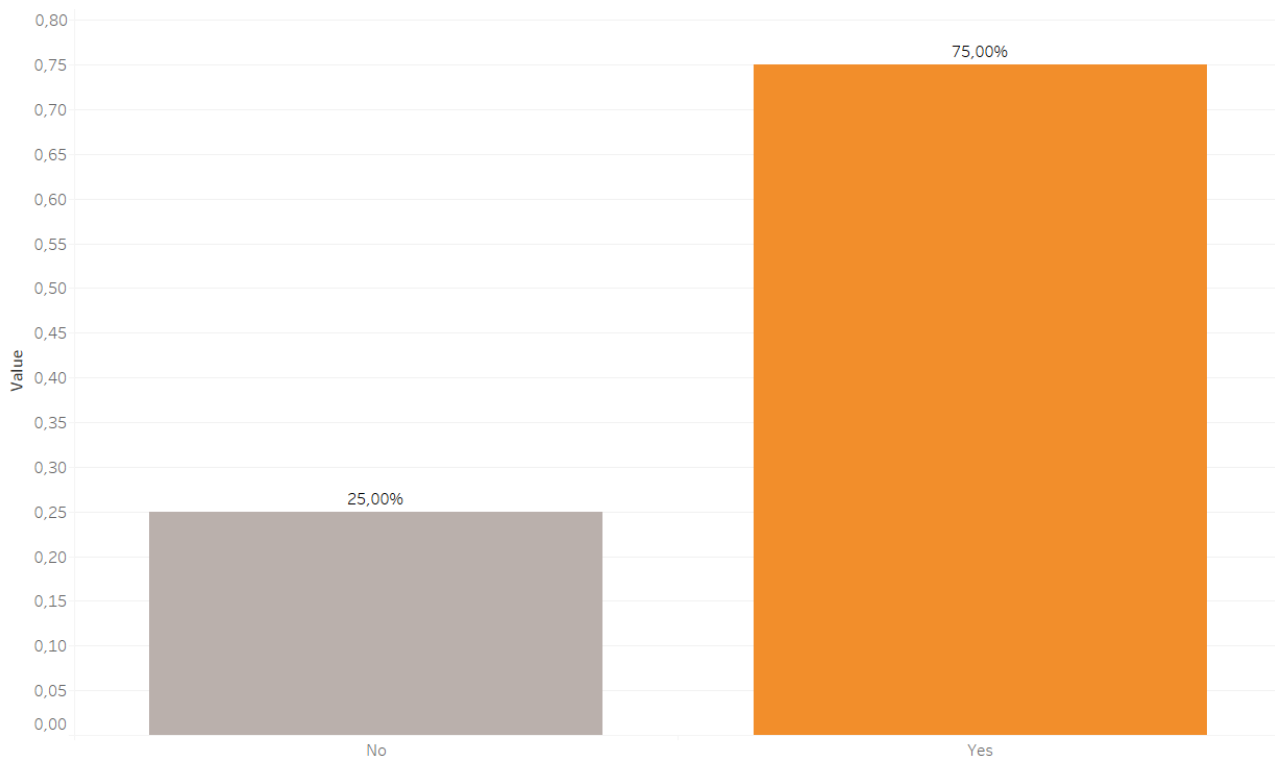


### *Common partners*

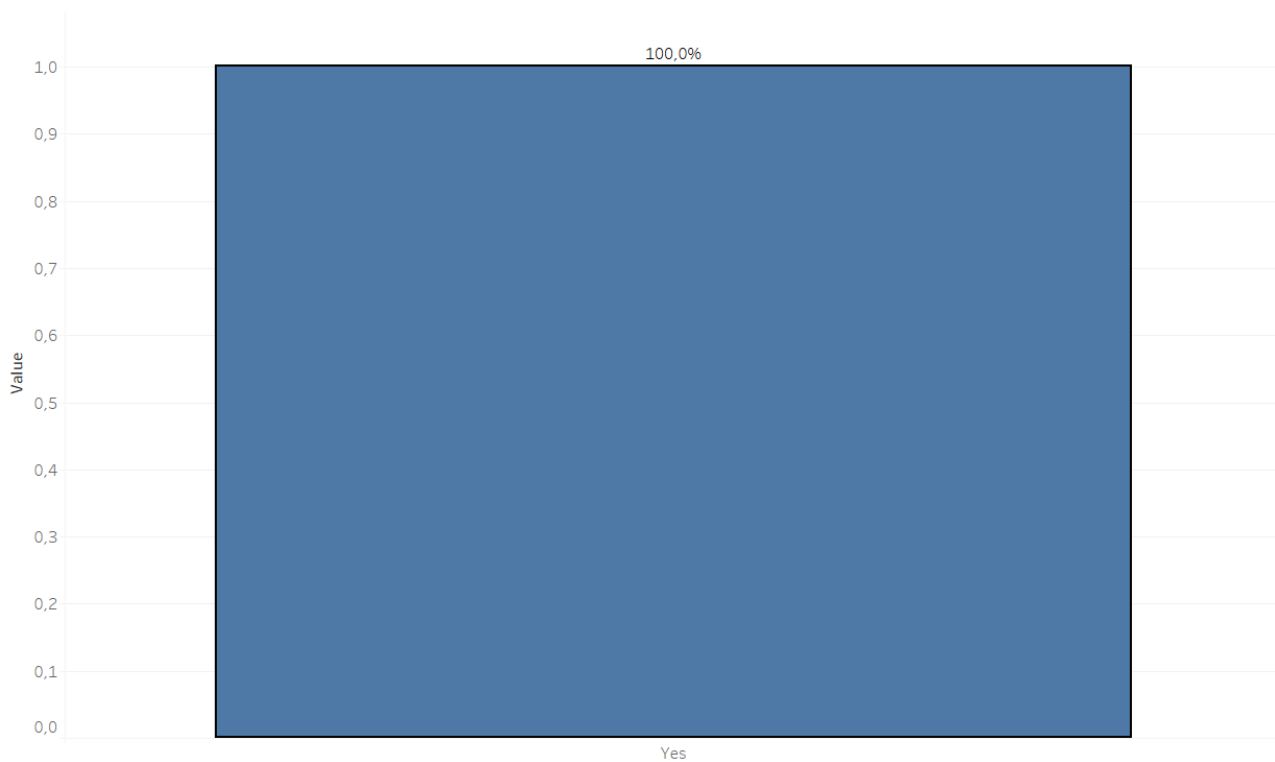
Who are the most common partners in the formal types of collaborative activities in your destination?

The examinees consider, as the most common partners in the formal types of collaborative activities in the Istria Region, the local administration and other public institutions and DMO (all examinees), followed by private entities, public entities, public sector and local community actors and civil sector entities.

