Final Report

Enhancing the Competitiveness of Tourism in the EU

An Evaluation Approach to Establishing 20 Cases of Innovation and Good Practice

Annex B – Good Practice Cases

September 2013

Centre for Strategy & Evaluation Services

Contents

INTEGRATED NATIONAL TOURISM PLAN (ES)

CASE 1

Introduction

Spain has a leading position in tourism at a global level and tourism is of strategic importance to the Spanish economy. Its 350,000 enterprises generate more than 10% of national GDP and provide 11% of employment. It is also a sector that the government regards as important for the economic recovery, expecting it to deliver growth and employment.

However, the Spanish tourism sector faces a series of the challenges - many of which have parallels across Europe - that called for a strategic response. The sector believes that it has suffered from a loss of competitiveness in recent years and that it needs to reposition itself in the face of competition from other destinations and the changing requirements of visitors. The Integrated National Tourism Plan (PNIT) presents a national framework for this response over the period 2012-2015.

Theme

This particular case is different from all the others presented in the Report in that it concerns a development at a more strategic level. Furthermore, it involves a large number of parallel initiatives relating to all the themes covered elsewhere and more besides.

Reasons for Highlighting this Project

By way of illustrating the potential contribution of a strategic framework, this case describes a national strategy adopted in Spain. It represents good practice, not only in its strong vision, its systematic approach, its highly innovative elements and the well-structured arrangements for implementation, but also in the monitoring system that has been developed and the regular reporting processes.

PNIT
Spain's National and
Integral Tourism Plan

The intention by citing this case is both to provide inspiration from the breadth of vision and the systematic processes deployed in developing and implementing the National Plan, but also to point to particular measures within the Plan that are of interest, especially those that relate to the encouragement of innovatory processes and the development of 'smart destinations'.

Project Highlights

Contribution to Tourism Policy objectives: Systematic review and re-orientation of 'Destination Spain', involving multiple actions in all the areas covered by the 2010 Commission Communication

Innovative elements: The overall national approach is itself innovative, including the rigorous monitoring processes, but there are also many innovative elements within the Plan, including for instance the development of 'smart destinations'.

Main outputs: The Plan has defined 28 measures involving a total of 104 actions, to be implemented over the period 2012-2015. By March 2013, 39% of the planned measures had been implemented and 16 actions out of the 104 included in the PNIT had been completed.

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Results and impacts: Monitoring of actions includes collection of data on results and impacts, though at this relatively early stage, these data are not publicly available.

Monitoring arrangements: There is continuous monitoring of all actions and monthly reporting up to ministerial level on progress. Progress with the Plan is also published on a national website

Description

The PNIT was drawn up after extensive consultation with the regions and municipalities of Spain, with private sector providers of tourism services and with related industries and the Plan itself initiated new mechanisms to continue this dialogue during the course of its implementation. The Plan therefore reflects a national consensus on the challenges for the sector and the initiatives taken in response.

The PNIT is set out in a document that begins with a SWOT analysis of the challenges facing the industry. Issues identified include the changing requirements of customers and their increased discrimination based on the availability of extensive information on the Internet, over dependence on customers from certain western European countries, the limited season of sun and beach tourism, a slow rate of innovation and the need for a better integration of services based on cultural and natural assets into the general tourism offer.

The Vision

The response to the challenges identified begins with a statement of the vision for 'Destination Spain':

> *'Destination Spain' is directed towards generating a differentiation, which is highly relevant for the consumer in that all the cultural, natural and entrepreneurial resources available, together with the public services, are directed towards providing a service to the tourist'.*

This vision encompasses the following elements:

- The international projection of the country as a leading destination that the client recognises as clearly differentiated

- Within an economy that is sustainable, socially and environmentally, that generates sufficient returns and a high value-added, creates high quality employment and makes responsible use of natural resources

- With economically sustainable destinations, encouraging sufficient investment, both public and private, to bring about a steady evolution in the competitive model

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- Efficiency in its business model, corresponding to global levels in both its management processes and its rate of return

- The application of the excellent talent available as the basis for the management of destinations and tourism enterprises and as the source of innovative entrepreneurship

- Immersion in the digital era in order to maximise the benefits of information and communication technologies as a vector of continuous transformation for the tourism sector

- Collaboration between the public and private sectors and the other social agents and organisations that are part of the tourism sector, in order to jointly define strategies and actions that will enhance the value proposition for the client

The implementation

The Plan goes on to define a series of specific objectives derived from this vision:

1. Increase tourism activity and productivity

2. Create quality employment

3. Stimulate a single market

4. Improve international positioning

5. Improve the coherence and recognition of the 'Spain' brand

6. Encourage public-private co-responsibility

7. Reduce the seasonality of tourism

It can be seen that these objectives echo aspirations that that have a wider resonance across Europe and reflect themes that have figured prominently in debates at a European level for some years now. Essentially they are the components of a vision of a more diversified tourism sector that is able to maintain its competitive position internationally and be responsive to the broadening scope of customers' demands. A broad section of opinion in the tourism sector can identify with them.

The objectives are then used to define a series of 28 measures, making use of three general instruments:

a) Promoting awareness, entrepreneurship and training
b) Improving the offer
c) Diversifying the demand.

At a more operational level, the 28 measures are made up of a total of 104 actions.

A range of different organisations are responsible for the implementation of the PNIT over a four year period, but the principal responsibility for the co-ordination of this process lies with Turespaña, the Spanish national agency for tourism, under the direction of the Spanish Ministry of industry, Energy and Tourism.

The measures are very diverse and include changes to the legislative and regulatory framework in Spain. This involves addressing the regulatory barriers that have arisen, since a large part of the political responsibility for tourism lies with the regions and over the years these have developed their own regulatory provisions. The Plan therefore talks of the development of a Single Market in Spain.

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There are also practical measures, including reorganisation of the network of Tourist Offices, and the development of training, support and finance for enterprises, including credit lines for young entrepreneurs.

Many of the measures relate more particularly to development in areas that are close to the central issues for the current assignment. A large part of the Plan consists of a systematic approach to developing Spain's capacities in the relevant areas. In particular, it highlights a series of measures to reconfigure the offer and re-orientate destinations. These include renewal of the infrastructure of mature destinations and the development of new destinations, especially by exploiting natural and cultural assets and encouraging developments away from the coast. Actions include the removal of unsightly buildings that are a legacy of the years of rapid development and replacement by open parks and gardens. There is also the development of certification schemes, especially those promoting quality in service delivery. One of these schemes is the subject of a separate case. It concerns the 'Integral System for Tourism Quality in Destinations' – SICTED - Case 8. It is being considered because rather than applying at the level of an individual enterprise, as is the case for a number of established quality schemes, it is attempting to develop a broad certification system at the level of a destination. Of course, it remains the case that individual service providers are responsible for the quality of the service they deliver, but the SICTED scheme aims to address the point that all the service providers of a destination affect the perception of its quality in the mind of the visitors.

The Plan also has a series of measures that aim to promote talent and entrepreneurship. This includes arrangements for facilitating access to finance, especially for young entrepreneurs, but also actions to promote innovative thinking and a review of training provision in order to align it better with the requirements of firms in the industry. A further series of actions are designed to help the private sector move away from reliance on the traditional packages offered for holidays in Spain to a more entrepreneurial approach centred on a mediating role in developing new and flexible packages that combine a variety of rich experiences, especially in areas away from the coast. The aim here is to create a network of experience destination management agencies and support this innovation, both with access to finance, but also with inputs from academic experts and business schools.

Smart Destinations

Of particular interest are the measures to promote innovation. Among these is the *Smart Destinations* programme, an initiative of SEGITTUR, a public company dependent on the Spanish Ministry of Industry, Tourism and Commerce. The aim of this initiative is encourage innovation at the level of the destination, as much as in individual enterprises. The approach has partially been inspired by the idea of 'smart cities' and is being implemented in a series of pilot projects in up to 11 destinations. These have to be responsive to local needs and involve all the major local stakeholders, including the private sector, local universities etc. and because of the variety of inputs and local circumstances each project will have its own particular features. However, a common element is the emphasis on using ICT as a vehicle for promoting innovation in a variety of forms and particularly the use of hand-held devices. In part it is a matter of developing infrastructure. In one pilot, for instance, the aim is to establish WiFi connectivity everywhere in the destination. But new and existing infrastructure is also delivering new services, such as access to tourist guides or e-parking services, promoting an increased interaction with customers and generating a richer information base from which to develop more detailed knowledge of the market and the way that it is developing. This in

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turn is changing the way that all concerned are behaving. It is changing customer expectations, but also the ability of the providers to respond.

Supporting these developments, there is a systematic and co-ordinated management effort, organised around local agreements with the stakeholders of the destination that are participating in the initiative. At its most basic, it is a matter of ensuring that all the relevant core ICT services are available and working well, but there is also a management process designed to ensure steady development, while at the same time allowing aspects that are frankly experimental. Part of this process is putting in place management disciplines, articulating and agreeing objectives and the indicators that will measure progress. It also involves the development of standards, where this is appropriate, or necessary to ensure interoperability, and subsequently introducing or even defining certification procedures. There is an ISO committee on smart cities, for instance, and it is hoped that a similar arrangement at a national level could be implemented for smart destinations.

There is then support for the efforts of particular enterprises that aim to contribute to the common service package, assisting them with technical issues, such as the installation and use of sensors and data storage, advice on how to develop content and the promotion of knowledge sharing and transparent administration, not least between those involved in the different pilot projects. This support can extend to business advice and facilitating access to finance. Finally there is the continuous effort put into encouraging a culture of innovation and creative thinking and promoting the developments taking place to a broader audience.

Monitoring of Implementation

Another important part of the Plan refers to the co-ordination of policy and also to co-ordination of the Plan's implementation processes. Policy co-ordination includes that with policy and developments at a European level and it is acknowledged that this needs to be in both directions.

Elaborate provisions have been introduced for the implementation of the Plan. In the PNIT document itself, there is a discussion of priorities and an assessment of the relative difficulty in implementing different elements. There is also a list of indicators relating to each of the 7 objectives and the 3 principal instruments. A rigorous process of monitoring has been introduced

Features contributing to Improved Competitiveness

The PNIT aims to contribute to the competitiveness of the Spanish tourism sector at different levels. In its overall vision the strategy is aiming to re-align the industry so that it can face important challenges and this is a matter of cultural change to a significant extent. It is supporting this with a systematic analysis and detailed provisions for change that are very impressive in their scope and thoroughness. The strategy is also followed through to provision for a large number of actions addressing particular issues.

The intention is that the Plan is to be implemented over a four year period from 2012 to 2015.

Supporting the implementation of the PNIT is an elaborate system of monitoring and evaluation. A set of indicators was included in the Plan and has since been refined. Monthly reports on progress at the level of outputs, results and longer term impacts are prepared for the Minister and Secretary of State. It was recognised in the Plan itself that some elements would be a lot more difficult to implement than others and progress is being made in some areas more quickly than in others. However, overall and after 1 year of operation, the PNIT is judged to be on schedule.

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The detailed monthly report is for internal use. It is an instrument to follow the progress of the PNIT measures, learn what achievements have been made and detect where problems are arising so that appropriate measures can be taken. However, the overall results are made public on the web page of the Ministry of Industry, Energy and Tourism[1]. By March 2013, it is estimated that 39% of the planned measures had been implemented, with 16 actions out of the 104 included in the PNIT having been completed.

It is still too early to establish the results and impacts arising from the PNIT's implementation.

Features relating to the Wider Adoption of the Good Practice

The lessons from the PNIT do not only apply at the level of national planning. Planning at the regional, destination or even project level could make use of elements that are evident in the PNIT, though inspiration could be drawn from the fact that even at a national level in a country with a well-established and extensive tourism sector and with significant regional differences to take into account, it is still possible to establish a consensus on the way forward.

The more general characteristics of the PNIT that can be used to inspire change at many levels include the almost textbook approach to structuring the analysis, beginning with a frank discussion of the threats and opportunities facing the industry in Spain and its weaknesses and strengths. The resulting diagnosis of the challenges to be faced provides a firm basis for articulating a new vision and for following this through with a definition of objectives and a structured approach to the very concrete measures that need to be taken.

The precise focus of the measures that have been selected can also be of broad interest. The comment has been made that the objectives of the PNIT echo aspirations that that have a wider resonance across Europe and reflect themes that have figured prominently in debates at a European level for some years now. The specific way that these objectives are reflected in particular measures can be of great interest to professionals with similar responsibilities.

It is also remarkable that with such a complex set of measures and related actions, the determination to see the Plan followed through into full implementation is so marked and that a systematic monitoring and reporting system has been put in place, so that progress with all the different elements can be considered at up to ministerial level on a regular basis.

Further Information

Turespaña   -   http://www.tourspain.es/es-es/VDE/Paginas/PNIT.aspx
http://www.tourspain.es/es-es/VDE/Documentos%20Vision%20Destino%20Espaa/National%20and%20Integral%20Tourism%20Plan.pdf

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[1] http://www.minetur.gob.es/turismo/es-ES/PNIT/Documents/Informe%20de%20seguimiento.pdf

OPEN ALL YEAR – SW WALES (UK)

CASE 2

Introduction

The 'Open All Year' strategy for South West Wales is an integrated strategic programme of action initiated in 2004 aiming to achieve an effective seasonal spread of tourism in South West Wales in a way that is sustainable, both economically and environmentally. Under the umbrella of the programme, there are a number of activities including the strengthening of coordination and partnership among public, private and 3rd sector actors, targeted marketing initiatives and thematic campaigns, training of tourism businesses and various thematic events for businesses and tourists.

The SW Wales Regional Tourism Partnership – a regional public-private partnership – has been responsible for the overall implementation of the strategy and the coordination of the activities implemented by various local stakeholders.

Theme

The overarching theme is addressing the problem of seasonality. Extending the season is the main focus of activities although skills improvement, the development of innovation and strengthening the socio-economic knowledge base are also parts of the overall strategy.

Reasons for Highlighting this Project

Extending the season is an important aim for many destinations, especially since by allowing existing assets to be used more effectively and by providing more stable employment conditions, it can unleash a positive cycle of improvement. In this case the aim of being 'open all year' has provided a motivating and inspirational theme for a broadly-based public-private partnership in a range of other complementary and innovative developments.

Project Highlights
Contribution to Tourism Policy objectives: Primarily extension of the tourism season, but also improving skills, development of innovation and strengthening the socio-economic knowledge base.
Innovative elements: Institutional innovation in the form of a broadly-based public-private partnership – the South West Wales Tourism Partnership and a systematic up-grading of the service offer.
Main outputs: A wide range of activities have taken place under the umbrella of the Open All Year strategy since its initiation in 2004 with a broad range of outputs, including more than 1000 persons receiving training on an annual basis, major events and new attractions (gardens, parts, golf courses) opened along with 21 Blue Flag beaches, upgrading of accommodation and leisure facilities and transport initiatives.
Results and impacts: The number of visits to South West Wales increased much faster that for

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the whole of Wales during the period 2006-2011 (17.5% increase in comparison to 1.6%).

Off-season (Oct-March) visits increased from 26% in 2006 to 33% in 2011.
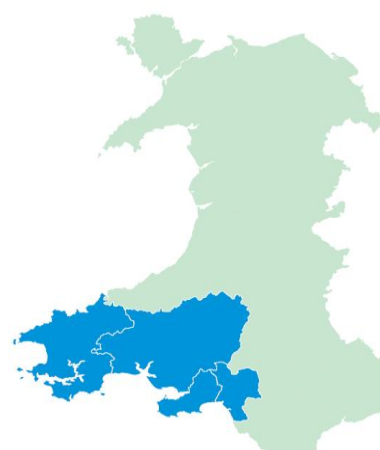
Monitoring arrangements: Strategic research projects, visitor and business surveys at the regional and local level have been conducted on an annual basis.
A set of indicators have been identified for monitoring performance reflecting results and longer term impacts.

Description

The South West Wales region is comprised of the areas of Neath, Port Talbot, the City and County of Swansea, Carmarthenshire and Pembrokeshire. It has a combined population of 652,000 – approximately 22.4% of the population of Wales. The tourism sector represents an important part of the South West Wales' visitor economy sustaining around 20,000 jobs in 6,000 businesses and bringing in over £350m (around €412m) revenue to the region annually (2010 figure).

The area is characterised by an extensive and varied coastline and rural inland areas sustaining diverse wildlife. The built environment includes ancient castles and other historic properties and landscapes, picturesque villages, small market towns, coastal resorts and the maritime city of Swansea.

Intervention logic and project objectives

In 2004, the South West Wales Tourism partnership formulated a strategy aiming to provide an inclusive and common focus and a set of shared objectives for the development and promotion of tourism. The development of the "Open All Year" strategy for the period 2004-2008 followed a consultation with public and private actors and an extensive assessment of the SW Wales tourism product, the current markets and recent trends and assessment of external influences on future growth. The SWOT analysis that was conducted indicated that the important assets of the region (coastline and diverse environment, cultural heritage, wide range of opportunities for activities) come together with a number of weaknesses, including the small size and fragmented provision of tourism services, limited coordination, highly seasonal and an over-dependency on traditional market segments and the low quality and limited skills of most service providers. Thus, the strategy developed set an overall vision for an "all year accessible destination, providing high quality services, supporting profitable tourism businesses as a source of good quality jobs".

The strategic approach adopted for fulfilling this vision focused on the generation of more business outside of the summer season and the attraction of higher value market segments capitalising on the region's environmental and cultural strengths, raising product and service quality and developing marketing initiatives aimed at carefully selected target markets (including seniors and young couples, families, business tourism and day visitors). The strategy also identified two key concepts as central elements for effective implementation: the adoption of Integrated Quality Management principles - as the basis for effective Destination Management - and Sustainable Development.

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Under the Open All Year strategy five specific strategic objectives were set and a number of activities have taken place. These were initiated by SWWTP but most often have been implemented by local consortia:

1. *Stronger partnerships of tourism stakeholders in SWW working effectively together, informed by good quality, up to date information*. The South West Wales Tourism Partnership (SWWTP) that was already in place – see below – bringing together local authorities, local tourism associations and other actors (including national parks) was to be strengthened, facilitating the flow of knowledge among the different actors and helping them to improve their services. At the sub-region level, arrangements for formal and informal Destination Management Organisations (DMOs) were created. In parallel business surveys have taken place monitoring activities and visitors' satisfaction and benchmarking as part of the IQM. Being a predominantly rural area, there have also been frequent contact with the European Network for Rural Development and particularly and their Local Action Groups.

2. *Re-focusing of marketing onto off-peak opportunities.* This included targeted destination and thematic campaigns, improved co-ordination and packaging of suppliers and the targeting of appropriate markets. A number of targeted thematic campaigns (One Big Garden', 'Inspirational South West Wales' and 'Wild West Wales') have been implemented by consortia developed with the support of the SWWTP. SWWTP coordinated the overall marketing activities targeting overseas and regional markets and provided training to various tourism service providers in order to develop tailored packages corresponding to promoted themes and brands.

3. *Improving the quality of the visitor experience throughout the year.* This included improvements in information provision and signposting, guidance to improve the quality of accommodation – with a focus on high quality accommodation – and to integrate quality considerations into funding provided for accommodation and catering facilities, improving specific attractions and extending their period of operation, and supporting the development of a programme of events related to local strengths.

4. *Responsibly developing and sustaining the infrastructure and the unique environmental and cultural resources of SW Wales for the benefit of visitors and residents.* This included the adoption of sound environmental management practices and the integrated quality management schemes, improving the built environment and public facilities leveraging available funds, improving accessibility to various attractions and the provision of public transport.

5. *Improving tourism business practices and performance.* This included the provision of training tailored to the needs of tourism enterprises – particularly SMEs - and targeted at identified skill shortages. It was reinforced by ensuring greater coordination among training providers. An important aspect of this was the implementation of Gallu project that was launched in 2004 and still continues, providing training designed to meet the very specific and eclectic skills or knowledge shortfalls experienced by micro and small tourism businesses and covering a wide range of thematic areas. The training is organised by a consortium of local actors including the tourism associations and the regional hospitality and tourism training forums.

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The activities implementing the Open All Year strategy have been funded by Visit Wales (Welsh Government) that has been contributing around £1 million (around €1.18m) on an annual basis. Additional funding has been provided by the local public and private organisations participating in the regional partnerships and the individual activities. A number of larger scale interventions also relied on accessing funding available from other programmes of the Welsh Assembly government or through EU funding.

The objectives of the initial four year strategy for the period 2004-2008 have been carried over into subsequent years and, according to the SWWTP annual business plans, are still considered as very relevant for the region. As a result, training activities under the Gallu project or the various events continue to be implemented and developed further on the basis of the framework set by the Open All Year strategy.

Role of the SWW Tourism Partnership

The Open All Year strategy has as a rather unique feature in the role assumed by the South West Wales Regional Tourism Partnership (SWWTP). Regional Tourism Partnerships were created in all four regions of Wales in 2002 as an initiative of the Wales Tourist Board (WTB), now Visit Wales (VW), which was granted devolved resources and responsibilities for tourism marketing and development. In South West Wales the SWWTP was established in shadow form in September 2001 and formally constituted as a 'not for profit' entity in April 2002. The SWWTP works in partnership with Visit Wales, other Assembly Sponsored Public Bodies, Local Authorities, the private sector and all other organisations with an interest in collaborative tourism.

Unlike the other partnerships in Wales, the SWWTP divests most of the funds made available to it by the Wales government to the local tourism associations/private sector placing the responsibility of determining local priorities firmly in the hands of local trade operators. Thus, the SWWTP role is to set the overall strategy and principles and to monitor implementation and it has had rather limited visibility assuming a behind the scenes role of coordination and guidance.

Outputs of the programme

Since the initiation of the Open All Year strategy the various activities have led to significant outputs. While not exhaustive, the following list is indicative:

- more than 1000 persons have benefited on annual basis from the tailored training initiatives under the Gallu project;

- 30-40 staff in the Tourist Information Centres (TIC) around Wales have taken part every year in training concerning the cross-promotion of the region;

- the three local Tourism Associations reached in 2011 a total of 1400 members;

- sustainable transport initiatives such as the Heart of Wales railway line were supported;

- a number of industry road shows and open days were organised on an annual basis. In 2011 three major events took place with over 500 businesses attending;

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- new attractions (gardens, parts, golf courses) opened along with 21 Blue Flag beaches;

- major events such as the South Wales Boat Show, Pembrokeshire Fish Week, West Wales Food Festival, Garden of Wales festival, Dylan Thomas Festival and the Tenby Blues Festival were organised attracting large number of visitors;

- opening and redevelopment-upgrade of accommodation and leisure facilities;

- strategic research projects, visitor and business surveys at the regional and local level have been conducted on an annual basis.

Features contributing to Improved Competitiveness

The Open All year Strategy adds to the competitiveness of the tourism sector directly and indirectly by focusing on both the supply and the demand side. The activities implemented aim to upgrade the skills of the local labour and improve the quality of tourism services and attractions following the Integrated Quality and Destination Management principles while at the same time through the targeted and thematic marketing and branding increase the number of visitors throughout the year, targeting new tourism markets with higher levels of spending.

At the same time, the operation of the SWWTP has facilitated formal and informal cooperation among local and regional actors, addressing inherent limitations of individual and fragmented tourism businesses and service providers. It has made possible the organisation of events, marketing activities and other initiatives with broad economic and employment benefits for the tourism and other sectors but has also contributed to better and more inclusive planning and support activities.

Looking into the results and impact of the programme, the Open All Year strategy document included a set of indicators to be used for monitoring performance reflecting results and longer term impacts. A number of indicators were identified and for some of them data have been made available:

- the volume of business (visitor trips, nights and overall spending in the region) and market shares (percentage of UK visitor trips, nights and spending)
- business performance (accommodation occupancy, percentage of enterprises indicating that the level of business had increased over the previous year)
- level of seasonality (percentage of total nights spent that occur in third quarter, occupancy in third quarter as a ratio of average annual occupancy, number of attractions and accommodation establishments open all year).
- participation of tourism enterprises in training courses and tourist associations
- enterprise satisfaction with destination services for tourism and visitor satisfaction
- sustainability (enterprises participating in environmental training programmes and in Green Dragon award; percentage of visitors using public transport; number of Blue Flag beaches).
- business development (number of planning permissions granted for accommodation development; new jobs created by enterprises; salary levels within a constant sample of representative tourism enterprises).
- marketing (participation in relevant marketing campaigns and cost per response to direct marketing activity).

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Data on these indicators have not been made available but the data on the number of visits to South West Wales already provide indications of positive trends. The total number of visits to South West Wales increased much faster that in Wales during the period 2006-2011. Even more important and relevant to the Open All Year strategy is the increasing share of the off-season (Oct-March) visits to the total visits in the region. From 26% in 2006, off-season visits represented close to one third of the total in 2011.

Table 1 – Evolution of total and off-season visits in Wales and South West Wales (2006-2011)

	Total visits			Off season visits (Oct-March)			Share of off-season to total in SW Wales
	Wales	**SW Wales**	**Share of SW Wales in total (%)**	**Wales**	**SW Wales**	**Share of SW Wales in total (%)**	
2006	9,547,000	1,909,000	20	3,022,000	495,000	16.4	25.9
2011	9,697,000	2,243,000	23.1	3,355,000	728,000	21.7	32.5
% Change	1.57	17.5		11	47		

Source: Welsh government

In addition to the directly measurable impacts, the operation of the SWWTP has by itself brought significant benefits to the tourism industry in the region. An assessment that took place 2007 – 3 years after the initiation of the strategy - concluded that the SWWTP had had a key role in bringing together different actors – the tourism industry, the local authorities and the public sector - and effectively addressing the problem of the small size of operators and their limited capacity for investment. In the absence of the SWWTP, many of the activities would not have been delivered commercially, or would not have been delivered efficiently. Among the Regional Tourism Partnerships in Wales, the SWWTP has distinguished itself by developing uniquely strong relationships with the stakeholder associations in the region and facilitating the public-private partnerships between tourism associations and local authorities. The partnership has operated as an "informal" Destination Management Organisation and has supported implementation of a range of development measures in line with business planning priorities and especially those that require consultation and cooperation. These include:

- development and update of the Strategic Marketing Action Plans

- a consultation process to ensure best value from supporting grants and avoiding displacement.

- cost effective regional marketing presence overseas in key markets such as Ireland

- joint delivery in events such as regional road-shows, workshops and tourism awards

- integrated communications and involvement in the development and implementation of Centres of Excellence and also Rural Development Plans and general regeneration programmes

- promotion and greater participation of firms in regional business surveys

As a result, the successful operation of the partnership has had significant positive spill-over effects in most areas.

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Features relating to the Wider Adoption of the Good Practice

The approach followed by Open All Year strategy can be transferred to other regions but will require a significant level of engagement and cooperation among the relevant actors. The SWWTP representative has commented that the presence of mutual trust among the different actors has been a key element of success in the strategy so far. This mutual trust was gradually built, first on the basis of a key priority of extending the season that was accepted by all actors following a consultation process. Putting the various activities under this commonly accepted theme has been an important unifying factor. The back stage role assumed by SWWTP has given an opportunity to local public and private actors to take initiatives while, at the same time, ensuring that the key objectives and priorities of the programme are being served and principles of Destination Management and quality management are observed.

Of course, in other countries or regions the current institutional structures and institutional culture must permit such an approach to be adopted.

Further Information

http://www.swwtp.co.uk/index.php?option=com_content&view=article&id=32&Itemid=532&lang=en

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EUROPE SENIOR TOURISM (ES)

CASE 3

Introduction

The Europe Seniors Tourism programme is an initiative of the Spanish government aiming to alleviate the problem of the seasonality of traditional tourist locations in Spain and to diversify the customer base away from the traditional countries of origin. The programme works through the attraction of senior tourists (over 55 years old) from other EU countries during the low season period of October to May. The objective is to contribute to the creation and maintenance of employment in the tourist sector throughout the low season, particularly in the hotel and catering industry, while in parallel contributing to improving the quality of life of seniors. The programme was initiated as a pilot in 2009 and has been running for four consecutive years attracting – during the period 2009-2012, over 120,000 senior tourists.

Theme

The **extension of the tourism season and diversifying the customer base** are the key themes and core objectives of the Europe Senior Tourism project and represent the focus of the analysis. At the same time it represents an effort to diversify the supply of tourist services and the target groups away from the dominant sun and sea approach that contributes to the extreme seasonality.

Reasons for Highlighting this Project

The Europe Seniors Programme is a focused programme which provides a clear illustration of the significant direct and indirect impacts and the positive returns of a targeted, well-managed initiative to address the seasonality problem. At the same time, the programme is genuinely innovative in the sense that it is the first programme which seeks to create new tourism flows to the country through the provision of financial incentives that reduce the costs of travel packages. The available evidence gives a clear indication of the economic and social benefits of such a public investment.

Project Highlights
Contribution to Tourism Policy objectives: Extension of the tourism season and diversification of the customer base of the tourism sector.
Innovative elements: The Euroseniors programme is the first programme which seeks to create new tourism flows to the country through the provision of financial incentives that reduce the costs of travel packages. The available evidence gives a clear indication of the economic and social benefits of such a public investment.
Main outputs: Since its initiation in 2009, the programme has attracted over 120,000 tourists (period 2009-2012), mainly from Central and Eastern Europe countries, with a total government expenditure of €14.8 million. Over 200 hotels in four regions of Spain have participated in the programme over the three year period.   As part of the programme a wide range of promotion activities have taken place across Europe.
Results and impacts: Available data indicate a sizeable contribution in terms of the direct and

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indirect economic activity and employment creation.

The total economic impact to the tourism sector other sectors have been estimated close to €550-600/visitor, four-five times the level of government subsidy.

Employment created in all sectors was in the range of 60-120 jobs created or retained per million of government investment.

The total of overnight stays during the October-May period (371,000 in 2009-2010, 420,000 in 2010-2011 and 150,000 for 2011-2012), around 3% of the total overnight stays of European tourists during the off-season in the specific locations.

In all years the government investment has been fully recovered. The percentage of participants indicating their willingness to return to Spain was 98% in the 2011-2012 survey.

Monitoring arrangements: there is **monitoring** of key indicators and an evaluation by an independent consultant, plus direct feedback from the participants of the programme.

Description

Description of the project

The programme has been an initiative of the tourism promotion agency TURESPAÑA but has been designed and managed by SEGITTUR – a state company.

The programme sets up a system for organising and promoting group travel of seniors from 16 EU countries (mainly new markets for Spanish destinations). The travel packages offered were for stays of 8, 15, 22 and 29 days during the low season period of October-April. A fixed subsidy of €100 or €150 per package – reduced to €90 and €130 during the last period - has been provided by the Spanish authorities depending on the country of origin. The first pilot phase took place during the period October 2009 - April 2010 and has been repeated in the subsequent three low season periods (2010-2011, 2011-2012, 2012-2013). The regions that have participated so far are those with the typical high summer seasons, including the Balearic Islands (all periods), Andalusia (all periods), Valencia (2010-2011, 2011-2012) and Canary islands (2010-2011), even though the programme is not exclusively created for them.

SEGITTUR is responsible for the overall management of the programme. However, the actual commercialisation of the programme, the contact with providers and the selection of tourist facilities in the regions, the coordination with the travel agencies and the selection and coordination of tour operators in the countries of origin have all been the responsibility of a private company that was selected on the basis of open public tender. TURESPAÑA and SEGITTUR maintain an active role in promoting the programme outside Spain with a number of promotion activities (see below).

The initial budget allocated for the first pilot year of the project was €10 million – half from TURESPAÑA and the rest by the participating autonomous regions – for a maximum of 80,000 visitors. The actual expenditure, including around a million euros for promotion activities and setting up of the management structure, was €5.3 million with around 45,000 seniors actually participating. In the subsequent period the initial budget was increased to €14 million for a maximum of 111,000 visitors but this was scaled down to 4.5 in the period 2011-2012 due to the financial crisis that led to cuts and also the fact that a number of Spanish regions were not allowed to contribute due to the

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deficit rules. The amount of subsidy was also reduced from €100/€150 Euros depending on the country of origin to €90 or €130. For the period 2012-2013 further cuts to the government budget led to a further reduction in the initial budget to €2.4 million for a maximum number of 24,200 arrivals and with a focus on a smaller number of targeted countries, exclusively in Eastern Europe. The plans of SEGITTUR for the next period are based on a new model with government support reduced further and a greater focus on promotion and marketing on the basis of the recognised Europe Seniors Tourism brand. Strong cooperation and agreements with the private sector (airline carriers, agencies and tourist facilities) are expected to gradually replace the incentive element.

Table 1 – Basic data on the Europe Seniors Programme

	2009-2010	2010-2011	2011-2012	2012-2013
Subsidy	100/150	100/150	90/130	-/130
Participating regions	Andalusia, Balearic islands	Andalusia, Valencia Region, Balearic Islands, Canary islands	Andalusia, Valencia Region, Balearic Islands	Andalusia, Valencia Region, Balearic Islands
Number of target countries	14 (11/3)[2]	16 (12/4)	19 (15/4)	9 (-/6)
Number of participating hotels	51	89	50	n.d.
Initial budget	€10 million	€14.4 million	€4.5 million	€2.4 million
Maximum number of visitors	80,000	111,000	46,875	24,000
Actual expenditure from the Spanish government	€5.3 million	€7.3 million	€2.1 million	n.d.
Actual number of senior tourists	45,000	54,713	21,033	n.d.

