Report on interviews
Document references

**Project:** BLOUTOURSYSTEM “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.:** 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 results

**Credits**

**Partner in charge:** PP1 – Veneto Region

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**Partners involved:** all PPs

**Info**

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Abstract

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.
Pilot area description

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.

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 km² 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
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 Korcula 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 interconnected 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.

Panel of stakeholders interviewed

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<th>Pilot area</th>
<th>Name</th>
<th>Typology</th>
<th>Contact person</th>
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<td>Tourist Board Korčula</td>
<td>General public</td>
<td>Hana Turudić</td>
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<td></td>
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<td>Enterprise</td>
<td>Michael Unsworth</td>
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<td>Andrej Ćurčić</td>
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<td>Korcula Hotels</td>
<td>Enterprise</td>
<td>Mihajlo Grgić</td>
</tr>
<tr>
<td>Municipality Mljet</td>
<td>National Park Mljet</td>
<td>General public</td>
<td>Andrea Anelic</td>
</tr>
</tbody>
</table>

Stakeholders addressed
Public sector – Tourist board/DMO, National Park
Private sector – tourism entrepreneurs

Outcomes from the interviews

a. SUGGESTIONS FOR THE CALIBRATION OF THE SMART CROSS BORDER DATA SYSTEM (SCBDS) AND THE CREATION OF NEW INDICATORS
   • Attractions
### Man-made attractions

- **Origin, age, sex of visitors**: 5.40
- **Type of visitors (single tourist, couple, family, group traveller)**: 5.60
- **Number of visitors to man-made attractions**: 5.00
- **Working hours**: 5.80
- **Average price of the tickets**: 4.80
- **Number and type of different man-made attractions**: 5.40

**Country**: SOUTH ADRIATIC

### Accessibility

- **EXTERNAL ACCESSIBILITY - FLIGHT**
  - **Services used while staying at tourist destination**: 5.60
  - **Average age of flight travellers**: 4.80
  - **Type of travellers**: 5.60
  - **Average flight ticket price**: 5.20
  - **Daily number of flights**: 5.60
  - **Country of origin for flight travellers**: 5.80
  - **Number of the LCC carriers available through whole year**: 5.80

**Country**: SOUTH ADRIATIC
**INTERNAL ACCESSIBILITY - SMART SOLUTION**

- **Accessibility of smart infrastructural and other solutions for disabled people**: 5.20
- **Accessibility of the open platform services (UBER taxi)**: 5.00
- **Smart hub spots availability**: 5.40
- **Availability of passenger and road user information service provider in a destination**: 5.60
- **Information service providers - availability of parking places**: 5.40
- **Available parking lots**: 6.00

**INDICATORS - ACCOMMODATION**

- **Working hours of restaurants, bars and entertainment places**: 6.00
- **Number and type of catering facilities**: 5.80
- **Accommodation type**: 6.40
- **Quantity (measured in number of beds)**: 5.80
- **Quality**: 6.80
- **Distribution of accommodation supply**: 6.20

**Amenities**

**Ancillary services**
- **Available packages**

- **Activities**
### NUMBER AND TYPE OF SPECIAL (CREATIVE) ACTIVITIES

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<td>Nature and wildlife activities</td>
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<td>Sights and landmark sightseeing</td>
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<td>Sailing and water tours</td>
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<tr>
<td>Outdoor sport activities</td>
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<tr>
<td>Treasure hunts</td>
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<tr>
<td>Wine and food tastings</td>
<td>6.60</td>
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<tr>
<td>Traditional crafts’ workshops</td>
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<tr>
<td>Culinary workshops</td>
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<td>Language schools</td>
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### DESTINATION INFORMATION FROM

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<td>Google trends</td>
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<td>Facebook analytics - dmo page</td>
<td>5.80</td>
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<tr>
<td>Google analytics - dmo website</td>
<td>5.80</td>
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<tr>
<td>Instagram</td>
<td>6.20</td>
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</tbody>
</table>
b. GAPS AND NEEDS IN CAPACITY BUILDING PROCESSES (at CB Area level)

### DIGITAL COMPETENCES

- Geospatial technologies: 5.60
- Internet of things: 5.00
- E-commerce: 5.40
- Website implementation: 5.80
- Social media monitoring: 5.80
- Social media use and its management: 5.80

### COMPANY'S INTERNAL COMMUNICATION QUALITY

- Among staff in supply department: 6.00
- Among staff in catering department: 6.20
- Among staff in sales department: 6.20
- At lower management level: 6.00
- At middle management level: 6.20
- At senior management level: 6.20
**KNOWLEDGE OF FOREIGN LANGUAGES**