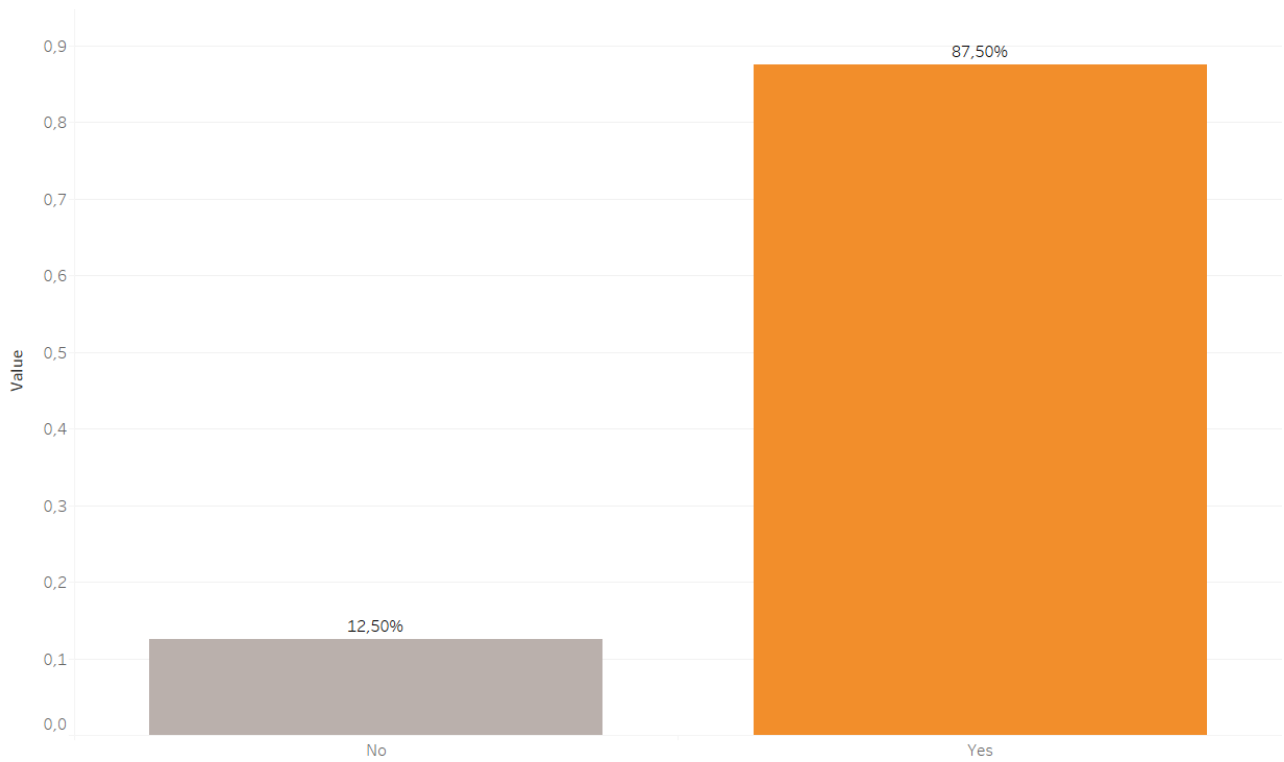
### Civil sector entities



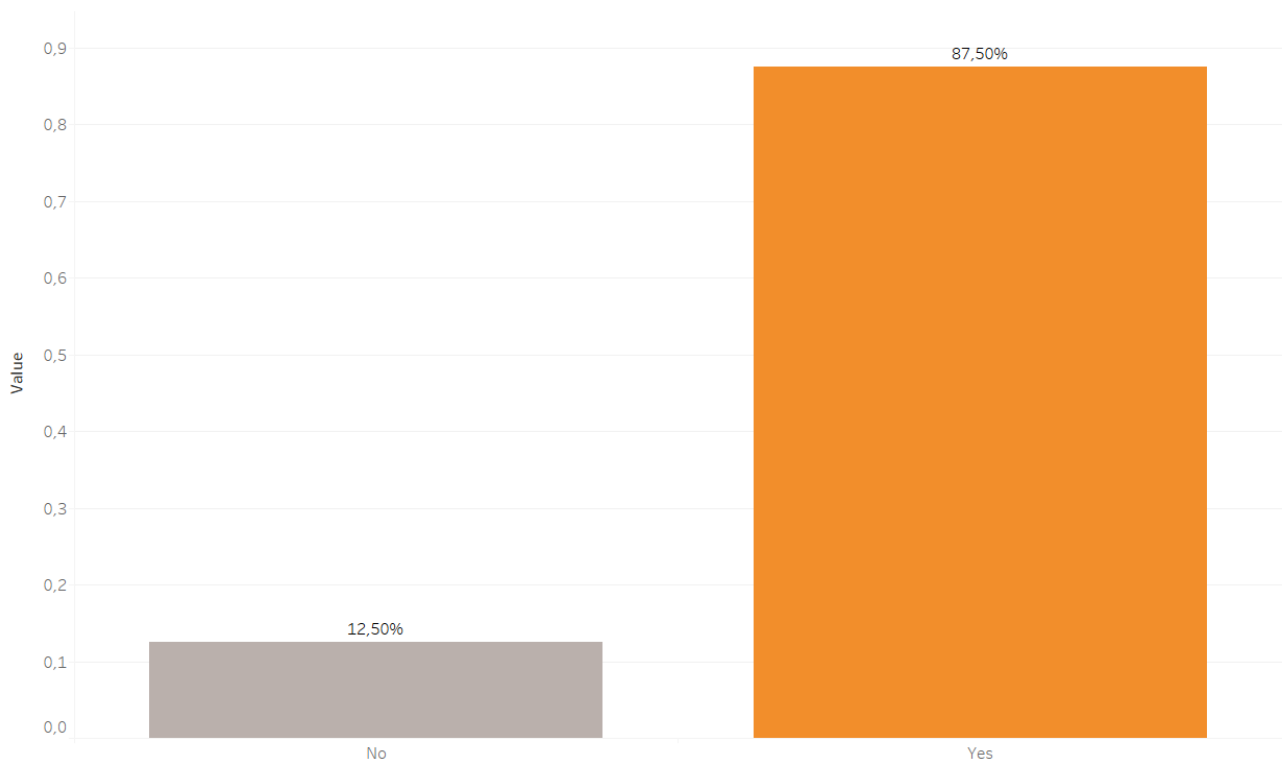
### Local Administration

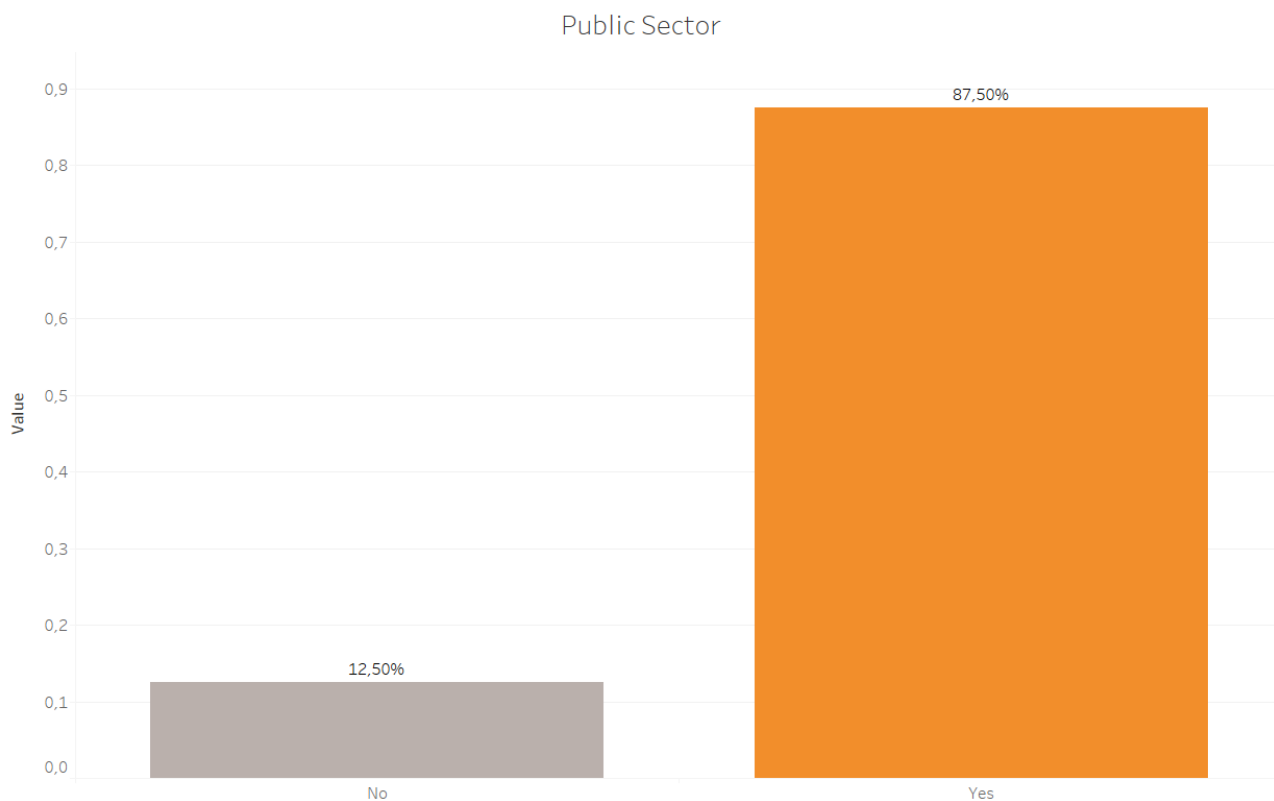


### Private entities



### Public Entities



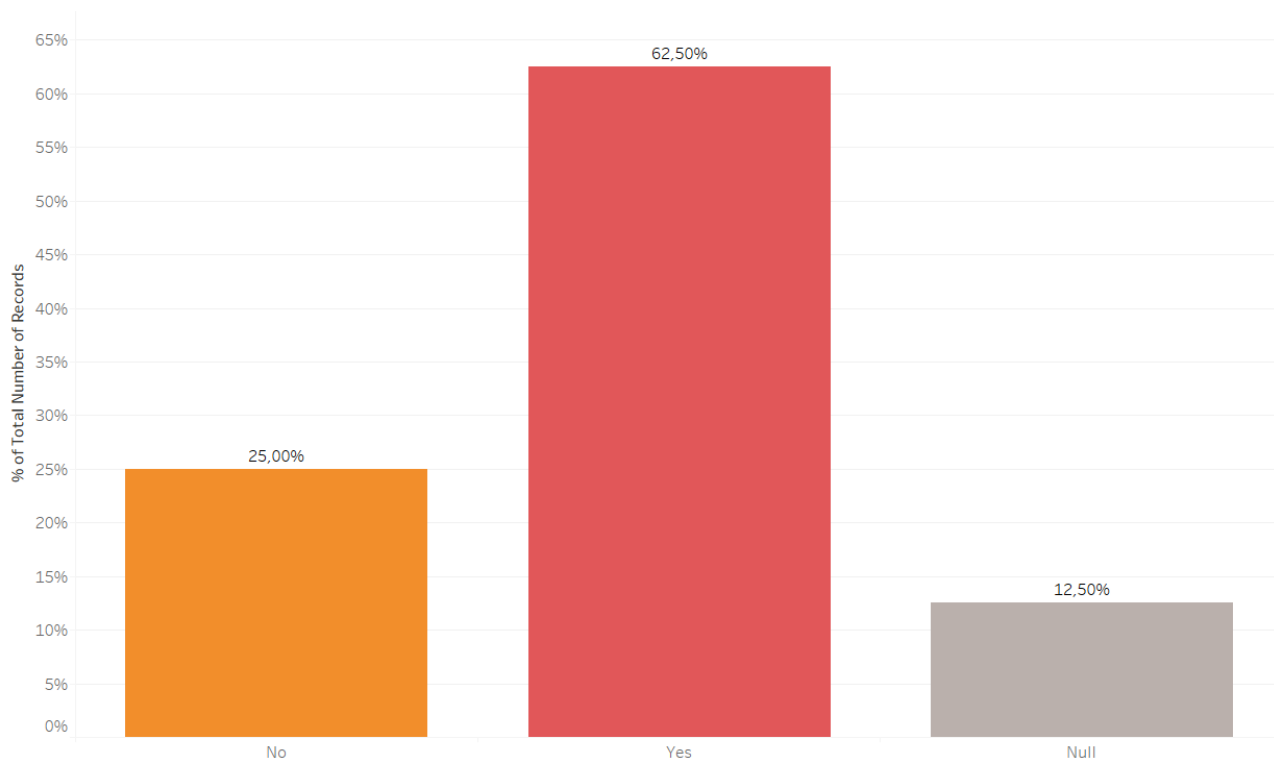


### *Types of activities*

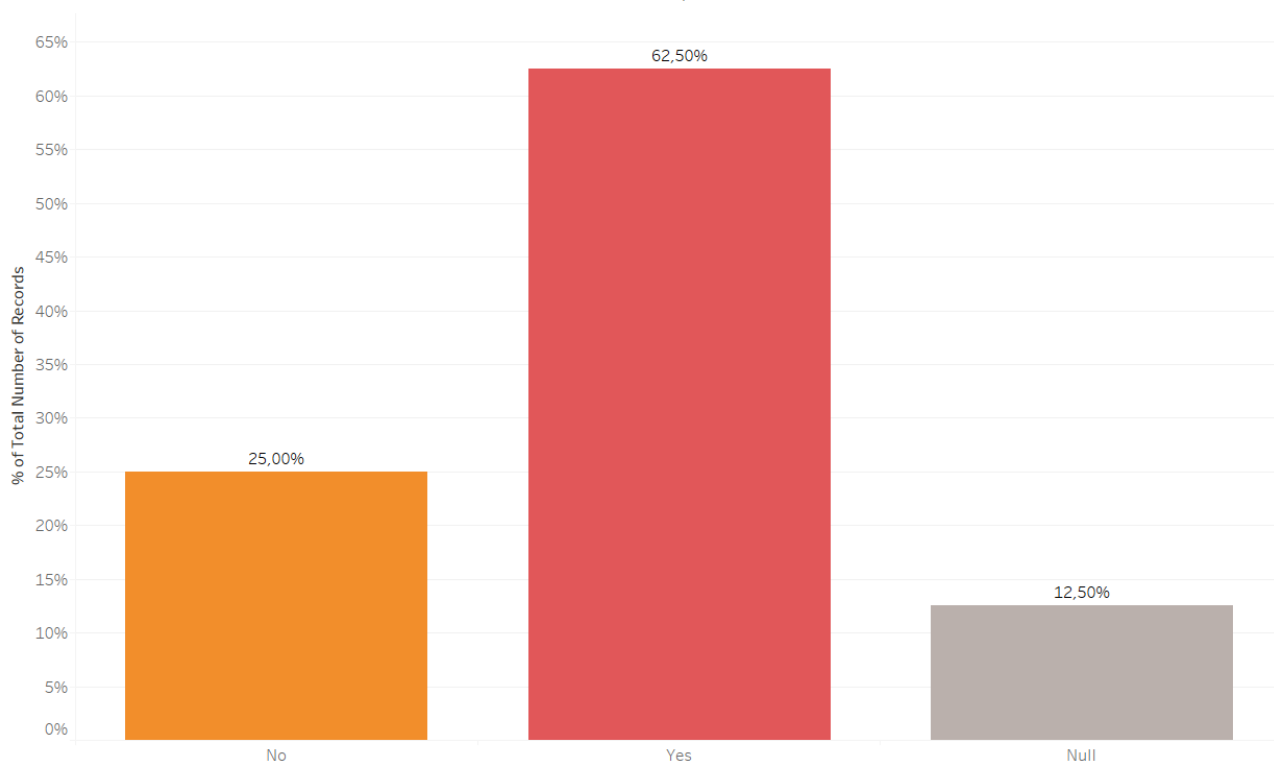
What types of activities are most commonly shared between different stakeholders?

Regarding the types of activities which are most commonly shared between different stakeholders in the Istria Region, one examinee considers all proposed activities as being shared between stakeholders. All other seven examinees agree on promotion and/or branding of products/activities/destination as the most commonly shared activity, followed by the creation/enhancement of the products/activities and adapting and developing Destination Management Plans.

