BLUTOURSYSTEM
VENETO REGION
REPORT ON DELIVERABLE 3.2.2
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.: 3

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

Activity N.: 3.2

Activity Name: Defining innovative learning tools and the QHelix Mechanics

Deliverable N.: 3.2.2

Deliverable Name: Report on interview results that should point out gaps and needs individuated through consultation

Credits

Partner in charge: PP1 - Veneto Region

Partners involved: contributing Veneto Region; collaborating others

Info

Status (Draft/final/N. of Version): Final/1

Date: 29/11/2018

For public dissemination (YES/NO): YES
Abstract

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.
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 grow 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.
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 initiates, 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

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

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

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

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

LAGUNA VENETA – VENETIAN LAGOON

The Venice Lagoon is a unique world ecosystem that, extending for about 550 km², 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
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

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

  ![Cultural Asset Diagram](attachment:veneto_region.png)

  - Origin, age, sex of visitors: 5.20
  - Type of visitors: 5.40
  - Number of visitors to different historical monuments and heritage: 5.50
  - Working hours: 4.00
  - Average price of the tickets to cultural attractions and events: 5.10
  - Number and type of cultural events: 6.20
  - Number of national level protected historical monuments: 6.00
  - Number of UNESCO protected historical monuments: 6.40

  **VENETO REGION**
Natural assets

- Origin, age, sex of visitors: 5.89
- Type of visitors (single tourist, couple, family, group traveller, ...): 5.78
- Number of visitors to protected areas: 5.56
- Working hours: 4.00
- Average price of the tickets: 4.89
- Number and type of natural heritage under different type of protection: 6.67

Man-made attractions

- Origin, age, sex of visitors: 5.40
- Type of visitors (single tourist, couple, family, group traveller): 5.40
- Number of visitors to man-made attractions: 5.10
- Working hours: 4.10
- Average price of the tickets: 4.70
- Number and type of different man-made attractions: 6.20

Accessibility
**Amenities**
**Ancillary services**

### INDICATORS - ACCOMMODATION

- Working hours of restaurants, bars and entertainment places: 5.50
- Number and type of catering facilities: 5.20
- Accommodation type: 6.30
- Quantity (measured in number of beds): 6.10
- Quality: 6.00
- Distribution of accommodation supply: 6.30

### INDICATORS - SERVICES

- Number and distribution of ATMs: 4.40
- Working hours of banks and shops: 5.20
- Car rental companies: 5.80
- Sport rental equipment: 6.40

**VENETO REGION**
• **Activities**

<table>
<thead>
<tr>
<th>Activity</th>
<th>Veneto Region</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nature and wildlife activities</td>
<td>6.60</td>
</tr>
<tr>
<td>Sights and landmark sightseeing</td>
<td>6.40</td>
</tr>
<tr>
<td>Sailing and water tours</td>
<td>6.30</td>
</tr>
<tr>
<td>Outdoor sport activities</td>
<td></td>
</tr>
<tr>
<td>Treasure hunts</td>
<td>5.70</td>
</tr>
<tr>
<td>Wine and food tastings</td>
<td>6.10</td>
</tr>
<tr>
<td>Traditional crafts' workshops</td>
<td>5.10</td>
</tr>
<tr>
<td>Culinary workshops</td>
<td>5.10</td>
</tr>
<tr>
<td>Language schools</td>
<td>3.40</td>
</tr>
</tbody>
</table>

• **Source of destination information**

<table>
<thead>
<tr>
<th>Source</th>
<th>Veneto Region</th>
</tr>
</thead>
<tbody>
<tr>
<td>Google search</td>
<td>6.40</td>
</tr>
<tr>
<td>Google trends</td>
<td>6.30</td>
</tr>
<tr>
<td>Facebook analytics - dmo page</td>
<td>6.40</td>
</tr>
<tr>
<td>Google analytics - dmo website</td>
<td>6.50</td>
</tr>
<tr>
<td>Instagram</td>
<td>6.20</td>
</tr>
</tbody>
</table>
b. **GAPS AND NEEDS IN CAPACITY BUILDING PROCESSES (at CB Area level)**

