BLUTOURSYSTEM
PP2 – PUGLIA REGION

TRACKS FOR INTERVIEWS AND REPORT ON INTERVIEW
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: 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 of the deliverable: PP2 – Puglia Region
Report elaborated by: PP2 – Puglia Region – Special Agency of Puglia Region contracted for WP3 activities – Mr. Carlo Bosna;
Checked and reviews by: QPM
Approved by: Steering Committee
Report edited by: PP2 – Puglia Region – Mr. Andrea Santoro
Partners involved in the deliverable: contributing: Veneto and Istria Regions; collaborating: Universities and LAG

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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 roughly per partner, who represent both public and private sector in the tourism field. Thanks to the multi-purpose survey promoted by the Blutoursystem project, it will be possible to measure the main aggregates of tourism demand, highlighting its specific aspects and needs.

The scope of this document 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.

Deliverable 3.2.2: 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.
1. 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 Istria:

In particular:
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**

<table>
<thead>
<tr>
<th>Arrivi: 3.8 milioni (+4% rispetto al 2016)</th>
<th>Pernottamenti: 15.1 milioni (+4.8%)</th>
<th>Permanenza media: 3.8 notti (slazionaria)</th>
<th>Arrivi dall’estero: 903 mila (+5.5%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pernottamenti dall’esteri: 3.2 milioni (+8.7%)</td>
<td>Arrivi dall’Italia: 2.9 milioni (+3.3%)</td>
<td>Pernottamenti dall’Italia: 11.8 milioni (+3.8%)</td>
<td>Offerta ricettiva: 6.865 strutture (+9%)</td>
</tr>
<tr>
<td>Tasso d’internazionalizzazione: quota % arrivi dall’estero 23.2% (22.7 nel 2016)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>pernottamenti 21.4% (20.7 nel 2016)</td>
</tr>
</tbody>
</table>
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, 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 presence of foreign tourists is more evenly distributed during the year, with a concentration in the months of April, June, 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 with an excel file.

**Public administrations:**
- Municipality of Ostuni
  The councillor 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.

2. 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>Municipality Ostuni</td>
<td>Tourist Board Ostuni</td>
<td>General public</td>
<td>Vittorio Carparelli</td>
</tr>
<tr>
<td>Municipality Polignano a Mare</td>
<td>Tourist Board Polignano a Mare</td>
<td>General public</td>
<td>Domenico Matarrese</td>
</tr>
<tr>
<td>Municipality Castellana Grotte</td>
<td>Tourist Board Castellana Grotte</td>
<td>General public</td>
<td>Maria Teresa Impedovo</td>
</tr>
<tr>
<td>Italian General Confederation</td>
<td>General manager Confcommercio Puglia</td>
<td>General public</td>
<td>Giuseppe Chiarelli</td>
</tr>
<tr>
<td>Enterprises - Puglia</td>
<td>Director Parco Dune Costiere</td>
<td>Enterprise</td>
<td>Gianfranco Ciola</td>
</tr>
<tr>
<td>Fasano area</td>
<td>Owner of Leonardo trulli resort</td>
<td>Enterprise</td>
<td>Rosalba Cardone</td>
</tr>
</tbody>
</table>
3. Stakeholders addressed

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

4. Outcomes from the interviews

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

- Attractions

<table>
<thead>
<tr>
<th>CULTURAL ASSET</th>
<th>PUGLIA REGION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Origin, age, sex of visitors</td>
<td>5.64</td>
</tr>
<tr>
<td>Type of visitors</td>
<td>5.55</td>
</tr>
<tr>
<td>Number of visitors to different historical monuments and heritage</td>
<td>5.55</td>
</tr>
<tr>
<td>Working hours</td>
<td>5.73</td>
</tr>
<tr>
<td>Average price of the tickets to cultural attractions and events</td>
<td>5.91</td>
</tr>
<tr>
<td>Number and type of cultural events</td>
<td></td>
</tr>
<tr>
<td>Number of national level protected historical monuments</td>
<td>5.82</td>
</tr>
<tr>
<td>Number of UNESCO protected historical monuments</td>
<td>6.36</td>
</tr>
</tbody>
</table>
Natural assets