### Destination management

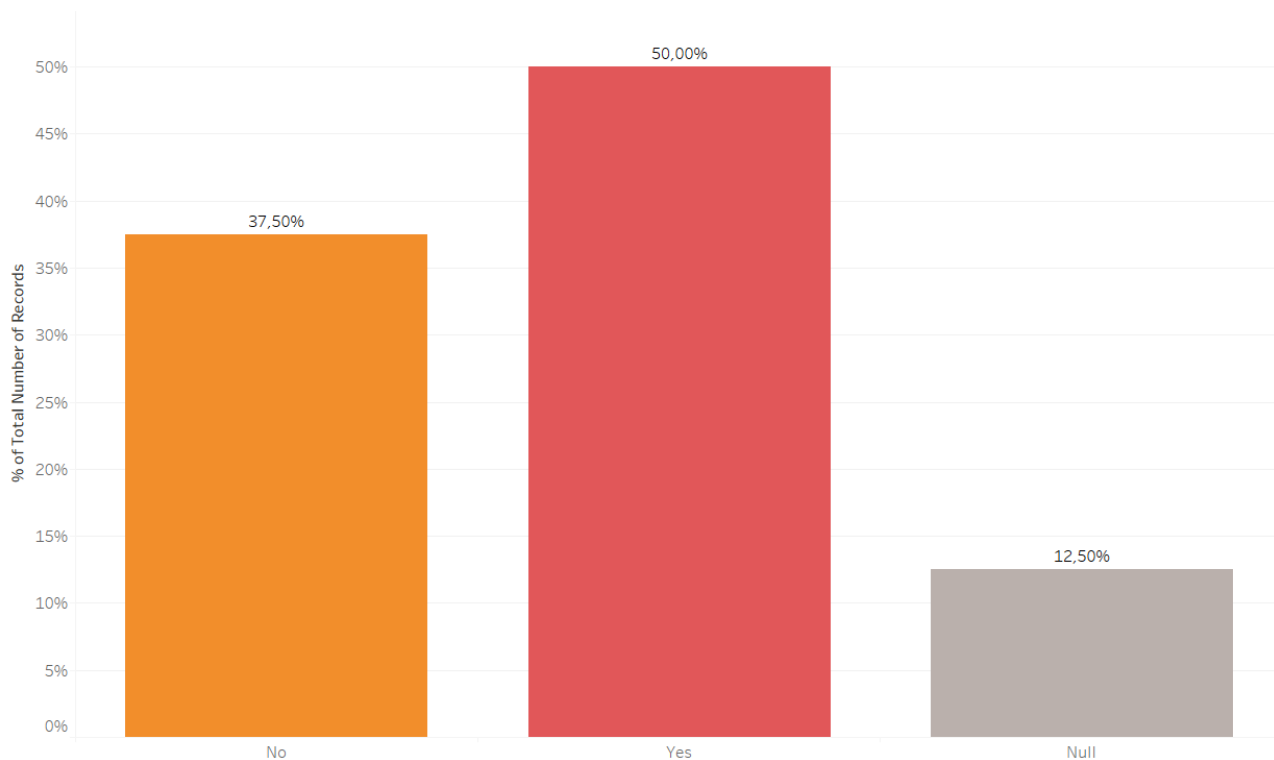


### Creation of the products

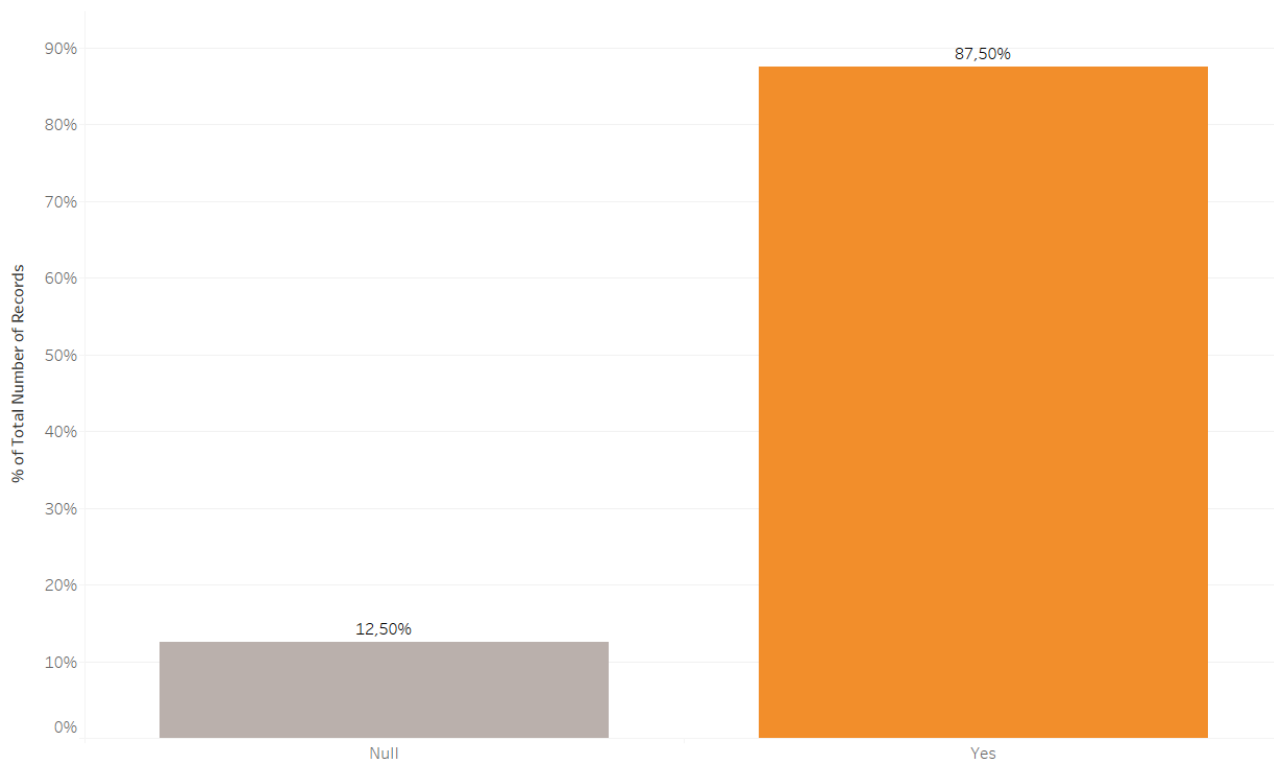




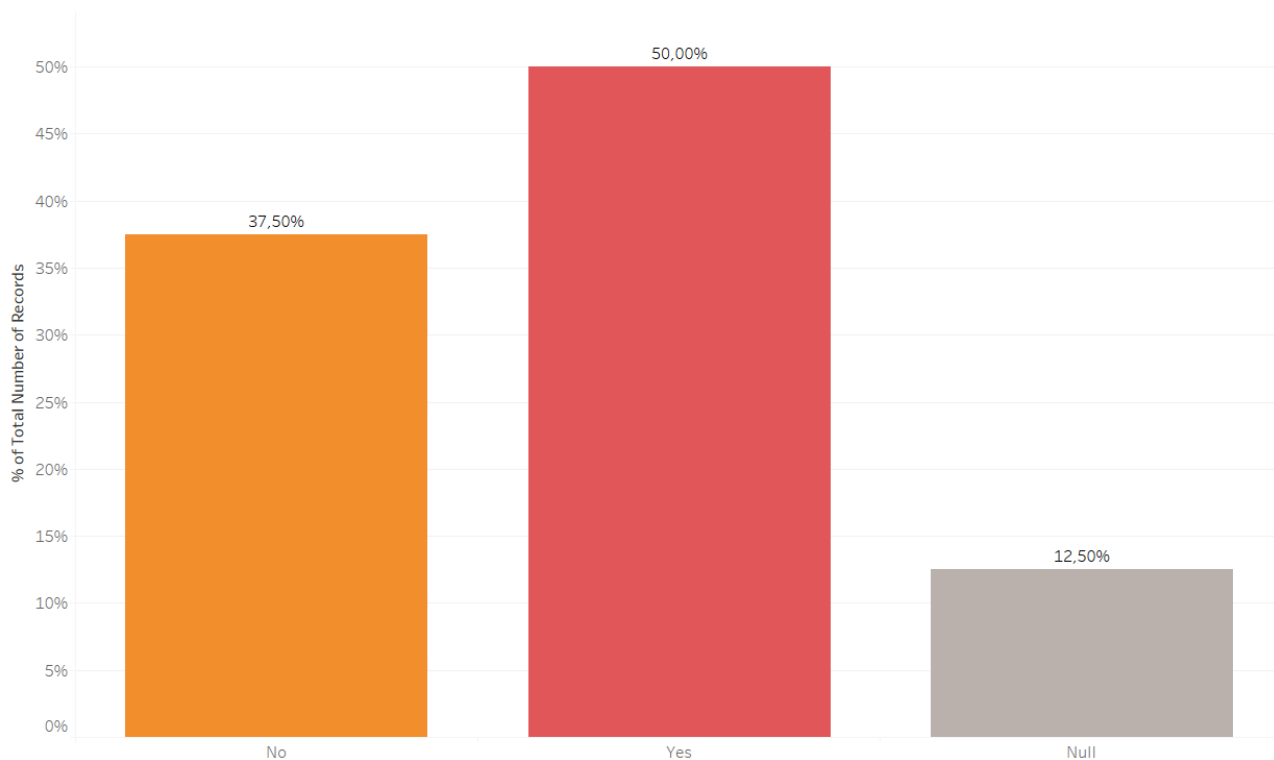
Distribution of products