**DIGITAL COMPETENCES**

- Geospatial technologies: 5,33
- Internet of things: 5,33
- E-commerce: 5,89
- Website implementation: 5,11
- Social media monitoring: 6,00
- Social media use and its management: 5,89

**COMPANY'S INTERNAL COMMUNICATION QUALITY**

- Among staff in supply department: 4,75
- Among staff in catering department: 4,75
- Among staff in sales department: 5,13
- At lower management level: 4,44
- At middle management level: 4,67
- At senior management level: 5,33
At senior management level
At middle management level
At lower management level
Among staff in supply department
Among staff in catering department
Among staff in sales department

KNOWLEDGE OF FOREIGN LANGUAGES

COMPANY'S INTERNAL ORGANISATION
c. IDENTIFICATION OF THE BUSINESS ECOSYSTEM OF THE CHOSEN PILOT AREA

• Creative tourism

ADMINISTRATION
CREATIVE TOURISM DMO LOCAL

- Tourism labor knowledge: 5.80
- Process monitoring: 5.70
- Price creation: 5.80
- Distribution: 6.10
- Promotion: 6.00
- Creation: 6.10

CREATIVE TOURISM DMO REGIONAL

- Tourism labor knowledge: 5.40
- Process monitoring: 5.00
- Price creation: 5.20
- Distribution: 5.80
- Promotion: 5.70
- Creation: 5.50
CREATIVE TOURISM DMO NATIONAL

- Tourism labor knowledge: 5.11
- Process monitoring: 4.44
- Price creation: 4.67
- Distribution: 4.11
- Promotion: 4.33
- Creation: 3.78

CREATIVE TOURISM DMO INTERNATIONAL

- Tourism labor knowledge: 5.22
- Process monitoring: 4.78
- Price creation: 5.11
- Distribution: 4.33
- Promotion: 4.67
- Creation: 4.44

PRIVATE STAKEHOLDERS
### CREATIVE TOURISM PRIVATE STAKEHOLDERS LOCAL

<table>
<thead>
<tr>
<th>Service</th>
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<tbody>
<tr>
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<td>Process monitoring</td>
<td>5,90</td>
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<tr>
<td>Price creation</td>
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<tr>
<td>Distribution</td>
<td>6,50</td>
</tr>
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<td>Promotion</td>
<td>6,20</td>
</tr>
<tr>
<td>Creation</td>
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</table>

### CREATIVE TOURISM PRIVATE STAKEHOLDERS REGIONAL

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</tr>
<tr>
<td>Creation</td>
<td>5,90</td>
</tr>
</tbody>
</table>
**CREATIVE TOURISM TOURISTS LOCAL**

- Tourism labor knowledge: 5.70
- Process monitoring: 5.70
- Price creation: 5.70
- Distribution: 5.20
- Promotion: 5.50
- Creation: 5.80

**CREATIVE TOURISM TOURISTS REGIONAL**

- Tourism labor knowledge: 5.40
- Process monitoring: 5.60
- Price creation: 5.70
- Distribution: 5.10
- Promotion: 5.60
- Creation: 5.60
CREATIVE TOURISM RESIDENTS NATIONAL

- Tourism labor knowledge: 4.56
- Process monitoring: 4.33
- Price creation: 4.44
- Distribution: 4.00
- Promotion: 5.11
- Creation: 4.00

CREATIVE TOURISM RESIDENTS INTERNATIONAL

- Tourism labor knowledge: 4.44
- Process monitoring: 4.22
- Price creation: 4.44
- Distribution: 4.00
- Promotion: 5.22
- Creation: 4.67

CIVIL SECTOR
### Creative Tourism Civil Sector National

<table>
<thead>
<tr>
<th>Category</th>
<th>Score</th>
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<tbody>
<tr>
<td>Tourism labor knowledge</td>
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</tr>
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</tr>
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### Creative Tourism Civil Sector International

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<tr>
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</tr>
</tbody>
</table>

### Associations/Organizations Related to Cultural and Natural Heritage of the Area
- Eco tourism
ECOTOURISM ADMINISTRATION LOCAL

- Tourism labor knowledge: 6.11
- Process monitoring: 5.78
- Price creation: 5.44
- Distribution: 5.56
- Promotion: 5.11
- Creation: 5.67