- Origin, age, sex of visitors: 5.91
- Type of visitors (single tourist, couple, family, group traveller, ...): 5.27
- Number of visitors to protected areas: 5.73
- Working hours: 5.91
- Average price of the tickets: 5.64
- Number and type of natural heritage under different type of protection: 6.00

Man-made attractions

- Origin, age, sex of visitors: 6.09
- Type of visitors (single tourist, couple, family, group traveller): 5.73
- Number of visitors to man-made attractions: 6.00
- Working hours: 5.82
- Average price of the tickets: 5.55
- Number and type of different man-made attractions: 6.00

Accessibility
EXTERNAL ACCESSIBILITY - FLIGHT

- Services used while staying at tourist destination: 5.91
- Average age of flight travellers: 5.27
- Type of travellers: 5.45
- Average flight ticket price: 5.55
- Daily number of flights: 6.27
- Country of origin for flight travellers: 6.36
- Number of the LCC carriers available through whole year: 6.27

EXTERNAL ACCESSIBILITY - TRAIN

- Services used while staying at tourist destination: 5.64
- Average age of train travellers: 5.09
- Type of travellers: 5.00
- Average train ticket price: 4.91
- Daily number of trains: 5.00
- Country of origin for train travellers: 5.45
Amenities
- Ancillary services

- Available packages
**Activities**

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

- Nature and wildlife activities: 6,36
- Sights and landmark sightseeing: 6,45
- Sailing and water tours: 5,64
- Outdoor sport activities: 6,00
- Treasure hunts: 4,45
- Wine and food tastings: 6,00
- Traditional crafts' workshops: 5,64
- Culinary workshops: 5,55
- Language schools: 5,45

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

### Digital Competences

- Geospatial technologies: 5.55
- Internet of things: 6.27
- E-commerce: 5.55
- Website implementation: 6.09
- Social media monitoring: 6.18
- Social media use and its management: 6.43
COMPANY’S INTERNAL ORGANISATION

- Operational competences: 6.55
- Strategic management/planning competences: 6.64
- Long life learning policy: 6.73
- Human resources department: 6.36

PERSONALIZATION OF SERVICES

- Specific target groups according to age, culture, sexual orientation, single-couple-group-family: 7.00
- Special needs tourists – physical obstacles, food intolerances, food preferences (vegetarian, vegan, etc. allergies, religious groups’ food requirements: 6.91
c. IDENTIFICATION OF THE BUSINESS ECOSYSTEM OF THE CHOSEN PILOT AREA

- Creative tourism

ADMINISTRATION

CREATIVE TOURISM ADMINISTRATIONS LOCAL

- tourism labor knowledge: 6.80
- process monitoring: 6.60
- price creation: 6.40
- distribution: 6.40
- promotion: 6.80
- creation: 6.80
CREATIVE TOURISM ADMINISTRATIONS INTERNATIONAL

tourism labor knowledge: 6.40
process monitoring: 6.40
price creation: 6.30
distribution: 6.30
promotion: 6.60
creation: 6.30

DESTINATION MANAGEMENT ORGANISATIONS

CREATIVE TOURISM DMO LOCAL

tourism labor knowledge: 7.00
process monitoring: 6.30
price creation: 6.30
distribution: 6.40
promotion: 6.80
creation: 6.90
CREATIVE TOURISM TOURISTS INTERNATIONAL

<table>
<thead>
<tr>
<th>Service</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>tourism labor knowledge</td>
<td>5,40</td>
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</tr>
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</tr>
<tr>
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<td>6,30</td>
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CREATIVE TOURISM RESIDENTS LOCAL

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</tr>
<tr>
<td>creation</td>
<td>6,70</td>
</tr>
</tbody>
</table>
CREATIVE TOURISM CIVIL SECTOR REGIONAL

- Tourism labor knowledge: 6,20
- Process monitoring: 5,80
- Price creation: 5,90
- Distribution: 6,10
- Promotion: 6,10
- Creation: 6,30