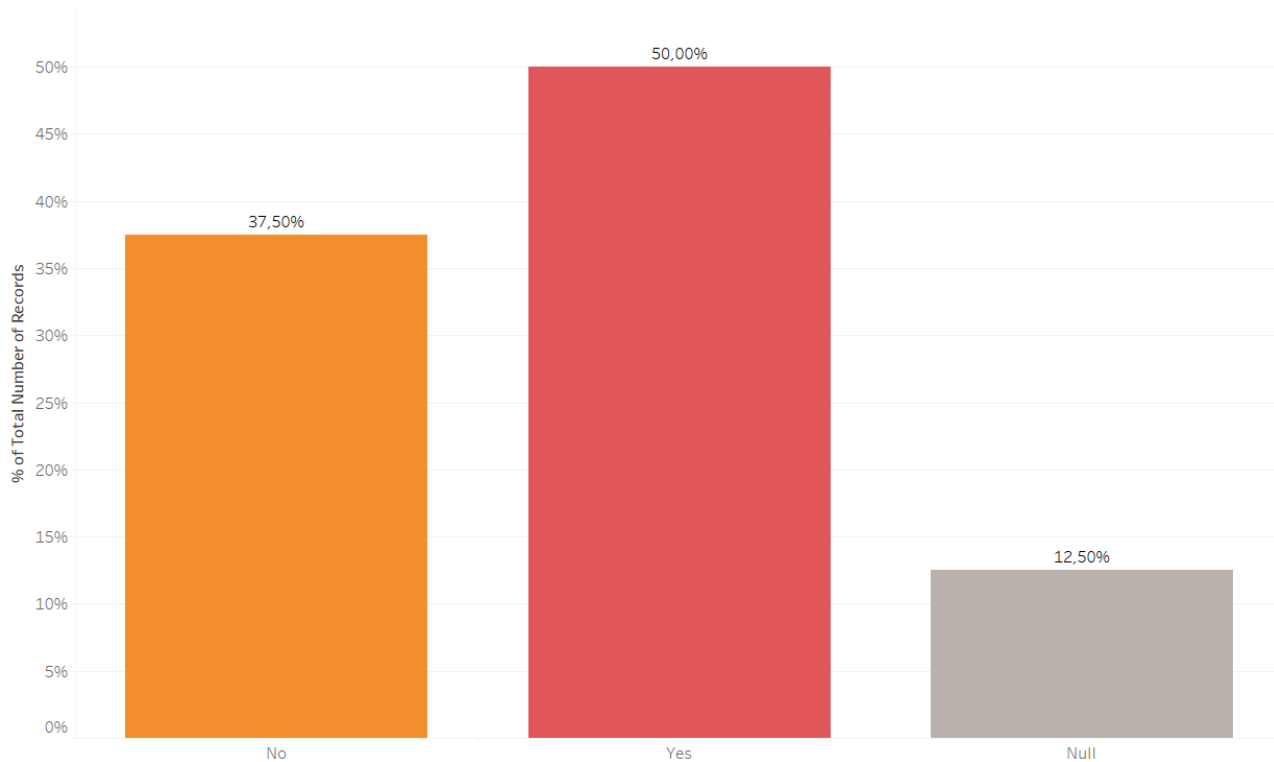
Promotion of products



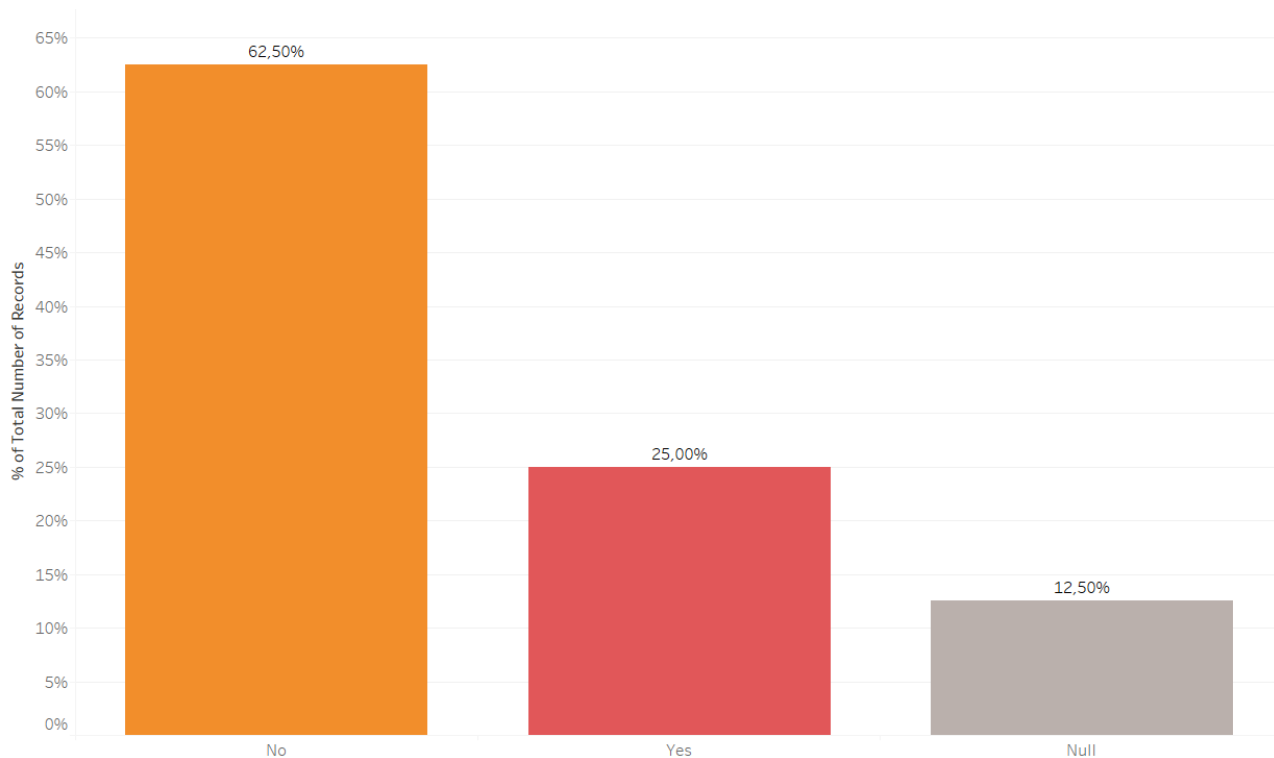
### Price creation of products



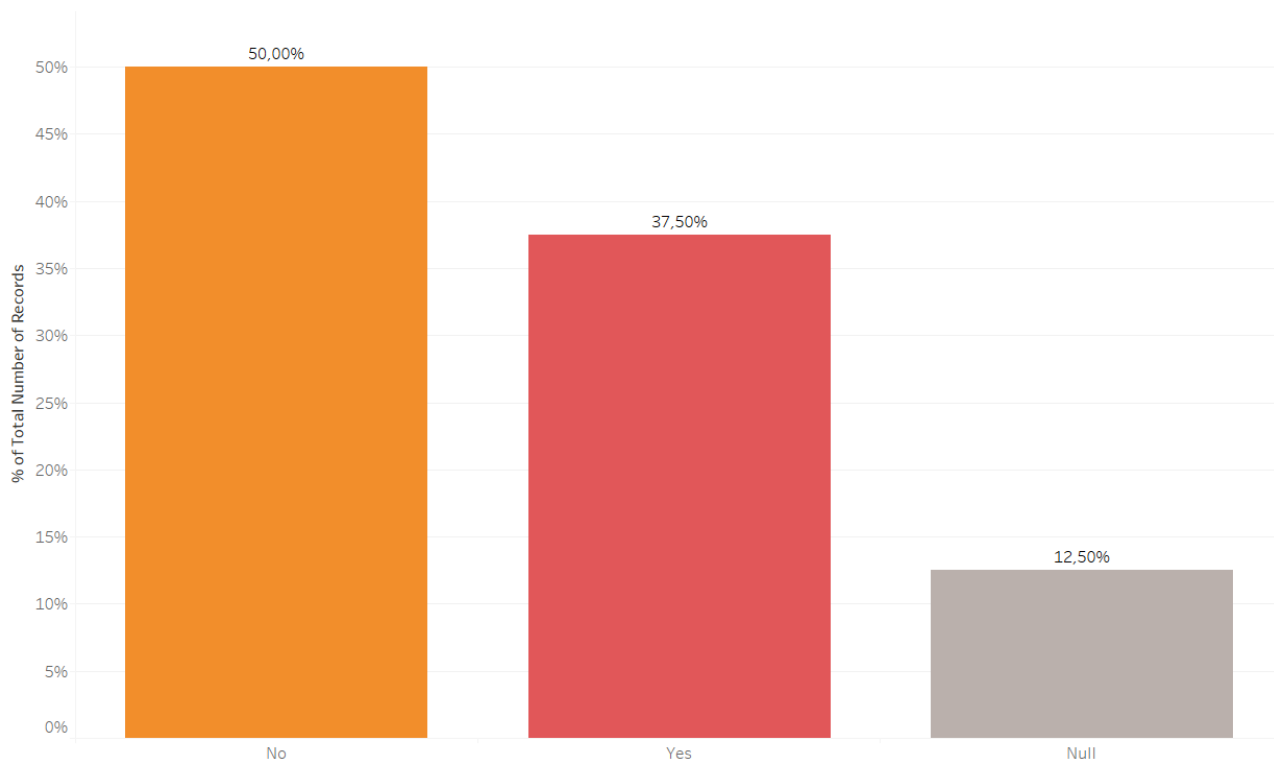