Source: SEGITTUR

The promotion of the programme is based on a combination of measures tailored to the target audience. Besides the programme website[3] which is available in 16 languages, there have been campaign activities making use of social networks like Facebook and Twitter and including a photo competition, brochures, posters and promotion videos that were broadcasted through international news platforms, advertisements in the media and magazines for seniors in the target countries, direct e-mail marketing , participation in fairs and presentations to tour operators, trade unions and the press and also promotion through activities of the Calypso programme.

An important aspect of the Europe Seniors programme is the systematic **monitoring and evaluation** of both its effectiveness and efficiency on the basis of a number of key indicators and an evaluation by an independent consultant that estimates the direct and indirect economic and employment impact for the tourism sector and other sectors of the economy. In addition, the participants of the programme are asked to provide feedback and assess the quality and level of satisfaction with various aspects of the programme (quality of service, information provided, accommodation, trips).

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[2] Number of countries receiving the €100 subsidy/ Number of countries receiving the €150 subsidy
[3] www.europeseniortourism.eu

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Project objectives - Intervention Logic

The prime objective of the Europe Seniors Programme has been to promote a year-round tourist activity in order to alleviate the problems arising from seasonality and to assist in the creation and maintenance of employment throughout the low season in the tourist sector, and particularly in the hotel and catering industry. For Spain, seasonality is a major problem for the tourism services sectors, especially in the traditional summer resorts. The seasonality of tourism in Spain is considered to be one of the most important limitations when trying to improve competitiveness, and business and socio-economic profitability.

The current programme makes use of the experience of the Programme of Social Tourism organised by the Spanish State Institute for Seniors and Social Services in the 1990s which focused on Spanish seniors. The underlying logic of the programme is that the increasing level of the senior population in Europe – currently around 25% - generally characterised by a higher than average purchasing power (at least in some EU countries) can help to create a year round demand for tourism activities, with a greater willingness to pay for quality, comfort and safety, and this represents a segment of the market that can help alleviate the problems related to seasonality. Thus, the Europe Seniors Programme aims to attract seniors by reducing the costs of the basic travel packages during the low season period. Furthermore in concentrating on less traditional markets for Spain, especially in Central and Eastern Europe, the initiative could help to open up new markets for Spanish tourism. Consequently, the level of incentive has been higher for seniors from those countries and the programme is now exclusively focused on them.

The objectives of the "Europe Senior Tourism" are part of the broader goals of the Horizon 2020 Spanish Tourism Plan for the fight against the seasonality of tourism and the promotion of employment in the tourism sector. In parallel, at the European level, the programme is closely linked with the European Calypso programme for the promotion of social tourism, which aims to:

- improve the quality of life of senior citizens in Europe through participation in travel and tourist activities, by engaging with other environments and getting to know about the cultural and natural resources of other European countries;

- contribute towards building European Citizenship.

Features contributing to Improved Competitiveness

The prime contribution of the programme is the alleviation of the seasonality problem that enables businesses to make better use of the existing infrastructures, improve productivity of the tourism sectors and provide for a more stable and motivated workforce. At the same time, increasing the attractiveness of Spain to new markets - seniors, with an increasing share and often higher level of available income and customers from new markets in countries that have traditionally not travelled to Spain in large numbers, can also assist in increasing the competitiveness of the Spanish tourism sector.

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Impacts of the Project

Looking in more detail on the impact, available data made indicate a sizeable contribution of the programme, in terms of the direct economic activity and employment creation in the hotel and catering sector of the respective regions, plus indirect impacts in other related sectors (transport, restaurants, travel agencies, cultural centres). The direct economic impact to the tourism sector and the indirect impact to other sectors have been estimated to be around four-five times the government funding and close to €550-600/senior. Employment created in the tourism sector and in other sectors through the various types of spending was in the range of 60-120 jobs created or retained per million of government investment (that is, a cost of €8,000-16,000/job), that compares favourably with other types of intervention under the Structural Funds, suggesting that the programme is relatively efficient. A key aspect is the additional expenditure of seniors besides the costs of the travel package. In parallel, there has been an economic activity and employment creation impact in the countries of origin – mainly related to air transport and commercialisation activities - representing around one third of the total costs of the programme.

The contribution to addressing the seasonality issue is indicated by the total of overnight stays, which during the October-April period in 2009-2010 was 371,000, 420,000 in 2010-2011 and 150,000 for 2011-2012. The total number is not insignificant, although still modest in terms of overall impact, representing around 3% of the total overnight stays of European tourists during the October to May period of 2009-2010 in the specific locations[4].

Furthermore, there have been next to no displacement effects, since the additional tourists are taking up under-utilised capacity, are from new markets and in most cases would have been unlikely to travel elsewhere, in the absence of the incentive.

What is also important is that, despite the fluctuation in the number of visitors for the 3 seasons for which data are available, in all cases the government investment has been fully recovered - through tax collection or reduced unemployment benefits - with a ratio of €1.3-1.5 for every euro spent; another indication of a high level of efficiency.

The high level of efficiency of the programme is at least partly linked to the management model adopted. SEGITTUR assumed a coordinating role of the of the overall activity while the actual implementation and the promotion activities were left - on the basis of an open competition - to specialised contractors with established experience and networks.

The quality of the services provided by the contractors both in the country of origin and the destination is confirmed by the satisfaction surveys which are positive, with most respondents indicating high levels of satisfaction (9 out of 10). In addition, more than 82% of participants in the first pilot period indicated willingness to participate again in the programme, increasing to 95% in the 2011-2012 period. The percentage of participants indicating their willingness to return to Spain (98% of respondents in the 2011-2012 survey) was even higher.

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[4] INE data, Overnight stays of the travellers by tourist zones, country of residence and months, http://www.ine.es/jaxi/menu.do?type=pcaxis&file=pcaxis&path=%2Ft11%2Fe162eoh%2F%2Fa2010&L=1

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Table – Key performance and impact indicators

	2009-2010 (7 months)	**2010-2011**	**2011-2012**
Total programme cost (€s)	18.9 million	25.3 million	9.5 million
Average subsidy size/senior (€s)	108.6	122.5	100.9
Total users	45,000	54,713	21.033
Total number of overnight stays	370,988	424,018	149.870
Total expenditure by Spanish government (€s)	5.3 million	7.3 m	2.1 million
Govt share in total cost of programme	22%	23%	22%
Economic and employment impact			
Total economic activity at destination (€s)	24.9 million	31 million	12.4 million
Direct Impact at destination (hotel and catering sectors) (€s)	12.3 million	17.8 million	6.1 million
Indirect impact – expenses (€s)	12.6 million	16.7 million	6.3 million
Average spending/user in destination	280.51	308,3	301
Employment created in hotel & catering sector (no of jobs)	294	393	104
Total employment created/retained (no of jobs)	609	882	269
Total tax income for Spanish gov't (€s)	7 million	9.1 m	3.4 million
Ratio of tax income/gov't investment	1.32	1.3	1,58
Impact outside Spain			
Economic activity in countries of origin (€s)	6.6 million	8.2 million	3.4 million
Number of jobs in countries of origin	85	130	71
Quality indicators			
Stated interest to participate again in the programme (% of participants)	82.7%	94.7%	95.1%
Satisfaction with Quality/price ratio (1-very dissatisfied; 10 -extremely satisfied)	8.9	9.0	8.8

Source: Innova management, Annual evaluation reports of Europe Seniors Tourism programme (2009-2011)

A key question is the **sustainability** of the Europe Seniors Programme. While there is strong evidence of the positive return on investment, the financial crisis and the budget cuts mean that maintaining or extending the level of activity and the number of tourists will be particularly challenging. The reduction in the number of participants follows the reduction in the government contribution, suggesting a strong dependence on the government support. The managing entity, SEGITTUR, recognises that in the long term the success of the programme will depend on the capacity to maintain its attractiveness and to extend its reach without being dependent on the government subsidy. Given that the price of the tourist packages will always be an important factor the efforts of SEGITTUR for the forthcoming period 2013-2014 are directed towards greater cooperation with the private sector to secure reduced prices for the travel packages offered. Furthermore, while cultural and recreational activities are already included in most travel packages, greater connection with

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alternative forms of tourism is considered necessary as a mechanism to increase its long-term viability.

Features relating to the Wider Adoption of the Good Practice

In relation to the question of transferability, the basic idea and the experience of the Europe Seniors Programme are already being utilised in the context of the European Senior Travellers pilot project under the EU Calypso Programme, with the participation of partners from Portugal, Poland and Spain[5]. This Programme aims to promote the parallel exchange of senior citizens during the mid and low seasons in three countries - Portugal, Poland and Spain, ultimately leading to the creation of an exchange network of senior citizens from all the European Union Member States that join the initiative. The model can then be extended or transferred to other social tourism targets in the CALYPSO programme (young people, families with hardships and disabilities).

The initial work of the pilot project - where SEGITTUR is one of the partners aims to identify a sustainable model, or possibly multiple models, for the implementation of the exchange of senior citizens in the three countries during mid and low seasons. Lessons from the Spanish experience are utilised, such as for example the idea that the incentive and the travel packages provided should be tailored to each country of origin but also that the needs and characteristics of the destination country should be an important influencing factor. Cooperation with the local authorities and the private sector is also necessary. Finally, the greater connection with alternative forms of tourism (e.g. cultural, recreational) can contribute to the sustainability of such a programme – reducing the role of the incentive as the key driver - and giving each country the opportunity to tailor the programme to its own characteristics and needs.

Further Information

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[5] http://ec.europa.eu/enterprise/sectors/tourism/calypso/activities/documents_calypso/est_summary_en.pdf

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Introduction

The principle of the 'Tourism for All' policy is to allow everybody, independently of their age, income, health or disability to be able to have a carefree, affordable holiday. The Policy, which was launched in 2003, is run by Flemish Tourism Agency (Toerisme Vlaanderen) with financial support from the Flemish Government.

A specific service within Tourism Flanders 'Steunpunt Vakantieparticipatie' (Holiday Participation Centre) was set up in 2001 to promote social tourism. The Centre is still managing many aspects of the 'Tourism for All' policy and in particular the initiatives for those with limited resources. The Centre negotiates special deals with a host of tourism partners both in the social and private sectors (hotels and other holiday accommodation, holiday parks, attractions and events), coordinates with social services and welfare agents, and carries out targeted promotion to reach those who do not traditionally go on holidays. In short, it acts as a 'go-between', organising cooperation between the different stakeholders involved. Furthermore, it organises training for the different partners through a learning network. Another related service within Tourism Flanders – the 'Accessible Travel Advice Centre' deals with tourists with a disability, mapping out the offer of accessible accommodation, advising on how to make premises accessible and distributing infrastructure grants.

The social objective of this policy also has implications for the competitiveness of the tourism industry. By extending the market to include a wider range of social groups, not only is more revenue generated, but the sector learns to be responsive to a wider range of requirements.

Theme

Extending the season and diversifying the supply of tourist services*: this case emphasises elements relating to the extension of the tourism market, but there are also strong elements of marketing and promotion involved in the policy and capacity building within the sector.

Reasons for Highlighting this Project

'Tourism for All' is an excellent example of a policy which contributes to improving the productivity of the sector by extending the market, introducing new target groups to tourism that have not previously been used to going on holidays. The 2010 Commission Communication specifically mentions the need to enable 'key groups such as young or elderly people, people with reduced mobility and low-income families to travel…..' which is exactly what the Flemish policy aims to do.

Project Highlights
Contribution to Tourism Policy objectives: Enabling 'key groups such as young or elderly people, people with reduced mobility and low-income families to travel'.
Innovative elements: Creating a framework for matching the needs of the targeted social groups with the availability of holiday and recreational offers.

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Main outputs: Creating networks with a host of tourism partners in the social and private sectors, coordinating with social services and welfare agents, and carrying out targeted promotion to reach the groups in question.

Results and impacts: The Programme helped a total of 105.000 people living in poverty to enjoy a holiday in Flanders, more than double the figure of just a few years before.

Monitoring arrangements: A regular holiday survey, plus a major evaluation carried out in 2007 and 2008.

Description

Background

The 'Tourism for All' Policy takes its inspiration from the concept of social tourism, a principle initially introduced in Belgium in 1936 when workers were given the right to an annual holiday and holiday pay. Subsequently, the principle was included in the 1948 Universal Declaration of Human Rights: "The right to rest and leisure, including reasonable limitation of working hours and periodic holidays with pay".

Following the introduction of mandatory holidays in Belgium, a number of non-commercial vacation centres (centres for social tourism) were set up to provide group holidays for workers, subsidised by the Government. The centres blossomed in the post-war years, but economic growth gradually changed the face of tourism and people moved to more commercial and individualised holidays. This meant that the social tourism activities of the centres were no longer considered as part of their core business and public subsidies to the centres eventually dried up in the 1990s. It was only after the World Tourism Organisation underlined the universal right to holidays in its Global Code of Ethics in 1999[6] that the trend started to move towards social tourism once again.

In spite of the generally favourable socio-economic context which allowed more people to travel, a large proportion of the Flemish population continued to be unable to go on holiday for various reasons, such as lack of means, health problems, limited mobility or lack of knowledge about the possibilities (at the time this group was estimated to be more than 30% of the Flemish population). In order to meet this challenge, the Flemish Government passed a decree in 2003, based on the WTO principles, which gave a new interpretation to social tourism focusing on a number of target groups with particular holiday needs. This in turn became the beginning of the 'Tourism for All' policy programme.

Problem Definition and Policy Objectives

The 'Tourism for All' Policy is based on a desire to regard tourism as a universal right and to make it accessible to all. Research has shown the importance for everyone's well-being of occasionally going away to visit different environments to relax and recharge batteries. Holidays are furthermore a vehicle for learning experiences, allowing people to get into contact with different cultures, places

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[6] Article 7 states that "Social tourism, and in particular associative tourism, which facilitates widespread access to leisure, travel and holidays, should be developed with the support of the public authorities" and that "family, youth, student and senior tourism and tourism for people with disabilities, should be encouraged and facilitated". The Code was officially recognised by the United Nations in 2001.

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and customs. Apart from offering benefits to body and mind, holidays are also proven to consolidate family ties.

The Policy encourages and facilitates widespread access to holidays and recreation for groups of people who traditionally have not been able to go on holidays. Consequently, 'Tourism for All' targets the following four groups:

     1) People living in poverty
     2) People with disabilities
     3) Children and young people
     4) Families and senior citizens.

Separate strands of the Policy were established for each of the target groups, reflecting their differing holiday needs.

1) *People living in poverty* are typically not able to afford to go on holidays, especially not traditional commercial holidays. Social tourism sees it as a duty to focus on this group in society, both in terms of providing affordable holiday solutions, but also making people aware of the possibilities and teaching them 'how' to go on holidays, since they tend to have no prior experience. Those living in poverty are not always easy to reach, since they are often socially isolated. Resources therefore have to be made available through intermediary organisations (often welfare bodies) already in contact with this target group. It is thought that for a first travel experience group travel with others in the same situation is the best solution initially, as it reduces the cost, allows travellers to share experiences and often involves a guide to help out. However, it is important that social tourism should not be seen as a form of welfare service but as a means of emancipation, integration and altering cultural perceptions. People should not be stigmatised and forced into a separate niche market and that there should always be a cost involved for the travellers. It is important that people can travel on their own as a next step and become embedded in an inclusive tourism, in which everyone is welcome.

2) For *people with disabilities* the emphasis is on the provision of good quality infrastructure that caters for the specific needs of this target group. A key aim here is to get the entire tourism sector to embrace the idea of accessibility, building awareness and providing training on how to make premises accessible. An essential additional activity is to provide advice and assistance to the target group on where to find appropriate accommodation. Both services are provided through the 'Accessible Travel Advice Centre'.

3) The main focus with regard to *Children and young people* is to guarantee the quality and safety of the accommodation infrastructure and to ensure that there is sufficient capacity, diversity and quality accommodation available to choose from in the youth tourism sector, both nationally and to some extent internationally as well. The educational aspect of youth tourism is however also a consideration of the 'Tourism for All' Policy and a special charter has been drawn up between the Ministry for Tourism and the Ministry for Youth in order to promote educational youth tourism activities.

4) Many *families and senior citizens* are among the group of people who are not able to enjoy a holiday. There is a considerable overlap in initiatives for this group and for those with limited means. As the cost of accommodation is often the main barrier, special day-tourism initiatives were included as an important element of the Policy.

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The most important factor in the philosophy of 'holiday participation' is that everyone should be able to choose their preferred way of a going on holiday, whether individually, with friends or family and be it for a week, a weekend or even just a day.

Tourism Flanders is bound by an agreement with the Flemish Government which each year stipulates the Policy goals. For 2013, the aim is to achieve a total of 110,000 people living in poverty being able to enjoy a holiday through the Holiday Participation Centre.

Main Activities and Outputs of the Policy

The 'Tourism for All' policy covers a large number of initiatives, with the type of support varying in form and extent depending on the target group.

Holidays for People living in Poverty

The following means are used to increase holiday opportunities for those with low income:

- Making sufficient **financial resources** available to ensure that holidays are affordable for people living in poverty. In 2012, a total amount of €466,536 was awarded in support to 15 'intermediary organisations' (often welfare centres). Financial support was also provided to a coordinator for these intermediary organisations (€132,210 for 2012).

- **Creating a framework** for the support of organisations working with people in poverty, including the setting-up of a membership system and a database for this purpose.

- Creating and running a **Support Desk** ('Steunpunt Vakantieparticipatie' within the Holiday Participation Centre). Intermediary organisations and potential holiday-makers can consult the Desk for information and help on numerous issues, including assistance in the booking of holidays.

- Negotiating **advantageous prices** with hotels, holiday centres, attractions and transport companies.

- Putting together a **list of the holiday offers that are available** to the target group. This can be found on the Tourism Flanders' **website** which also provides an **online booking system.** Several high-quality tourism brochures are also produced on the different holiday destinations and day trips that form part of the 'Tourism for All' system. There is a choice of about 100 different tourist attractions at a reduced rate, since day trips are a good way of overcoming the 'holiday barrier'.

- **Creating public awareness** with the population in general and policymakers in particular.

- Creating a **consultation platform** for guiding and **evaluating implemented initiatives**.

A major role for the Holiday Participation Centre is to act as **'go between'**, since it enjoys the trust of all parties concerned: the holiday centres and attractions are certain that the lower prices they offer are in effect directed towards the persons most in need of help, given that participants are chosen by welfare agents who know their circumstances; the intermediary organisations know they can count on the Centre for advice and support; finally, the holiday-makers know that they will get all the practical help they need and will not be stigmatised but treated as full-paying guests.

In addition, it is easier for the Holiday Participation Centre, being a government organisation, to enlist the help of the tourism sector. The enterprises collaborating with the Centre can grant lower

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prices without neglecting their core business, and even benefit from the initiative when reservations made through this channel boost low season occupancy.

The Holiday Participation Centre also contributes to the formulation of Government social tourism policy, evaluation of activities and international cooperation.

Holidays for Persons with Disabilities

The initiatives benefitting this group mainly **focus on accessibility** and are concentrated largely on the quality of the accommodation infrastructure on offer. A distinction is made between different types of disability (motor disability, hearing impairment, visual impairment, allergy/asthma).

The policy aims to make the entire tourism sector accept the idea of accessibility. Owners are often put off by the cost of such facilities, but overlook the fact that they might also benefit other guests (the 'design for all' principle). In view of the demographic development of society, accessibility will become even more important in future with older people likely to remain active and continuing to travel.

Financial support is not provided directly to the disabled traveller, but is used instead on the following initiatives:

- Financing of projects that **improve the infrastructure** and enhance the accessibility of accommodation, in social holiday centres as well as in the regular tourism sector.

- Financing and setting up of an **advice centre** on infrastructural issues. Proprietors can consult the centre for information on accessibility standards, new materials and new types of service on offer.

- Awarding a **certified label of accessibility**[7] to those who have invested in accessible facilities, which they can use in their promotional campaigns. There are various labels according to the degree of accessibility offered and these are only awarded after thorough examination on site. When choosing to stay at a labelled facility the disabled traveller is sure to find the accommodation suited to his needs.

- **Building awareness** within the accommodation sector and **offering training** to proprietors and their staff. This is an important element because it is often possible to avoid aggravation or to remedy shortcomings through the sole intervention of friendly personnel or an understanding proprietor.

- Organisation of an '**Accessible Travel Advice Centre'** for disabled travellers. They screen a vast number of facilities in Belgium (and some abroad) and provide verified and reliable information about the holiday destination, the accommodation and transport facilities. This is essential as the needs of each person are different and a tailor-made approach is often preferable. The information is also provided to customers via a website and high-quality, glossy publications provided in several languages (Flemish, French, German and English).

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[7] These are based on comparable standards developed by the international organisation ENAT

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Holidays for Children and Young People

Youth tourism is a fully-fledged target group within the 'Tourism for All' Policy and many of the initiatives involved focus on ensuring that there is sufficient capacity, diversity and quality accommodation available to choose from in the youth tourism sector, both in Belgium and abroad.

Various fields have been defined as requiring action, but the two most important areas in which specific initiatives have been undertaken are the following:

- **Youth work as a component of youth tourism** - In Flanders the education, and in particular the support and guidance of children and youths by youth organisations (e.g. scouting), is categorised as youth work. It is essential that youth tourism is able to guarantee sufficient 'opportunities' for youth work, for which reason a Charter was drawn up between the Ministry for Tourism and the Ministry for Youth with the aim of stimulating relevant initiatives. The Charter involves the following fundamental aims:

  - To provide sufficient capacity, diversity and basic quality in youth tourism accommodation to meet the requirements of all the different youth work activities. Quality standards on hygiene and fire safety are paramount and a system of certification is incorporated. A random selection study evaluates the actual situation of different venues, infrastructural requirements and financial costs.

  - Financially supporting youth tourism accommodation – it is seen as important to safeguard the social rates providing positive discrimination for youth tourism and youth work, but at the same time ensure that the accommodation is managed on an economically sound basis (taking into account the need for rising quality standards)

  - A permanent youth and tourism consultation platform has been set up to monitor the execution of the Charter.

- **International Youth Tourism Action Plan** - From a marketing point of view, the youth target group deserves particular attention because of the future tourism prospects the group represents. When left with good memories, adults often wish to return to the spots where they took part in holiday or sports camps as children. It is therefore seen as essential for establishing client loyalty to upgrade and provide continuous support to the accommodation infrastructure for the international youth tourism market by:

  - Certification for international youth tourism and legal protection of the use of the names 'youth hostel'.

  - A satisfactory geographical spread of the infrastructure with at least one well located youth hostel in Flemish historic cities (more in large historic cities), three well located youth hostels on the coast and several youth accommodation theme infrastructures in rural areas.

  - Promotional activities supporting new communication techniques, such as online reservation systems, a specific website, modern canvassing brochures, providing product information and promoting interesting destinations in reputable youth guides.

  - Product development - offering inexpensive holidays, packages to tour operators involved in youth holidays or supporting pilot projects in collaboration with third parties (e.g. adventure holidays).

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Holidays for Families and Senior Citizens

Many people in this group still find it difficult to get away from home for their holidays. Organisations with a large membership, such as trade unions, health service organisations and leisure organisations can play an important part in encouraging and increasing the participation of this target group. 'Tourism for All' supports the principle that existing social holiday centres should continue to play their part in making holidays more democratically available and that the good practices and know-how from the past should not be lost.

Funding

Since the 'Tourism for All' was launched in 2003 as a result of the Flemish Government passing the decree on social tourism, the policy has been run with Government support to finance the above activities. A large part of the funding goes to the running of the different support services within Tourism Flanders:

- In 2012, the Holiday Participation Support Desk had a budget of €293,000

- The Accessible Travel Advice Centre had a budget of €238,000

- A total amount of €466,536 was awarded in support of 15 'intermediary organisations' in 2012. They in turn organised holidays for 3,635 persons living in poverty.

- The cost of a coordinator for the intermediary organisations amounted to €132,210 in 2012

- Furthermore, a number of subsidies were provided to proprietors for improving the accessibility of accommodation and attraction infrastructure (€3.9 million in 2012).

Performance of the Policy

As a publicly financed programme 'Tourism for All' is required to carry out **regular monitoring** of its activities and reach certain goals, defined according to a number of indicators set out in the management agreement between the Flemish Government and Tourism Flanders. These cover aspects such as the number of persons able to go on holidays via the Holiday Participation Centre; the number of people living in poverty who are able to go on holidays as a result of the subsidies given to the intermediary organisations; the number of contact of the Accessible Travel Advice Centre; the number of accessibility labels that have been awarded; the cumulative number of 'accessible' beds; the cumulative number of youth tourism labels awarded; leverage value of the animation subsidies to families with children; total investment value that is supported through the animation subsidies. For 2013, the agreement with Government requires Tourism Flanders to achieve a total of 110,000 people living in poverty going on holidays through the Holiday Participation Centre.

Features contributing to Improved Competitiveness

The 'Tourism for All' Policy is completely in line with several of the objectives of the **2010 Commission Communication**, not least the objective to stimulate competitiveness in the tourism sector. Apart from the social effects that the Policy evidently has, the various initiatives to introduce new target groups to tourism, which attract around 100,000 additional people each year, are also a very effective way of encouraging a **diversification of the tourism supply** and **encouraging an extension of the traditional tourism season**, especially through the extensive offer of day-trips. The

TOURISM FOR ALL – FLANDERS (BE)

CASE 4

Communication specifically highlights the need to extend the tourism supply to groups like the young or elderly, people with reduced mobility and low income families.

The Policy also contributes to **improving the quality** of the tourism offer and stimulates innovation. The activities aimed at disabled people and youth incentivise hotels and other 'Tourism for All' accommodation establishments to develop, innovate and improve their infrastructure, not least through their financial support. This is reinforced through the use of the various labelling systems. The construction of new accessible facilities not only benefits those with a disability – this is also likely to improve the experience for others, including senior holidaymakers who, given the current demographic trends, will increasingly become an important market in the future. The 'Tourism for All' Policy also contains elements that **improve the professional skills** in the sector with the organisation of a special training platform to develop the capacity of hotel owners and staff to deal with their new clients in a professional manner.

The figures on holiday participation in Flanders over the years show that there has been a steady increase since the 'Tourism for All' Policy was launched and organisers conclude that it has been a genuine success. In 2012, the Programme helped a total of 105.000 people living in poverty to enjoy a holiday in Flanders, more than double the figure of just a few years before (see the table below). Participants could choose between an individual or organised holiday, a stay in a holiday centre or a day trip, the latter being the most popular by far.

Table 1: Results of the 'Tourism for All' Programme

	Day trips	Group stays	Organised holidays	Individual holidays	Total
2001	0	0	752	0	752
2002	170	107	1,570	412	2,259
2003	6,500	718	2,216	526	9,960
2004	12,629	503	2,433	774	16,339
2005	14,865	1,238	3,183	1,567	20,853
2006	13,906	1,341	3,478	1,887	20,612
2007	44,523	1,693	2,854	1,910	50,980
2008	65,014	1,426	3,994	2,478	72,012
2009	77,715	2,661	4,207	2,702	87,285
2010	84,906	5,680	4,339	3,055	97,980
2011	85,115	5,674	5,100	3,995	99,884
2012	89,410	5,703	5,305	4,513	104,931

With regard to the impact of the Policy on the Flemish Tourism sector and the economy as such, it is clear that such a significant increase in the number of holidaymakers, whether they go on longer holidays or day trips, is bound to have an effect in terms of injecting money into the broader economy (accommodation, transport, entrance fees, on-site spending, etc.). The increase in the number of hotels and other accommodation that have been made their facilities accessible will of course also have an effect on the overall quality of the tourism supply, in the same way as will the objective to improve the quality of venues available for youth tourism.

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In terms of **evaluation**, the Holiday Participation Centre has for a number of years sent out a holiday survey in order to gather the opinions of the various groups with whom it works: member organisations, accommodations, attractions and holidaymakers.

In addition - and more specifically related to the functioning of 'Tourism for All' - a **major evaluation study** was carried out during 2007 and 2008 of the scheme which provides holidays for those living in poverty in order to determine the effects of these holidays. The report, established in collaboration with Dr. Lynn Minnaert of the University of Westminster's Centre for Tourism Research, presented the results of an intensive research process based on an extended holiday survey and a series of focus groups.

The study concentrated on the different support mechanisms that make it possible to go on holiday and the focus was intentionally placed on the **effects of the holiday**, since many reactions from holidaymakers indicated that a holiday meant much more to them than just "a short time away from home". The outcome of the study was more than positive and was sometimes surprising, even to the experts in the field. Some examples of positive effects were increased confidence, an expanded social network, improved family ties, stronger mental health and a more proactive attitude to life. People not only felt better after their holiday, but indicated that the skills they acquired by going on holiday continued to serve them well in their everyday-life. Apart from publishing the full evaluation report, the Holiday Participation Centre also put together a small booklet setting out the experiences of holidaymakers in the form of a number of testimonies which illustrate what a holiday really means for people living in poverty.

Another evaluation exercise was carried out in connection with the pan-European Calypso project 'FETE' based upon the principles of 'Tourism for All' and led by Tourism Flanders in collaboration with partners in Sweden, Finland and Germany.

As mentioned before, the significant increase in the number of holidaymakers as a result of the 'Tourism for All' measures, also has an impact on the broader economy by injecting money into local accommodation, transport, entrance fees, on-site spending, etc.

Features relating to the Wider Adoption of the Good Practice

The 'Tourism for All' Policy in principle has every potential to be transferable to other countries with good effect. A possible stumbling block in many countries, in these times of austerity, could nonetheless be the lack of political will to spend considerable resources on what might be seen as a 'socially ambitious' policy.

In order to transfer their experiences to others, Tourism Flanders has already been involved in a pan-European CALYPSO project with similar goals. In 2011, the 'FETE' (First European Travel Experience) project received a grant of € 135,000 under the European Programme. 'FETE' is an international holiday exchange project for young people between the ages of 16 and 26 with limited or no holiday experience due to financial or other constraints. Tourism Flanders is the lead partner with other partners in Northern Europe - the regions of Jämtland Härjedalen (Sweden) and Kainuu (Finland), and the region of Mecklenburg-Vorpommern (Germany). Through the FETE project a group of youngsters from all 4 regions is able to enjoy a holiday in one of the other regions. In addition, the necessary research was conducted and a database developed. Ideally, the developed mechanism should be ready for use throughout Europe and be perceived as a good practice. Within the scope of FETE, a

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Charter of Social Hospitality for Tourism Providers, which would be a worldwide first, was also conceived.

A next step is the extension of the 'Tourism for All' idea throughout Europe. As a member of the International Social Tourism Organisation (ISTO), Flanders currently has two types of cooperation with other member countries: exchanging information and best practice, and exchanging families or groups for a holiday in those countries participating in the scheme "The European Holiday Experience". After having exchanged groups with the UK (through 'The Family Holiday Association') and France (through 'Vacances Ouvertes') Tourism Flanders are able to expand their holiday horizon.

Further Information

http://www.toerismevlaanderen.be/toerisme-voor-allen

http://www.vakantieparticipatie.be/

http://www.toerismevlaanderen.be/infopunt-toegankelijk-reizen

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INTEGRATED ECOTOURISM DEVELOPMENT OF THE DRÁVA BASIN (HU)

CASE 5

Introduction

The Integrated Ecotourism Development project of the Dráva Basin aims at mobilising the Dráva river area's potential by investing in tourism and nature conservation, and by constructing new facilities for local communities and renovating run-down tourist attractions.

The project unifies a region that geographically and culturally already exists, but creates at the same time a new tourism offer for the region that can compete with other tourist destinations by targeting a particular market: eco-tourism.

Theme

 Extending the season and diversifying the supply of tourist services / Diversifying the demand

Reasons for Highlighting this Project

The area along the Dráva River abounds in small villages with populations below 500 inhabitants. This region suffers from a poor communication infrastructure, weak economic activity and high unemployment. Investors are not attracted because of poor infrastructure and a small, rapidly aging, population. The project builds on the area's indigenous potential which is the richness of its nature in order to develop the region around activities linked to ecotourism.

The underlying aim of this project was to develop an accessible, integrated eco-tourism product, yet at the same time preserving the environment and ensuring it continues to be respected.