CREATIVE TOURISM CIVIL SECTOR NATIONAL

- Tourism labor knowledge: 6,10
- Process monitoring: 5,50
- Price creation: 5,60
- Distribution: 5,80
- Promotion: 5,80
- Creation: 6,00
<table>
<thead>
<tr>
<th>Creative Tourism Associations Regional</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tourism labor knowledge</td>
</tr>
<tr>
<td>Process monitoring</td>
</tr>
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<thead>
<tr>
<th>Creative Tourism Associations National</th>
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</tbody>
</table>
- Eco tourism

## Creative Tourism Associations International

<table>
<thead>
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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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<td>6.90</td>
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<tr>
<td>Creation</td>
<td>6.90</td>
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</tbody>
</table>

## Administration

## Ecotourism Administration Local

<table>
<thead>
<tr>
<th>Service</th>
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</thead>
<tbody>
<tr>
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<td>6.90</td>
</tr>
<tr>
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</tr>
<tr>
<td>Distribution</td>
<td>6.20</td>
</tr>
<tr>
<td>Promotion</td>
<td>6.50</td>
</tr>
<tr>
<td>Creation</td>
<td>6.60</td>
</tr>
</tbody>
</table>
ECOTOURISM ADMINISTRATION INTERNATIONAL

- Tourism labor knowledge: 6,50
- Process monitoring: 6,70
- Price creation: 6,30
- Distribution: 6,50
- Promotion: 6,70
- Creation: 6,60

ECOTOURISM DMO LOCAL

- Tourism labor knowledge: 7,00
- Process monitoring: 6,30
- Price creation: 6,30
- Distribution: 6,40
- Promotion: 6,80
- Creation: 6,90
ECOTOURISM DMO REGIONAL

- Tourism labor knowledge: 7.00
- Process monitoring: 6.30
- Price creation: 6.30
- Distribution: 6.40
- Promotion: 6.80
- Creation: 6.90

Note: The values are likely to be percentages or ratings. The diagram shows the distribution of these values across different categories.
**PRIVATE STAKEHOLDERS**

**ECOTOURISM PRIVATE LOCAL**

- Tourism labor knowledge: 6.60
- Process monitoring: 5.90
- Price creation: 5.90
- Distribution: 6.20
- Promotion: 6.20
- Creation: 6.20

**ECOTOURISM DMO INTERNATIONAL**

- Tourism labor knowledge: 6.50
- Process monitoring: 5.80
- Price creation: 5.80
- Distribution: 6.00
- Promotion: 6.40
- Creation: 6.40
### ECOTOURISM TOURISTS REGIONAL

<table>
<thead>
<tr>
<th>Service</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>tourism labor knowledge</td>
<td>6,10</td>
</tr>
<tr>
<td>process monitoring</td>
<td>5,70</td>
</tr>
<tr>
<td>price creation</td>
<td>5,70</td>
</tr>
<tr>
<td>distribution</td>
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</tr>
<tr>
<td>promotion</td>
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</tr>
<tr>
<td>creation</td>
<td>6,40</td>
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</table>

### ECOTOURISM TOURISTS NATIONAL

<table>
<thead>
<tr>
<th>Service</th>
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<tbody>
<tr>
<td>tourism labor knowledge</td>
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<tr>
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</tr>
<tr>
<td>promotion</td>
<td>6,20</td>
</tr>
<tr>
<td>creation</td>
<td>6,20</td>
</tr>
</tbody>
</table>
**ECOTOURISM TOURISTS INTERNATIONAL**

- **tourism labor knowledge**: 5.70
- **process monitoring**: 5.90
- **price creation**: 5.70
- **distribution**: 6.10
- **promotion**: 6.60
- **creation**: 6.60

**RESIDENTS**

**ECOTOURISM RESIDENTS LOCAL**

- **tourism labor knowledge**: 6.70
- **process monitoring**: 5.90
- **price creation**: 6.20
- **distribution**: 6.30
- **promotion**: 6.50
- **creation**: 6.70
ECOTOURISM RESIDENTS INTERNATIONAL

- Tourism labor knowledge: 5.90
- Process monitoring: 5.80
- Price creation: 6.10
- Distribution: 6.20
- Promotion: 6.50
- Creation: 6.70