### Monitoring the process of a products



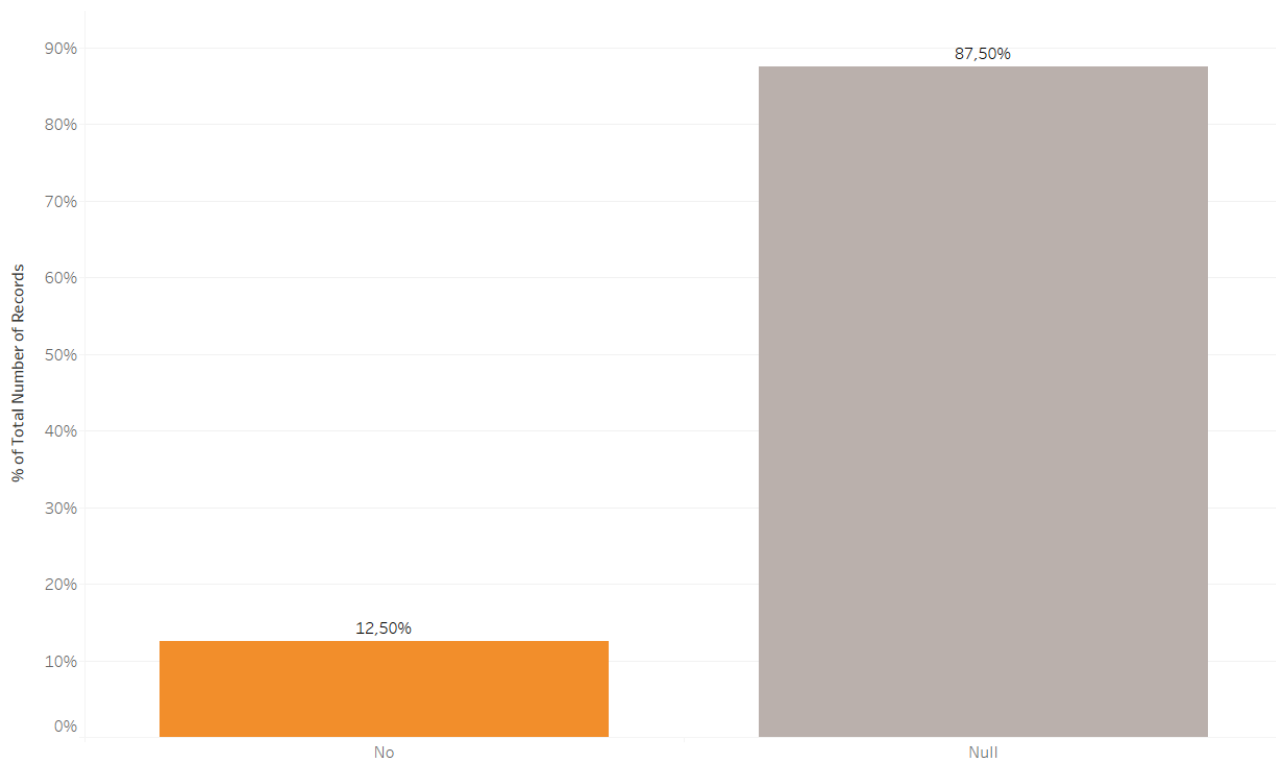
### ICT dissemination and implementation



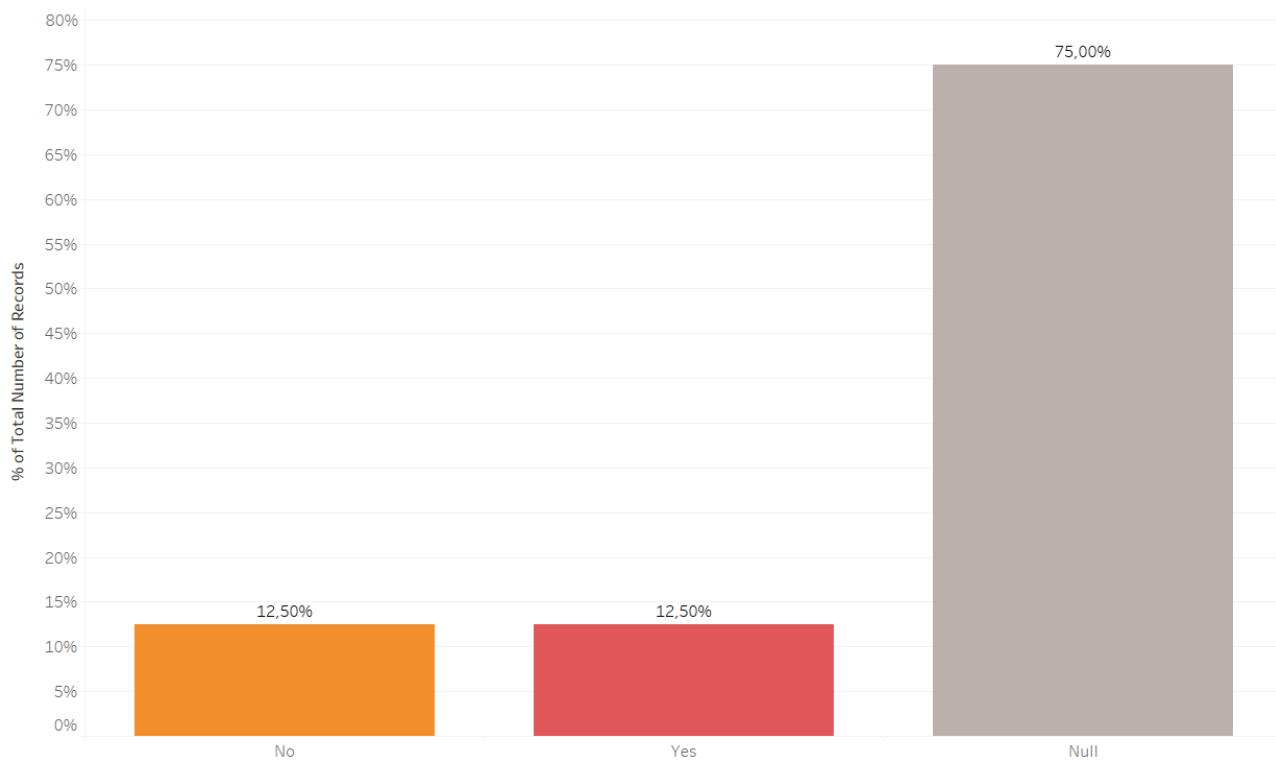
### Tourist labour knowledge enhancement