Project Highlights
Contribution to Tourism Policy objectives: Extending the season, diversifying the supply of tourist services and creating a new demand based on ecotourism.
Innovative elements: A flat governance structure involving public and private local stakeholders in a single project. Isolated communities empowered to take part in the eco-tourism project by generating ideas etc. Regular meetings of the project partners contributed to smooth and continuous information flow between all relevant stakeholders and helped to solve emerging problems. Public-private efforts to promote the area.
Main outputs: Construction of ecotourism-related community facilities, infrastructure and services along the Dráva river. Integrated nature conservation activities.
Results and impacts: Improved tourist attraction potential generating added economic value and higher revenues for the region. Strengthening of the region's identity. Additional employment possibilities for the region's young, educated workforce.
Prior to the project, the region welcomed 167,000 tourists per year, now it welcomes 617,000 tourists each year. The number of nights spent in the region every year prior to the project was 112,000 now it is 439,000. 47 jobs created in the region.
Monitoring arrangements: The project manager was supported by two coordinators responsible for technical and financial issues and in regular contacts with sub-project managers to monitor progress and follow up on new developments.

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Description

The Location

The Dráva River Basin Project is a significant eco-tourism development project implemented along the Dráva River, Hungary's most untouched river. The project aims to integrate the Drava region into the tourism market by promoting its natural assets while at the same time protecting its existing values. The Dráva Basin boasts almost untouched and unique habitats, flora and fauna, as well as many historical sites and cultural and artistic assets.

Project Approach

The purpose of the Integrated Ecotourism Development project of the Dráva Basin was twofold. First, it aimed to harness the Dráva river area's economic potential and to intensify revenue-generating and higher value-added activities in the region. Secondly, it aimed to improve nature conservation. The project aimed to achieve this double objective by investing in ecotourism and nature conservation, as well as by constructing new facilities for local communities and reconstructing existing run-down tourist attractions.

The project aimed to target both the domestic and international tourist markets. It targeted Hungarian visitors from urbanised areas for short stays as well as visitors from abroad in an effort to make them discover more rural parts of the country, also to compete with and ease the strain on more popular destinations such as Budapest or Lake Balaton. The project also took advantage of an incentive scheme which exists in Hungary which allows employees in the tourism industry to receive part of their wages in vouchers which can be spent on tourism services (accommodation, meals, transport, sports and cultural activities). This scheme is in fact a major boost to the domestic tourist market in Hungary and also benefits local businesses in the industry, including the Drava Basin region.

The project leader, the local authority of Baranya County, and the local authority of the other participating region (Somogy) were mainly responsible for marketing the project and for public relations activities. The Board of the Duna-Dráva National Park and the Dráva Tourist and Nature Conservation Association also took part in the partnership.

Activities were grouped under three headings:

> 1) construction of ecotourism-related community facilities along the Dráva river;

> 2) integrated nature conservation and

> 3) a joint promotion of the area.

In terms of construction activities, investments included a free beach area, a diving centre, observation towers, a bird park, multi-functional tourist centres and exhibition spaces, as well as educational facilities. Examples of integrated nature conservation activities included investments in

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tourist walking paths and facilities that enhance the attractiveness and the accessibility of the area's natural resources and, at the same time, attempt to minimise the ecological impact of intensifying tourism. Thirdly, activities aiming to improve the promotion of the area as well as integrating the previously isolated tourism marketing endeavours carried out by different organisations were among the key elements of the project.

The direct beneficiaries of the project were the local authorities, local small firms and the local community. The results of the project are both tangible (new facilities, new and renovated buildings, etc.) and intangible (improved environment; conserved natural habitats; new opportunities for cultural and nature exploration; raised awareness about natural attractions; intensified networking of the project participants, etc.).

The main innovative element of the design phase was the concept of the project that emphasised both tourism development and sustainability aspects, that is, aspects that focus both on the construction of small infrastructure and on the conservation of the natural environment. Additionally, the planned involvement of the local communities into the operation of the facilities and a concept of linking tourism and education within the area were all new, innovative elements of this approach. Additionally, it was decided from the inception phase that the 44 constructions included in the project were to be designed in a way that their appearance suggested that they belonged to the same project. A common architectural design reinforced the coherence of the project, giving the Drava Basin region a distinct identity ready to be promoted on the tourism market. This project also fitted in with Hungary's national plans to develop and regenerate natural parks as important assets for targeting the green tourism market.

The project took into account the importance of extending the season epitomized by the development of a 655 km tour trail network across the Dráva River Basin. The aim was to achieve continuous access to and passage through all five micro-regions of the Dráva River Basin area. This habitat trail links micro-regions by creating foot and bicycle access to all famous attractions developed within the scope of the Dráva River Basin Project. The habitat trail functions all year round and its length can entice tourists back to explore different parts of the wider region.

Implementation

This project consisted of 44 sub-projects which brought together 31 partners with a budget of €3.1million. Most of the funding came from ERDF (75%) under the Operational Programme for Regional Development which covered 97.5% of the total costs. The project evaluation report identified several obstacles in the partnerships and the rigidity of the monitoring process, largely because of local administration issues and lack of expertise in the managing authorities.

The participation of so many partners in a single project was new at the regional level where such entrepreneurial behaviour of local authorities was up until then quite uncommon. The partners' commitment and willingness to participate was, of course, greatly enhanced by the fact that this project is nearly fully covered by ERDF and national grants. Some of the partners have already cooperated in previous projects, but there were many newcomers, since the intention to be "as inclusive as possible" was also a new element of this project.

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The organisation the governance structure was innovative as well as it was set up according to two principles: a regional and a functional structure. Concerning the regional level, each individual local authority was represented by the mayor, as the decision-maker, and by a contact person up-to-date on the key developments. At a more functional level, the project manager was supported by two coordinators responsible for technical and financial issues and regular contacts with sub-project managers.

Features contributing to Improved Competitiveness

The Dráva River project saw five regions and 20 municipalities work together to enhance eco-tourism development of the river area. The success of the efforts can be seen in wide range of activities on offer, including tour paths, canoe tours, lookout towers and bird parks.

The project resulted in the creation of new infrastructures and services and improved tourist attraction potential generating added economic value and higher revenues for the region. The project thus contributed to the strengthening of a regional identity and to maintaining a young, educated workforce in the region by offering them additional employment possibilities.

A success factor was that the project incorporated many smaller and inexperienced partners (local authorities of small villages). This has had a significant demonstration effect, namely that small, neglected, distant villages could also receive something, could participate, generate ideas and become networked by participation in the project. This has, at least initially, added considerably to the commitment and enthusiasm of the partners. These distant villages by taking part in the project were able to make themselves known and increased to the tourism offer in the region. The project had a multiplier effect in that it involved isolated communities to take part and to benefit from activities generating direct profits from eco-tourism.

Another success factor was the democratic character and the creative design of the governance structure. This enabled participants to get together regularly, discuss and decide upon issues on a consensual basis and to try to help each other in a common learning process. A related success factor was the meticulous documentation of progress, not only for external monitoring purposes, but also for the sake of internal information flows. The inclusive approach and the open governance structure contributed to the somewhat uncharacteristic outcome of a project free of political conflicts. Representatives and supporters of different parties cooperated in this project towards a common goal of regional development which was therefore realisable given the smooth operation of the governance structure. Activities developed in the frame of these projects were well spread across the area, generating benefits equally spread out over the region.

This project included previously missing development aspects, namely ecological considerations as well as aspects of regional cohesion. Ecological considerations had somewhat been previously neglected at all levels during the transformation and the modernisation process of the region. In the first phase, transformation, stabilisation, liberalisation, institutionalisation and privatisation were considered as crucial factors. In the modernisation and development phase, the emphasis was put upon attracting foreign direct investment, competitiveness and various economic performance indicators. The demonstration effect of the ecological and sustainable development aspects of the project could not be underestimated. As a result, the project succeeded in attracting foreign interest

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both from tourists and from business investors. The project has revived the key economic factors at play in the region.

Direct evidence of improved competitiveness thanks to the project is reflected in the number of tourists visiting the region. Before the start of the project the region welcomed on average 167,000 tourists per year. Following this project, the region now welcomes on average 617,000 tourists each year. Similarly, the number of nights spent by tourists in the region has gone from 112,000 prior to the project to 439,000 since the project closed. 47 jobs were created in the Drava basin region thanks to this project.

Features relating to the Wider Adoption of the Good Practice

The participation of so many partners in a single project could be considered extremely novel at the regional level where risk-taking behaviour of the local authorities is traditionally not common. The good practice stemming from a well-designed governance structure was new, both in Hungary and in the region. Regular meetings of the project partners contributed to smooth and continuous information flow between all relevant stakeholders and helped to solve emerging problems.

The main innovation result that seems transferable concerns the governance of the project. Seminars, workshops and informal meetings contributed to the dissemination of information about the existence of this project, as well as about its early experiences. On such occasions, the partners emphasised the importance of the well-established governance structure. As the project evolved and the stock of first tangible results accumulates, dissemination also concerned the impacts of the project.

This particular project thus provides three general and two project-specific lessons. The first general lesson is the necessity to centralise and accelerate decision-making. The number of co-operating organisations and supervising authorities should be reduced and bureaucracy streamlined. Furthermore, the monitoring and evaluation process should allow much more flexibility in the terms of adapting project activities as needed during implementation, rather than enforcing a word-by-word implementation of the original project plan. A second lesson is that the personal qualities of project managers are decisive for the project's success and therefore, project managers should be selected very carefully. A third general lesson is that calculation of costs has to be made very cautiously and a sufficient contingency fund is necessary in order to overcome potential cost-increases and unexpected additional expenses in the course of the project.

A significant project-specific lesson is that both participants and beneficiary communities tend to concentrate on 'bricks and mortar', instead of taking into account partnership building and environmental benefits. Moreover, sustaining stakeholders' commitment is crucial and therefore improved communication is an imperative. Another lesson that emerged was the necessity to involve more partners from the private sector. This would at the same time improve the sustainability of the project and contribute to a shift towards financial sustainability, independent of the availability of future public funds. This was a key aspect of the Destination Management Plan for this project. Private companies had a key role in mobilising local authorities in isolated areas to take part in a construction project focused on new light infrastructures geared towards eco-tourism which do not compromise the natural assets of the region.

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Another key lesson from this project is that applicants should calculate more carefully the projected costs and that local financial means are necessary irrespective of the fact that ERDF co-financed programmes cover a dominant part of the costs. Final and detailed cost estimates should be done at the very end of the application process when detailed design and feasibility studies are conducted. Consultants' and potential contractors' help should be asked for to provide better estimates for the costs to be incurred. Nevertheless, in the Hungarian case the availability of sufficient local financial means will remain constrained in the near future by national fiscal restrictions and the poor shape of regional economies in some underdeveloped regions.

The management qualities, decision-making authority, as well as the financial potential of Hungarian regions, have to be substantially improved to facilitate access to and implementation of ERDF co-financed regional development projects. It is in principle the Managing Authority that ought to support the project throughout its cycle and pre-finance its preparatory phase. It should also manage the links, e.g. information flow between the funding providers, supervising agencies, cooperating agencies and the end-users as well as provide necessary financial assistance at least in the preparatory phase of the project.

The project's real beneficiaries were the small villages, since this project was implemented in one of the most undeveloped rural parts of Hungary. The project was a perfect example of cooperation that has to be further developed in the future, notably together with the Croatian partners from the other side of the Dráva River.

The initiative created various synergies and exerted a multiplier effect as it was connected to various international, bilateral (with Croatia), and regional development programmes. One of them is EcolAND Hungary, a national project executed between 2003–2006, which is linked to its international counterpart under the same brand name. EcolAND Hungary aimed at increasing local small and medium-sized enterprises' (SMEs) awareness of environmental issues and maps local environmental problems, while the international EcolAND aimed at the sustainable development of the region. Also, the Dráva project is linked to INTERREG IIIA, (2000-2006), the Slovenia-Croatia-Hungary Neighbourhood Programme, and INTERREG IIIB CADSES programme, aimed at protection and improvement of the environment.

Finally, this project also shows that the concept of responsible travel, as well as the increased sensitivity to new ideas such as natural heritage, biodiversity, etc. can be made transferable through training and education (including via the educational facility supported by the project).

Further Information

http://www.nfu.hu/content/1971

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EXCITING CYCLING IN THE BALTIC COUNTRY OF LAKES (LT, LV, BELARUS)

CASE 6

Introduction

As the Euroregion territory "Country of Lakes", covering border areas of Latvia, Lithuania and Belarus, is rich in nature parks, protected nature areas, landscapes and water resources, the rural and active tourism is considered to be one of the priority directions for cross-border cooperation. The main project activities are implemented to strengthen and market the cycling net of the Baltic Country of Lakes consisting of 45 picturesque cycling routes that are developed by setting up the small-scale infrastructure

Theme

Extending the season and diversifying the supply of tourist services

Reasons for Highlighting this Project

Latvian, Lithuanian and Belarusian territories represented in the "Country of lakes" Euroregion are bordering regions with many similarities – high unemployment, poorly developed infrastructure, situated far from the capital and major cities – and at the same time many challenges to cope with regarding tourism – they are rich in natural, historical and cultural resources and traditions that could be attractive to the tourists. The development of active and rural tourism is the priority defined in the national, regional and local development plans and strategies of the three countries, as well as in the rural tourism development strategy for the "Country of lakes" Euroregion.

Co-operation between the municipalities in the territory of Euroregion "Country of lakes" started in 1998. Since then, many successful projects have been implemented due to the fact that many common problems can be efficiently solved in partnership.

Project Highlights
Contribution to Tourism Policy objectives: Extending the season, diversifying the supply of tourist services, promoting sustainable tourism and healthy life styles.
Innovative elements: The cycling network served as a platform on which local entrepreneurs were able to build a diversified range of small business activities. GPS technology was developed along the new cycling routes.
Main outputs: Creation of 51 cycling tourism routes and the establishment of more than 100 public recreation places. Elaboration of a 45th international/euroregional cycling route, and preparation of further local/international routes. Staging a late season cycling competition.
Results and impacts: The growing popularity of eco-friendly tourism stimulated entrepreneurs to develop more diverse tourist services (gastronomy routes, spas etc.).
Monitoring arrangements: Structural Fund procedures. Independent reviews and studies.

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Description

Project approach

The overall objective of the project is to contribute to the development of active tourism, to promote healthy lifestyles among the population of Latvia, Lithuania and Belarus and to increase awareness about the possibilities offered by the Baltic Country of Lakes in terms of tourism, thus adding value to the existing tourism products and attracting more tourists to the 'Country of Lakes'.

In particular, the aims are to advertise the existing tourism cycle route network in the Baltic Country of Lakes through marketing activities and campaigns involving society at large, to increase human resource capacity for Euroregion tourism specialists in relation to the planning and exploitation of routes, using GPS technologies, and to harmonise as well as to improve the infrastructure of the tourism cycle route network of the Baltic Country of Lakes, setting up uniformly designed indicators, road signs, elements of small scale infrastructure, and actions to ensure nature protection. Information targeting tourists included the description of routes, details about flora, fauna. Elements of small scale infrastructure included summerhouses, waste bins, toilets, footbridges, bike stands, seesaws, and view towers.

The project involved the purchasing of interactive maps and GPS devices for tourism information centres in Latvia and Lithuania. Stakeholders received theoretical and practical training in order to on interactive mapping and GPS devices to plan new cycle routes and provide tourists with updated, precise and interactive maps.

The project targets local and international tourists, ICT stakeholders in the "Country of Lakes" Euroregion, and local residents (landowners, employers related with tourism, pupils, students etc.).

Implementation

A partnership of 16 project partners was formed (8 LV, 6LT partners – ERDF part, 5 BLR partners - TACIS part) ready to cope with the constraints in the targeted territories. Each partner had a clearly defined role in the project for the achievement of its sub-objectives proportionally contributing human and financial resources taking into consideration the real needs (both for human resource development and infrastructure) and capacity of the relevant territories.

The leadership of the project was public. Latvian Lithuanian tourism offices acted as the main public bodies, gathering member municipalities at national level, as well as other partners. District municipalities participated in the project as public territories targeted for economic development.

As the project was funded under two distinct programmes, ERDF and TACIS, the ERDF part of the project (Latvian, Lithuanian partners) started 2005 and ended in 2007. The TACIS part (Belarusian partners) started in 2006 and ended in 2008. The reason for the delayed start in Belarus is the long project registration procedure in Belarus. When a project is approved by the Financing programme,

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Belarusian legislation requests special registration and approvals from several Belarusian ministries and the Council of Ministers.

The total budget for this project was of €1,033,017 including €774,763 of EU funding.

Marketing

The marketing strategy was not only to promote scenic routes but also a range of businesses along the different itineraries offering services all complementing each other such as creative tourist attractions promoting the culture of the region, local and authentic cuisine restaurants, cyclist-friendly accommodation, and bicycle repair shops.

As a result, the project contributed to the diversification of the supply of tourist services by the creation of 51 cycling tourism routes and the establishment of more than 100 public recreation places. Local entrepreneurs could offer the cycling routes as their own product. The growing popularity of eco-friendly tourism stimulated the entrepreneurs to develop more interesting products (Culinary heritage, healthy life style, smoke saunas etc.). This project contributed to a common understanding in promoting the common assets to Latvia, Lithuania and Belarus which were defined as the key features of the Baltic Country of lakes tourist destination.

Features contributing to Improved Competitiveness

The cycling net of the Baltic Country of Lakes was strengthened and marketed by common marketing activities and public involvement campaigns. This involved updating information on 44 cycling routes, the elaboration of a 45th international/ euroregional cycling route, plus the preparation of further local/ international routes. Promotional information and information on project activities was disseminated in in specialised newspapers/magazines, TV, Internet portals, radio, thus attracting different categories of inhabitants. Other promotional activities included the publishing of joint standard marketing materials (e.g. Multilingual cycling guides, promotional booklets posters and tear-off maps), the launch of a web page (incl. the same information as in cycling guide and tear-offs with advantage of regular updating and download in the pdf format). The project coordinators attended international tourism exhibitions in the Baltic States (Balttour 2007(LV), Vivatour 2007(LT)) and an international tourism exhibition in Greece with strategic focus to increase the awareness about the possibilities offered by the Baltic Country of Lakes and attracting more tourists to the territory of Euroregion.

The project was based on a Destination Management Plan. Especially the Work Package 2 'Information & Publicity' was based on the Tourism marketing strategy for the Baltic Country of Lakes 2006-2010, prepared within the Lithuania-Latvia-Belarus Interreg IIIA priority "South" project "Discover the Country of lakes". Through this particular strategy, it was possible to devise a plan aiming to target as many tourism niche markets as possible (e.g. the active sports tourism market, the green tourism market, cultural tourism).

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The principles of destination management were being applied effectively taking account of the needs of visitors, local residents, businesses and the environment. Furthermore, all the following tourism projects have been developed and implemented based on the common strategy for the Baltic country of lakes destination, offering a variety of tourism products alternating between nature and culture thus fully exploiting the assets and heritage of this cross-border region. This strengthening of the Destination Management Approach in the region is the legacy of the 'Cycling' project.

The most innovative activities were implemented within the Work package 3 GPS technologies in tourisms development. Training sessions, study visits and the purchase of the latest GPS equipment constituted the basis for disseminating innovative working methods to local municipalities and tourism stakeholders and specialists in the region.

In summary, the creation of a central system of cycle routes meant that there was a clear theme for marketing purposes, but it also contributed to the diversification of the supply of tourist services in a previously under-exploited area. In particular, the cycle route system has provided a platform on which local entrepreneurs have been able to build a diversified range of small business activities (additional sport or health activities, businesses based on culinary heritage etc.), further enriching and extending the offer. The region has also been able to broaden the market for its services by staging events, such as a late season cycling competition.

Features relating to the Wider Adoption of the Good Practice

As regards information & publicity, new projects have been developed to build on the healthy life style principles in the years following the end of the project. Several entrepreneurs investigated the surrounding territories and created new walking, riding, water and cycling routes. The project inspired the border regions to promote tourism as valuable sector for economic development. There has been, as a result, a marked increase of amount of entrepreneurs in the tourism sector, and the development of a variety of 'green' tourism products in all three countries.

In parallel, the catering and accommodation services were developed. There has also been a transfer of knowledge and good practice from more experienced to less experienced localities in the marketing of tourism services along the cycling network. Moreover, several municipalities have started activities promoting the culture of the region, new infrastructures, and similar green tourism products exploiting the natural assets of the region to attract tourists. These municipalities aim to ensure a constant flow of tourism all year-round by promoting off-season tourism products, 'escapes' to the countryside.

Further Information

http://balticlakes.com/en/projekts_exciting

Contact details

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DISCOVER CROATIA (HR)

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Introduction

The Discover Croatia programme was initiated by the Association of Croatian Travel Agencies (UHPA) with the financial support of the Ministry of Tourism.

The purpose of the programme is to reposition the image and reality of Croatian tourism, moving away from the tourism of 'sun and sea' towards 'special interest tourism', by developing tourism offers in undeveloped areas reducing the negative impact on Croatia of the high seasonality of tourism, increasing occupancy rates and the profitability of tourism enterprises and reducing unemployment and population displacement.

This is a comprehensive programme, involving the development of at least 50 tourism agencies as competent Destination Management Companies in undeveloped areas and the development of around 2000 new special interest (thematic) tourism programmes (packages). These new programmes are expected to be developed with the active involvement of, mainly local, experts with relevant competences (e.g. archaeologists, botanists, geologists, vintners, traditional craftsmen, photographers, free-lancers, chefs).

Theme of the project

Extending the season and diversification of the supply of tourist services

Reasons for Highlighting this Project

Discover Croatia is a good example of a project that represents a systematic approach to changing the nature and geographical location of the tourism offer, illustrating a number of EU policy objectives. It combines a key objective of season extension with the diversification of tourism services beyond the traditional "sea and sun" product, extension to other parts of the country and promotion of high quality and sustainable tourism services. Sustainability aspects are evident both in terms of a reduction of the environmental pressure on the coastal zone from the over-concentration of tourism activity while, at the same time, the special interest tourism approach and the formation of Destination Management Companies (DMCs) are geared towards a sustainable and quality based approach in the development of tourism activity in the main part of the country.

At the same time, the Discover Croatia project has already attracted interest from neighbouring countries (Slovenia, Montenegro, Serbia, Hungary, and Italy), for the development of cross-border tourism programmes adopting the basic principles of the project - special interest tourism, formation of DMCs with the provision of support for training and marketing. It is thus in line with the Commission policy for

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the promotion of transnational thematic tourism products.

The involvement of experts that are not directly related to the tourism industry to support the development of special interest tourism packages and participate in their provision is another interesting aspect of the project. This brings a fresh perspective, makes productive use of existing local knowledge and expertise, contributes to the creation of employment outside the core tourism services sector and facilitates a greater connection of the provision of the tourism services with the local economy.

Project Highlights
Contribution to Tourism Policy objectives: Extension of the season and the diversification of tourism services beyond the traditional "sea and sun" product, extension to other parts of the country and promotion of high quality and sustainable tourism services.
Innovative elements: A systematic approach to changing the nature and geographical location of the tourism offer, applying the principles of Destination Management. The development of special interest (thematic) tourism programmes with the participation of local experts, making productive use of existing local knowledge and expertise and promoting integration into the local economy.
Main outputs: Development of training manuals to promote a better understanding of business operation and successful implementation of the principles of destination management; meetings with over 600 representatives of around 100 tourist agencies; a national database with over 650 tourism packages; promotion material.
Results and impacts: While still too early to identify clear results and impacts a total number of 30 DMCs have already been created and around 1000 special interest packages have been developed. Over 43,000 foreign tourists were attracted to the inland parts of Croatia in 2011 and 65,000 more in 201. This represents around 10% to the total arrivals.
Monitoring arrangements: The Association of Croatian Travel Agencies monitors the overall implementation of the programme with explicitly defined targets and result indicators (including the formation of at least 50 Destination Management Companies and development of 2000 tourist packages). The Ministry of Tourism and the National Tourism Board collects information on the effectiveness (e.g. number of visitors attracted) of the individual tourism programmes.

Description

The Discover Croatia project started in 2009. It is an initiative of the Association of Croatian Travel Agencies with financial support from the Ministry of Tourism and the Croatian National Tourist Board. The project reflects a recognised need – documented in the 2003-2010[8] and subsequent strategy documents for the tourism sector[9] - to reposition Croatia away from the dominant model of sun and sea towards an alternative tourism of 'special interests'. The tourism of Croatia remains highly seasonal, is

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[8] http://www.mint.hr/UserDocsImages/TOURISM-FINAL-2010.pdf
[9] http://www.mint.hr/default.aspx?id=9582

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concentrated in the coastal areas, and exhibits the dominant characteristics of relatively "low-cost" mass tourism. Data from 2009 are illustrative. The period of May- September accounts for more than 85% of the total arrivals of foreign tourists. Of these, 90% are directed to the coastal areas while the continental part of the country is largely underdeveloped (see table below).

Table 1 – Number of foreign tourists' arrivals by season and location

	Total	**Zagreb**	**Baths**	**Seaside**	**Mountain**	**Other resorts**	**Other**
Jan-Apr	630,540	93,113	5,091	471,183	12,544	12,708	35,901
Oct-Dec	513,607	77,120	4,094	377,227	12,918	10,860	31,388
May-Sep	8,190,675	237,579	10,803	7,513,339	206,437	46,190	176,327

Source: Croatia statistical office

Furthermore, average tourist consumption per day in 2005 was €47 – in comparison to €69 in Italy and €71 in Spain and, more importantly, more than 60% of expenditure is related to accommodation and only 8% related to sport, recreation and cultural activities (in comparison to 15% in Spain and Italy)[10] [11]. From the sustainability perspective, the concentration of too many tourists in a short season (from June to September) in a small part of the country creates problems with water and electricity supply, pollution and loss of biodiversity. It leads to environmental, socio-cultural and economic changes and the loss of destinations' attractiveness.

Intervention logic and project objectives

In response to the above observations, the UHPA and the Discover Croatia programme aims to diversify the tourism product by promoting special interest tourism packages taking advantage of the diverse nature of the Croatian mainland and its appeal to different target groups, with the potential to attract them throughout the year and particularly in the off-season period. The new tourism packages aim to address a broad range of special interests including cultural tourism, eco-tourism, sports tourism, religious tourism and others forms of alternative tourism.

A key element of the project is the priority given to the formation of local Destination Management Companies from the existing travel agencies following the provision of training supporting the adoption of the main principles of destination management and sustainability. Thus, the project also incorporates a skills and capacity building element. Part of the Destination Management approach is also the requirement that tourism packages are developed in co-operation with local experts (e.g. archaeologists,

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[10] http://cdn.intechopen.com/pdfs/29225/InTech-Croatian_tourism_development_model_anatomy_of_an_un_sustainability.pdf
[11] Strategy of Tourism in Croatia for Competing on the European Tourism Market - Grzinic Jasmina

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botanists) that actively contribute to the setting up of the programmes and the provision of the tailored services (e.g. as guides).

The role of the Association of Croatian Travel Agencies has been in the provision of training to the individual travel agencies to help them become DMCs and to ensure a common promotion strategy and a minimum quality for the packages developed. It has also taken the responsibility, particularly at the initial stage, of reaching the target groups across Europe through a number of targeted promotion and marketing activities.

The approach is **consistent** with the EU policy objectives while also supporting the development of sustainable tourism on the basis of destination management principles. At the same time it is in line with other actions of the Croatian government that are concerned with the promotion of low season tourism in the inland part of Croatia and for further uptake of the Destination Management principles by travel agencies[12].

A target has been set for the establishment of 50 viable destination management companies that will assist in the stimulation of the development of tourism in the regions with currently undeveloped tourism facilities. The last stage of the project, currently in progress, includes the establishment of clusters of Destination Management Companies around certain thematic areas or specific regions and the certification of the travel agencies on the basis of minimum quality standards related to the promotion of sustainable tourism and quality control. Furthermore, while local authorities were largely absent during the initial period – with a top-down approach largely followed - they are expected to assume a more active role through the local tourism boards and to participate in the development and, through the local tourism boards, in the promotion of the tourism packages.

Bringing the different aspects together, the main objectives of the Discover Croatia project are:

- Reposition the image of Croatian tourism from 'sun and sea' to tourism of special interests;

- Develop sustainable tourism in the regions where tourism is not developed;

- Prolong the tourism season and improve utilisation of the existing catering facilities in the regions with undeveloped tourism during off-season;

- Strengthen existing tourist agencies in line with the principles of destination management in order to support the development of special forms of tourism engaging local public and private organisations and individual experts with appropriate competences;

- Establishment of a minimum of 50 Destination Management Companies in Croatia to serve the special interests tourism market.

Funding

The funding for Discover Croatia project was provided by the Ministry of Tourism of Croatia which supported the training of the travel agencies, the initial stage of the development of the tourism packages and their promotion. The total budget allocation (2009-2012) has been a bit less than €2m.

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[12] http://www.mint.hr/default.aspx?id=8814

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The UHPA has received a total of 720,000 kn (€94,000) for the various implementing activities (training, seminars, promotion). During the period 2010-2011 a total of 7,810,000 kn (€1.028m) was provided by the Ministry to support the development of the tourist packages while €600k more have been allocated for 2013[13]. The support provided covers up to 50% of the total development costs (design and promotion) of those packages. The beneficiaries were travel agencies meeting criteria including the level of co-operation with other partners or experts, adoption of Destination Management principles and the targeting of underdeveloped regions. In the long term the activity is expected to be self-sustaining with the DCMs financing the development of new or improved tourism packages. Furthermore, the Croatian National Tourist Board (HTZ) allocated 5.4 million kn (€712,000) for the promotion of the 650 programmes developed by around 70 agencies.

Main activities and outputs of the programme

The main outputs of activities performed so far in the "Discover Croatia" project include:

- Development of training manuals to promote a better understanding of business operation and successful implementation of the principles of destination management
- preparatory meetings in various parts of the country with the participation of tourist agencies in the course of which tourism packages/programmes were developed
- support by UHPA for the presentation of the programmes
- development of a national database including all tourism packages and their presentation in a common format and a standard level of information in a single portal
- promotion material including leaflets, photographs and short films and promotion activities by UHPA making use of the internet, social networks and other media.

The table summarises the main activities that took place during the period 2009-2011

Table 2 - Main outputs of the Discover Croatia project during the period 2009-2011

Type of activity	Number
Preparatory meetings and seminars supporting travel agencies	17
Number of participants (number of travel agencies)	565
Number of travel agencies receiving support in development of programmes	99
Number of tourism packages developed	987
Manuals distributed with guidelines for business operation and marketing	2,000
Number of tourism packages for which UHPA provided support for presentation in database	650
Promotion films	70
Promotion Photographs	3,000

Source: UHPA

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[13] http://www.mint.hr/default.aspx?id=8814

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In 2012, the focus of the project was on the harmonising the presentation of the developed tourist packages, development of new products and consolidation of some of the existing ones. Additional topics, areas and activities which had not been included in the tourist programmes have been added and the local authorities in two cantons (Sisačko-Moslovački and Zagrebački) and two cities (Zagreb and Ogulin) were involved in their development and promotion.

Features contributing to Improved Competitiveness

The Discover Croatia project is expected to contribute to improving the competitiveness of the tourism sector of Croatia, initially by diversifying the tourism offer, but also by strengthening the capacity of the travel agencies to develop facilities, in line with the principles of destination management. It is a systematic approach to addressing a key problem of the Croatian tourism sector – seasonality and an over concentration in the coastal zone. These are problems that have been identified for quite some time but are still very much present. The targeted special interest tourism packages can be expected to increase the number of arrivals throughout the year and thus the utilisation of existing infrastructure, but also to raise the level of spending of visitors on cultural, sports or other recreation activities that currently represent only a small share (8%) of the total expenditure of tourists in Croatia.

In parallel, the diversification and extension of the season should be expected to reduce the pressures on the environment in the coastal areas, an aspect which is important for the long term viability of the tourism sector and attractiveness of the country.

Impacts of the project

At this stage it is still too early to identify clear results of the project, and still less, impacts. A total number of 30 DMCs have been created – 60% of the target set - and close to 1000 special interest packages have been developed – 50% of the final target. These are all the direct results of the programme. Their longer term viability remains to be seen. In terms of the broader contribution to tourism activity, the data provided by the Ministry of Tourism in relation to the 1000 packages that have already received support indicate that 43,754 foreign tourists were attracted in 2011 and 65,670 more in 2012, all in the inland parts of Croatia and/or the low season period. While small in relation to the total annual number of 9.6 million arrivals in Croatia, this still represents a significant contribution to total activity for the off season period and non-coastal areas (around 10% to the total arrivals)[14].

It is difficult to assess at this stage whether the ratio of outputs to inputs is satisfactory, but the initial signs are that the management of UHPA has been generally effective in achieving the targets set for the initial period.

In terms of the longer term viability, what remains to be seen is the extent of the continuing demand for the proposed packages and their capacity to reach the target population. The formation of Destination Management Companies, the cooperation with local actors, and the creation of thematic clusters among the DMC are important steps in ensuring the viability of the supported activities. Other considerations, such as the quality of accommodation services and accessibility (e.g. number of flights) may also

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[14] It is not possible to distinguish between the two from the data made available.

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important, but there are positive indications. The representative of UHPA reported an increasing interest on the part of the agencies in the development of new tourism packages for which additional funding is expected to be available even without the Ministry support, making use of own resources as well as other local and regional funds available. At a broader European level, the UHPA suggests that there are already indications of the uptake of the Discover Croatia concept in other countries including Slovenia, Montenegro, Hungary, Serbia and Italy including the development of packages with a cross-border character that will combine the extension of the tourist season, diversification of tourism services and promotion of the Destination Management principles.