ECOTOURISM ADMINISTRATION REGIONAL

- Tourism labor knowledge: 6.20
- Process monitoring: 5.56
- Price creation: 5.00
- Distribution: 5.22
- Promotion: 5.78
- Creation: 5.50
ECOTOURISM ADMINISTRATION NATIONAL

- Tourism labor knowledge: 5.20
- Process monitoring: 4.00
- Price creation: 4.00
- Distribution: 3.11
- Promotion: 4.44
- Creation: 3.22

ECOTOURISM ADMINISTRATION INTERNATIONAL

- Tourism labor knowledge: 4.78
- Process monitoring: 4.00
- Price creation: 4.22
- Distribution: 3.60
- Promotion: 4.30
- Creation: 3.56

DESTINATION MANAGEMENT ORGANISATIONS

39
**ECOTOURISM DMO LOCAL**

- Tourism labor knowledge: 5.67
- Process monitoring: 5.44
- Price creation: 5.56
- Distribution: 6.00
- Promotion: 5.67
- Creation: 5.89

**ECOTOURISM DMO REGIONAL**

- Tourism labor knowledge: 6.00
- Process monitoring: 5.40
- Price creation: 5.40
- Distribution: 5.90
- Promotion: 5.90
- Creation: 5.70
ASSOCIATIONS/ORGANIZATIONS RELATED TO CULTURAL AND NATURAL HERITAGE OF THE AREA
ECOTOURISM ASSOCIATIONS LOCAL

tourism labor knowledge 6,30
process monitoring 6,00
price creation 6,10
distribution 6,60
promotion 6,00
creation 6,80

ECOTOURISM ASSOCIATIONS REGIONAL

tourism labor knowledge 5,70
process monitoring 5,50
price creation 5,80
distribution 6,10
promotion 5,80
creation 6,20
### ECOTOURISM ASSOCIATIONS NATIONAL

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- **Impact of stakeholders**
IMPACT OF PUBLIC INSTITUTIONS AT DIFFERENT LEVELS

VENETO REGION

DMO'S IMPACT ON

VENETO REGION
Collaborative actions

Are there any forms of collaborative actions among stakeholders?
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)

Yes: 80.00%
No: 20.00%

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

Yes: 70.00%
No: 30.00%
- **Types of activities**
  What types of activities are most commonly shared between different stakeholders?

![Bar chart showing destination management percentages]
Tourist labour knowledge enhancement

- Yes: 60.00%
- Null: 10.00%
- No: 30.00%

None of above

- Null: 60.00%
- No: 40.00%
all of above
ASSETS ANALYSIS

- Participation in co-creation, decisions making: 6.63
- Cooperation: 6.44
- Efficiency of public administration: 6.63
- Climate: 6.00
- Natural resources and landscape: 6.89
- Entrepreneurship development: 6.33
- Labour quality: 6.11
- Transport and accessibility: 6.67
- Accommodation: 6.56
- Cultural attractions and sites: 6.44
GAPS AND NEEDS TOWARDS INNOVATION OF THE PILOT AREA’S BUSINESS ECOSYSTEM

MAIN GAPS AND NEEDS IN BUSINESS ECOSYSTEM

- Low level of cooperation: 6.00
- Asymmetric information: 5.44
- Apathy: 4.10
- Poor empowerment processes: 4.70
- Low level of knowledge: 4.40

MAIN GAPS AND NEEDS IN INNOVATION

- Low level of cooperation: 5.90
- Asymmetric information: 5.00
- Apathy: 3.60
- Poor empowerment processes: 4.70
- Low level of knowledge: 5.00
Conclusion: Gaps and needs

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 organized 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 by the analysis of the data and charts shown above.

With reference to accessibility, it can be noted that the data on the services used to reach the destination and locally, and also the services related to the various types of transport, are considered particularly interesting for the interviewed territorial actors. 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, although for the latter the figure highlights a greater necessity to achieve an optimal management.

Skills as defining and planning shared strategies and the ideation of personalized services for specific need a specific training.

In general, the data show that actors feel more influence by local and regional level organizations and less by national or international level both in relation to public institutions and for tourism organizations.