None of above



all of above



## Assets analysis - please rate importance of each asset for the Istria Region:

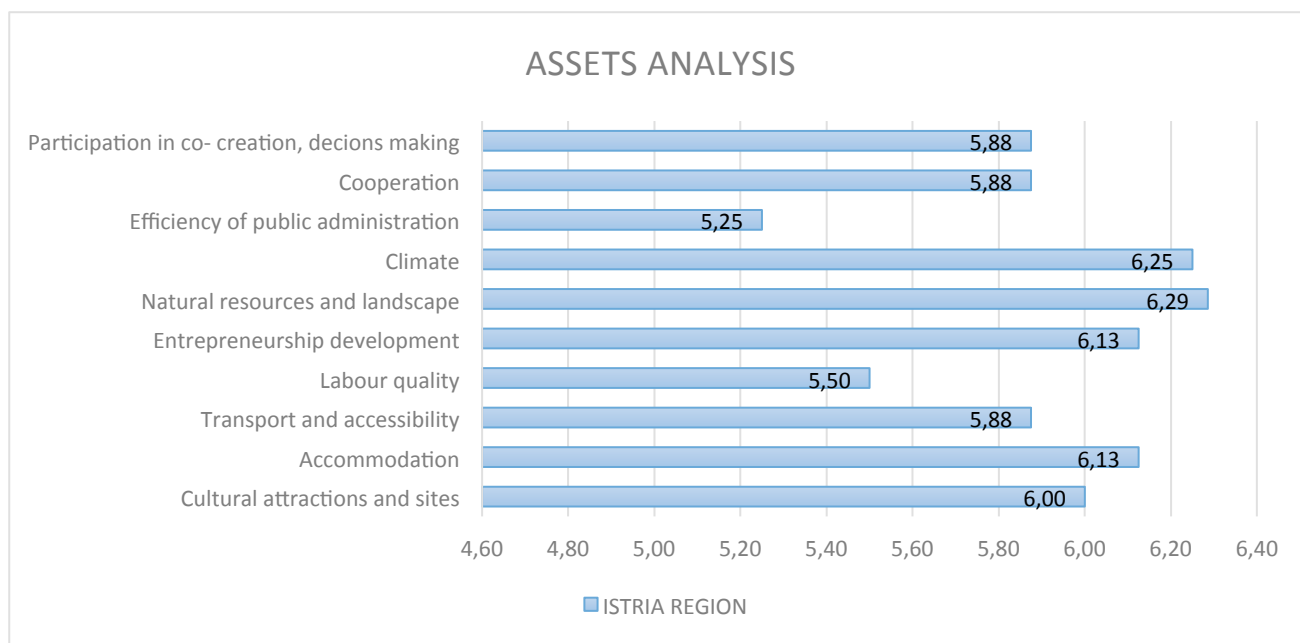
In the context of **anthropic capital**, the examinees consider as most important accommodation, followed by cultural attractions and sites and transport and accessibility.

In the context of **economic capital**, the examinees consider entrepreneurship development more important than labour quality.

In the context of **environment capital**, the examinees consider both natural resources and landscape and climate as very important.

In the context of **social capital**, examinees consider participation in co-creation, decisions making and cooperation as equally important.

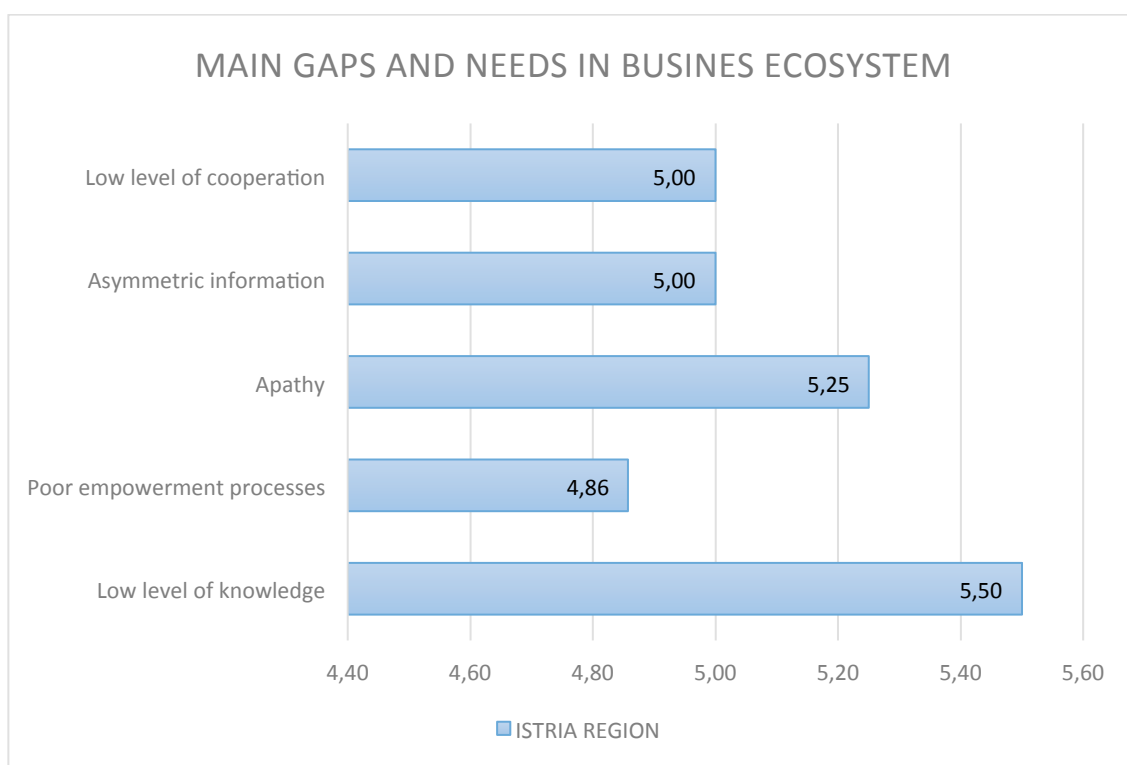
In total, examinees have rated as the most important assets in the Istria Region the natural resources and landscape (6.29), climate (6.25), accommodation (6.13), entrepreneurship development (6.13) and participation in co- creation, decisions making (5.88).