Features relating to the Wider Adoption of the Good Practice

The basic concepts of Discover Croatia are transferable to other regions and there has actually already been interest from other countries (Montenegro and Slovenia) in the development of a cross-border cooperation project on the principles of special interest tourism and Destination Management companies. Similar negotiations have also been initiated with representatives of the associations of tourist agencies from Serbia and Hungary.

The basic principles of the project – training to upgrade the skills of travel agencies and the development of tailored special interest tourism packages – can be replicated in other countries. The focus on special interest tourism as a tool to extend the season is generally recognised but each country or region will need to identify the relevant assets and the target groups to be attracted.

An important element is the presence of an entity with the evident capacity to coordinate this effort – in this case the Association of Travel Agencies – one with a direct connection to the key tourism service providers. Similarly, it is important that a certain level of funding is made available to kick start the project and attract the interest of the tourism agencies. The role of the national government has been particularly important in this respect and it is expected to invest further and to support the basic principles and objectives of the programme.

Further Information

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SICTED - INTEGRAL SYSTEM FOR THE TOURISM QUALITY IN DESTINATIONS (ES)

CASE 8

Introduction

The Integral System for Tourism Quality in Destinations (SICTED) is a project to improve the quality of tourism destinations promoted by the Tourism Institute of Spain (TURESPAÑA) and the Spanish Federation of Municipalities and Provinces (FEMP).

The goal of SICTED is to enhance the quality of services provided across a whole destination, by ensuring a consistent level of quality in the services offered to tourists within a specific destination, avoiding substantial quality deficiencies among different products offered at a destination and any negative impact on the perception and level of satisfaction among tourists. It is based on a comprehensive method, involving an initial appraisal of interested businesses, tailored training and other support, external assessment, review and renewal. The methodology followed is adapted to the specific characteristics of the sector and the objectives set by local actors within a destination.

Theme

The themes covered by this case study primarily relate to Training, Skills Development and Building Capacity and also the development of innovation in the tourism industry.

Reasons for Highlighting this Project

The key aspect of SICTED is that it goes beyond the effort to improve the quality of individual tourism businesses, and aims to improve destinations' overall quality of service.It adopts an integrated process for the development of quality among businesses that takes into consideration the shared goals of all the actors involved. It favours the design, planning, execution and measurement of actions that harmonize the quality levels of services and products consumed by tourists with the image and the perception that visitors have of the destination. This improvement in the services –beyond the traditional tourism services - also has direct repercussions on the local residents who are frequently the ones who consume these services on a daily basis.

Project Highlights
Contribution to Tourism Policy objectives: Development of professional skills, quality services and broader capacity building in the Spanish tourism industry. Through these activities it contributes to the development of sustainable, responsible and high quality tourism and the strengthening of the competitiveness of the tourism sector.
Innovative elements: SICTED's key feature is the adoption of an integrated process for the development of quality tourism services at the level of destinations rather than individual services. It

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therefore aims to influence the quality of the visitors' experience of a destination and the image, and perception created.

Main outputs: The SICTED programme has achieved broad recognition across Spanish destinations and participation is already very broad. By the end of 2008, SICTED had been adopted in 91 destinations. The implementation of the quality systems is supported with periodic visits and workshops while good practice guidelines have been developed for firms in 30 different sectors.

Results and impacts: In terms of short terms results, by the end of 2008 2,431 establishments had received the SICTED emblem and a further 3,851 establishments were in the process. At the beginning of 2013, the total number of destinations involved was a total of 155, with 3854 businesses having been recognised and 3,320 more in the process.

Longer term impacts – such as increases in the number of visits, productivity or level of spending by visitor – linked to SICTED programme have not yet been published.

Monitoring arrangements: SICTED has been incorporated into the general tourism strategy for Spain, as set out in the Integrated National Tourism Plan 2012-2015 (PNIT). This means that it is subject to a reporting regime which includes a set of indicators:

Description

The Integral System for Tourism Quality in Destinations (SICTED) is a project initially promoted in 2000 by the Spanish Federation of Municipalities & Provinces and financed by the Ministry of Industry, Tourism and Commerce General Secretariat for Tourism as part of PICTE programme 2000-2006 for quality in the tourism sector (Plan Integral de Calidad del Turismo Español). SICTED represents one of the pillars of the Tourism Quality System of Spain (SCTE) which is comprised of four pillars covering sectors, destinations, products and good practices.

The main objective of the programme has been to increase the quality of destinations across Spain on the basis of a comprehensive management model. The underlying logic of SICTED – as part of the quality support actions promoted by the Spanish government indicated above - is to assist in addressing the increasing price competition in the attraction of tourists that comes for other countries. Ensuring that a high level of service quality is offered by businesses and destinations is considered to be a key differentiating factor that can serve this objective. The adoption of quality management systems are also expected to contribute to the reduction of operating costs for businesses and tourist destinations and improve the balance of quality versus price in the goods and services offered to their client. They are thus expected to strengthen the financial sustainability of the businesses and increase customer loyalty.

At the same time, the focus on destinations is based on the recognition of the transversal nature of the tourism sector that extends not only across the traditional tourism services sector but to all those that contribute to the visitor's experience. There is thus a need for the coordination, motivation and collaboration of all the actors of a destination who, in one way or another, offer services that may be

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consumed by tourists. The perception that visitors take home from any retail or other establishment is as important as the experience of public infrastructures and tourist facilities (beaches, museums, leisure centres, etc.). Thus, the project includes not only the main tourist services provided by hotels, restaurants, travel agencies or tourism boards, but also other services that are not primarily tourist-related, but which have an impact, such as city cleaning services or citizen security services.

Participants in SICTED are, at the first level, tourist destinations. However, it is individual enterprises and organisations that deliver services. Consequently, once the destination joins SICTED, all their tourist enterprises and services can participate in the project. SICTED offers to each destination a methodology to support comprehensive and continuous quality management, characterised by a focus on continuous improvement and an approach based on the recovery, revitalisation and enhancement of existing resources and space. Participation in the programme includes a set of actions:

- Formation of a Management Body with the participation of the public and the private sector in charge of designing the promotion of each destination to facilitate administrative and cross-sectoral collaboration.

- Organisation of surveys to obtain and analyse necessary information to allow the destination to evaluate itself, to establish priorities for actions, exchange data and experience with other destinations with common characteristics.

- Establishment of a working method based on existing models of excellence developed by the Institute of Tourism of Spain tailored to the characteristics of the destination and to different sectors.

- Advice services to local companies that have decided to join a SICTED scheme on the model for good practice in service quality.

In brief, the methodology to be followed by each destination for the implementation of the SICTED methodology includes the following steps:

1. **AWARENESS-RAISING PHASE** - The Managing or Destination Body for each destination determines the channels and tools to disseminate and communicate the SICTED scheme (e.g. in-person visits to the establishments, contacts with the trade associations at the destination, dissemination of the project in the media, presentations to groups, etc.). These are arranged so that they are both accessible and useful and add value to the private sector, thereby encouraging the participation of local businesses. The Management Body is responsible for the operation of a Quality Forum that works as a meeting point between public and private professionals in the destination, where common strategies are established and different aspects of the project implementation are discussed.

2. **AFFILIATION OF COMPANIES**: Interested companies formalise their participation in the project through an Affiliation Protocol, which lists the different commitments and rights that the business owner acquires and the admission requirements that need to be fulfilled in order to participate.

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3. **IMPLANTATION OF THE QUALITY SYSTEM IN COMPANIES**: Implanting the quality system in companies is a result of a joint effort by the participating enterprises and specialised consultants that offer tailored technical assistance at each destination (consultants, technical officers at the destination, advisors, etc.). This includes an initial diagnosis of the firm that serves as the basis for designing its Improvement Plan, which sets targets and development activities to be carried out. The implementation is supported with visits, workshops and other support tools. Good practice guidelines have been developed for firms in 30 different sectors.

4. **TECHNICAL ASSISTANCE AT A GROUP LEVEL**: At the same time, in order to pool experience and help improve the overall system at the destination technical assistance workshops with the participation of enterprises from all the relevant subsectors also take place.

5. **RECOGNITION**: External assessment of all enterprises are conducted in order to examine how far there has been a successful implantation of the quality system and, on the basis of this, the Managing Body determines which companies are awarded the SICTED emblem that signifies Tourist Quality Commitment. Dissemination activities (including a public ceremony, publication of guides and brochures etc.) are conducted to make those companies known to local residents and visitors. The common SICTED emblem is also used by firms outside their establishments.

7. **FOLLOW-UP AND RENEWAL**: Enterprises that have been recognised continue to receive support in order to support a process of continuous improvement. They undergo yearly follow-up audits to check whether fulfilment of the requirements is being kept up and to incorporate any new recommendations. Those considered excellent are encouraged to prepare for more demanding quality systems recognised within the tourism sector (e.g. Q, ISO, etc.)

SICTED is supported by an ICT tool supporting the coordination among partners and the management of the project, including the provision of the technical assistance by consultants and access for participating businesses to tools to help them embed the quality system (for example, self-assessment questionnaires).

In the initial development phase of the project (2000-2003) SICTED was piloted in 9 destinations, 4 related to urban and cultural tourism (Barcelona, Zaragoza, Santiago de Compostela, Segovia), 3 to sun and sand (Calvia, Lanzarote and Menorca) and 2 to indoor rural tourism (Mountain of Navarre and Benasque Valley). This pilot phase enabled SICTED to adapt the initial model to different types of destinations. In the period 2003-2004 it was introduced in 15 new Spanish destinations and in 2004-2005 in 24 more.

SICTED has now been incorporated into the general tourism strategy for Spain, as set out in the Integrated National Tourism Plan 2012-2015 (PNIT) – see case 1 -, along with other quality initiatives. As well as helping the co-ordination of SICTED developments with others such as the development of 'smart destinations', this means that process with SICTED is subject to the same disciplines and reporting regime as the other elements in the Plan. A series of indicators have been defined. These include:

- the number of enterprises joining SICTED programmes

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- the number of people applying to participate in the training actions organised

- the number of participants completing training courses and obtaining certificates

- the number of copies sold or downloaded of a planned study on quality

- the number of clients participating in the SICTED programme that require services launched within the PNIT.

Data on these indicators are being collected under the PNIT, but none have yet been published.

Features contributing to Improved Competitiveness

SICTED contributes to the competitiveness of the tourism sector by promoting an integrating approach to quality that links improvement in the quality of services by individual firms to the broader improvement of the quality of the overall experience of visitors in destinations. As such it contributes in a systematic way to improving the competitiveness of whole destinations, a critical element in addressing the challenges of the experience economy.

The participation of businesses in SICTED helps them improve their service quality management, especially in the processes related to customer satisfaction, and in parallel, through the SICTED emblem and other promotion activities helps them attract new customers – primarily those with a focus on the quality of services. Participation in SICTED is designed to lead participants to a constant process of service quality improvement. In this way, every stage represents a step towards a continuous improvement of the enterprise.

In parallel, SICTED paves the way for the broader adoption of more demanding quality systems in the tourism sector, such as the generally recognised Q for Quality Tourism. While less demanding on individual businesses, the implementation of SICTED paves the way for tourism businesses to obtain the Q for Quality designation.

The SICTED programme has achieved broad recognition across Spanish destinations and participation is very broadly based. The destinations vary greatly. They include: World Heritage Cities, fishing villages, spa towns, rural tourism or urban-cultural areas and sea and sun destinations. By the end of 2008, SICTED had been adopted in 91 destinations. 2,431 establishments had received the emblem and 3,851 establishments more were in the process. In 2013, the total number of destinations has reached 155, with 3854 businesses having been recognised and 3,320 in the process.

Features relating to the Wider Adoption of the Good Practice

The SICTED approach illustrates how destinations and regions can move beyond and complement quality schemes aimed at individual establishments, to generate a co-ordinated approach at a destination level. The concept could certainly be adopted widely, though the implementation would clearly need to be adapted to the specific characteristics of each country.

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Further Information

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DEVELOPING LEADERS FOR CHANGE AND INNOVATION IN TOURISM (MT)

CASE 9

Introduction

Malta, famous for its historic monuments and costal scenery, is a popular destination for tourists. With a population of some 400,000, the islands receive over 1.4million tourists per year. The industry generates 15% of the country's gross domestic product, compared to an EU average of about 5%, and even more if indirect linkages are included. It is an important source of employment.

The *Developing Leaders for Change and Innovation in Tourism* programme (ESF 2.11) was developed by the Malta Tourism Authority (MTA) specifically to meet needs of tourism firms as identified in the course of research on employment levels and training needs in the tourism sector. Research identified that there had been a significant shift in the way that tourists visit Malta. Whereas in 2006 some 33% had been independent travellers and 67% travelled through tour operators and groups, by 2012 this had switched to 53% independent and 47% through tours and tour operators. This was related to the arrival of Ryan Air and low-cost flights in Malta.

The result of this shift was that tourist arriving in this way had different expectations from their visits to Malta compared to what was the case in the past, and that those in the industry had to provide different experiences and meant that new skills were required in Maltese tourist firms in areas such as marketing, operations, customer skills, and use of ICT.

For example, where tourists might in the past have flown in and taken up full board at a four or five star hotel, they now would often not go for the five star hotels, or if they did, they would look for food and entertainment outside that provided by the hotel from local suppliers. These local suppliers needed to develop the necessary skills to meet this new type of demand and remain a competitive tourist destination.

The programme was designed for those managing and/ or owning firms in the industry and/ or in supervisory positions that would be responsible leading product and service development and delivery in their companies in response to the changes in the market as identified above, helping these firms to adapt and remain competitive in the challenging environment. It aimed to improve or update the skills of those that had been in the industry for a long time as well as those that had joined more recently and through other routes (e.g. from administration and finance).

Theme

*Training, Skills Development and Building Capacity: t*his is an ESF OPII Cohesion Policy programme covering the timeframe (2007-2013) in the category "Empowering People for More Jobs and a Better Quality of Life", with the operational objective of *increasing participation in lifelong learning*. The priority axis is PA2 "Investing in employability and adaptability of the workforce", and the focus area of the intervention is OPIIPA2: "Continuous training and education". As such the main theme covered is that of skills development and building capacity, but it also covers areas of ICT,

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sustainability, research and innovation, all of which contribute to helping industry change and to competitiveness.

Reasons for highlighting this project

This was a very ambitious programme because it was quite large (total budget of €3.1 million, including 85% from the ESF) and required a good deal of local organisation to deliver. It targeted 1380 participants at supervisory level who would be responsible for leading change in an industry that has some 9000 direct employees in total. It was effectively aimed at re-skilling the industry leaders in a very short period (over some 2-3 years) so that they could influence operations throughout the whole industry, bringing about a step-change in the industry in a relatively short time frame in this strategically important industry for Malta and thereby helping it to compete.

A further point of interest is that of how to channel funds to tourism within the envelope of wider programmes – in this case Operational Programme II – Cohesion Policy 2007-2013 "Empowering People for More Jobs and a Better Quality of Life.

The programme also encompassed some other key themes of interest, particularly developing innovation and ICT in the industry, as perusal of list of topics of the training modules as set out below makes clear. Thus, while the Operational Programme was not specifically targeted at the tourism industry, it was deployed to that end because the high-level goals of the programme reflected the specific industry needs at the time.

As such the project embodied several of the 2010 Communication's axes, including stimulating the competitiveness of the sector, promoting the development of sustainable, responsible and high quality tourism, and maximising the potential of EU policies and financial instruments. It included promoting the uptake of information society tools in the tourism sector and the promotion of the mobility of workers in the sector in order to facilitate the operation of the tourism labour market.

Project Highlights
Contribution to Tourism Policy objectives: Development of skills and building capacity in the sector; use of ICT; increased sustainability; use of research and innovation; all of which contribute to helping industry change and to compete effectively.
Innovative elements: Increasing skills or re-skilling of the leadership of the whole tourism sector on a "top-down" basis, based on a training programme and one-to-one reviews with business owners and senior managers.
Main outputs: Some 1,020 people completed the programme - a substantial proportion of the industry.
Results and impacts: Reorientation of marketing and service development in the industry in response to competitive changes in the market
Monitoring arrangements: Initial surveys carried out, results yet to be published.

DEVELOPING LEADERS FOR CHANGE AND INNOVATION IN TOURISM (MT)

CASE 9

Description of the project

The overall project objective was to increase the number of qualified professionals working in the tourism industry by upgrading their management knowledge/ skills in order to drive service quality improvements through change and innovation.

Specifically, the project aimed to:

1. Strengthen and increase the profitability and competitiveness of the tourism industry.
2. Fill in training gaps where employees in key positions have never had the necessary exposure to academic and professional training.
3. Provide research supporting lifelong learning.
4. Improve the long term employability and adaptability of the tourism workforce by increasing flexibility and adaptability to adapt to change.
5. Improve the employability of the unemployed.
6. Improve the adaptability of non-tourism employees defined as unemployed and jobseekers, especially those in declining industries.

Location

The project was carried out on the islands of Malta and Gozo.

Approach

Where the objective was to develop knowledgeable and competent leaders for the tourism industry to help it to remain competitive, this was to be achieved through Continuous Professional Development targeting those in leadership positions in the industry who want to improve their capabilities in innovation and change management.

Implementation

The programme ran from Q2 of 2008 until Q2 of 2013. The Training Programme provides a range of practical and result focused modules leading to a Diploma at level 5 on the European Qualifications Framework. It includes 1 to 1 mentoring sessions, online learning and development of a Professional Networking Community via WEB 2.0. There was also a possibility of an overseas field visit.

The learning platform has 2 levels: 'Higher' for owners, heads and senior management and 'Lower' for middle and supervisory management. Both learning platforms provide a range of practical and result-focused modules that have been designed to minimise participants' time off their work. Both learning platforms offer the same level of qualification and modules. However the delivery of the content was different. Learning Platform 1 - Higher Management Programme focused on the strategic outlook and contributed towards long term planning while Learning Platform 2 - Middle Management

DEVELOPING LEADERS FOR CHANGE AND INNOVATION IN TOURISM (MT)

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Programme focused on operational aspects including the day to day responsibilities of the participants.

The compulsory training modules, representing the core skills required, were:

- Future Industry Trends and Innovation;

- Sustainable Tourism, Corporate Social Responsibility and Ethical Considerations;

- Customer Relationship Management and Managing Customer Care;

- Leadership & Management Skills;

- People Management;

- Continuous Personal Development (CPD) and Self Learning.

In addition, participants had to choose two elective modules from the following list, allowing scope for specialisation in specific areas of interest:

- Risk Management and Strategic Planning

- Quality Assurance

- e-Business & e-Marketing

- Business Funding & Financial Awareness

- Managing Health & Safety

- Entrepreneurial Skills for Business Growth

- Performance Optimisation in Tourism and Hospitality

- Niche Tourism Marketing

- Alternative tourism – managing Eco–cultural Landscape for the benefit of our environment and tourism industry

The 6 core modules and 2 electives of two 4-hour sessions each were spread over the 8 tourism shoulder/winter months, so that there was less intrusion into the high-season's work commitments. There was also 12 hours of one-on-one mentoring with a qualified mentor and additional time was to be included for independent study, preparing the final assignment, and 40 hours of CPD through participation in the Online Learning and Professional Networking Community via WEB 2.0

Applicants for the programme were considered from the eligible sectors listed below:

- Tourist Accommodation including hotels, apart- hotels, guest houses and hostels.

- Catering

- English Language Schools

- Scuba Diving Schools

- Incoming Travel or Transport Operators including travel agents, tour operators and Destination Management Companies/ Organisations

DEVELOPING LEADERS FOR CHANGE AND INNOVATION IN TOURISM (MT)

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- Heritage and visitor attractions

- Creative Industries / local produce including crafts, performing arts, recording studios, pottery, glass, lace amongst others

- Any other sector directly or indirectly serving tourism and hospitality

Fees for child minding during the duration of the programme could be reimbursed under certain conditions.

Subject to the requirements of participating in the programme, those not currently working in tourism but considering a new career in tourism could apply, as well as those currently seeking employment and wishing to train for a job in tourism and hospitality.

There were three intakes in total.

Marketing

The programme was promoted intensively though the MTA, TV, radio, newspapers, social media, trade associations and direct to firms. It was provided for free to approved participants. All eligible participants were selected.

Factors contributing to improved competitiveness

Budget/ funding

The budget of €3.14 million for the project was part-funded through the ESF with 85% co-financing and 15% from National Funds. This was a large project – as was required in view of the ambitious goal of reskilling the industry.

Main results and impacts anticipated

For individuals, the direct benefit foreseen was the attainment of a professionally recognised certification as well as increased motivation following participation in a professional development programme. Participants were also expected to benefit from the acquisition of new skills and/ or upgrading of existing skills, interaction with tourism experts and knowledge gained from the programme. This would enable them to compete more effectively in the changing market environment as a whole.

The programme was also expected to have direct impacts for the tourism industry – expected amelioration of service standards and the development of new services. These should improve the competitiveness of the sector, which in turn will yield positive economic results both in terms of retaining levels of employment and increased income in the sector.

The main result anticipated was to obtain a pool of knowledgeable and competent leaders that would be in a position to drive changes required in the Maltese economy's service offer, and the impact hoped for was that this would assist the whole tourism industry in Malta to remain competitive in the changed market environment.

Some 1,020 people completed the programme. So a substantial part of the industry had been through the programme and others would be impacted directly.

DEVELOPING LEADERS FOR CHANGE AND INNOVATION IN TOURISM (MT)

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Anticipated spill-over effects

The tourism industry represents some 10% of Malta's GDP (maybe even 25% - if knock-on effects are included), so improving the skills of those in the industry can have a major impact on living standards in the islands.

An example of an outcome includes a web designer participating in the programme to understand the market and identify clients' needs.

One of the very positive spill-over effects of the programme is the networking between participants and the exchange of good practice.

A survey of those who completed the programme has recently been carried out but the results are not available yet.

The programme contributed to improved competitiveness by making participants aware of the new competitive environment and helping them develop ways to deal with it. This would be achieved by those who had been trained being made aware of changes in the industry and having learnt how to develop their companies' service offering to respond to the trends identified in the course of the training programme, both in terms of product offering (e.g. sustainability), and service delivery and management.

The training toolkit included a series of self-diagnostic tools and exercises covering the key strategic and operational issues discussed during the workshops. In the course of the "homework" and one-to-one mentoring the self-diagnostic tools were used to identify the competitive situation of their firms and to design and implement responses.

At present it is not envisaged to repeat the programme in the foreseeable future.

Features relating to the wider adaptation of good practice

The programme itself is highly international – some 70% of the trainers were foreign – and the core modules can be readily adapted to other environments. There was also a possibility of visiting some exemplar projects abroad for the participants (e.g. in Scotland and Italy).

A key lesson learned by the programme managers was not to underestimate the purely administrative challenges in setting up and running such a large programme presents. A good deal of planning is required up front to ensure success in the delivery of the programme.

Further information

http://www.mta.com.mt/advance

http://www.advance.com.mt/

www.advance-tourism.com

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KURBITS – BUSINESS DEVELOPMENT FOR THE HOSPITALITY SECTOR (SE)

CASE 10

Introduction

'Kurbits' is a business development programme for small businesses in the tourism and hospitality industry. Focusing on the management and performance of their own enterprise as a starting point, participating SMEs enhance their knowledge and make use of specially designed tools to help them to streamline, promote and develop their business.

Developed initially in 2008 for the Swedish region of 'Dalarna', the Kurbits project went on to receive support from the Structural Funds from 2009-2011, after which it was turned into an official national programme under the Swedish tourism strategy in January 2012. It is now owned and operated by the Swedish Travel and Tourism Industry Federation (RTS). Under the new structure Kurbits as a national office receives funding from the State and the Swedish Board of Agriculture, but the individual programmes are financed by the destination that in turn has often received support from EU Structural Funds or rural support. 25-50% of the costs of the programme is paid by the participating enterprises.

Theme

Training, skills development and building capacity: this case concentrates on a successful and innovative training formula, though there are additional elements that are significant in the programme, especially those that relate to marketing and promotion.

Reasons for Highlighting this Project

 The Kurbits programme is an example of a successful approach to developing training and skills, initially piloted with Structural Funds support and now being rolled out across a growing number of Swedish regions. The approach brings the challenges being faced by tourism businesses in the age of the experience economy right into the business processes, especially of small businesses in the tourism and hospitality industry and helps them develop innovative responses.

Project Highlights
Contribution to Tourism Policy objectives: Improving the professional skills of people and businesses working in the sector and the quality of local tourism. Promoting innovation in tourism services.
Innovative elements: The methodology, contents and tools of this business development programme are tailor-made for small-scale businesses in the tourism and hospitality sector. The programme has strong local and regional anchorage and encourages innovative thinking and networking between participating businesses, destinations and regions thus improving the overall experience for the tourist.
Main outputs: A series of specialised training programmes, each consisting of 6 subject meetings for groups of 10 businesses, but involving personal coaching of individual participants.
By June 2013, the programme has been rolled out across 12 regions in Sweden and there are a

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total of 400 active Kurbits businesses

Results and impacts: Nearly all participating enterprises report changes that have improved their performance, in some cases with as much as a 50% increase in turnover or a 25% growth in profitability. 27% of those participating have employed new people.

70 people have been employed as a result of Kurbits.

Monitoring arrangements: The programme contains a detailed evaluation plan consisting of analysis of participants' needs, evaluation of each of their 6 meetings, ex-post evaluations of each programme after 6-12 months and an overall ex-post evaluation of the Kurbits concept by an external consultancy firm.

Description

Background

Kurbits was originally developed in 2008 as a project for the Swedish region of 'Dalarna'. The idea for the project came about in connection with a study of the competency needs of businesses in the tourism sector and was inspired by the so-called FUNK-model developed by the Knowledge Foundation (KK-Stiftelsen)[15]. The model builds on the principle of collaboration between stakeholders within different fields (research, education, business and culture) with a view to creating new ways of thinking and enhancing the capacity and growth of individual businesses. It suggests that collaboration between companies, universities and the public sector across regional borders is necessary in order to create growth. These beliefs had been put into practice in a successful business development programme for small-scale companies in the food industry (meNY), whose unique methodology, pedagogical principles and ways of working inspired the creation of Kurbits. Having adapted the project to the specific needs of the hospitality sector, a partnership consisting of the Regional Development Council of Dalarna County, RTS, meNY, the university of Dalarna and business development experts, managed to secure EU funding from the European Regional Development Fund for phase 2 of Kurbits from 2009-2011 (6 million SEK over 3 years, including 50% co-financing from the Regional Development Council of Dalarna County).

Programme Objectives

The overarching aim of Kurbits is to **increase the effectiveness, efficiency and competitiveness of SMEs within the tourist and hospitality industry**, both nationally and internationally. This is done through the provision of a programme of business development courses, tailored specifically to fit the needs of small-scale businesses in the tourism sector. The courses, delivered by experienced business development experts, provide participating companies with the tools

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[15] The Knowledge Foundation (KK-Stiftelsen) is a research financing body for universities with the aim of strengthening Sweden's competitiveness and ability to create value. They finance research and skills development in collaboration with the business world. 'FUNK' stands for Forskning, Utbildning, Näring & Kultur (Research, Education, Business and Culture).

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and knowledge that allow them to develop their business ideas and strategies within a number of different subject areas such as: pricing, sales, target groups & markets, distribution, marketing, communication and financial management, all with the aim of increasing their profitability. The programme is also supplemented by practical support in the form of individual coaching. Details of the programme are provided below.

An important premise of the programme is that tourism is all about experiences. The Kurbits vision is to take firms out of their day-to-day routines in order for them to review how they can best make their tourism business special and create a worthwhile experience for their customers. Participating in the Kurbits programme will provide them with the knowledge, tools and support to follow through this process.

What makes Kurbits unique is the combination of the following elements:

- It is the only nation business development programme specifically developed for enterprises in the tourism and hospitality sector

- The sector-specific methodology, contents and tools are tailor-made for small-scale tourism businesses

- Emphasis on regional and local anchorage - the interests, specificities and vision of the destinations are taken into account and integrated into the programme as well as the orientations of the national tourism strategy

- Quality assurance by Dalarna University and the 'meNY' programme

- Continuous support from a process leader with subsequent evaluation and follow-up

- A digital platform for participants

- Ready-made contract templates between those commissioning a programme and the participants.

Main activities and outputs

Each 'Kurbits' business development programme is run for a **group of a maximum of 10 SMEs** and consists of six meetings during which participants work together to develop their businesses through a well-balanced combination of lectures, workshops and individual work. The **topics for the six meetings,** which each last a day, are:

1) **Business goals/analysis of status quo** – analysis of the current situation, vision, goals, action plan and organisation of the business.

2) **Products and services** – analysis of core activity, products, target groups and markets.

3) **Market communication** – marketing, trademarks, story-telling, cohesiveness, creative workshop.

4) **Sales and distribution** – market and distribution channels (booking and payment), social media, agreements with customers/agents/partners, travel insurance, payment systems, accessibility, hosting, follow-up and complaints.

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5) **Financial management and pricing** – results, the balance sheet and liquidity, revenue, costs, key variables, budgets, forecasting, pricing, rules and policies for making bookings.

6) **Entrepreneurship and study trip** – the participant as an entrepreneur, personal leadership followed by a company visits.

Each programme is being **organised by a 'process leader'** who is responsible for the programme and its development, both content-wise, logistically and in terms of selecting participating businesses. The meetings are run by **experienced lecturers and experts** who share their knowledge and experience of business development within the tourism sector with participants and provide them with a set of practical tools. As a culmination of the programme and in connection with the last meeting, participants go on a **study trip** to visit 3-5 firms within the hospitality sector that might inspire them to look at their own business differently and to learn from them (a number of questions are prepared for each company that they visit). The latest trend is that they want to visit Kurbits companies in other regions.

An important characteristic of the whole programme is that it aims to take business managers out of the normal run of their day-to-day activities and make them take a fresh look at their businesses.

The group of participants within each individual programme has been put together in such a way that there is a **mix of different types of organisations and businesses** that complement each other and can benefit from working together. The fact of mixing different types of enterprise also means that there is less scope for a conflict of interests. This means that they are able to build up networks that can benefit them in the long run. In addition, given that the **meetings are spread out over a certain period**, participants have the opportunity, in between meetings, to use their newly acquired knowledge and tools to develop their business and to become more attractive to customers. They can then exchange experience with the other participants and continue to collaborate.

Another interesting aspect of the programme is that participants have **access to personal coaching.** The process leader also functions as a coach and will visit them at their company to help them transfer the theory from the course into practical action adapted to the particular circumstances of their business. Studies have shown that a combination of group meetings and personal coaching provides much better prospects of business development since it combines two different angels at the same time and is able to focus business principles on the specific needs of a particular enterprise. To ensure that process leaders and coaches have a full understanding of the Kurbits methodology and tools and are equipped to run the programmes, the Swedish Travel and Tourist Industry Federation has developed a **special training programme** to prepare them for their role.

An important element of the Kurbits methodology is to build networks. This **networking** happens at 3 different levels:

- Between different types of **enterprises** – often in small regional clusters (it is important that they are not direct competitors);

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- Between the '**destination'** and the relevant **region** (if a destination has a vision for the development of their area, they will need to work with the region to develop infrastructure, roads etc. They can for instance apply to set up a Kurbits course with financial support from the region);

- Between the **regions** and the **national level** (the Kurbits process leaders for each programme that have taken place in the different regions get together to discuss key regional issues which are then taken up at national level by the Swedish Travel and Tourist Industry Federation (RTS) with a view to shaping the national tourism strategy.

The **contents of the 'Kurbits' programme** have been developed in close collaboration between the Regional Development Council of Dalarna County, the Swedish Travel and Tourism Industry Federation (RTS), the University of Dalarna and some of the prime business development experts with roots in the sector. The programmes are specially developed and adapted to suit small-scale enterprises in the tourism and hospitality sector and they have been carefully tested.

In some cases, it is even possible to set up a special tailor-made programme for a specific group of firms in a network or geographical area with a content that is specifically designed to fit their needs.

The **process of commissioning a Kurbits programme** can take different forms. The 'client' who takes the initiative to commission a Kurbits course with the Swedish Travel and Tourist Industry Federation (RTS) can either be a region, a destination, an individual company, an authority, or maybe an association or society. Having made a pre-booking, they apply for funding, if necessary, from their region or from other available EU funds or rural development funds and propose a group of potential companies to participate. The client is then put in contact with the process leader who starts the process of selecting a well-balanced group of interested participants, putting together the detailed contents and logistics of the course and finalising contractual matters with participants and RTS.

Funding

Since Kurbits was launched as a national programme run by the Swedish Travel and Tourism Industry Federation, it has received funding to the tune of **2.5 million Swedish Kroners (€300,700) for the period 2012-2014**, of which 500,000 SEK originates from the Swedish Agency for Economic and Regional Growth (Tilväxtverket) and the rest from the Swedish Board of Agriculture (Jordbruksverket). The funds are spent on the RTS, building up the national platform for Kurbits and carrying out a number of training courses for future Kurbits process leaders (these are the people who manage the whole process of organising individual programmes, both in terms of content, logistics and the forming of groups of participants).