CIVIL SECTOR

- Tourism labor knowledge: 6.50
- Process monitoring: 6.10
- Price creation: 6.00
- Distribution: 6.10
- Promotion: 6.40
- Creation: 6.50
ASSOCIATIONS/ORGANIZATIONS RELATED TO CULTURAL AND NATURAL HERITAGE OF THE AREA

ECOTOURISM ASSOCIATIONS LOCAL

- Tourism labor knowledge: 6,90
- Process monitoring: 6,30
- Price creation: 6,40
- Distribution: 6,50
- Promotion: 6,90
- Creation: 6,90
- Impact of stakeholders

### IMPACT OF PUBLIC INSTITUTIONS AT DIFFERENT LEVELS

- Creation of physical infrastructure in a destination: 6.10
- Price formulation in a destination: 5.55
- Creation of smart /ICT solutions in a destination: 6.09
- Destination’s online reputation: 5.82
- Destination’s sustainability: 6.09
- Destination’s supply competitiveness (refers to how efficient is destination in relation to their competitors?): 6.00
- Destination’s attractiveness: 6.27
DMO'S IMPACT ON

- Creation of physical infrastructure in a destination: 6.30
- Price formulation in a destination: 6.27
- Creation of smart /ICT solutions in a destination: 6.36
- Destination’s online reputation: 6.36
- Destination’s sustainability: 6.55
- Destination’s supply competitiveness (refers to how efficient is destination in relation to their...): 6.27
- Destination’s attractiveness: 6.55

PRIVATE STAKEHOLDERS' IMPACTS ON

- Creation of physical infrastructure in a destination: 6.00
- Price formulation in a destination: 6.09
- Creation of smart /ICT solutions in a destination: 6.09
- Destination’s online reputation: 5.91
- Destination’s sustainability: 6.18
- Destination’s supply competitiveness (refers to how...): 5.91
- Destination’s attractiveness: 6.09
### TOURISTS' IMPACT ON

<table>
<thead>
<tr>
<th>Destination Area</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Creation of physical infrastructure in a destination</td>
<td>5,80</td>
</tr>
<tr>
<td>Price formulation in a destination</td>
<td>5,80</td>
</tr>
<tr>
<td>Creation of smart /ICT solutions in a destination</td>
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</tr>
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<td>Destination's online reputation</td>
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<tr>
<td>Destination's sustainability</td>
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<tr>
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<td>6,27</td>
</tr>
<tr>
<td>Destination's attractiveness</td>
<td>6,55</td>
</tr>
</tbody>
</table>

- **Collaborative actions**
  Are there any forms of collaborative actions among stakeholders?

  - No: 36.35%
  - Yes: 63.64%
Are there any forms of collaborative actions among stakeholders? (Franchising and management contracts)

- No: 54.54%
- Yes: 45.45%

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

- No: 36.36%
- Yes: 63.64%
• Common partners
  Who are the most common partners in the formal types of collaborative activities in your destination?
Type of activities
What types of activities are most commonly shared between different stakeholders?
Distribution of products

- Null: 0.00%
- No: 27.27%
- Yes: 63.64%

Monitoring the process of a product

- Null: 0.00%
- No: 63.64%
- Yes: 27.27%
ICT dissemination and implementation

Tourist labour knowledge enhancement
d. GAPS AND NEEDS TOWARDS INNOVATION OF THE PILOT AREA’S BUSINESS ECOSYSTEM
MAIN GAPS AND NEEDS IN BUSINESS ECOSYSTEM

- Low level of cooperation: 6.09
- Asymmetric information: 4.73
- Apathy: 4.73
- Poor empowerment processes: 5.09
- Low level of knowledge: 5.27

MAIN GAPS AND NEEDS IN INNOVATION

- Low level of cooperation: 5.60
- Asymmetric information: 4.40
- Apathy: 4.60
- Poor empowerment processes: 4.80
- Low level of knowledge: 4.30
5. 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 personalism 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

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<thead>
<tr>
<th>Municipality</th>
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<th>Average stay</th>
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<tr>
<td></td>
<td>Arrivals</td>
<td>Presences</td>
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<tr>
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<td>Trani</td>
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Source: Pugliapromozione Tourism Observatory

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

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