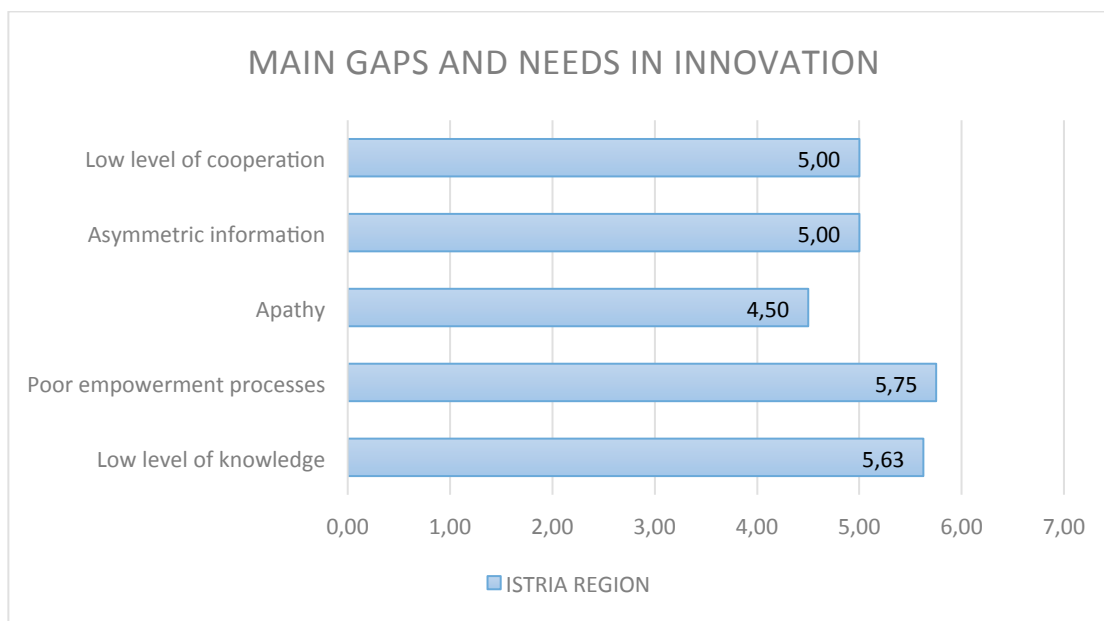
***d. GAPS AND NEEDS TOWARDS INNOVATION OF THE PILOT AREA'S BUSINESS ECOSYSTEM***

Which are the main gaps and needs in the Istria Region business ecosystem? In other terms: what, at the moment, prevent the sector to reach a good level of innovation which can be translated into a major competitiveness, attractiveness and sustainability of tourism in the area?

The examinees consider low level of knowledge as the main challenge in the Istria Region's business ecosystem, followed by apathy, low level of information and asymmetric information.



The examinees consider, as the main gaps and needs in the field of innovation in tourism, poor empowerment processes and low level of knowledge.



### *e. POTENTIALS OF THE PILOT AREA'S BUSINESS ECOSYSTEM*

Which are the tourism sector development potentials, which can be exploited in the Istria Region?

The examinees offered the following answers:

- More intensive development of selective types of tourism, e.g. summer tourism, ecotourism, culinary culture, wine culture, olive oil, cultural tourism, sustainable tourism;
  - Creativity of stakeholders, cooperation between stakeholders, long term experience in different tourism related projects.
- 

In particular, are there potentials in developing eco-tourism?

Seven examinees confirmed that, additionally offering some examples:

- Lim channel; Kamenjak protected landscape, Premantura; Punta corrente forest park Rovinj
  - Sustainability, higher income from tourists
  - Marine life, Forests, Rare and attractive ecosystems, Sustainable growth ...
  - All the areas outside the towns and in the town suburbs or near the sea are potentially eco-friendly areas with potentials for developing various forms of eco-tourism
  - Through connecting tourism with organic agriculture; organising workshops for relevant stakeholder; exploring untouched nature and nature activities; camping in nature, etc.
  - There are no eco-friendly accommodation or restaurants in our eco-system.
-

In particular, are there potentials in developing creative tourism?

Seven examinees confirmed that, additionally offering some examples:

- Valorisation of archaeological heritage
  - Cultural exchange, complex linguistic structure, rich history and natural world that can inspire art and science, conservation of local cultural and natural values...
  - “We have lot of historical landmarks, e.g. archaeological localities, which by my opinion are not fully known and not fully exploited. (ex. Moncodonja near Rovinj)”
  - Organising workshops for subjects that are involved in organic agriculture; culinary courses; healing herbs picking courses, etc.
  - Absolutely, creative tourism could be developed using the historical and cultural heritage at local and regional level in creating new events, eno-gastro routes, fun zones and active and thematic parks, using new technologies and gamification...
-



## *6. Conclusion: Gaps and needs*

The research has shown different gaps and needs in the Istria County. In the contexts of digital competences, the examinees feel mostly incompetent regarding website implementation, social media use and its management and social media monitoring. As regards to company's internal communication quality, the examinees consider biggest gaps related to communication quality at senior management level, among staff in catering department.

Concerning knowledge of foreign languages, examinees recognise biggest needs in capacity building among staff in sales department, then among staff in catering department and at lower management level. Regarding company's internal organisation, the main need in capacity building process is related to long life learning policy. Concerning personalisation of the service according to tourist targets, both offered answers, i.e. special needs tourists – physical obstacles, food intolerances, food preferences (vegetarian, vegan, etc.), allergies, religious groups' food requirements (kosher, halal...) and specific target groups according to age, culture, sexual orientation, single-couple-group-family were recognised as very important. In the context of creation of relationship with different stakeholders in the Istria Region, the examinees consider as the most important the relations with job agencies.

The examinees were asked to consider the level of impact of proposed stakeholders (public institutions, DMOs, private stakeholders and tourists) on proposed Istria Region attributes. The stakeholders consider the highest impact of public institutions on the creation of physical infrastructure in the Istria Region, followed by destination's sustainability and creation of smart /ICT solutions in a destination. DMO's have the highest impact on region's attractiveness (refers to an extent destination's assets satisfy the visitors' needs), followed by and destination's online reputation (refers to online public opinions using various forms of social media) and destination's sustainability (refers to the optimal development of a destination from the business, society and eco systems points of view). Private stakeholders' highest impacts are on price formulation in Istria Region, followed by destination's online reputation (refers to online public opinions using various forms of social media) and destination's supply competitiveness (refers to how efficient is destination in relation to their competitors). Tourists' highest impacts are on destination's online reputation (refers to online public opinions using various forms of social media) followed by destination's supply competitiveness (refers to how efficient is destination in relation to their competitors).

The most significant forms of collaborative actions among stakeholders in Istria Region are: local action groups and informal networks (recognised by all examinees), then followed by formal networks, clusters, alliances and franchising and management contracts. The examinees consider, as the most common partners in the formal types of collaborative activities in Istria Region, local administration and other public institutions and DMO (all examinees), followed by private entities, public entities, public sector and local community actors and civil sector entities.

Regarding the types of activities which are most commonly shared between different stakeholders, all examinees agree on promotion and/or branding of products/activities/destination as the most commonly shared activity, followed by the creation/enhancement of the products/activities and adapting and developing Destination Management Plans.

As the most important assets in Istria county, the examinees have rated natural resources and landscape, climate, accommodation, entrepreneurship development and participation in co-creation, decisions making.

As the main challenge in the Istria county the examinees have recognised low level of knowledge business ecosystem, followed by apathy, low level of information and asymmetric information.

The examinees consider, as the main gaps and needs in the field of innovation in tourism, poor empowerment processes and low level of knowledge.

## References

1. Croatian Chamber of Commerce, Istria county ( [www.hgk.hr](http://www.hgk.hr))
2. Croatian Bureau of Statistics ([www.dzs.hr](http://www.dzs.hr))
3. Istria county, Administrative Department for Tourism ([www.istra-istria.hr](http://www.istra-istria.hr))
4. Tourism in Figures 2017, Ministry of Tourism ([www.mint.hr](http://www.mint.hr))