The Regional Development Council of Dalarna County has also invested about 1.2 **million Swedish Kroners (€130,904) from 2012-2013** for the development the "level two" programmes such as Kurbits Export, Kurbits Design and Kurbits Capital.

The cost of an individual Kurbits programme in Sweden, with a maximum of 10 participating enterprises is 250,000 SEK excl. VAT (€30,070) or 25,000 SEK per firm. The financing can originate

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from a host of different sources. Either the destination makes an application for funding from the regions, the Swedish Board of Agriculture or various EU funds or it can come from a destination's own resources or from membership fees of an association. It is up to the individual or the organisation who commissions a Kurbits programme to decide how much each participant has to pay, but typically the contribution fee per business is about 2,500 to 5,000 SEK (€ 600) out of the overall cost of 25,000 SEK. The more programmes a regions has had, the higher the contribution fee per business (Dalarna now pays 5,500 SEK but started with 1,500 SEK in 2008).

The Performance of the Programme

A detailed evaluation plan has been set up as part of Kurbits. This consists of the following elements for each programme:

- an analysis of participants' needs is carried out by the process leader in preparation of the overall course

- participants complete an evaluation form at the end of each of the six subject meetings

- a representative from RTS/Kurbits attends one meeting of each group (when a new type of programme is developed like the enhanced programme 'Kurbits Export'; they follow all the meetings)

- participants fill out an evaluation form on the whole programme after they have finished

- for each programme an ex-post evaluation is also carried out after 6-12 months by the process leader and an RTS representative who attempt to take into account the immediate impacts on participating companies of attending Kurbits

- an ex-post evaluation is currently being conducted with an external consultancy firm specialised in measuring business impact and using the SIMPLER method. They evaluate the financial results of enterprises before and after Kurbits over a span of two years prior to and a couple of years after attending a Kurbits programme. In terms of examining the longer term impacts on participating businesses, a problem arises from the fact that nearly 50% are very small and not registered as a 'company' (Aktiebolag - AB) with publicly available company information. RTS has now found a solution in that information is collected at the beginning of the programme and followed up later.

- SIMPLER is a method is based on economic analysis, focusing on the relationship between the value added produced in a firm and the costs incurred. Once applied, it is a tool for strategic analysis and management monitoring. A short text explaining the method is available here: http://www.grufman-reje.se/wp-content/uploads/2012/09/Simpler-Management-in-short.pdf

So far, a total of **270 businesses have participated** in the Kurbits programme. Including the people who have committed to participating in the near future, by June 2013, there will be a total of 400 active Kurbits businesses.

Whereas the initial EU-funded Kurbits project only applied to the region of Dalarna, the current national programme has so far been **rolled out in twelve regions**: Dalarna, Kalmar, Jämtland, Härjedalen, Värmland, Skåne, Jönköping region, Blekinge, Gävleborg, Uppsala, and Kronobergs region. This autumn Örebro region will start their first groups.
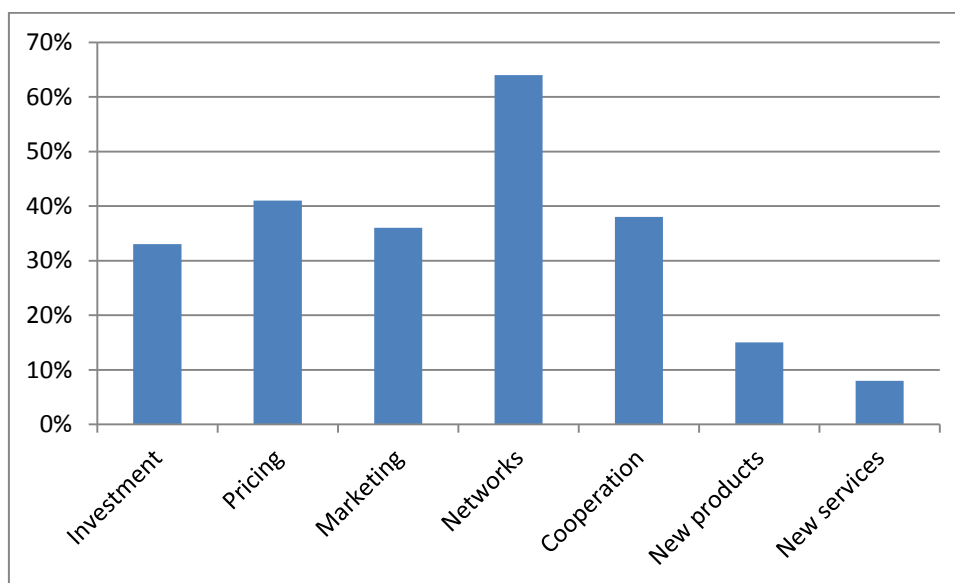
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After having finalised the Kurbits programme, **nearly all participants have carried out actual changes to their businesses** which have improved their performance and made their work easier and more structured. These range from changing their pricing structure, creating new products and services and making them available commercially on-line or developing their website, to more striking changes resulting in an improvement of turnover by 50% in some cases, growth in the number of guests by 40% and in number of 'nights' by 38%, or an increase in profitability of 25%. 27% of those participating have employed new people, of which 14% involved full time employment, all in all corresponding to 70 people having been employed as a result of Kurbits. Nearly all firms report that they have developed their networking and have started to work together with other participants of the programme.

The following chart gives an overview of the proportion of participants who have made changes to their business in different areas.

Figure 1: Proportion of Kurbits participants having changed their business in different ways

Features contributing to Improved Competitiveness

It is clear from the above results that Kurbits is able to contribute to an increase in the competitiveness of participating tourism businesses. Even if the performance of all the individual firms has not improved as drastically as some of the examples, the fact that Kurbits leads to increased collaboration between participating businesses and the building of networks, at a regional level or often within a specific destination, is a strong indication of its effect. With the constant rise in the number of regions and firms that take part in Kurbits, an improvement of competitiveness across the whole sector in Sweden is a very possible prospect.

This networking aspect of the programme also prepares the ground for more active 'destination management' in several regions, an approach that is promoted at the national level.

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The programme is completely in line with the aim of improving the professional skills of people and businesses working in the sector, as set out in the **2010 Commission Communication**. It also has every opportunity to increase the overall quality of local tourism by making individual businesses focus on how they can improve what they do and make the experience of their customers even better. The emphasis on networking between different types of company in a particular location or destination is a crucial element in the improvement of the overall experience for the tourist.

Networking at the national level between Kurbits programmes in the different regions and the Swedish Travel and Tourist Industry Federation reinforces this positive effect and creates the possibility of exchanging good practices. It also provides the opportunity for local experiences to feed into the national tourism strategy and vice versa.

Features relating to the Wider Adoption of the Good Practice

There is already a large degree of interest in Kurbits from beyond the current stakeholders: especially from other regions in Sweden than those currently involved, but also from other countries. Norway currently participates through an Interreg project.

Furthermore, the Swedish Travel and Tourist Industry Federation has obtained seed funding to develop a Flagship project 'Tourism Business Generating System' for the Baltic Sea region based on the principles of Kurbits and an application for a thematic partnership has recently been submitted as next step. The ambition is that this project will become an EU Flagship.

Although the institutional details may need to be different in different countries, there is likely to be a need for development and enhanced professionalism in small-scale tourism companies and the principles behind the Kurbits approach, and particularly the pedagogical principles, potentially have a wide application.

Further Information

http://www.kurbits.org

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I BRIGANTI DI CERRETO

CASE 11

Introduction

The initiative 'I Briganti di Cerreto' was launched in 2003 to re-invigorate the village of Cerreto Alpi, a very small village of about 80 inhabitants in the mountains of Emilia Romagna, which because of the scarcity of employment opportunities and no economic prospects was faced with the effects of depopulation with many of its young people being forced to leave. Established by a group of young residents who did not want to leave the area where they had grown up, the project has used the various professional backgrounds of its founders to create a variety of tourism and forestry activities based on the natural features of the area and its heritage. In spite of its size, the village receives up to 5-6,000 visitors each year, although many come for day-trips only. There is a strong will in the community to maintain the authenticity and atmosphere of their village and the development of the tourism activities are therefore deliberately kept in control.

The project is run by a Community Cooperative representing the whole village (it is the cooperative that is called 'I Briganti di Cerreto'). Theirs was one of the very first Community Cooperatives in Italy, a concept which has since extended all over the country together with the notion of 'Community Tourism'.

Theme

Training, skills development and capacity building': The project has been included to illustrate its contribution to 'Training, skills development and capacity building' but there are also strong elements of diversification of the supply of tourism servicers based on natural and cultural heritage, and the promotion of sustainable tourism.

Reasons for Highlighting this Project

The Briganti di Cerreto Project constitutes a very good example of how a small community has been able to reinvent itself by working together in partnership in order to develop an integrated approach to economic regeneration and sustainable tourism, thereby recreating local employment opportunities for its young people and developing professional skills to fit in with the new activities.

The project very much reflects the strategies advocated in the 2010 Commission Communication in terms of developing a type of tourist service that capitalises on Europe's diverse heritage, building quality capacity within the industry, and promoting the principles of sustainable and responsible tourism.

Project Highlights

Contribution to Tourism Policy objectives: Contributing to a diversification of the tourism offer, capitalising on Europe's cultural and natural heritage and promoting the principles of sustainable and responsible tourism, building quality capacity within the industry.

Innovative elements: One of the first Community Cooperatives in Italy and an example of how a small community can reinvent itself by working together in partnership in order to develop an integrated approach to economic regeneration and sustainable tourism; recreating local employment opportunities for its young people and developing professional skills to fit in with the new activities. Has led to the creation of a new concept: 'Community Tourism'.

I BRIGANTI DI CERRETO

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Main outputs: Tourist activities including guided tours (by foot, horses, mountain bikes, Nordic walking, snowshoe excursions...), educational trips, management of local accommodation and catering. Environmental activities such as maintenance of public and private forests and parks, production of timber, management of a chestnut production chain, production and sale of local products, breeding of wild animals and management of hunting areas.

Results and impacts: The village of 80 inhabitants receives up to 5-6,000 visitors each year, about two-thirds on day-trips only. The Cooperative has created 4 new businesses and employs 5 people permanently and 4-5 people on fixed term contracts. A territorial network of local villages has also been created.

Monitoring arrangements: This is not a publicly funded project, but as a business it is subject to business management disciplines and its effectiveness is clear from its annual accounts.

Description

Background

The idea for this project originally arose at a time when the village of Cerreto Alpi was in a very bad condition as a result of depopulation, with few economic prospects, no future for its young and when the last café had just closed. In order to do something to keep the community alive, a small group of young residents decided to set up a Cooperative consisting of 16 founding members representing each of the families in the village. The first initiative was to raise money from all families to keep the café open which would also create a few jobs. The money from running the café was then reinvested into the Cooperative, and little by little they started to think of other ways to reinvigorate the community. Using their different professional backgrounds, members of the Cooperative started to manage the forests surrounding the village and after a couple of years the Cooperative managed to break even. They gradually extended their activities into the production of traditional food, nature conservation, and environmentally friendly tourist activities. The development of activities has been a continuous process with the overall goal of making it possible and enjoyable for the village's 80 some inhabitants to live there, a majority of whom are now under 35 years of age.

Programme objectives

The main objectives of the partnership in developing the Cerreto village were:

- To relaunch the economic development of the area
- To create job opportunities for the young people, and
- To strengthen the local identity (traditional trades and crafts).

These initial goals have been achieved in a remarkably positive way since the project was first launched in 2003 and a series of new challenges have been generated with their own objectives:

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- the establishment of a network of coordinated hosting facilities aimed at different target groups and a "dispersed community hotel" composed of a combination of hotel facilities and accommodation in the hosting community

- a project called "Community Tourism for families" to be implemented by the end of 2013, aimed at creating apartments able to host families with children

- further developing the Rural Guest House in the Mill which will be enhanced with a camping area

- developing an area for tents called "Scout"

- setting up a shop for the sale of local products and staging tasting events

- the establishment of a Centre for the Development of Italian Local Community Cooperatives in accordance with the Italian Cooperatives Association (ACI).

Main Activities of the Project

Today, the activities organised by the Cooperative fall into two categories: tourist services and environmental services (forest management).

Tourist activities:

- organising guided tours with instructors for groups (trekking – by foot, horses, mountain bikes, nordic walking, excursions with snowshoes)
- educational school trips
- recreational, sporting or cultural packages for groups and associations
- management of tourist packages in coordination with tour operators
- management of the cabin used as a base for the guided tours, for renting trekking equipment and providing catering
- management of the Mill (an old mill which has renovated to provide accommodation for up to ten people)
- management and renting of apartments to tourists and other hostel-like accommodation

Environmental activities:

- maintenance of both public and private parks
- maintenance of forest trails, small building works, installation of fencing
- projects concerning the care of both publicly and privately owned forests
- services such as snow ploughing (by vehicles and by hand)
- production and sale of work timber
- management of the production chain of chestnuts (care of chestnut trees, drying, milling, sale of chestnut's flour)
- production and sale of other local products (mushrooms, truffles, forest fruits, cheeses, meat, …)
- breeding of wild animals and management of hunting areas.

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The Cooperative has also taken the initiative to create a broader, territorial network of Cooperatives in neighbouring villages with the aim of developing the communities in the whole territory.

Skills Development and Training

The training of staff is constantly evolving and in certain cases it is aimed at creating specific professional profiles (guides, instructors etc.). However, training also concerns the forest management activities (the pruning of monumental trees, the leading of pack animals, etc.) and it extends to computer skills to be employed in promoting the activities of the Cooperative, selling tourist packages, web marketing and advertising the local communities.

Funding

Initially a relatively small amount of money was collected for the Cooperative from all local families to restart the local café. This money was then reinvested into the Cooperative and Briganti de Cerreto now has an annual budget of around €320,000. In terms of the origin of the revenue about 80% is raised from forest management activities and 20% from tourism. All revenue is reinvested into the continuing business of the Cooperative.

Cerreto Alpi is the home of the first community cooperative in Italy and it is one of the most effective ones. By combining the management of the environment with a new form of tourism, Community Tourism, it has transformed what was once a small mountain village threatened by depopulation into a tourist destination strongly connected to the local community and pursuing the promotion of local identity in areas such as the environment, heritage and traditions, ancient occupations, typical products and local culture.

Features contributing to Improved Competitiveness

Although carried out at a small scale, this project is extremely interesting in terms of being able to contribute to improved competitiveness in the tourism industry. The fact that this small community has been able to reinvent itself with relatively limited resources and set up an integrated approach to economic regeneration and sustainable tourism, by pooling the creativity and resources of the whole community, is a promising development. If enough smaller communities around Europe are able to do something similar, the combined effect on the tourism industry more globally could be significant.

In fact, since this community cooperative was first created, a momentum has developed and a number of rural communities across Italy have followed suit. This, in turn, has led to the **creation of a new concept: 'Community Tourism'** which combines socially responsible economic development with the principles of sustainable tourism. As one of the Cooperative managers puts it: "The age of the classic tourism [……] is now outdated. Today tourism means the search for authenticity and for alternative places and itineraries, for authentic encounters and new and exciting experiences. Tourists want to explore places where other people just stopped by in order to discover a new point of view, experience new inner and outer paths and feed the soul not just the body".

The project very much reflects the strategies advocated in the **2010 Commission Communication** in terms of developing a type of tourism that capitalises on Europe's diverse nature and heritage, building quality tourism services and professional capacity to support them, and promoting the principles of sustainable and responsible tourism.

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Given the size of the village (80 residents) and the relatively small scale of the Cooperative's activities, their performance is quite remarkable. All in all, the **number of visitors** that come to Cerreto Alpi for the various events and activities they organise amount to around 5-6,000 people on an annual basis. If you only count the number of visitors that have been 'accommodated' they add up to approximately 1,500 per year, with some 1,000 people staying there in the summer and 500 during winter. It has to be remembered that the Cooperative is adamant that it should maintain the authenticity and atmosphere of their area, since this is exactly what the visitors enjoying this type of tourism are looking for. Visitor numbers are therefore kept relatively limited on purpose.

In terms of the **employment effect**, the Cooperative has 5 people permanently working for it and 4 to 5 people with fixed term contracts.

Since the Cooperative was started, it has been directly responsible for creating the following **new businesses:**

- a café and restaurant capable of catering for 30 guests
- a rental business hiring out equipment for winter activities
- a guided tour and instructors' business
- a business organising the rental of rooms and apartments

Other businesses that are directly or indirectly connected to the Cooperative have been set up in the village itself and within the villages that form part of the territorial network:

- a bar, a grocery store managed by a recreational association and a restaurant-pizzeria
- a trout breeding farm which also organises a tourist tour, a swimming pool and a cafeteria.

Features relating to the Wider Adoption of the Good Practice

'I Briganti di Cerreto' has a very high degree of transferability which has already been demonstrated by the fact that many similar community cooperatives have emerged all around Italy and the notion of Community Tourism has become a very popular concept.

Further Information

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DIGITAL TOURISM BUSINESS FRAMEWORK – WALES (UK)

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Introduction

The Digital Tourism Business Framework programme was initiated in 2010 by Visit Wales – the Welsh government Tourism Unit - and partly funded by the European Regional Development Fund. Its main objective is to assist tourism businesses and other supporting organisations to adapt to new digital technologies so that they can meet visitor expectations and become more competitive in the market place. The vision of the programme is that by end of 2014 Wales' tourism industry will have moved from relative e-business immaturity firmly into the digital age.

The programme includes a number of interrelated support actions including tailored ICT diagnostics and assessments of individual businesses; workshops, training and seminars; financial support of innovative pilot projects developing tools and applications; and development of digital communities and information and knowledge sharing platforms. The aim is that the tourism industry in Wales will become better equipped to generate, share and distribute tourism content and to use ICT tools to provide quality services. It will lead to performance gains and enhanced competitiveness.

Theme

The main theme of the programme is around the two key themes, development of professional skills in relation to ICT and development of innovation in the tourism sector.

Reasons for Highlighting this Project

The DTBF programme provides an example of an integrated approach to the uptake of information society tools in the tourism sector and the promotion of ICT innovation by firms and organisations in the sector. It addresses both the demand side - improving information provision and strengthening the on-line presence of firms to attract tourists - and the supply side by focusing on improving the services provided by firms and support organisations. An important feature is the formation of digital communities, which bring together different actors in order to create a mechanism for knowledge sharing and ideas creation that should have a long lasting effect.

Project Highlights
Contribution to Tourism Policy objectives: The DTBF programme follows an integrated approach towards the uptake of information society tools in the tourism sector and the development of ICT innovation by firms and organisations in the sector.
Innovative elements: An innovative feature of the programme is the formation of digital communities bringing together different actors intended to operate as a mechanism for knowledge sharing and ideas creation that should have a long lasting effect.
Main outputs: The main outputs of the DTBF include support of up to 750 tourism SMEs including ICT health checks and diagnostics, the formation of collaborative digital communities, 20 projects piloting innovative technology products and services , a user generated content sharing processes using cloud based systems, and a digital ecosystem.

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Results and impacts: While rather early, the mid-term review of the programme already identifies some positive results of the programme:

- 569 tourism businesses have already received an ICT diagnostic followed up by reviews to assess the progress made.
- around 1000 individual tourism business have visited the ShareWales website – the programme's main platform for sharing of news and ideas.
- a step up in e-business competence reported by 53% of tourism sector businesses
- 30% of the businesses that received the ICT diagnostic experienced an increase in the number of visitor numbers in comparison to 2009.

Monitoring arrangements: The programme performance is monitored on an on-going basis and there are external evaluations arranged at key stages. A set of specific targets and performance indicators have been set

Description

The Digital Tourism Business Framework project (DTBF) has been an initiative of Visit Wales – the Wales Assembly Government Tourism Unit. It was initiated in January 2010 and is expected to last until December 2014.

The project is managed on a day to day basis by Visit Wales with the assistance and guidance of a steering group comprised of experts from the business and academic communities in the area of tourism services digital media, ICT and e-commerce.

The programme is structured around four interrelated areas of intervention:

- Provision of direct support by a specialised consultant to tourism SMEs including 750 ICT health checks and diagnostic exercises, guidance on business and technology operation to encourage a more pro-active participation in digitally networked environments, training and seminars to improve ICT skills, presentation of case studies and online discussion forums. By April 2013, 569 tourism businesses had already had an ICT diagnostic performed and this will be followed up by reviews to assess the progress made.

- Financial and logistical support from the Visit Wales team for the formation of collaborative digital communities in various areas around Wales, to assist in the collection, up-dating, exchange and distribution of digital travel related information and to develop ideas for projects.

- Funding of up to 20 projects, competitively selected, and piloting innovative technology products and services including support for feasibility studies and the development of digital technology solutions to improve visitor experience in key tourism attractions[16]. Project funding ranges between £20k and £200k (€25k – €250k). Many of the projects are a result of the ideas developed by the digital communities and are also expected to reflect ideas developed in the technology horizon scanning, that has reviewed the current state of the technology

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[16]http://www.dmwales.com/sites/default/files/fckupload/file/1_Digital_communities_pilots_overview_v1%207.pdf
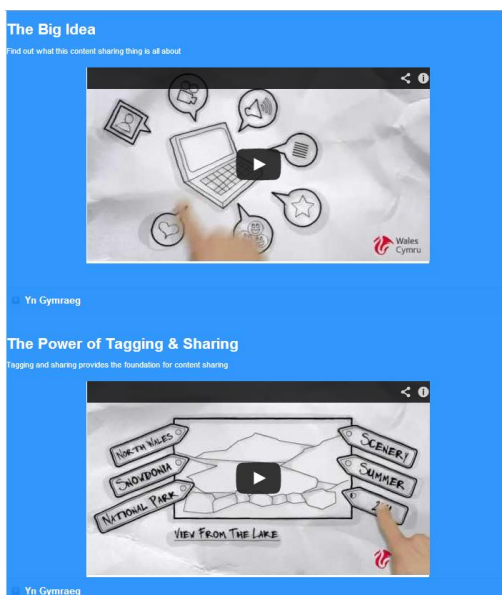
DIGITAL TOURISM BUSINESS FRAMEWORK – WALES (UK)

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- Activities by the Visit Wales team promoting user-generated content sharing processes, using cloud based systems, the development of a pan-Wales tourism sector knowledge base (digital ecosystem) and an open interoperable platform, plus demand creation using the content. Digital communities receiving support from the activity described above are required to make their data available to Visit Wales for integration into the wider digital tourism community in Wales. The technology horizon scanning by the DTBF team is also part of the programme activities with information provided in a relevant blog to facilitate an exchange of ideas[17].

The initial budget allocated to the programme was £17.4 million (€20.5 million) but this was subsequently brought down to £9.3 million of which € 5 million came from the European Regional Development Fund and the remaining part from the Welsh government (£3.1 m) and the private sector (£1.2 m), in the form of contributions to specific projects.

Project objectives – intervention logic

The Digital Tourism Business Framework project came as a response to the recognition of the increasing role and importance of ICT for the tourism sector. Earlier studies – e.g. the Henley Centre "Futures" project in 2003 – had identified that a key driver in relation to tourism in Wales was the need to engage fully and embrace the emerging digital environment in order to drive tourism forward. The available data at that time indicated a low level of penetration of ICT in the tourism industry. The 2006-2007 a review of the use of the ICT by key sectors in Wales[18] - including hotels and restaurants - demonstrated that tourism businesses reported the lowest level of internet connectivity of all sectors at 41%. Only 5% used customer relationship management systems, 75% of tourism businesses had a website but only 32% sold on line and only 10% received payments on line. In the Tourism Strategy for Wales for 2006 – 2013 (Achieving Our Potential)[19] it was recognised that Wales's tourism industry – comprised mainly of small businesses-remains fragmented in its online visibility. It was suggested that Wales needs to extend its visibility and the tourism industry must be encouraged to accept and use modern technological innovations as essential marketing tools.

The Tourism strategy document set out a vision of tourism for 2013 as a 'customer responsive, innovative, sustainable and profitable industry which makes an increasing contribution to the economic, social, cultural and environmental well-being of Wales. The digital environment was increasingly seen as an integral part of this vision. The 5 year Strategic Plan for Visit Wales highlighted the need for the tourism industry in Wales to adapt quickly and fundamentally in order to

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[17] http://www.sharewales.com/
[18] State of the Nation report published by the eCommerce Innovation Centre (eCIC) at Cardiff University
[19] http://www.tpnw.org/docs/strategies/Acheiving_our_potential_ENG.pdf

DIGITAL TOURISM BUSINESS FRAMEWORK – WALES (UK)

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be competitive and the tourism strategy for Wales identified the need to invest in new skills, approaches and technologies as one of the Strategic Priorities.

The Digital Tourism Business Framework project (DTBF) is very much integrated into the priorities defined in the 'Achieving our Potential' document. It aims to address a number of challenges and weaknesses of the tourism industry in Wales and help firms take full advantage of the opportunities presented to them by new technologies and move them further up the e-adoption ladder. It aims to be radical, seeking to achieve a paradigm shift in the way the tourism industry sees itself as operating by encouraging the effective networking of the players in the digital community environment and the exploitation of innovative content, services, distribution and applications.

The aim set by the project promoters is that by December 2014, the tourism businesses in Wales will be more conversant and efficient in their use of emerging digital technologies so that they are more competitive, attract more tourists to Wales and provide visitors with a better experience during their stay. Firms should be able to make efficient use of the growth in the amount and quality of information and services available on-line, given that the way that visitors access and use information, pre-trip, on-trip and post trip has changed considerably in recent years.

Features contributing to Improved Competitiveness

The activities of the DTBF programme aim to improve the competitiveness of the tourism sector by directly strengthening the use of ICT tools within firms and organisations, and addressing both demand and supply aspects. Then, rather than adopting a one-off approach, the projects aims to reinforce the initial effects by developing an innovative and sustainable support environment, through the formation of digital communities, knowledge exchange and the use of an open platform that will be the basis for creating new ideas and innovation in the form of online and digital tourism services. Through a competitive process it funds innovative approaches from digital tourism communities and individual businesses that assist the wider industry to grow its knowledge and capabilities.

Since the programme activities are still ongoing it is not possible to assess longer term results or impacts. However, monitoring and evaluation are an integral part of the programme with three "stage gate" reviews set to assess progress and make any necessary changes and the relevant baselines have also been established. Specific targets were set at the outset of the programme launch and for some of them the mid-term review report indicates some positive results:

- By 2014, 50% of recorded tourism businesses in Wales will have improved their e-commerce performance as measured by the e-business ladder adopted for tourism. The mid-term review indicates that 75% of businesses see themselves as being in the third step of the e-business ladder[20] with 54% indicating that they are going up a step in the ladder. The recent mid-term report indicates that an average of 2.4 new or improved products, processes or services per business have been developed as a result of the ICT diagnostic support; a total of 439 (against a target of 400) amongst the survey sample of 183 businesses. Furthermore, the study indicated high levels of satisfaction for the ICT diagnostic support provided. 67% of firms surveyed

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[20] typically referring to firms that order and pay online

DIGITAL TOURISM BUSINESS FRAMEWORK – WALES (UK)

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indicated that they are now confident that they are using the right technologies for their business and 58% agreed they had improved efficiency through the use of technology.

- 50% of supporting organisations (e.g. Visit Wales, Tourism Marketing Areas, and Regional Tourism Partnerships) will have improved their digital business skills (measured by an adaptation of the e- commerce ladder for non-commercial support organisations)

- 50% of Wales' recorded tourism industry will be part of a self-sustaining, open, local digital tourism networked community that is proactive and innovative. At this stage, the data provided suggest that around 1000 individual tourism business have visited the ShareWales website – the programme's main platform for sharing of news and ideas (around 22% of total recorded tourism businesses).

- Business generated via digital demand creation will have increased by 50% in comparison to 2009. At this point, the mid-term review results indicate that for 30% of the businesses that received the ICT diagnostic there has been an increase in visitor numbers.

Table 1 – Mid-term Performance of DTBF programme

Indicator	Target	Result by April 2013
Enterprises assisted	750	569
Enterprises financially supported	50	44
New or improved products, processes or services launched	406	439
SMEs at step 3 of e-commerce maturity ladder or progressed one step	12.5%	75% at step 3 54% progressed one level
SMEs using www.sharewales.com	15%	22%

Source: DBTF Mid-term report

Features relating to the Wider Adoption of the Good Practice

There are no evident obstacles to the transferability of the specific practice to other regions and countries. The promoters consider that what is important is the close engagement with the tourism sector and the adoption of a tailored approach to the provision of ICT support that fits to the specific needs of the firms rather than the more generic and horizontal provision of ICT training. In the case of the programme, this meant the gradual identification among the broader pool of ICT consultants of those with expertise and experience in the tourism industry. The provision of tailored support is also critical in attracting the interest of firms in the sector, achieving a high level of participation and a sizeable effect.

Given the fast developments in the ICT sector, another key aspect is the provisions of a continuous update of the information and guidance. In the case of the DTBF this is served through the continuous update of the ICT support provided as well as the digital platforms and forums developed that provide access to information on new activities and developments.

The capacity of Visit Wales to manage the implementation of the programme is also an important supporting element. However, the Visit Wales representative considers that a less formal government role and a greater engagement of the tourism industry – through the local tourism associations – would help to reach a wider business audience.

DIGITAL TOURISM BUSINESS FRAMEWORK – WALES (UK)

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Further Information

http://wales.gov.uk/topics/tourism/dtbfl1/?lang=en

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POSTCARDS FROM THE BALTICS – EXPLOITING DIGITAL ASSETS (LV)

CASE 13

Introduction

Over the last ten years cultural and heritage organisations have been accumulating a veritable treasury of digital assets – images and recordings of objects in collections and archives, events, performances etc. Europeana provides a single access point to more than 20 million books, paintings, films, museum objects and archival records that have been digitised throughout Europe, and gathered from hundreds of individual cultural institutions.

Easy access to reliable information and striking images for illustrative purposes is a basic resource, especially for those wishing to promote and support culture and heritage-based tourism, but also for any business wishing to highlight the attractive and interesting features of a destination. Exploitation of this resource can take various forms including applications for use on-line or in mobile devices.

Europeana 'Hack4Europe' Hackathons are informal workshops gathering software developers from across Europe to develop innovative applications through the Europeana Application Programming Interface (API) which gives access to the full database of cultural heritage objects available on the Europeana portal.

At each of these Hackathons, applications with the greatest commercial potential, the greatest social impact, and the most technically innovative are rewarded.This case study describes 'Postcards from the Baltics', a tourism-oriented pilot project,which was developed at the Europeana Hackathon event held in Riga in 2012. The application received an award in the category 'Greatest commercial potential'.

Theme

Developing the use of ICT: the development of smartphone web-based applications to provide interactive services for visitors and potential tourists, using Europeana digital assets.

Reasons for Highlighting this Project

'Postcards from the Baltics' is an innovative smartphone application that exploits the cultural heritage of the Baltic region to attract tourists with cultural interests. It has the potential to enrich the experience offered by the region's tourism industry and to contribute to diversifying its offer.

However, its interest in the context of the Good Practice project is that it provides an example of how a significant resource for the tourism industry – the large repository of digitised cultural assets (to a large part of which Europeana gives access) - can be exploited to revitalise existing attractions and enrich the tourism offer.

The Postcards from the Baltics project was the winning project in the 'Greatest commercial potential' category at the Europeana Hackathon held in Riga, Latvia, in 2012.

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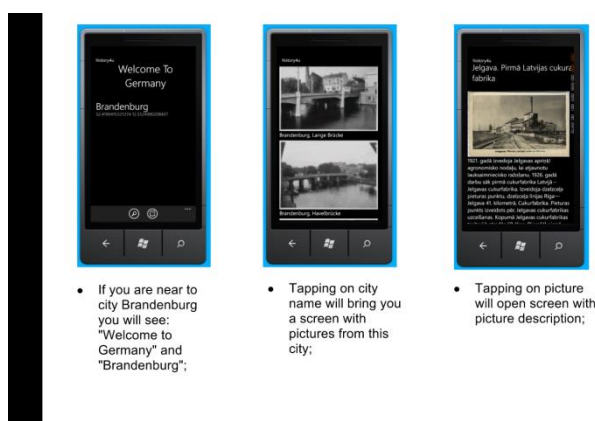| Project Highlights |
|---|
| **Contribution to Tourism Policy objectives:** Developing ICT in the tourism industry and diversifying the supply of tourism services by exploiting a major digital resource |
| **Innovative elements:** Use of Europeana's digital images and recordings to develop a mobile phone application offering a cultural experience to tourists already present in the Baltic region and provide information about the cultural heritage of the Baltic region to potential tourists |
| **Main outputs:** Smartphone application making use of the Europeana API and database as primary source |
| **Results and impacts:** a pilot project demonstrating potential |
| **Monitoring arrangements:** n/a (pilot project) |

Description

Europeana Hackathons aim to promote dialogue and the sharing of experiences among software developers and stakeholders in a range of sectors (e.g. culture, tourism, leisure) with the objective of making cultural data more openly available for various purposes.