- Among staff in supply department: 6.00
- Among staff in catering department: 6.50
- Among staff in sales department: 6.00
- At lower management level: 6.40
- At middle management level: 6.60
- At senior management level: 5.80

**COMPANY’S INTERNAL ORGANISATION**

- Operational competences: 5.80
- Strategic management/planning competences: 5.60
- Long life learning policy: 5.40
- Human resources department: 5.40
c. IDENTIFICATION OF THE BUSINESS ECOSYSTEM OF THE CHOSEN PILOT AREA

- Creative tourism
CREATIVE TOURISM ADMINISTRATION LOCAL

- tourism labor knowledge: 6.40
- process monitoring: 5.80
- price creation: 5.80
- distribution: 5.80
- promotion: 6.00
- creation: 5.80

CREATIVE TOURISM ADMINISTRATION REGIONAL

- tourism labor knowledge: 6.20
- process monitoring: 5.20
- price creation: 5.00
- distribution: 5.20
- promotion: 5.60
- creation: 5.60
CREATIVE TOURISM ADMINISTRATION NATIONAL

- tourism labor knowledge: 6.20
- process monitoring: 4.60
- price creation: 5.20
- distribution: 5.00
- promotion: 5.60
- creation: 5.20

CREATIVE TOURISM ADMINISTRATION INTERNATIONAL

- tourism labor knowledge: 5.20
- process monitoring: 5.00
- price creation: 5.20
- distribution: 5.60
- promotion: 6.00
- creation: 4.80

DESTINATION MANAGEMENT ORGANISATIONS
CREATIVE TOURISM DMO LOCAL

- Tourism labor knowledge: 6.00
- Process monitoring: 5.80
- Price creation: 6.20
- Distribution: 6.60
- Promotion: 6.80
- Creation: 6.40

CREATIVE TOURISM DMO REGIONAL

- Price creation: 5.60
- Distribution: 5.20
- Promotion: 5.00
- Creation: 6.20
- Promotion: 6.40
- Creation: 6.00
PRIVATE STAKEHOLDERS
### CREATIVE TOURISM PRIVATE LOCAL

- **Price creation**: 6.40
- **Distribution**: 6.00
- **Promotion**: 6.40
- **Creation**: 6.60
- **Tourism labor knowledge**: 6.60
- **Process monitoring**: 6.40

### CREATIVE TOURISM PRIVATE REGIONAL

- **Price creation**: 5.60
- **Distribution**: 5.20
- **Promotion**: 5.40
- **Creation**: 6.60
- **Tourism labor knowledge**: 5.80
- **Process monitoring**: 6.00
CREATIVE TOURISM TOURISTS LOCAL

- Price creation: 5.40
- Distribution: 4.20
- Promotion: 4.80
- Creation: 4.20
- Tourism labor knowledge: 4.20
- Process monitoring: 5.40

CREATIVE TOURISM TOURISTS REGIONAL

- Price creation: 4.00
- Distribution: 4.00
- Promotion: 4.60
- Creation: 4.00
- Tourism labor knowledge: 4.40
- Process monitoring: 5.40
**CREATIVE TOURISM CIVIL SECTOR NATIONAL**

- Tourism labor knowledge: 3.60
- Process monitoring: 2.80
- Price creation: 3.40
- Distribution: 4.20
- Promotion: 4.80
- Creation: 4.20

**CREATIVE TOURISM CIVIL SECTOR INTERNATIONAL**

- Tourism labor knowledge: 3.80
- Process monitoring: 2.60
- Price creation: 3.00
- Distribution: 4.00
- Promotion: 4.60
- Creation: 3.80

**ASSOCIATIONS/ORGANIZATIONS RELATED TO CULTURAL AND NATURAL HERITAGE OF THE AREA**
CREATIVE TOURISM ASSOCIATION LOCAL

- Tourism labor knowledge: 5.40
- Process monitoring: 4.60
- Price creation: 5.20
- Distribution: 5.40
- Promotion: 5.60
- Creation: 5.20

CREATIVE TOURISM ASSOCIATION REGIONAL

- Price creation: 5.00
- Distribution: 4.80
- Promotion: 5.40
- Creation: 5.40
- Promotion: 5.40
- Creation: 5.00
• **Eco tourism**
ECOTOURISM DMO NATIONAL