From the joint reading of the answers concerning the evaluation of the impact and the influence of the main public and private stakeholders, according to the data collected and referring to the graphs above, the impact of public institutions is mainly perceived on sustainability policies, on infrastructure management, on improving attractiveness and competitiveness and on the monitoring process. The DMOs play an important role, according to the responses, mainly on attractiveness, competitiveness, sustainability and reputation, although the other indicators also reach a high rate, underlining their function of improving cooperation among public and private fields and designing and adopting strategical decisions. Also for the "Private stakeholder" groups, looking at the data, there are high rates for all the indicators, although the sector is particularly influential in terms of price policy, competitiveness and attractiveness of the destination. Tourists are co-responsible for reputation. The creation of the tourism products is partially the result, according to the data, of a sharing with the local community, including the residents. With reference to the forms of agreement, the data confirm the presence of both formal and informal networks and the importance of the Local Action Groups, while the presence of clusters and sectoral franchises is less perceived.
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 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.

The data are coherent with the results programme for implementation the Tourism Strategical Plan of Veneto region and they highlight needs and gaps expressed by the stakeholders and then translated into 6 programmatic axes, corresponding to 29 strategic lines divided into 94 actions in the Plan.

The results of the Blutoursystem correspond to the objectives of axis 1 "Tourism Products" of the abovementioned Plan, with reference to the analysis and identification of both current and potential products. As far as Axis 1 "Tourist Products" is concerned, the Strategic Plan, in fact, defines the transition from a "destination offer model" to one of “motivation and experience”, from the logic of territorial thematism to that of tourism product, for a renewed tourist, aware and informed and who can organize autonomously every component of their holiday. In this sense, the development of new tourism products (e.g., cycling tourism, sports tourism, culture, nature, etc.) or the regeneration of mature tourism products (sea, winter mountains, etc.) is essential for the construction of a tourism offer that in the medium-long term will be able to catch new and diversified segments of national and international demand.

Axis 3 of the Plan "Digital tourism" is also crucial with respect to the evidence of the data referred to the graphs drawn up. This strategic axis are designed and developed taking into account the fact that sharing economy has grown exponentially in recent years and has registered its major impact in tourism; an epochal change that need to be managed, so that tourist destinations and tourism enterprises can deal with it effectively.

This is the framework in which the strategic lines and actions of the Strategic Plan have been elaborated, they are oriented at managing the changes arising from the growth and diffusion of the web in its various shapes affecting tourism, from the management and distribution of information to the promotion and commercialization (with the help of DMS), up to the development of a Veneto digital ecosystem. Strategic actions concern in particular:

• Actions to promote the dissemination and use of the Destination Management System (DMS) at regional level, for the integrated management of tourist destinations that can optimize and share information to tourists on a inter territorial scale, up to more complex features such as booking and the construction of customized tourist packages;
• Actions to improve the digital knowledge and culture in tourism enterprises;
• Definition of cooperation strategies with the On Line Travel Agency (OLTA), subjects that strongly influence, through their potential, the relationship between tourist demand and supply;
• Actions to integrate the tourism sector in the creation and organization of a "Digital ecosystem".

The Axis 6 "Shared Governance" responds to the clear indication emerged from the data processed thanks to BLUTOURSYSTEM, regarding the needs of improving the skills of monitoring and analysing the statistical data, and therefore even the necessity of an easy access to them. The Taking in account all this evidences, axis 6 defines a series of strategic lines and actions of a transversally helpful:
- the development of a "Tourism Observatory" that carries out predictive analyzes as well as a summary of official statistical data, surveys and "on demand" surveys on topics of particular interest and relevance for the actors of the tourism system;
- internal communication actions, in order to facilitate data sharing;
- actions for monitoring and evaluation, in a "in progress" programming, shared and circular logic.

Raising awareness about all these issues through training, sharing and networking is a goal of BLUTOURSYSTEM, both through new platforms and through capacity building meetings. They respond both to the gaps and needs raised through BLUTOURSYSTEM questionnaire and during PSTV meetings; needs that, although expressed through different paths and forms, are corresponding to each other...and there can be no other kind.