At these Hackathon events, participants are encouraged to experiment and try out ideas in the creative re-use of the Europeana content, with a view to building applications that showcase the social and business value of open cultural data.

At the Europeana Hackathon held in Riga, Latvia, in 2012, the Postcards from the Baltics project aimed to create an application that tourists could download before or during their trip to one of the Baltic States in order to learn more about the heritage of the area and share the information with their friends and contacts. The application provides access to photographs and images of a series of locations around the Baltic countries dating from the beginning of the 20th century to shortly before World War II. Around 6,000 photos and postcards from the Baltic countries (mainly Latvia and Lithuania) are available from the Europeana database. This allows users to see how particular locations looked in the past and helps them to get better acquainted with the landmarks and architecture of cities and countryside towns that they are visiting.

- If you are near to city Brandenburg you will see: "Welcome to Germany" and "Brandenburg";

- Tapping on city name will bring you a screen with pictures from this city;

- Tapping on picture will open screen with picture description;

The application is also of interest to local people and can help stimulate an interest in the history of the area where they live.

The smartphone application automatically detects the user's location and allows all available photographs of the location to be downloaded. Alternatively, users also have the possibility to search for other cities. Tapping on a city name from a pre-defined list will bring up a screen with pictures from

POSTCARDS FROM THE BALTICS – EXPLOITING DIGITAL ASSETS (LV)

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the chosen city. Tapping on a picture enlarges it and a description of the picture is provided.

Projects developed at Europeana Hackathons make use of the Europeana Application Programming Interface (API) which gives access to the full database of cultural heritage objects available on the Europeana portal. Software developers are encouraged to exploit the API to automate and streamline data searches on cultural repositories and libraries. The 'Postcards from the Baltics' application uses the API to search automatically for cultural heritage items from the Baltic region according either to the tourist's current location or areas that are potentially of interest.

Android technology is used to connect to the Europeana API and, in line with the Hackathon rules, www.europeana.eu is the primary database. Europeana is an open data source. The application also uses GPS technology and the Google Maps API to find users' current coordinates.

The application is easy to download and use and consequently provides users with an easy and simple way of viewing different places of interest in the Baltic States. A useful insight into the history of an area to be visited is provided in a quick glance.

In addition, there is a social application that allows users to share their adventures via Twitter, Facebook, Google + and other social networking platforms. In this way the Postcards from the Baltics service is helping to integrate Baltic destinations into all the major social networking websites and thus into an important dynamic for the development of tourism activities in the era of the 'experience economy'.

Furthermore, there is scope for further exploitation of the application through its integration into the websites of tourist information centres through links and advertisements. In this way , the application could provide a ready tool fortourist information websites in the Baltic States, especially since the open data regime of Europeana allows public tourism organisations fulfilling their public service mission to use the resources available through Europeana to open up access to cultural heritage. This could lead to the creation of new services based on the creative reuse of material.

Although small scale, the Hackathon concept and 'Postcards from the Baltics' application in particular, demonstrate the possibility of exploiting digital cultural assets in ways that not only enrich the experience of existing destinations, but also offer an 'open innovation' route to diversifying the offer and developing new destinations.

Features contributing to Improved Competitiveness

The digital assets of Europe's cultural institutions – images, film, scanned documents and other data objects - can provide an immediate impression of so many aspects of Europe's rich cultural inheritance and for many destinations and regions, these assets can be accessed through the Europeana portal. The fact that there is now so much of this material and in so many forms means that it constitutes a major resource, especially for those in the tourism industry that are attempting to diversify their offer and emphasise its cultural dimension.

Simply making creative use of this material in any form contributes to a better integration of a destination's cultural aspects into its overall offer and enhances the destination's image, marketing and overall competitive position. However, encouraging creativity, both in the imaginative use of the material and in the computing skills deployed, adds an additional element, especially at a time when

POSTCARDS FROM THE BALTICS – EXPLOITING DIGITAL ASSETS (LV)

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there is an explosion of promotions using social media and in the development of applications for mobile devices.

In bringing together software developers from all over Europe with the objective of creating inventive and innovative applications, the Europeana Hackathons are a simple and direct way of encouraging creative exploitation of cultural content and the case from the Baltics shows how they can have a clear application for tourism. At this stage, their direct contribution to performance has yet to be demonstrated, but it is easy to see that they have the potential to generate some very useful developments, especially, if the approach is adopted more widely.

Features relating to the Wider Adoption of the Good Practice

Europeana Hackathons are a useful way of drawing attention to the resources that are available to tourism and closely related industries and demonstrate potential applications of these resources in ways that could be of interest to a wide variety of destinations. Furthermore they directly encourage innovation and creativity. At the same time, they are relatively easy to organise and would be even more effective, if they had a higher profile among potential users. Organising similar events elsewhere, therefore, would not only be relatively easy, but would also represent a useful way of contributing to the general effectiveness of this instrument.

Specifically in relation to the Postcards from the Baltics project, a simple smartphone application was developed that is easily replicable in other Europeans regions, where similar material drawn from the Europeana database could be used. The developers would be pleased to hear from other potential users.

Further Information

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Europeana :   http://www.europeana.eu/

http://www.pro.europeana.eu/web/guest/re-use-data

http://pro.europeana.eu/web/guest/prototypes-latvia

CODE OF CONDUCT FOR CUSTOMER-FRIENDLY ONLINE-MARKETING & COMMON DATA STANDARD – DRV-VIR (DE)

CASE 14

Introduction

The German Travel Association - Deutscher Reiseverband (DRV) has sought to improve the competitive position of its members and their relations with their customers by a series of developments designed to improve their online services. Two of these - a Code of Conduct for customer friendly online-marketing, where it has worked with the German Association of Online Travel Agencies (VIR), and a new data standard - are highlighted in this good practice case.

Theme

Developing the use of ICT*:* This case illustrates the use of ICT developments to address marketing issues.

Reasons for Highlighting this Project

The introduction of appropriate Information and Communication Technology (ICT) can improve the efficiency of business processes, the marketing and ultimately the productivity and performance of almost any enterprise. Practical initiatives from the industry are particularly important in promoting developments of this kind. This case shows how the German Travel Association (DRV) is promoting ICT developments that can strengthen the market position of its members and improve their efficiency.

Project Highlights
Contribution to Tourism Policy objectives: These technical developments have improved the ability of the industry to provide accurate and detailed information to customers, enhancing the competitiveness of suppliers and intermediaries.
Innovative elements: New standards of conduct and data collection
Main outputs: A Code of Conduct for on-line marketing and a new data standard
Results and impacts: The Code of Conduct has been adopted by most of the main operators in the German market. It is still early days for the data standard, but it can be licensed and its take-up will this be monitored.
Monitoring arrangements: This is an initiative from the industry, but the take up of both elements will be apparent.

Description

DRV is an association for tour operators and travel agents in Germany, but also has a wider group of associate members in areas such as hotels and car rental, such that overall it covers around 80% of the industry and is broadly representative of the industry as a whole. DRV explores a series of themes relating to ICT developments that are of interest to the industry. Among these, two in

CODE OF CONDUCT FOR CUSTOMER-FRIENDLY ONLINE-MARKETING & COMMON DATA STANDARD – DRV-VIR (DE)

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particular are highlighted in this case: the Code of Conduct for customer friendly online-marketing and a new data standard.

The Challenge

Tourism has been a significant driver of Internet development and other forms of information technology. Equally, the availability of extensive information and online services has caused major changes in the way that tourism services are marketed and has prompted innovation in various forms, not least in the business models and processes of suppliers of tourism services. One of the consequences has been an increase in independent travel, resulting from the direct contact made possible by the Internet between providers of tourism services, such as accommodation or transport, and the tourist. However, in view of the vast amount of information available and the time and effort required for searching and finding the right deal, there has been scope for the development of new mediating services, for instance in the form of comparison sites, and also for a competitive response from the more traditional forms of travel business. Essentially this response has been in providing a better service of higher quality.

Improvements in the quality of online services have been in a number of different forms. Increases in the amount of information available and improved clarity and better design features in the presentation of information have obviously been important considerations throughout the development of online services, but measures to improve the confidence of potential clients in the accuracy and fairness of the information provided is also important for customers themselves and individual providers and equally for the industry as a whole, since trust in the online systems is critical for maximising the number of transactions that take place.

Similarly, improvements in the accuracy and detail of the information that can be sought by tourist consumers and an ability to match provision with ever more precise requirements are also significant developments in the quality of the service provided, irrespective of whether they are made available by online or high street intermediaries. These developments in turn heighten the competition between the different means through which access to tourism services is delivered and lead to further innovations and improvements in the services on offer.

In Germany, the industry itself identified two particular areas where there could be improvements in the quality of the services offered and where the DRV could play a useful mediating role. These are explained in the next two sections.

A Code of Conduct for Customer Friendly Online-Marketing

The development of the Code of Conduct for Customer Friendly Online-Marketing was an initiative to ensure that online marketing was not misleading and that it was conducted so as to allow fair and undistorted competition between providers. It invited operators in the tourism industry to commit

CODE OF CONDUCT FOR CUSTOMER-FRIENDLY ONLINE-MARKETING & COMMON DATA STANDARD – DRV-VIR (DE)

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themselves voluntarily to conforming to minimum standards, to avoiding unfair practices and, more generally to conducting themselves in line with ethical principles. In particular, they should not seek to seek a competitive advantage by manipulating search procedures.

Part of the problem was that studies had shown that customers clicked on an average of 36 links on the Google results page before they found a suitable offer. This considerable effort clearly has the potential to undermine the online market, as customers found that online booking was becoming simply too complex and difficult for the customer.

The Code of Conduct was developed in conjunction with German Association of Online Travel Agencies - Verband Internet Reisevertrieb (VIR), which represents German online travel portals, including include eight of the largest online travel companies in Germany. VIR members are also members of DRV.

The Code of Conduct is recommended as a voluntary undertaking to the members of DRV and VIR and their associated companies, but it is addressed to all companies in the tourism industry and can be adopted by non-member companies; it supplements and reinforces legal obligations and it applies until it is revoked. Adoption of the Code by companies can be indicated on their web sites and in publicity by the use of a special logo (with slightly different versions for members and non-members).

The Code has the following provisions, relating to the use of the identity of other companies, the nature of the product advertised and advertising claims:

- It bans the use of trademarks, corporate logos or company names of a third-party company or protectable components with the intention to deceive and/or the use of the identity of another company in a deceptive form as a keywords e.g. within Google 'Adwords'
- This applies on screen or as metadata (unless this corresponds to the content offering of the page)
- No protected domain names can be used by other parties
- Members are committed to checking, as part of their usual duty of care, whether the rights of third parties are being infringed by an online marketing measure.
- A travel agency may not intentionally advertise products which it does not actually offer in its range of services.
- On activating a link, a user must be immediately directed to the advertised product and not diverted to other offerings.
- A travel agency may not give the impression through advertising that it is the service provider/operator or that it has a closer proximity to the product than other agencies.
- Factual, service-related advertising claims must correspond to the facts and comply with statutory provisions. Only services which the customer will actually receive may be promised.
- This applies specifically to rebates or other concessions offered by the provider.

Compliance with the Code of Conduct is audited by the DRV and VIR. If there is a violation of the Code of Conduct DRV and VIR reserve the right to withdraw the Code of Conduct logo from the relevant URL.

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A New Data Standard

Being able to match the nature of a holiday, the attractions, the accommodation and the other elements of a tourist package to the customers' precise requirements is a competitive factor that has become more and more important for DRV members, who in spite of pressure from customers seeking a wider range of tourist experiences and from those offering services directly to clients, continue to account for over 45% of the German travel market. The Association's members have therefore sought to maintain this position by improving the quality of their services and, in particular, by being able to identify appropriate potential offerings with greater precision.

The basic computer programs used by travel agents in Germany to identify offerings potentially matching what the customer is seeking were originally developed in the 1980s and although there have been on-going modifications since, there was a need for a more fundamental review of the nature of information that is provided and stored in such systems. Detailed searches cannot be conducted if the information is not there in the system. Furthermore, for the most efficient searching, it would help if terminology could be standardised.

It was also necessary to take account in changes in legal requirements.

The main components of the data standard are DRV GlobalTypes and the DRV Request Interface.

DRV GlobalTypes are used for product descriptions. 18 categories of service have been defined ranging from different types and aspects of accommodation, meals and location to transport arrangements and modes of payment. Within these categories, particular attributes are defined within a structured hierarchy that allows three levels of detail. Each attribute has a standardised definition and is assigned a specific code.

All attributes of tourism services are defined by tour operators themselves. It is up to the operators to decide how their products are presented in sales systems. GlobalTypes then enables those selling the services to find offers made by operators that meet the criteria desired by the final customer, in detail that goes well beyond a simple price comparison.

Since GlobalTypes use standardised codes, they allow standardised attributes to be assigned to the products to be searched. This ensures that attributes such as "partial sea view" or "close to beach" are always based on the same criteria, but also allows information requests to be made across different systems. The standardized offer attributes can be transmitted to sales systems in any data format and requested online using the DRV Request Interface.

The standardized DRV Request Interface supports product searches using DRV GlobalTypes. This means that travel agents and online travel sites can develop their systems, so as to be able to access information presented using DRV GlobalTypes without any difficulty. The interface allows the classic request processes of existing sales systems (e.g. regional lists, hotel lists, date lists) to be used, plus additional novel requests (offer matrix, offer calendar, etc.). In this way it can allow more precise information to be provided to customers and can also support the development of new, innovative front-ends that take advantage of the additional capability offered by the data standard. Furthermore, the Request Interface was consciously formulated to be non-specific to product type, so that requests can be made across product types, allowing richer information to be provided.

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In technical terms, the definition of the data structures is spread among several XML Schema files. This makes it easy to develop appropriate client applications, because advanced programming languages (e.g. Java or .Net-based languages) provide tools that can directly generate the appropriate source code from such Schema files. Furthermore, the Request Interface is a SOAP (Simple Object Access Protocol) web service and the formulation in any new system is accordingly done in a WSDL (Web Services Description Language) file. The data structures used by the interface for "Request" and "Response" are formulated in XSD files (using XML Schema Definition) and are included within the WSDL. Both formats are XML-based and consequently independent of platforms, protocols and programming languages. At a technical level, therefore, the DRV data standard offers tremendous flexibility.

There is on-going development of the data standard through the 'GlobalType Center, an online application that allows system-supported maintenance of the GlobalTypes while the system is in operation. Downloads giving access to the most recent GlobalType lists are available for all licensed operators and sales systems. In addition there are facilities to make requests for changes and/or a new setup.

Features contributing to Improved Competitiveness

The two initiatives outlined add directly to the competitiveness of the tourism industry. In the case of the Code of Conduct, the implementation of its terms ensure that a direct and fair comparison can be made between the different offers of providers, that customers are enabled to access the information they are seeking more easily and that their confidence in the on-line purchasing of tourism services is being enhanced. In this way competition in the industry is intensified, a better quality service is being provided and, especially in the long run, more customers are being encouraged to enter the market.

The data standard allows a better service to be provided, by making better quality information available and allowing customers to obtain a service package that better meets their precise requirements. Better comparability is possible between various products on offer, special requests can be dealt with more efficiently and the quality features of each operator can be highlighted. Face to face sales can be delivered more quickly and efficiently and online sales can offer more efficient searching, higher transparency and improved comparability of the nature of the offer and prices. In short the data standard helps to improve the quality of tourism services.

Both the Code of Conduct and the development of the data standard are direct responses to needs identified by companies in the tourism sector   The Code of Conduct is open, on a voluntary basis, to DRV and VIR members, but also to firms in related areas and it has been widely taken up in Germany. The data standard has been developed in a way that allows its adoption (subject to licence) by a wide range of enterprises and software providers in the industry, both in Germany and over a wider area. This process will take some time and so far it is difficult to assess how extensively it is being used, but interest from other countries suggest that there is scope for it to be used widely. The effects on customers of both initiatives are also yet to be gauged. Germany continues to have a buoyant online market.

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The spill-over effects on other industries are obvious in the case of the effects of the data standard on software suppliers, since they are needed to implement the standard. Otherwise the impacts of the two initiatives are principally on the competitiveness of the tourism industry.

Features relating to the Wider Adoption of the Good Practice

The Code of Conduct could easily be adopted more widely

DRV GlobalTypes and the DRV Request Interface are the property of the German Travel Association (Deutscher ReiseVerband, DRV). Utilization of both aspects of the data standard is subject to authorisation and licensing by DRV's service subsidiary, DRV Service GmbH. However, DRV Service is happy to discuss licensing arrangements, well beyond its membership and is already in discussion with various associations outside of Germany.

There is clearly a case for a wider adoption across Europe of similar approaches. Apart from the advantage to be gained from improving the general quality of information available, even the existing system could be enhanced by a wider adoption across Europe, since tourism services are often provided for German customers in other countries and may involve non-German tour operators. It is understood that discussions about a more general adoption of the data standard's approach are being discussed with ECTAA, the group of European Travel Agents' and Tour Operators' Associations.

Further Information

http://www.drv.de/

www.v-i-r.de/vir-verband-verhaltenskodex.htm

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TOUREG (BG, EL, PT, RO, ES, SE)

CASE 15

Introduction

TOUREG project was a project financed by the 7th Framework Programme for Research with the participation of partners from six regions in Spain, Portugal, Greece, Sweden, Bulgaria and Romania and the objective of contributing to the establishment of research driven clusters in the tourism industry to support the development of application of technologies in the tourism sector. The main activities of the project included an analysis of the supply and demand of technologies relevant to the tourism sector and the development of an online tool to facilitate technology transfer and partnerships among firms. It also included a comparative analysis of existing public R&D and innovation policies in relation to the tourism sector in the participating regions which aimed to contribute to the development of more targeted and relevant policy measures.

Theme

Developing the use of ICT*: the themes covered by the TOUREG project mainly relate to the use of ICT to develop innovation in the tourism sector and to strengthen the knowledge base and understanding of the tourism sector.

Reasons for highlighting this Project

The TOUREG project has a number of interesting aspects in line with the broader EU policies. The key part is the promotion of innovation and the integration of technology in the tourism services sector. The interesting aspect is the objective of establishing the foundations for a viable technology cluster around the tourism sector bringing together research organisations, firms and public authorities. In this direction the aim of better integrating tourism into R&D and innovation support policies is also particularly relevant.

Project Highlights
Contribution to Tourism Policy objectives: Strengthening of the competitiveness of the sector through the development of a platform to support the identification and adoption of ICT and other technologies by firms in the tourism sector and to promote the establishment of a technology cluster.
Innovative elements: Establishing the foundations for a viable tourism technology cluster, bringing together research organisations, firms and public authorities. Integrating tourism into R&D and innovation support measures.
Main outputs: project website (www.tourisminnovation.eu) visited over 43,500 times since 2008; report analysing the situation of tourism services in the participating regions (downloaded 10,600 times); a technology map presenting supply and demand for technologies for tourist services;

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technology transfer and possible collaborations.

A total of 100 technological solutions and 132 were initially registered[21]

a handbook, newsletters and a report on the project, together with a Joint Action Plan for the creation of an R&D cluster.

Results and impacts: The co-ordinators of the project could not indicate measurable results or impacts as a result of TOUREG activities but pointed out that the project has established the basis for the formation of a technology cluster closely linked to the tourism sector.

Monitoring arrangements: The monitoring arrangements were those established for FP7 projects and are available through the project website.

Description

The TOUREG project was an FP7 project implemented during the period 1 January 2008 – 31 December 2010 with the participation of partners from six regions in Spain (Balearic Islands), Portugal (Madeira), Greece (Crete), Sweden (Luleå), Bulgaria (Sofia) and Romania (Bucharest). The partners included public and private R&D organisations, innovation support agencies, enterprises and public authorities. It was coordinated by the Directorate General for Research, Technological Development and Innovation of the Government of the Balearic Islands.

Its strategic objective was the establishment of a multinational research-driven cluster bringing together firms in the tourism sector and public and private providers of relevant technologies which could serve as a platform for the generation and the application of knowledge and technologies to strengthen the competitiveness of the tourism industry. The project's general objectives were to:

- To adapt and strengthen R&D and innovation policies related to the tourism sector.

- Facilitate the generation and transfer of R&D+I knowledge in the tourism sector.

- Establish a platform for the generation of knowledge in the tourism sector.

- Increase productivity in the tourism sector through 'upskilling' and the use and promotion of new technologies.

- Exchange experiences among the participating countries and regions.

The project aimed to address the low level of awareness of the possible benefits of R&D and innovation among firms in the tourism sector – particularly among SMEs- by facilitating the linkage of tourist service SMEs with providers of technologies and showcasing the benefits of adopting new technologies and new business models. It also aimed to strengthen R&D and innovation policies linked to the tourism sector, an aspect of R&D policy that tends to be underdeveloped. The inclusion of participants from Bulgaria and Romania – regions where the tourism services sector is less developed – was also intended to support the transfer of experience from the regions of Spain, Portugal and Greece.

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[21] http://www.cepis.org/upgrade/files/amengual-II-2010.pdf

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The project had a total budget of €979,000 and it was organized around a number of work packages with the joint participation of the partners from the different regions. During the 30 months of its duration the main outputs of the project included:

- a project website (www.tourisminnovation.eu) intended to promote contacts among SMEs, research centres and regional players;

- a report analysing the situation of the tourism services sector in the regions taking part in the project including a SWOT analysis;

- a technology map presenting supply and demand for technologies related to tourist oriented services in the participating regions intended to facilitate technology transfer and possible collaborations. The technology mapping was based on an interview and survey programme of over 100 tourism SMEs and technology suppliers in the six regions. These analyses were used in the development of an online tool[22] intended to operate as a virtual market place linking demand for ICT, energy and green technologies with providers of such technologies within the specific regions and thus to address the demands and needs of firms in the tourism sector. A total of 100 technological solutions and 132 requests for solutions from firms were initially registered[23] to be further extended with the electronic submission of information from SMEs supplying technologies or seeking solutions;

- a report identifying actions of mutual interest at regional and at trans-regional level and of technologies and applications with transfer potential including a pre-feasibility analysis of potential projects;

- a handbook addressed to SMEs, technology suppliers and policy makers on how to efficiently apply the new technologies – with particular focus on ICT - in the tourism sector;

- two newsletters referring to projects, products and activities in the tourism sector in the different regions;

- a report with conclusions and recommendations for possible future directions of public R&D and innovation activities focused on the tourism sector;

- a Joint Action Plan for the creation of R&D cluster including proposals for mutual action that could be financed through existing EC programmes (FP7, CIP).

Features contributing to Improved Competitiveness

The project clearly aimed to support the competitiveness of SMEs in the tourism sector both in the short term – by bringing together technologies and technology suppliers that address various needs of tourism SMEs – but also by contributing to raising awareness of the role of R&D and innovation among tourism businesses and among policy makers. It also contributed to strengthening the knowledge base in relation to the tourism sector, with particular focus on the use of, and the demand for, technology.

The co-ordinators of the project could not indicate measurable results or impact indicators but pointed out that the project has set the basis for the formation of a technology cluster closely linked

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[22] http://www.tourisminnovation.eu/index.php/technology-map/solutiontechnology
[23] http://www.cepis.org/upgrade/files/amengual-II-2010.pdf

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to the tourism sector. This formation of the cluster is expected to be further supported as part of a second phase of the Toureg project which is currently under discussion among some of the Toureg partners. It is expected to include a wider range of partners across Europe and to support specific activities supporting the formation of an active cluster.

At the same time it was suggested that, at least in the case of the Balearic islands region, there was a direct utilisation of the results – in terms of the knowledge created and lessons learned concerning the development of R&D and innovation policy for the tourism sector. These lessons fed into the new Regional innovation strategy of the Balearic islands in which more than 80% of the economic activity is related to tourism.

The project was expected to have a particular impact on the Romanian and Bulgarian regions but it has not been possible to identify the extent of such a contribution.

Features relating to the wider adoption of the good practice

There are no obvious obstacles to the transferability of the project activities to other regions. By its very nature the project is a cross-regional project intending to transfer experiences among different regions. Furthermore, according to the project coordinator the objective is to invite additional actors from other regions in a possible second phase of the project. It is equally possible that a similar cluster can be formed among other groups of regions bringing together tourism services, R&D and technology providers and public organisations.

Further Information

http://www.tourisminnovation.eu/

http://ec.europa.eu/research/regions/index_en.cfm?pg=projects&lg=en&country=greece&region=el43&project=toureg

LET'S PROMOTE POLAND TOGETHER (PL)

CASE 16

Introduction

'Let's Promote Poland Together' (*Promujmy Polskę Razem*) was a project that aimed to create a new presence for Poland on the Internet, promoting the country as an attractive destination for both Polish and international tourists. It was led by the Polish Tourist Organisation but an important aspect of the whole project - suggested by its title - was the active two-way collaboration between the central agency and those operating on the ground in the regions. The project made use of the Internet's interactivity to build on tourists' experience of major events held in Poland between 2010 and 2012 and to further develop the country's tourism industry by drawing attention to its rich and diversified natural and cultural heritage. It had three inter-related elements: an advertising and PR campaign, a new and efficient tourist information system and a programme of training activities, bringing about a transfer of knowledge.
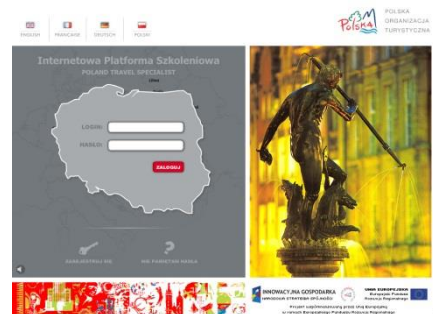
Theme

Developing the use of ICT: the use of the Internet to support the marketing effort by using online facilities to enhance the marketing and the knowledge of those providing tourism services through e-learning packages and regional training courses.

Reasons for Highlighting this Project

Poland aims to contribute to diversifying the tourism offer across Europe by presenting itself as a new destination for many visitors from outside of the country. This particular case shows how information and communication technologies (ICT) have contributed to this objective. The aim has been to support and reinforce the promotion of Poland as a destination in cooperation with all the organisations and entities taking part in promoting Poland worldwide (i.e. Polish Tourist Organisation (PTO), PTO branches abroad, regional offices). The planned initiatives were intended to increase inbound tourism to Poland and to extend the tourist season. These actions also aimed to increase the degree of recognition abroad of Poland as a country that is attractive to tourists, and that offers tourist destinations of high quality. All the actions involved the use of modern and effective promotional tools.

The project in general has a number of mutually supporting elements, but there are two inter-related aspects of the support provided by using ICT: the development of ICT products targeting visitors to Poland (web portals, mobile phone applications with information on nearby tourist attractions, event promotion etc,) and the related development of capacities in the industry through an e-learning platform.

A complex tourist information system using the latest technologies was developed targeting both tour operators and individual tourists. Tourism stakeholders in Poland were trained to make use of and exploit the opportunities offered by modern information technology for marketing their products (e-marketing, smartphone application development etc.). The idea was to change the image of Poland abroad, showcasing it as a modern and dynamic country open to the world.

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Project Highlights
Contribution to Tourism Policy objectives: Development of ICT to support marketing strategy objectives. Encouraging uptake of ICT among tourism service providers through e-learning packages and regional training courses.
Innovative elements: The integrated tourist information system hosted by the www.polska.travel portal available in 20 different languages and including applications for mobile devices to help tourists travel around Poland. The information systems was developed on the principle that data are collected at the local level by Polish regional tourist organisations and then integrated and distributed centrally by the PTO. The number of fully functional language versions is also unique.
Main outputs: The e-learning platform. The tourist information system hosted by a web portal. Mobile phone applications for tourists. Extensive training provision
Results and impacts: Increase in foreign tourist spending and increase in GDP generated from tourism: $7.050 billion projected (around €5.287 billion) compared to - $5.490 billion (around €4.118 billion) - prior to the start of the project. Arrivals: 14.7 million (projection) compared to 11.9 million prior to the start of the project. 13-fold increase in the number of visitors to the National Tourism Portal (from 579,000 in 2008 to 7.9 million in 2014).
Monitoring arrangements: Beneficiaries supervised the e-learning training courses. Statistics on the number of e-learning certificates obtained and on the number of visits to the web portal was monitored.

Description

The Project's Approach

Under the co-ordination of the Polish Tourist Organisation, a government agency and a member of the European Travel Commission, and the Baltic Sea Tourist Commission, the project has been successful in engaging many of the range of institutions and associations acting for tourism and the promotion of Poland. Collaboration within this programme has enabled the project to embrace a variety of the already existing initiatives of institutions responsible for the promotion of tourism, for instance, in connection with sporting events. Previously, these initiatives had all been dispersed and the potential mutual benefit dissipated..

The project was based on a Destination Management strategy inasmuch as it implemented the provisions of policy strategies (such as the Marketing Strategy of Poland, and Directions for Tourism Development until 2015) promoting a multidimensional approach combining improvements on various fronts (i.e. attractions, services, infrastructure, communication) through interactions between public authorities and private operators.

At the heart of the project were three parallel developments:

- An advertising and PR campaign targeted at Poles and residents of other, mainly European countries and based on a thorough investigation of tourism, the recreational preferences of consumers and the state of the Polish tourism market

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- Designing and developing a new and efficient tourist information system, together with a dedicated web site equipped with a new mechanism for collecting regional data in a single central repository. The information system was considered to be the most important and sustainable part of the project. It utilizes state-of-the-art information and communication technologies and was built up in a process of intensive cooperation with regional tourism organisations.

- The transfer of knowledge entailing various training activities aimed mostly at members of the tourism industry. The training events involved traditional conferences, in-class lectures and seminars as well as e-learning courses. The e-learning made use of a software platform that was specifically created within the project to accommodate particular learning requirements of both tourism industry representatives and also tourists themselves.

The main assumption was to treat tourism as an area closely linked to numerous development processes and to shape it in a way that will be consistent with other socio-economic objectives of the country's development. This requires taking into account not only the internal cohesion of the measures taken, but also the synergy effect between tourism and environment, culture, social development, infrastructure, etc. According to the strategic assumptions, making Poland an attractive country for domestic and foreign tourists will result in tourism becoming an important tool of the socio-economic development of Polish regions.

Although the project consequently had a series of objectives that went well beyond the development of ICT infrastructure, the technical elements nonetheless had a central place in the co-ordination and delivery of the strategy.

Implementation

During the implementation of the Project, the Polish Tourist Organisation has cooperated closely with its foreign representatives, i.e., with Polish Tourist Information Centres all over the world. The foreign Information Centres were located in 14 mostly European countries including Sweden, Germany, the UK, France, Holland and Belgium. Their task has been to support the choice of proper promotional tools, according to the market segment targeted and the anticipated effectiveness of reaching them. The concept of the project results from the assumptions for the Marketing Strategy of Poland in the Tourism Sector for the years 2008-2015, drawn up in 2008 by the Polish Tourist Organisation, and from the Tourism Development Strategy for the years 2008-2015 prepared by the Ministry of Sport and Tourism. The programme and principles of the "Let's Promote Poland Together" project were frequently subject to Ministry and industry consultations and in order to validate the assumptions made and investigate the feasibility of proposed IT and other solutions, multiple research studies were carried out, involving samples of industry representatives and tourists.

Marketing

The project involved major events, referred to as "media anchors", which were central to the process of encouraging foreign tourists to travel to Poland. These events were characterised by enormous promotional potential. They included the 2012 UEFA European Football Championships ('Euro 2012'), the Presidency of the Republic of Poland in the

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European Union in the year 2011, and also events taking place abroad such as the Chopin Year 2010 and the Polish Year in Great Britain 2009/2010.

The vehicle for publicising these events in the 'Let's Promote Poland Together' project was the new tourist information system. This is a national tourist information system that works in synergy with the regional tourist information systems developed thanks to EU funds under regional operational programmes. The regional sub-systems are responsible for providing and updating data on local events and attractions while the central organisation is in charge of the design, presentation, integration and quality control. The system features sophisticated Internet portals and websites taking advantage of state-of-the-art information technologies. The system components include the national tourist portal www.polska.travel.pl, and a network of certified points and centres of tourist information, functioning on-site in Poland. The portal covers both priority markets and secondary ones and has so far been translated into 13 foreign language versions (English, French, Flemish, German, Spanish, Italian, Hungarian, Dutch, Russian, Swedish, Japanese, Hebrew and Ukrainian. In addition, tourists on the move looking for information are able to find it using standard mobile phone functions and smartphone applications.

The system is now intended to function as the principal tool for promoting Poland as a tourist destination, as well as a communication tool for promoting the tourist advantages of the country.

E-learning

An important component of the project, supporting the marketing effort, is the measures promoting the acquisition of marketing knowledge that can be used to develop Polish tourism and promote Poland. This has been aimed both at tour operators outside of Poland and tourism professionals within the country. In this development, the PTO cooperated closely with the tourism industry and local-government, aiming to pass on knowledge of the current market conditions and best marketing practice (including the effective use of ICT) to those whose professionalism in everyday work could directly influence the level of services and the perception their quality by both domestic and foreign tourists.