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ECOTOURISM PRIVATE LOCAL

- Tourism labor knowledge: 6.20
- Process monitoring: 6.00
- Price creation: 5.80
- Distribution: 6.60
- Promotion: 6.20
- Creation: 6.40

ECOTOURISM PRIVATE REGIONAL

- Tourism labor knowledge: 5.40
- Process monitoring: 5.20
- Price creation: 5.20
- Distribution: 6.60
- Promotion: 5.40
- Creation: 5.60
ECOTOURISM PRIVATE NATIONAL

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ECOTOURISM TOURISTS LOCAL

- Tourism labor knowledge: 4.20
- Process monitoring: 3.00
- Price creation: 3.80
- Distribution: 3.60
- Promotion: 3.40
- Creation: 4.00

ECOTOURISM TOURISTS REGIONAL

- Tourism labor knowledge: 3.80
- Process monitoring: 3.80
- Price creation: 4.60
- Distribution: 4.40
- Promotion: 4.20
- Creation: 4.80
ECOTOURISM RESIDENTS LOCAL

- Tourism labor knowledge: 5.60
- Process monitoring: 5.80
- Price creation: 6.40
- Distribution: 6.00
- Promotion: 5.80
- Creation: 5.80

ECOTOURISM RESIDENTS REGIONAL

- Tourism labor knowledge: 4.80
- Process monitoring: 5.00
- Price creation: 5.80
- Distribution: 5.60
- Promotion: 5.60
- Creation: 6.00
European Regional Development Fund

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

ECOTOURISM CIVIL SECTOR NATIONAL

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ECOTOURISM CIVIL SECTOR INTERNATIONAL

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ECOTOURISM ASSOCIATIONS LOCAL

- Tourism labor knowledge: 5.60
- Process monitoring: 4.60
- Price creation: 5.20
- Distribution: 5.60
- Promotion: 5.80
- Creation: 5.20

ECOTOURISM ASSOCIATIONS REGIONAL

- Tourism labor knowledge: 5.20
- Process monitoring: 4.60
- Price creation: 5.40
- Distribution: 5.60
- Promotion: 5.60
- Creation: 5.20
**Impact of stakeholders**

**ECOTOURISM ASSOCIATIONS NATIONAL**

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IMPACT OF PUBLIC INSTITUTIONS AT DIFFERENT LEVELS

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<td>Price formulation in a destination</td>
<td>4.00</td>
</tr>
<tr>
<td>Creation of smart /ICT solutions in a destination</td>
<td>4.40</td>
</tr>
<tr>
<td>Destination’s online reputation</td>
<td>4.80</td>
</tr>
<tr>
<td>Destination’s sustainability</td>
<td>6.20</td>
</tr>
<tr>
<td>Destination’s supply competitiveness (refers to how efficient is ...</td>
<td>6.20</td>
</tr>
<tr>
<td>Destination’s attractiveness</td>
<td>5.60</td>
</tr>
</tbody>
</table>

DMO'S IMPACT ON

<table>
<thead>
<tr>
<th>Category</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Creation of physical infrastructure in a destination</td>
<td>4.20</td>
</tr>
<tr>
<td>Price formulation in a destination</td>
<td>3.60</td>
</tr>
<tr>
<td>Creation of smart /ICT solutions in a destination</td>
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</tr>
<tr>
<td>Destination’s attractiveness</td>
<td>5.40</td>
</tr>
</tbody>
</table>
Collaborative actions

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

100.0%

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

60.0%
40.0%
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?
Public Entities

Value

Null: 20.00%
No: 20.00%
Yes: 60.00%

Public Sector

Value

Null: 20.00%
No: 20.00%
Yes: 60.00%
• **Types of activities**

What types of activities are most commonly shared between different stakeholders?
### GAPS AND NEEDS TOWARDS INNOVATION OF THE PILOT AREA’S BUSINESS ECOSYSTEM

![ASSETS ANALYSIS](chart)

- **Participation in co-creation, decision making**: 5.80
- **Cooperation**: 6.20
- **Efficiency of public administration**: 5.20
- **Climate**: 6.20
- **Natural resources and landscape**: 6.60
- **Entrepreneurship development**: 5.80
- **Labour quality**: 5.80
- **Transport and accessibility**: 6.80
- **Accommodation**: 6.40
- **Cultural attractions and sites**: 6.80

**SOUTH ADRIATIC**
e. POTENTIALS OF THE PILOT AREA’S BUSINESS ECOSYSTEM
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
4. Croatian Bureau of Statistics (www.dzs.hr)