The platform comprised of two 'blocks. The 'foreign block" provided a wide group of audiences from abroad with comprehensive knowledge on the tourist attractiveness of Poland as an interesting travel destination. The platform is addressed especially to foreign tour-operators, employees of travel agencies and other organisations that offer or are interested in offering tours in Poland. As well as the themed sections on the available tourism products and those relating strictly to the attractiveness of Polish regions, the programme helped them to build skills useful in developing successful tourist offers and trained them to gather the practical knowledge necessary. To this end, the participants completed training sessions covering e.g.: communication accessibility in the country and abroad, crossing the border and visas, practical information (medical assistance, road help, police procedures, currency exchange, etc.), catering, tourist accommodation, cooperation with the Polish tourism industry and institutions operating in the tourism sector. The training courses are based on the validation of knowledge in a fully automatic process, i.e. a tutor-free method is used. It is available in Polish, English, French, and German. Upon completing the course, each participant would receive a Certificate from the PTO.

The 'domestic block' of the e-learning platform comprised of a series of free courses in the form of lessons based on a fully automatic process, i.e. a tutor-free method was used. The block supplemented the knowledge obtained during regional marketing courses and training sessions

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organised by the Polish Tourist Organisation. The courses (with 12 topics) on the platform were designed for employees and members of institutions responsible for tourism marketing in their regions (RTO, LTO, Marshal Offices, Convention Bureaux, personnel of tourist information points, Local Action Groups, enterprises in the tourist industry, etc.), students of tourism faculties at universities and schools at various levels. After completing the course (i.e. getting a credit for at least 6 subject areas), the participant received a Certificate from the PTO. Beneficiaries supervised the e-learning training courses. Data monitored included the number of visits to the web portal, the queries sent by users, the number of organisational and individual recipients of the newsletter and the number of online training participants and the number of e-learning certificates obtained.

Features contributing to Improved Competitiveness

This project aimed to provide direction to dispersed marketing actions undertaken by the Polish tourism industry. By centralising the marketing effort in a single portal and co-ordinating this with a series of promotional events, the project aimed to create a much more effective impact from previously dispersed activities. The portal was critical for this development, but equally there had to be a corresponding development in the capacity of industry stakeholders to exploit it, both in Poland and abroad. This aspect included the organisation of study trips to various regions, the publication of materials promoting the Project and of manuals for the participants of training sessions, but again the on-line facilities played an important part, particularly the activities in the area of e-learning. The e-learning platform had a major influence in terms of improving the professional skills of the people employed in the tourism industry. It has improved their understanding of how to use modern communication technologies to promote their services, taught them how to change and to modernize the image of Poland abroad and encouraged them to compete with other markets in Western Europe and attract tourists from France, Germany and the UK.

Regarding the transfer of knowledge, activities included the acquisition, distribution, and exchange of marketing knowledge, through organised training sessions, workshops, and conferences for participants and potential beneficiaries of the project (as a target, 50 regional conferences in the area of marketing).

The activities sought to co-ordinate marketing efforts undertaken by the Polish tourism industry (regions, tenderers, and creators of tourism products) following current tendencies in the global tourism industry. This included the organisation of study trips to various regions, the publication of materials promoting the Project and of manuals for the participants of training sessions, activities in the area of e-learning and PR activities. The e-learning platform had a major influence in terms of improving the professional skills of the people employed in the tourism industry. It improved their understanding of how to use modern communication technologies to promote their services, which overall resulted in a more competitive market. To change and to modernize the image of Poland abroad, the project invested in e-learning to encourage the uptake of ICT among tourism stakeholders to enable them to better compete with other markets in Western Europe and attract tourists from France, Germany and the UK.

The project was publicly-funded including 85% by the European Regional Development Fund, and 15% by the state budget. Funds were spent on various actions, including promotional campaigns,

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participation in fairs, the establishment of a tourist information system and measures in the field of training, deepening knowledge and the exchange of experiences. All measures used modern, reliable, and effective instruments of promotion and tourist marketing. The PTO cooperated in this respect with specialised advertising agencies. An example of a successful project that generated a lot of publicity was Chopin the Course – the cruise of the "Frederic Chopin" tall ship in the mission to promote Poland and Polish tourism to the largest European ports. It was accompanied by spectacular artistic events in each of its ports of call. The campaigns were commissioned by the PTO and prepared and implemented by specialised marketing agencies.

The project resulted in an increase in foreign tourist spending and an increase in GDP generated from tourism. It is anticipated that $7.050 billion (around €5.287 billion) is to be generated from tourism compared to $5.490 billion (around €4.118 billion) prior to the start of the project. Similarly, the projected number of visitors to Poland for 2013-2014 is now of 14.7 million compared to 11.9 million prior to the start of the project. Project coordinators have already recorded a 13-fold increase in the number of visitors to the National Tourism Portal.

Features relating to the Wider Adoption of the Good Practice

Knowledge transfer activities brought together regional and local tourist organizations, urban convention bureaus, public administration (governmental and self-governmental), tourist organizations and associations and tourist enterprises (members of the regional and local tourist organizations).

There are significant lessons to be learnt about this co-ordination process and the systematic nature of the 'Let's Promote Poland Together' project, in that the development of the ICT instruments, which made innovative use of both established and novel technology, was very much part of a larger strategy to raise the profile of Poland as a tourist destination. The ICT instruments were nonetheless critical in delivering the message to potential visitors and supporting the development of knowledge about Polish destinations and their promotion in a cost-effective and efficient way.

The integrated tourist information system hosted by the www.polska.travel portal is available in different languages and includes applications for mobile devices to help tourists travel around Poland. The online services include a tour planner which enables potential visitors to develop their own tourist route before the scheduled departure, using a national database of accommodation services, dining and cultural attractions. The portal also enables tourist to post reviews and share experiences.

The promotional and marketing activities and the use of web-portals and ICT applications developed by the project also provide an excellent basis for further developing and adapting e-marketing techniques using the latest computer technology. It allows future tourists and potential visitors to Poland to be kept up to date on upcoming major events, new tourist attractions etc. It is an important means for reaching out to an increasingly tech-savvy tourist audience and this provides lessons for a wider audience.

It is worth noting that the project also contributes to achievement of the 2010 Commission Communication objectives through the E-learning platform (domestic and foreign blocks), which contributes to the wider professional development through innovative and interactive training, using the latest technologies. This platform also encourages the development of innovation in the tourism

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industry. Some training sessions promoted the use of new technologies in tourism (e-marketing, e-media relations) and this tendency to use ICT and e-learning platforms to reach out to a wider range of tourism stakeholders is continuing.

Further Information

http://promujmypolskerazem.pl/

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CANTATA2 – ATLANTIC AREA (UK, IE, ES, FR, PT)

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Introduction

CANTATA2 (Celtic Authentic Niche Tourism Advancing the Atlantic Area) is a 2.2 million Euro tourism development project funded through the ERDF Interreg IVB Atlantic Area Programme, involving Denbighshire in North Wales in the UK; Shannon, on the West Coast of Ireland; Galicia, in North West Spain; Poher, in West Central Brittany, France and Montemor-o-Velho, in Western Portugal. Contributions under ERDF were estimated to be €1,481,989 whilst the national contributions were €797,995.

CANTATA2 was led by Denbighshire County Council which coordinated the transnational project on behalf of all partners. Through this project, the different local authorities involved could learn from each other's experiences and the added value that CANTATA brings to local tourism businesses.

The aims of the project were to achieve a sustainable and balanced distribution of tourism activity in Atlantic regions through the development of a clear common identity, based on shared elements of Celtic culture, the building of community capacity and the promotion of locally-driven tourist services and attractions sourced by creating access for visitors to local culture. The overall purpose of the project was to bring together partner areas with shared problems and explore ways of tackling difficulties in the tourism regeneration field.

Common identity: partially cultural heritage, but also an identity based on common elements of a more material kind in the sense of facing common problems, arising from living in peripheral areas of Europe, addressing similar issues in regions similar and even similar weather patterns.

Theme

Marketing and promotion: developing a common identity for the participants and promoting widely distributed areas on this basis, but with other elements, notably in terms of capacity building.

Reasons for Highlighting this Project

Whilst mainstream tourism drives the visitors to tourism 'hot spots', CANTATA2 aimed to contribute to the process of moving visitors from the 'hot spots' to more peripheral and less-developed areas, by delivering authentic and genuine visitor experiences, based on strengthened local distinctiveness. Cantata aimed to entice visitors to lesser-known locations and connect them with authentic local culture. This provided the foundation for the development of promotional activities, closely linked to the development of facilities and attractions. In Denbighshire, this meant increased county-wide marketing and promotion, a variety of free development workshops for businesses and tourism stakeholders, and further opportunity for trade groups to network together.

In summary, the project sought to link the marketing efforts to the improvements in the local offer, benefitting the economy, encouraging service quality, improving the visitor experience, strengthening local distinctiveness, and developing tourism businesses.

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Project Highlights
Contribution to tourism policy objectives: Marketing and promotion focusing on the development of a brand based on a common identity. Moving visitors from the 'hot spots' to more peripheral and less-developed areas by delivering authentic and genuine visitor experiences based on strengthened local distinctiveness.
Innovative elements: The web platform served as a vehicle for local businesses to share experiences, exchange and discuss feedback on various activities and case scenarios and to stimulate new marketing and communication ideas.
Main outputs: Creation of local business communities all reflecting on how to do better business and actively contributing to upskilling processes among local workers in the industries concerned. Uptake and use of ICT among local small businesses to promote their tourism products and to develop business contacts. The newsletter and website further enabled the sharing and broadcasting of information.
Results and impacts: New, innovative technology and marketing methods were explored and utilised and skills were passed on to the tourism trade. A multitude of tourism products to attract and retain visitors were developed. Some businesses were able to expand their activities and offer new services (e.g. farms providing tourist accommodation).
Monitoring arrangements: In the absence of a standard and centralised bank of information, monitoring was performed using a range of sources. Information has been gathered through direct contact with project partners and Transnational Steering Group (TNSG) meetings. Other sources have included activity reports, newsletters and discussions with the Transnational Coordinator.

Description

The strategy to improve the competitiveness of the tourism sector in less well-known areas implies upskilling and networking among local businesses to achieve a critical mass and to design coherent tourism products, reflecting local distinctiveness and in this case a common cultural heritage.

In phase one, the project had carried out research studies and made connections with the local tourism trade to get to know the local businesses and their problems. It also worked with the trade to help promote the local distinctiveness as well as providing opportunities for SME's and micro-businesses to network and undertake skills training designed specifically for them. The project started at grass roots level, bringing in the local trade early on to tell CANTATA what they wanted from the project as well as steering the project on an on-going basis.

Independent and family-run businesses were targeted in the participating localities. A wide variety of businesses took part in networking activities (catering, accommodation, leisure etc.) linked

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together by tourist trails. The aim of these networking activities was to raise awareness among local businesses that they could join forces to develop coherent tourism services around a common and distinctive identity.

This project enabled the creation of local business communities all reflecting on how to do better business and actively contributing to upskilling processes among local workers in the industries concerned. The common endeavour around a central theme allowed clear marketing material to be developed. The marketing strategy also focused on the use and uptake of ICT among local small businesses to promote their tourism products and to develop business contacts.

A web platform was created enabling these business communities to promote their region or joint events to the tourists. The emphasis was on the uptake of ICT and social media as a marketing vehicle. This has enabled local businesses to feel more connected to the national and international tourism sector. These businesses were previously very much isolated with very little prospects of expanding their activity. The web platform developed under CANTATA2 serves as a vehicle for business to share experiences, exchange and discuss feedback on various activities and case scenarios and thus to further improve their competitiveness in the tourism sector and to come up with a more compelling tourism offer. The project organisers used the web platform to post questions for discussion among various business communities to stimulate new marketing and communication ideas. The aim was to create a strong community identity with participation from providers, administrators and developers who will benefit from learning more about social networks and tourism; the realities of e-tourism and best practice.

As the project went on, the stakeholders were able to capitalise on the knowledge accumulated in phase one and develop the ideas into tangible results. The business networks were strengthened with a visible sense of ownership by the local trade. A multitude of tourism products to attract and retain visitors were developed, such as food trails, e-tourism products and trails, cultural events, marketing campaigns. New, innovative technology and marketing methods were explored and utilised and skills were passed on to the tourism trade. Further marketing followed logically after the second series of workshops on knowing one's own area. For instance in Denbighshire, a heritage booklet was developed for local businesses to encourage them to pass on a flavour of Welsh food, music and language to the visitor.

The Destination Management Approach for this project was based on a rural development plan and on the Tourism Partnership North Wales and Visit Wales Tourism Strategies which all focused on community involvement in improving and/or developing localities. The input from local businesses in the catering and leisure sectors was central to the approach. The Cantata team in Denbighshire met regularly with industry stakeholders across the county and from all different types of business.

A Consultation group was set up to provide an opportunity for people from businesses across Denbighshire to have input into shaping the project's activity. Meetings were held with local businesses and the main actions they felt were required to assist the success of tourism in Denbighshire were to raise the standard of customer service in Denbighshire to compete with other destinations, to improve the consistency of the tourism offer, to market the county in a joined up way, and to ensure a greater online presence of the area as a visitor destination. Practical workshops to help businesses, particularly Denbighshire SMEs, grow and develop their tourism offer were provided as well as assistance for networking events to connect the tourism trade across the county and help them share ideas to put into practice. The main workshop themes were Marketing, Local

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Area Knowledge, and Social Media. Hence, the development of a brand image and a marketing campaign were central to promoting the localities.

The transnational steering groups and conferences proved an invaluable part of the exercise, as they not only allowed project partners to come together and share common concerns, problems and solutions, but provided opportunities for learning and participation in a wide range of activities. They also provided a chance to engage with a wide cross-section of traditional and non-traditional tourism actors.

In the absence of a standard and centralised bank of information, monitoring was performed using a range of sources. Information has been gathered in a number of ways, including direct contact with project partners, information gleaned from Transnational Steering Group (TNSG) meetings, including minutes and presentations. Other sources have included activity reports, newsletters and discussions with the Transnational Coordinator. The TNSG meetings have been a particularly useful source, as these are the most direct means of transnational contact and exchange of information, experience and opinion.

The periodic CANTATA2 newsletter and website further enabled the sharing and broadcasting of information, regions often influencing one another by example. It was difficult to gauge the wider reach of such activities to non-partner regions, but this could have been considerable.

Features contributing to Improved Competitiveness

The success of CANTATA2 lay in its ability to fill gaps that other projects and funding streams were not able to fill and in its approach to working in an organic manner involving local community stakeholders, continually developing its actions to meet the needs of the tourism trade.

This Tourism Development model aimed to move from a 'sharing of experience' to a 'pooling of a critical mass' to develop innovative products and marketing with concrete and tangible outputs, rolled out across the 5 partner regions. By product development, training and marketing the project aimed to further connect with SMEs and explore innovative networks including the use of IT in order to exploit local potential and improve international competitiveness. It also aimed to strengthen links between public bodies responsible for tourism development and the private sector around the creation of an internationally recognised tourism 'brand' promoting a distinct identity and cultural heritage (e.g. a common logo that was used by all the partners was created).

The project has enabled small businesses in the localities involved to realise their potential by working jointly to improve their competitiveness and provide coherent tourism products, creating tourist trails and pooling their communication and creative skills to market and promote the specificities of their own localities as well as the common Celtic heritage of Atlantic regions to attract more tourists all year round.

The SMEs in all partner regions successfully engaged with pilot research and workshops, which made them better equipped to promote their products. CANTATA2 sought innovative ways of developing these products and routes to market. Real and genuine local tourism experiences, 'slow tourism' and sustainable development were the key selling points of this project.

For instance, Shannon built up a quality B&B database, working with highly motivated and committed individual businesses. This experience can be used both as beacons for rural tourism in the region and a model or benchmark approach for other rural tourism businesses. Galicia developed

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a model approach to rural tourism itineraries, one which has been used to inspire and inform others, for example, an artisan food and craft group in Monmouthshire. Moreover, time spent developing an onward strategy has been well spent in order to ensure the trails endure and are maintained beyond the lifetime of the project.

Through social media, the businesses involved together with their local authorities were able to reach out to a wider audience, particularly niche tourist markets (such as green tourism). Workshops on upskilling and the use and uptake of ICT were also promoted by the project organisers through social media platforms. The authorities in charge of the project also developed documentation about the various tourist trails (virtual trails on the web platform, leaflets etc.) electronically and on paper.

The CANTATA2 products have been mainstreamed into Denbighshire County Council's services. The turnbook technology pioneered by Denbighshire has left a valuable online resource which its tourism department can incorporate into its overall suite of promotional information. The work on social networking also confirms the potential of this particular medium and its usefulness in sharing contact and influencing behaviour. The mobile phone application provides yet another interesting channel for conveying and sharing information in a rapid and effective manner. The Tourism Team tested some of the CANTATA2 products, and did a walk around the town of Denbigh testing the tourism mobile phone app as part of a mainstreaming exercise. Poher, despite being hampered by political changes in the region, built on its key words concept from phase 1 and developed a series of flipbooks based on the turnbook approach developed by Denbighshire. It was also able to develop greater IT capacity than it might otherwise have done.

CANTATA2 also enabled the businesses in the localities concerned to develop a common long-term vision as to which tourism products to develop, which image to portray and promote and which tourist markets to go for. For instance, Montemor has had a series of studies in place which can be used to inform future decision making in relation to planning, tourism development and heritage conservation and presentation, as well as developing a novel and sustainable mode of access to a sensitive site. It generated several high profile events which spotlighted the area and which can be built upon in future promotional campaigns.

The project aimed to have positive knock-on effects for the local economy, through empowering and strengthening the network of local, rural businesses. Some businesses were able to expand their activities and offer new services (e.g. farms providing tourist accommodation) and to get in touch with regional bodies to promote themselves. Businesses that didn't think they had anything to do with the tourism sector were able to develop and market new services that would attract a tourist clientele.

The primary aim of the project was to divert visitor flows away from hotspots and towards less well known areas, by engaging local communities in becoming destination ambassadors taking responsibility for the development of their locality. Regions that are known as environmentally sustainable provided a vital setting for well-being, sports, cultural and environmental tourism. By emphasising CANTATA2's originality and local identity, this allowed the project stakeholders to be better equipped to compete with the tourism hotspots.

It has to be stated however that during the course of the project, the economic recession took hold and this meant that several adjustments had to be made, including changes in arrangements to respond to a shift from long stay holidays to day visits.

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Features relating to the Wider Adoption of the Good Practice

Some of the innovations such as rural business networking, electronic products and tourism branding are understood to be credible ways of improving tourism value for other tourism administrations, especially in regions with low levels of existing tourism infrastructure.

The project is readily transferable, especially the electronic products such as the Turnbook. This is a product which could easily be adopted and edited to the suit the tourism needs of another region. The Turnbook technology pioneered by Denbighshire has left a valuable online resource which its tourism department can incorporate into its overall suite of promotional information. The work on social networking also confirms the potential of this particular medium and its usefulness in sharing contact and influencing behaviour. The mobile phone application still needs further refinement in terms of its degree of connectivity, but otherwise provides yet another interesting channel for conveying and sharing information in a rapid and effective manner.

New tourism project ideas have also been influenced by CANTATA2, notably the Green Tourism Project funded under the Rural Development Plan. The project has allowed for improved engagement between local businesses and the local Destination Management Group, allowing businesses to be more empowered in helping to shape local tourism priorities.

Although the project was essentially Celtic in nature, representing the interests of western peripheral areas in Wales, Ireland, France, Spain and Portugal, it has much wider applicability to other parts of the EU, especially emerging rural tourism destinations in more recent European Union Member States. Its mix of new technologies and more traditional networking and cooperative approaches give it relevance beyond its partner regions and beyond its own project period. CANTATA2 has demonstrated that a proactive and innovative project can provide practical solutions to the development of real and authentic rural tourism products and ideas.

Further Information

http://atlanticprojects.ccdr-n.pt/project-area/cantata2/project_view?page=Project%20details

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Final Evaluation of the CANTATA2 project, Arwel Jones Consultancy (available upon request)

MERRION SQUARE (IE)

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Introduction

The Merrion Square Innovation Network (MSIN) is a group of over 40 stakeholders from the cultural and hospitality sector who were brought together by Failte Ireland (the state tourism authority) and Temple Bar Cultural Trust (experts in cultural development) to develop the Merrion Square area in Dublin as a new cultural tourism destination.

The project specifically set out to apply innovative thinking to the aim of developing Merrion Square as a new centre for cultural tourism in Dublin. Merrion Square is the finest Georgian Square in Dublin and its surrounding area has many interesting features, including the National Gallery, the Natural History Museum, Merrion Square park, Government buildings and numerous cultural and creative organisations. Despite this it had not previously figured prominently in Dublin's tourism offer. The process of realising the potential of the area and making effective use of its considerable and distinctive assets was conceived and developed by *Fáilte Ireland* and *Temple Bar Cultural Trust* (TBCT) working in partnership with a range of organisations located in or near the square, effectively developing a vibrant cultural tourism cluster.

Theme

Innovative marketing and promotion: through a collaborative stakeholder process. Although the Merrion Square project has a number of interesting and innovative features, this case study focuses on the role that marketing and brand re-positioning has played in the development of the project to harness its unique and distinctive assets and turn them in to competitive advantage for the area in a way that had buy-in and ownership from the stakeholders It will be seen that a customer focused approach combined with market analysis imposed an important 'reality check', on the wealth of ideas generated by the project's open innovation process, but equally how the well-planned use of an on-going programme of activities acted as a successful promotional instrument that has developed its own momentum and how the intelligent use of social media delivered a highly cost effective promotion campaign.

Reasons for Highlighting this Project

From the beginning, the Merrion Square project adopted an open innovation strategy, to engage a wide group of local stakeholders and potentially interested organisations and to encourage new thinking and ideas about the opportunities for tourism development that were available from the rich heritage of the institutions and organisations located in the Merrion Square area. This open innovation strategy generated a plethora of ideas and proposals for new developments based around a cluster of cultural heritage organisations and a learning process was unleashed that strengthened the capacities of all the participants. This process in itself should be considered as an interesting example of good practice, but there are further elements that are of additional interest in the context of improving the competitiveness of the tourism industry through effective marketing, branding and promotion. First there is the important discipline imposed on the innovation process by a methodology that included a marketing test at an early stage and, secondly, there is the development of self-promotion by the Merrion Square Innovation Network along with the highly cost-effective use of social media.

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While many other areas will not necessarily start with the considerable inheritance of Merrion Square, the Innovation Network made use of processes that could have a wide application.

Project Highlights
Contribution to Tourism Policy objectives: Stimulating innovation in tourism provisions, diversifying the offer, building capacity, exploiting cultural and natural heritage.
Innovative elements: Stimulating innovative ideas and developments was central to the project. Innovative use of social media to promote Merrion Square
Main outputs: A programme of co-ordinated events, high levels of media coverage
Results and impacts: Increased visitor numbers, development of an integrated destination capable of generating wider economic activity, by establishing Merrion Square as a venue, developing sponsorship etc. Highly cost-effective.
Monitoring arrangements: A baseline assessment established the critical indicators and collected the data that will enable progress to be assessed. An evaluation of audience and stakeholder reaction and impact was conducted in December 2012.

Description

The Location

Merrion Square is a fine Georgian Square located on the south side of the City of Dublin and originally laid out in the late 18th century. It is surrounded on three sides by Georgian redbrick houses, with the fourth side containing Government Buildings and the National Art Gallery. The centre of the square is a public park. The square and its surrounding area is home to a series of national cultural institutions, including the National Art Gallery, the Archaeological and Natural History sections of the National Museum of Ireland, the Irish Traditional Music Archive, the Irish Architectural Archive, the Irish Georgian Society, the Society of Antiquarians, the National Maternity Hospital, the College of Anaesthetists and the Irish Red Cross. It also has many associations with significant figures in Ireland's political and cultural history.

However, while Merrion Square had all the elements of a significant cultural tourism destination in a capital city and some of its institutions already had a substantial number of visitors, in the past the Square as a whole had been overlooked as a destination. Each of the institutions located in the

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square had pursued any promotion activity largely in isolation and there had been very little joined-up activity or co-operation between the cultural and creative stakeholders around the Square.

The Project's Approach

The Merrion Square Innovation Network was conceived and developed by *Fáilte Ireland* and *Temple Bar Cultural Trust* (TBCT), which had experience of the development of another area of Dublin as a cultural tourism destination. The aim from the beginning was consciously to promote innovation in the thinking and methods adopted. At the same time, the current economic circumstances meant that it was particularly important to be successful in a business sense, by contributing to the commercial viability of the Innovation Network's organisations and making more productive use of existing assets.

The challenge was to develop a model for clustering cultural organisations in Merrion Square to build and strengthen the sense of place, identity and community, to capture what is unique and distinctive about this part of the city and to release the potential of the Network's constituent organisations.

An open process of discovery was launched, by encouraging organisations located in and near the Square either to make suggestions for actions through which their own organisations could contribute to the development of the cluster or to propose more general developments for the benefit of the participants and the project collectively. This was supported initially by separate meetings with all the key cultural, creative and business stakeholder organisations - at a level that could ensure commitment - in which the aims and approach of the proposed Innovation Network were explained. Subsequently this was supported by a five-day training programme, joint meetings and open coffee mornings, a strong communications framework and an increasing degree of organisation, with working groups examining particular aspects of the overall project. Eventually, some 80 proposals for developments were defined and elaborated and then submitted for the consideration of the Innovation Network.

An important feature to note in this discovery process was that, while creative thinking and new ideas were definitely encouraged, the whole process was well-structured in order to ensure that a feasibility check could be applied to proposed developments and so that promising ideas could be further developed by the Innovation Network so as to attain their maximum effectiveness. Given that the initial concept for the project arose from an attempt to promote innovative thinking in the tourism industry, this discipline on the discovery process was applied through the use of a particular methodology - the Design Thinking model of innovation developed by Stanford University.

d. School Design Thinking is a particular approach to solving problems, inspired by the way that designers think about design challenges and combining a good feeling for the issues and a creative response to the problems with a systematic method and reasoned choices. It gives rise to a soft focus approach, characterised by grass root leadership and ownership of the project and it changes the way organisations and individuals work, promoting a better understanding among divergent interests

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and unleashing the creative potential of those involved. A five-day training programme was offered to participants, spaced over three months, to acquaint them with d. School Design Thinking principles and encourage the generation of creative ideas.

In response to the ideas put forward, attention was progressively focused on five building blocks:

- o   Programming/Animation – motivating the main stakeholders
- o   Public information
- o   Marketing – including rigorous analysis of the marketing aspects of new ideas
- o   Infrastructure development
- o   Game changing ideas – building on success.

Systematic progression through these building blocks made it easier to move to the next stage, so that by the time issues involving the development of new facilities were raised, it was already a matter of building on success.

Implementation

The project commenced in October 2011 and the full implementation took place in the second half of 2012, leading up to a launch that also commemorated the 250th anniversary of Merrion Square.

The current phase (2013) is building on the initial success of the initiative by formalising the structure for the stakeholder group and encouraging the members to act independently and self-sufficiently.

Among the ideas proposed by the Network for development were:

- A new iconic building to create a 'Bilbao effect'

- Creating a café in the park with facilities for a series of open-air concerts

- A renovation programme providing access to the Georgian houses of the Square, with a new standardised design code for participants in the scheme

- Re-opening a pedestrian route into the square and connecting it with Dublin's premier shopping district

- Creating a hi-speed Wi-Fi zone open to the public

- A new quarterly contemporary art Installation programme

- A visual and audio link to provide access to the world class quality of art and culture exhibited by local institutes and sharing and projecting that cultural vision to a new network of partners throughout the world

These ideas were all subjected to checking by Innovation Network working groups and priorities were decided for seeking further funding. Other ideas for events were organised in a jointly marketed programme that has included special exhibitions, activity trails, a skyline tour, discount shopping days in the various institutions and the first concert in 25 years, organised by the Irish Traditional Music Archive and featuring music from scores in the collection. The initial programme was launched in the summer of 2012 to mark the 250th anniversary of the Square, with a busy rolling programme of talks, tours, concerts and family activity following on for all the year round. This has been given additional profile on special occasions, such as through the Christmas market that was launched towards the end of the year.

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Marketing

From the beginning, the whole initiative has had a clear customer focus. Central to the d. School approach has been the aim of developing a deep customer insight, supported by an analysis of the potential of each idea in relation to specific consumer growth segments and strategies to position the brand locally, nationally and internationally.

As a result, the project specifically encouraged the development of ideas that would appeal to the various consumer groups. Four growth segments were identified:

- the UK
- North America
- Mainland Europe
- the domestic market

Analysis of each of these markets was conducted by a separate working group and as part of the third building block for each idea, it was subjected to a market test conducted by a Merrion Square Innovation Network sub-group on marketing.

Ideas that passed the test were developed further in compliance with an agreed procedure, which included observance of branding identity guidelines, before inclusion in the common programme.

Promotion of the activities generated by the initiative had to take account of a very restricted advertising budget, but made creative use of the opportunities presented by the development of the cluster. First of all, promotion of the activities of individual institutions in the Square could take advantage of the joint promotion engendered by the Innovation Network and the spill-over effects, whereby visitors to one institution were persuaded to take an interest, especially in the special events organised by others. And then, collectively the initiative had generated a lot of interest in the press and television, from which all the Network members could benefit. In fact this has now made Merrion Square a prime venue for events, which is attracting sponsorship and generating spill-over effects for the broader economy.

However, perhaps the most interesting cluster effect arose in the use of social media. Because of the broad membership base from the various institutions located in Merrion Square and the level of engagement of the staff of these institutions, an extensive potential network already existed for the initiative, both domestically and internationally, in the private contacts of people involved in the project. This was then further multiplied by encouraging the use of social media by visitors to the destination.

Together traditional media coverage and the use of social media represented a highly cost-effective means of promoting Merrion Square as the new destination, it aspired to be.

Features contributing to Improved Competitiveness

In the Merrion Square initiative, the application of an open innovation process, providing a framework for engaging a community of previously disparate institutions in the development of a cultural tourism cluster, gave rise to a creative learning environment, which enhanced the skills of a broad section of the community involved in the project and led to much more effective use of existing assets than had previously been the case. The use of a clear methodology governing this

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process and insistence on the discipline of assessing potential developments by reference to their appeal to specific consumer growth segments meant that the whole process was geared to delivering concrete results in terms of visitor numbers and improved commercial viability.

Success was initially assessed in terms of

- Customer feedback
- Stakeholder feedback
- Increased footfall
- Publicity achieved

Data was collected on these indicators throughout the project. A baseline assessment established the critical indicators and collected the data that will enable progress to be assessed on the basis of a firm foundation. An evaluation of audience and stakeholder reaction and impact was also conducted in December 2012. This evaluation has still not been fully published, but the following outcomes are evident in the initial analysis:

- Increased public awareness and civic pride in Merrion Square
- Stakeholder willingness to continue their participation in the programme
- Stakeholder satisfaction with the Merrion Square Brand
- An Increased number of visitors to the Square

85% of the stakeholders questioned reported an increase in visitors and one of the events – a culture night – reported a 42% increase in numbers attending. It is known that the major institutions in the Square (the National Art Gallery, the Archaeological and Natural History sections of the National Museum of Ireland) had 1.6 million visitors per year before the launch of the project. An increase in their visitor numbers is anticipated, but the real gain has been for the other institutions in the Square, both in terms of greater visitor numbers and in the impact on revenues.

The evaluation provided a particular indication of the levels of satisfaction on the part of stakeholders in the whole process of open innovation adopted by the Innovation Network. 96% of stakeholders would 'recommend participating in the Network to others'. It is interesting that, notwithstanding the ultimate objectives of increased visitors, awareness, visibility and collaboration achieved, when asked about their motivation for participation, the specific tourism related factors were cited by only 14% of Network members, while the top priority for the future was continuing with the initiative. It is evident that a critical factor for the impact of the Programme achieved within such a short timeframe was the platform for collaboration and shared values established in the Innovation Process.

The evaluation will also provide an indication of which elements of the audience programming worked best during the implementation of the initiative.

Fáilte Ireland also undertakes a Visitor Attitudes study every year. The numbers are still provisional for last year and have not been published officially, but the initial indication is that 24% of holidaymakers visiting Dublin visited Merrion Square. This is thought to confirm that the developments in Merrion Square now provide an excellent base for its new status as a major destination within Dublin, by showing the level of interest.

The initial funding for the Network was modest. Support from Fáilte Ireland in 2011 amounted to €10,000 and in 2012 €70,000. Some initial sponsorship was forthcoming, but as the Square has

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increasingly become a venue for events, there has been a growing interest in more substantial sponsorship, reflecting the initiative's increasing appeal to the commercial sector.

Overall the initiative has been highly cost-effective and the gains in visitors to the Square achieved without a corresponding decline in visitor numbers elsewhere.

Features relating to the Wider Adoption of the Good Practice

Fáilte Ireland is keen to make use of the approach developed for Merrion Square in other destinations in Ireland and believes that it could equally be applied elsewhere in Europe.

A new direction in the national tourism strategy developed by Fáilte Ireland is putting emphasis on the gradual building up of areas and attractions, especially where it is possible to enhance the use of cultural assets. Working directly with residents and business owners in an open process to identify and develop potential is replacing previous approaches that attempted to make use of top-down mechanisms. There is considerable scope in Ireland for improved stakeholder co-operation and this probably applies elsewhere. Merrion Square has shown that if the process is well-structured so that there is broadly based engagement with a wealth of new ideas, but at the same time a disciplined approach to testing ideas and carrying them through to practical application, a momentum is generated that makes resolving problems easier and creates its own promotional profile. At the same time the process inherently reflects local conditions and interests and is characterised by a considerable flexibility and a capacity to respond to a wide variety of circumstances.

Careful monitoring of the progress being made in the initial Merrion Square initiative has been important in encouraging a wider adoption of the approach. The fit between the project and national tourism strategy facilitated access to further funding, but the media profile and the success of the project on the ground in terms of increased visitor numbers and the commercial returns from the venture have been important in encouraging its wider adoption elsewhere in Ireland.

Further Information

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PROGRAMME DARK SKY® ALQUEVA (PT)

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Introduction

The main focus of the Programme Dark Sky® Alqueva, which was launched in 2009, is the preservation of the night sky and the creation of a destination based on the principles of sustainable tourism development. The programme has created a Dark Sky® Route comprised of six municipalities around Lake Alqueva in Portugal which all benefit from the same extraordinary night sky conditions, with a wide range of activities which mostly take place at night in order for visitors to be able to enjoy this special feature of the region. The programme closely follows the principles set out in the Agenda for a Sustainable and Competitive European Tourism.

The Programme is being developed in a partnership between a non-profit association, Genuineland, which is responsible for the overall coordination, the regional Government, the regional authority for tourism, public enterprise responsible for the management of the Lake Alqueva, the national Association for Astronomers Amateurs and a range of private sector providers.

Theme

'Marketing and promotion'*:* The Dark Sky programme has been included in this study under the theme **'**Marketing and promotion' but there are also strong elements of diversification involved, some capacity building and the promotion of sustainable and innovative tourism.

Reasons for Highlighting this Project

The Dark Sky® Alqueva Programme provides a good example of a tourism programme that combines and implements a number of EU policy guidelines. The programme implements the objectives of the 'Agenda for a Sustainable and Competitive European Tourism'[24], which promoted an integrated approach to sustainable tourism involving all stakeholders in partnership. It is also perfectly in line with the more recent Communication 'Europe, the world's No 1 tourism destination – a new political framework for tourism in Europe'[25] in terms of developing a new concept that is sustainable, responsible and of high-quality, while diversifying traditional tourism supply and extending the season.

The programme is furthermore remarkable in terms of the low cost involved in its implementation and its capacity to obtain publicity at both national and international level without major expenditure. This has been achieved because of the strength and originality of the original concept that has captured the imagination of a wide audience and through the application of the principles of 'destination management' that has led to a systematic approach and the engagement of local stakeholders in the development of a new and original destination.

Finally, the monitoring system put in place for the Programme is based on the principles of the new European Tourism Indicator System proposed by the Commission.

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[24] (COM (2007) 621 final)
[25] (COM (2010) 352 Final)

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Project Highlights
Contribution to Tourism Policy objectives: Effective promotion based on a highly original concept. An integrated approach to sustainable tourism, exploiting natural heritage.
Innovative elements: Creation of a new tourism product: 'Alqueva Dark Sky® Route' based on the preservation of the destination's extraordinary night sky and unique landscapes. The involvement of all stakeholders in a public-private partnership according to the principles of Destination Management.
Main outputs: Certification of tourism providers (hotels, restaurants and tour organisers) development of new activities - stargazing, hiking, horse riding, canoeing, bird watching and wildlife observation, as well as dinners on the lake shore, wine tasting and gastronomy.
Results and impacts: With limited resources, the Programme has made a substantial contribution to a region that was previously suffering economically as a result of depopulation and low levels of economic activity.
A 22% increase in occupancy rate, plus an additional 18% increase from astro-tourism when it became a Starlight Tourism Destination. A 12% increase in the interest of investors in projects linked to astro-tourism. Improved quality of life for the communities and energy cost savings of up to 25%.
Monitoring arrangements: The Programme measures its general performance using the indicators set by the Tourism Sustainability Group in 2007, which form the basis for the European Tourism Indicator System launched in February 2013.

Description

Background

The original idea for the project was generated in 2005 when the project manager was a Government representative and expert participating in the Tourism Sustainability Group, convened by DG Enterprise and Industry in the European Commission. At the time, there was a lot of interest in nautical tourism but this often required a high level of investment. Instead, the aim was to conceive of a sustainable project which was based on existing structures and good quality services rather than expensive new infrastructure and could make best use of existing assets. This led to the idea of using the night sky as a basis for the project, which went further than simply using existing assets more effectively by turning distinct disadvantages into real strengths.

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The region of the Great Lake Alqueva in Alentejo was suffering from the effects of depopulation and falling levels of economic activity, but this imaginative concept was able to transform these weaknesses into strengths. With a very low rate of light pollution in the local municipalities, the low level of latitude (38degN) and impressively clear skies, the region is a great place to see the stars, constellations and distant galaxies, and the unique characteristics of the night sky in this region presented the ideal conditions for high quality observation of the dark sky. In Alqueva the sky has good atmospheric conditions for stargazing most of the year. Such skies are disappearing across Europe, where most of the population no longer has the privilege of observing an unpolluted sky.

Alqueva, with its small picturesque villages, is a distinctive region that is very rich in cultural and natural heritage. Various megalithic remains suggest that there has been a longstanding interest in the value of the landscape and the relationship of human society to the movement of celestial bodies. This presented the opportunity to develop various night-time tourist activities that could take advantage of the unique sky conditions.

Programme objectives

The overall framework for the work of the partnership in developing the Alqueva Dark Sky® Reserve was provided by the creation of a Destination Management System.

A number of sub-objectives were set:

- A further decrease in the already low levels of light pollution
- The creation of new products linked with the night sky – the Alqueva Dark Sky® Route and the Alqueva Starlight Route
- The development of territorial marketing with the engagement of the residents and the local and regional stakeholders
- The engagement of the scientific community.

Organisation and Funding

The Programme was developed in cooperation with many different stakeholders: public and private organisations linked with tourism and with complementary issues (agriculture, water resources, etc.), local authorities and the scientific community.

The programme is managed by a Management Committee representing the partnership and a Working Group which is the main vehicle for the involvement of the broader network of relevant stakeholders. The partnership, under the coordination of the **Genuineland | Alentejo Network of Village Tourism**, is in charge of managing the Programme, developing its activities and carrying out all monitoring tasks. The Working Group closely supports the work of the Committee, participating in the decision-making processes, suggesting actions and developing some of them.

By their nature or their competencies, some of the organisations in the Working Group are more closely involved in the development of the Programme than others. These include **the six municipalities of the Alqueva Dark Sky® Reserve**[26] and the **Portuguese Association of Astronomers Amateurs (APAA)**. The municipalities have an enormous responsibility for the process of decreasing light pollution further, since this is mainly caused by public lightning. With its technical and scientific

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[26] Portel, Reguengos de Monsaraz, Alandroal, Mourão, Moura and Barrancos municipalities

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knowledge of the theme, the APAA has responsibility for training the regional tourist guides and monitoring the quality of the sky against all the relevant criteria.

The involvement of **private stakeholders** is a key element for the Programme - especially those that are affected by the important changes in the land use of this territory that are a result of the project. They are also significant as far as light pollution is concerned. The association that integrates all the promoters of tourism projects is therefore highly involved in the project.

The Programme is mainly funded from the resources of the various organisations involved, including the private stakeholders of the Alqueva Dark Sky® Route (hotels, restaurants and others) that are willing to invest in the project. This is encouraged by the positive returns expected on their investment.

So far, since the launch in 2009, a mere €39,000 has been spent. The team involved in the overall management of the project consists of around 40 people in total from the different partner organisations. Some of these are involved in their capacity as employees of one of the participating bodies, but many are contributing as volunteers.

Main Activities of the Programme

The Alqueva Dark Sky® Route links six municipalities around Lake Alqueva (Portel Reguengos de Monsaraz, Alandroal, Mourão, Moura and Barrancos). Within this area, a number of tourism providers (hotels, restaurants and tour organisers) have been certified as members of the Alqueva Dark Sky® Reserve and as such allowed to provide services and activities as part of the Programme. Some of them have collaboration agreements to divide up the services according to their individual specialisations.

All the organisations benefit from the same extraordinary night sky conditions and in order for visitors to be able to enjoy this special feature of the region, they have set up a **wide range of activities** which mostly take place at night, such as stargazing, hiking, horse riding, canoeing, bird watching and wildlife observation, as well as dinners on the lake shore and wine tasting and gastronomy. Many of the tourism providers are also able to organise special activities upon request. The lodgings that are integrated in the Route are prepared to receive astro-tourists with services adapted to their specific needs: they have telescopes and binoculars at their disposal and have been trained to teach people how to stargaze. They are also willing to provide late night meals and 'take-away' picnics for stargazers.

In this destination 'the sky is NOT the limit'; the Programme requires creativity, imagination and innovation from its members in the further development of the   tourism service offer, and this approach is strongly and actively supported by the programme management. Part of this orientation is achieved, through the use of a specific **motivational model** and the organisation of training courses for local entrepreneurs to develop their skills and improve the quality of their services

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(astronomy, tour-guiding, environmental sustainability, etc.). In order to ensure that tourism services are provided with the maximum quality that the demanding rules of the Route are seeking to establish.

In terms of capacity, there are approximately 80 rooms available within the 9 lodgings that form part of the Route's membership group. The group also consists of 6 restaurants and 4 'tour operators', but all the members are involved in organising different types of activities and tours.

The Dark Sky® Alqueva Programme is the first in the world to be **certified as a Starlight Tourism Destination** (awarded by the Starlight Foundation – UNESCO/ UNWTO and IAC (Instituto de Astrofísica de Canarias)).

In order to keep this certification, a monitoring system was established with specific indicators that support the evaluation of the destination's performance in terms of the quality of the sky and the tourism product. Apart from that, the Dark Sky® Alqueva Programme **measures its general performance using the indicators set by the Tourism Sustainability Group** in 2007, which form the basis for the European Tourism Indicator System launched in February.

In terms of **sustainability**, the project is based on a low level of financial commitment by all the organisations involved which makes it easy to be able to guarantee its continuity. The motivation and involvement of the most important and relevant stakeholders at local, regional and national level has given the Programme its own momentum. Like the monitoring, the work on innovation and motivation is continuous. The creation of new products and routes feeds the Programme and continues to keep the interest of the media and other supporters.

Marketing

With its unique nature, the Dark Sky® Alqueva Programme has been able to establish the necessary profile, without a substantial outlay for promotion and marketing. In effect the idea has sold itself. When the Programme was launched, the unusual theme straight away captured the interest of journalists. Receiving the UNESCO/ UNWTO certification as a Starlight Tourism Destination was a further occasion that triggered attention from the media, particularly at an international level. The publicity subsequently attracted tour operators from all over the world, which further increased promotional coverage. Later, for example, when the destination managed to create a significant increase in the local occupancy rate, the media interest again covered the developments.

The fact that the programme partnership includes the tourism association for the region (TGLA – Tourism Lands of the Great Lake Alqueva) has obviously provided an added advantage in this respect, as they have naturally promoted the programme as part of their activities. The support of the national tourism organisation, Turismo de Portugal, has also been important. Other **drivers** of the success of the project have been the motivation and enthusiasm of the programme partnership, the public authorities and the group of entrepreneurs that are involved. The existence of a strong leader with a clear vision and the capacity to drive it through and the support of a large number of volunteers have been other important factors. Finally, the fact of belonging to networks like the European Network of Village Tourism and NECSTouR is seen as crucial.

In terms of **lessons learnt** the following are important considerations:

- The budget is not the most important element of a programme

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- Creativity, imagination, investment in applied research and innovation are the most critical success factors
- It is fundamental to anticipate future trends but this requires proper research
- A real partnership based on trust is likely to work and can bring important added value
- Continuing the innovation process, having a new idea every day and keeping the interest in the Programme going at the level of the partnership and in the host community is of major importance.

Features contributing to Improved Competitiveness

The Dark Sky® Alqueva Programme has managed to make a substantial contribution to a region that was previously suffering economically as a result of depopulation and a low levels of economic activity. This has been done with very limited resources, apart from a unique natural resource, but a dynamic and sustainable destination has been created.

The following of the principles of 'Destination management' has been crucial in contributing to improved competitiveness, allowing the Programme to be based on systematic principles, prompting the involvement of all the stakeholders and ultimately creating a public-private partnership that came together around the same objective of promoting a high quality tourism destination.

The major innovative element of the Programme was undoubtedly the original conception of turning disadvantages into benefits and creating a new tourist destination on the basis of the night sky. However, the new tourism offer also made imaginative use of other features of the destination: landscape and prehistoric monuments, existing tourism facilities and the potential for attracting people with specialised knowledge and skills.

The Dark Sky® Alqueva Programme has managed to turn around this region which was previously suffering from the effects of depopulation and a lack of activity and with very limited funding has created a dynamic and sustainable destination which is entirely unique.

The impact of using an available resource like the night sky has had the effect of adding substantial value to an already existing natural asset and had made the public organisations involved see the destination in a new light. The recognition of the destination through its certification has also given a new sense of belonging to the host communities, and the whole project has led to greater degree of motivation among the local entrepreneurs.

In fact, the Programme has altered the mentality of the host communities, who previously faced problems with their use of energy. It has managed to focus public and private stakeholders on the principles of sustainability and develop a clear understanding of what this means. A marked decrease in energy use has freed resources for use on the other needs of the communities.

In terms of **results** the following achievements have been made:

- New life has been brought to the destination with an initial increase of 22% in the occupancy rate, plus an additional 18% increase due to astro-tourism when it became a Starlight Tourism Destination
- 15% increase in the number of foreign tourists

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- Direct involvement of 2,500 people through the organized seminars and actions of stargazing

- Recognition and credibility of the destination at international level have promoted interest in potential investment and the development of scientific research

- An increase of 12% in the interest of investors with projects directly linked to astro-tourism

- Increased knowledge about the sky and its importance

- Improved quality of life for the communities with more investment capacity in the territory by the municipalities (

- Savings in energy costs that can reach 25% which is very important for these municipalities.

- Positive impact on other sectors like handicrafts and gastronomy (regional products like wine, cheese, etc.)

- Creation of different and complementary products based on the concept of the Dark Sky® Alqueva but promoting other experiences

- Better quality tourism services due to the stringent rules of the Route

Features relating to the Wider Adoption of the Good Practice

While it is only possible to replicate the most obvious features of this project – tourism based on a dark sky - to a limited extent, there are clearly useful lessons in the methodology deployed and inspiration to be derived from the original striking conception. The determination to use an imaginative approach to the tourism challenges of the region, to rethink the problem and the possible solution, while also learning from discussions elsewhere on new directions for the industry and the application of a systematic Destination Management approach to the organisation of the programme and the motivation of stakeholders certainly qualify as a good practice, and suggest lessons with a relatively high degree of transferability. The very limited budget and imaginative use of available resources to obtain maximum results for a particular destination, including an important increase in visitor numbers and occupancy rates also suggests that the approach could be of wide interest.

The Programme is based on the implementation of the Agenda for a Sustainable and Competitive European Tourism under the main theme of scientific tourism. The principles set out in this policy document are transferable and depending on the specific profile of the destination can be implemented with a high rate of success.

Further Information

Project partners
Genuineland | Alentejo Network of Village Tourism, responsible for the design and implementation in partnership with TGLA – Tourism Lands of the Great Lake Alqueva; EDIA **-** Enterprise of Development and Infrastructure of Alqueva SA; CCDRA **-** Coordination Commission and Regional Development of Alentejo; and APAA **-** Portuguese Association of Astronomers Amateurs.

Web sites

http://www.darkskyalqueva.com

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http://www.genuineland.com

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THE EDEN PROJECT (UK)

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Introduction

The Eden Project is a visitor attraction located in a reclaimed kaolin clay pit in Cornwall, UK. The complex is dominated by two huge enclosures consisting of adjoining domes that house thousands of plant species and each enclosure emulates a natural biome.

The Eden Project is wholly owned by the Eden Trust, a UK registered educational charity. The project is operated on behalf of the trust by The Eden Project Limited, a wholly owned subsidiary of the Eden Trust. Any profit generated is reinvested back into the Trust. The initiative as a whole is the brainchild of Tim Smit, the promoter.

The overall strategic objective of the project is economic regeneration in the face of the decline of the extraction industries in the area. In the event, the project has generated as many jobs as had previously been lost – the net employment position in the area has stayed the same. However, the Project is also acting as a key attraction for the area, bringing in visitors particularly from other parts of the UK and is generating a wide range of spill-over effects.

It is set in an Objective 1 area and has transformed the disused china clay pit in a way that it brings new development to the region in the South West "periphery" of England.

Theme

Marketing & Promotion*: The project as a whole is highly innovative and its implementation encompasses many of the major themes that are the subject of this study: extending the season, sustainability, use of ICT, development of skills and capabilities, and innovative marketing. This is also an important social tourism initiative. The overall mission of the project is education, but all these elements work together to enforce each other and contribute to the overall success of the Eden Project.

The focus of this case study is on marketing. Marketing is the meeting and anticipation of customer needs in a profitable manner. In this sense the Eden Project is an excellent example of a highly creative marketing through all the elements of the marketing mix: product, place, promotion, price and people.

Reasons for highlighting this project

Probably the most interesting aspect of this project, that which justifies its inclusion in this report, is that it is a completely "synthetic" project. Most tourist destinations have some inherent unique and interesting characteristics due to the setting, the scenery, the presence of some natural or man-made monuments, animals, foods, etc. which makes people want to visit or see them.

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None of these factors were present at the beginning of the Eden Project. There was no initial product to start off with. There was a disused clay pit on one hand, and the inspired vision of the entrepreneur, Tim Smit, on the other. So everything about the project has had to be created: the whole marketing mix. This is quite unusual for a tourism project but does provide a warranty against the presence of the "Dutch Disease", which means in many instances tourism would still take place even if very badly managed, and with the presence of low service levels, just because of the presence of some special resource. As a result all the systems, processes, experiences at Eden have to provide a high level of satisfaction or else tourists would simply not arrive – there is no inherent draw. There is not even a sufficiently large demographic pool in the area to justify the project's existence – it is in the third most deprived ward in the UK and visitors have to come from far afield – London is nearly five hours away by car.

The project has encompassed many of the elements in the Commission 2010 Communication. The project has stimulated the competitiveness in the European tourism sector by its own creation and also in developing spin-offs in other parts of the EU; it is based on an offer of sustainable, responsible and high quality tourism; and it is making good use of the potential of EU support and financial instruments. It has diversified the tourism offer and promoted the uptake of information society tools in the tourism sector (e.g. in the environmental management systems that are used to control temperatures in the domes); it is strengthening the socio-economic tourism knowledge base through surveys and studies and has extending the tourist high-season and promotion of the mobility of workers in the tourism sector to facilitate the operation of the tourism labour market.

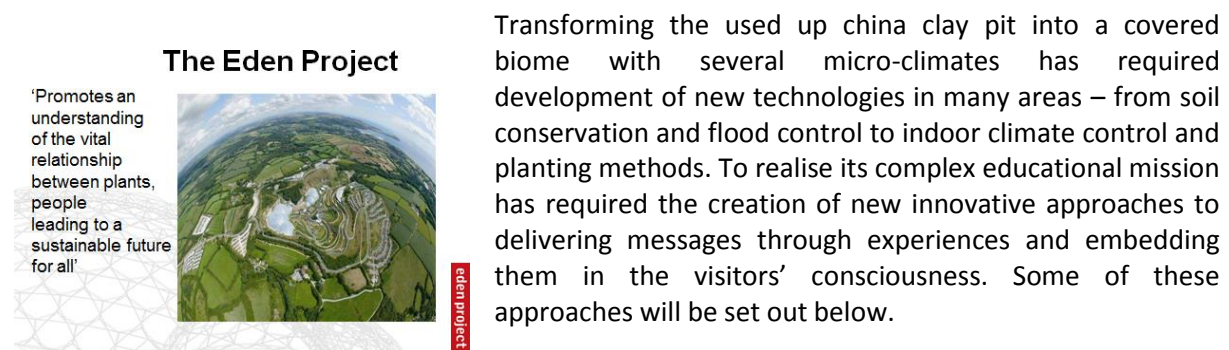| Project Highlights |
|---|
| **Contribution to Tourism Policy objectives:** Sustainable, responsible and high quality tourism; use of the potential of EU support and financial instruments; diversified tourism offer; use of information society tools in the tourism sector; strengthening the socio-economic tourism knowledge base through surveys and studies; extending the tourist high-season; and promoting the mobility of workers in the tourism sector to facilitate the operation of the tourism labour market. |
| **Innovative elements:** Creative concept – marketing an idea rather than a physical asset; use of high-tech state of the art technologies in a very "green" segment; and combining this with cultural and socio-economic tourism to develop a sustainable offer. Developing the 'education market'. |
| **Main outputs:** Mutiple services in a tourist attraction employing some 500 people |
| **Results and impacts:** Over a million visitors per year. Some €1.3 billion economic benefit. Regeneration of a region negatively affected by the depletion of extractive industries. |
| **Monitoring arrangements:** Annual reports reflecting environmental objectives and finances. In addition the project carries out ad hoc research reports on the results of specific initiatives. Structural Funds reporting arrangements. |

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Description of the project

The mission of the Eden project is educational: to promote "an understanding of the vital relationship between plants and people, leading to a sustainable future for all". The two covered biomes - one, encapsulating a tropical environment; the other, a Mediterranean environment - were built in a 160-year-old exhausted china clay quarry. The domes are made of hundreds of hexagonal and pentagonal inflated, plastic cells supported by steel frames. Inside the artificial biomes are plants that have been collected from all around the world.

The project started in 1995 as one of the Landmark Millennium Projects for the year 2000. The pit was actually acquired in 1998, and it was opened to the public while still in the construction phase in 2000. In March 2001 it opened its doors to the exhibits for visitors. At present more than 1 million visitors are received per year and some 500 people are employed. Several million plants are looked after.

The Eden Project

'Promotes an understanding of the vital relationship between plants, people leading to a sustainable future for all'

Transforming the used up china clay pit into a covered biome with several micro-climates has required development of new technologies in many areas – from soil conservation and flood control to indoor climate control and planting methods. To realise its complex educational mission has required the creation of new innovative approaches to delivering messages through experiences and embedding them in the visitors' consciousness. Some of these approaches will be set out below.

Location

The Eden project is located 2 kilometres from the town of St Blazey and 5 kilometres from the larger town of St Austell, Cornwall, in the United Kingdom. The ward in which the Eden project is situated is one of the most deprived in the UK, and there is a great deal of social deprivation in the surrounding area as well as as a result of the withdrawal of extractive industries, although there are also some relatively prosperous towns in the area. Furthermore the site of the Project is in one of the most remote parts of the UK – nearly at the South Westernmost tip of Cornwall and far away from the major concentrations of people in the UK or mainland Europe. As such it is also hard to reach for visitors and involves a long car, bus or train journey.

Approach

In order to realise the mission statement of the Eden Trust – its core product - "to promote public education and research in flora, fauna and other aspects of the natural environment" the project required the design and development of a very highly tailored set of products and services. The tangible product was the construction of the two bio-domes already alluded to, and their ancillary systems and structures. The augmented product consists of the transformational social and environmental projects it runs in Cornwall (and also elsewhere in the world), creating unforgettable learning experiences for students.

The way the Eden project works is to emphasise and bring out our relationships with the natural world – to reconnect people with the natural world by showing how closely they are linked to it, through simple hands-on experiences such as by looking where clothes and food come from in the

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plants of the project, showing which plants are involved and how the decisions about clothing relate to decisions about trade etc. It does this in "fun" ways for people and children. The basic approach seems to be aimed at developing an emotional link to nature, a connection, and stimulating an intellectual enquiry process as a result, which leads to an opening of the mind to new ways of thinking, metaphors and archetypes.

Thus the plants in Eden are not rare, exotic species, they are everyday plants such as cotton and lavender that illustrate a "story" that both adults and children can appreciate and use to make links between the everyday urban world they tend to live in and the natural world.

As such Eden has become a symbol of regeneration not only in terms of socio-economic factors but in terms of a wider sense as for example illustrated by looking at the clay pit before and after the project: transforming a waste land into a life-giving garden.

All the activities and initiatives at Eden are aimed at living out this mission - which is Eden's core product - in some way, whether it is promotion, doing valuable research into plants and conservation, or running the car park or other operations. When tourists leave Eden, whether they take away with them information on environmental issues, a new craft idea for them to try at home or the inspiration to plant their own garden, the hope is that they leave equipped to make changes in their lives that twill benefit themselves, their community and the planet[27].

Implementation

Under the heading of **product**, the first point is that the core product, the educational offer related to sustainability and its ecological, social and economic embodiment (the triple bottom-line) is high on the agenda in most of the project's target market areas: from grass roots local activities to global engagement. The selection of this link between man and the plant world is therefore the choice of a potentially very marketable product. Once the construction and population of the bio-domes – the tangible product - had been completed, the challenge has been to deliver this core product in a way that the project could sustain.

The portfolio of services designed to deliver the core product is a series of programmes, highly tailored to the specific market segments being served, some of which are set out below. Thus, sustainability is a major focus for the Eden Project, and every year the Eden Project produces an Eden Project Sustainability Report which includes environmental, social and economic aspects of running the project. Some of the initiatives as regards sustainability at Eden are:

- **The Green Foundation Programme,** funded by the European Social Fund, helps business engage with sustainability and identify new opportunities in the low carbon economy. It was launched in October 2010 and is an immersive programme providing courses for businesses.

- **Green Talent,** funded by the Department of Education (UK) involves a learning and careers programme for young people across the UK. 430 students participated in a 2-day learning experience at a UK environmental centre, of which Eden was one, and then went on to get a real insight into future career opportunities in the emerging green economy through a work-related placement at a company active in the field.

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[27] Sustainability Report, 2010/ 2011, p.8.

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- **Clear About Carbon** is a European Social Fund funded project to provide training in carbon literacy and sustainable procurement for small businesses in Cornwall that began in 2009. During 2010/ 2011 it has also involved working closely with the UK's (DEFRA) National Sustainable Public Procurement Programme and the Department of Health to create a major online carbon literacy training package designed for the public sector.

The sustainability report tracks performance as regards environmental factors compared to the 2007/ 08 baseline for the following indicators: greenhouse gas emissions, electricity, gas, LPG, oil, bottled gas, woodchip, fuel for transport, refrigerants, business travel, water and waste.

In the course of progressing to a low-carbon economy the Eden Project has gained a deep knowledge of what is involved and the technologies required. Eden has also developed some technologies itself. The result is that people want to visit Eden and see how it is managed - how creative thought has been integrated into a sustainable business model. Eden has been visited by many big businesses to this end: 27,000 of the 1 million visitors in 2010/2011 were of this kind.

In these ways, Eden has leveraged its strength, working with literally hundreds of other organisations and charities, to obtain funding to deliver projects for wide range of public sector partners. But sustainability goes beyond the monitoring of narrow environmental, social and economic indicators to developing a different relationship between people and the natural world. How that is done at Eden is illustrated by the following:

- **A Great Day Out**: a programme bringing ex-offenders, homeless people, and excluded young people to the Eden project.

- The **Eden Sessions**: a series of open-air concerts in the summer that brings together artists, scientists, and communicators to engage in climate change issues.

- For those in **formal education**: over 40,000 children and over 700 schools are provided with visit programmes.

- **The Big Lunch**: a social inclusion programme carried out in communities physically outside Eden itself aimed at bringing communities closer together.

- **Mud between your toes** is Eden's outdoor play and learning project which aims to help children and young people experience, understand and celebrate their sense of place and purpose in the natural world and in their communities. The project includes a two-year initiative designing innovative and inclusive nature-based play spaces for communities across the South West of the UK, known as Changing the State of Play, and a carefully designed programme of outdoor play and learning events which enable kids to develop both physically and mentally.

- **Changing the State of Play**: this project includes several programmes:

  - **Wild Days Out: a** family adventure of quests, challenges, storytelling and creativity in the secret, wild edges of Eden. These summer activities offer a rare opportunity for families to have a shared playful experience.

  - **Den building and water play: e**very summer the site is transformed into a place of play, where families roll their sleeves up and build their own den or water assault course. Den

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building encourages fledgling engineers, construction teams, scientists and artists! Over 100,000 people have built dens at Eden so far!

– **Play Days:** these are bespoke Play Days arranged for groups across the UK, offering young people a real adventure through activities such as den building, water play and wild art.

– **Muddy Shorts:** inclusive, adventurous, and accessible events to help disabled children, young people and their family access natural environments for play.

– **Outdoor learning/ teacher training:** a range of inspirational teacher training programmes and staff development packages to support school teachers in getting their pupils back outside.

– **School workshops:** facilitated workshops at the Eden Project site take classes outside for an immersive experience.

- A **"Gardens for Life"** network that includes over 400 schools and, crossing communities, cultures and countries, it is a network of schools that explores the world through gardening and growing food. It offers children everywhere the opportunity to share their knowledge and experience of growing with their counterparts from around the world. Thousands of children across four continents are taking part, creating school gardens that help them to explore the issues of food security, sustainable development and global citizenship.

- Currently there are some 36 "mini-Edens" in different stages of development or non-development throughout the world.

The above points make it clear that there are continuous major efforts made in service development, updating, and innovation to create a range of programmes that serve the envisaged market segments.

In order to improve the operation of the project by providing for continued operation beyond the core summer months through the winter, the approach adopted was based on increased integration and working with the local community.

The winter season is marketed as **A Time of Gifts -** a locally targeted season of events where the destination is transformed into a distinctively Cornish "winter wonderland". This becomes the setting for a series of winter events, including a skating rink (the first undercover ice rink in Cornwall, opened in October 2004) and music, art and torch light processions. Local schools, community groups and over a thousand people in Cornish choirs become part of this season and thousands of local people (many from some of the most deprived communities) access Eden. Most fundamentally for the project, visitors during this season input into the activities by taking part in dancing, singing, watching and creating material. Visitors during this period have a reciprocal relationship with Eden and therefore these visitors leave a lasting impression with the Project but equally the Project on them. To maximise the opportunities for local people to visit, a series of initiatives have been created including:
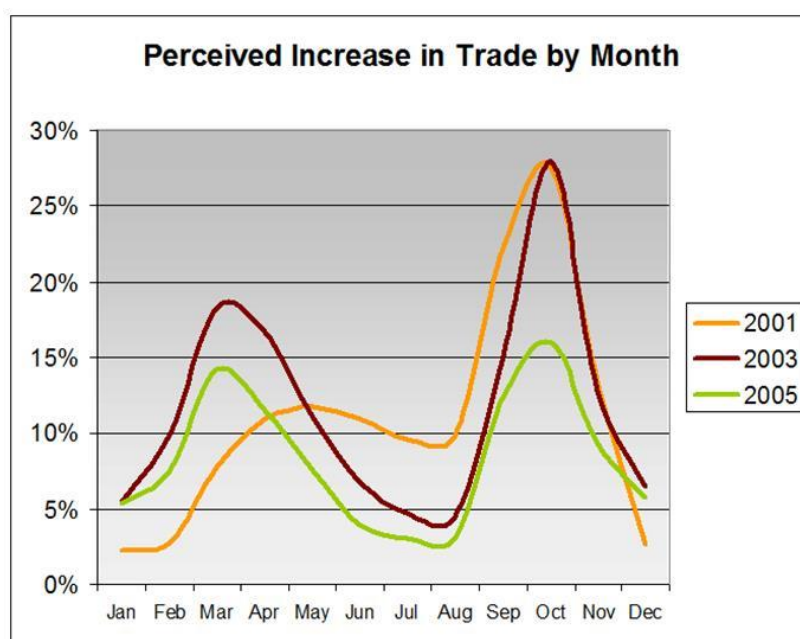
- **A Local Pass** - discounted season tickets for local households (Devon and Cornwall). Currently 30,000 local people take advantage of this offer each year

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- **Community weekends** – key community groups who impact positively on communities are invited to visit Eden for free. These groups include: the local community e.g. residents of St Austell and central Cornwall; Cornwall Council employees; NHS/Blue Light workers; youth groups including guides & scouts etc.; Eden suppliers and accommodation providers and local charities
- **Kids go free:** All children under 16 come for free during the winter season

Research among surrounding businesses as regards the impacts of this initiative makes clear when the greatest changes have been, as represented in the chart below.

Source: Eden Project

For example, Vivien Prideaux, who runs the "Artist's House" in Fowey, 10 miles from Eden, put it as follows: "For us accommodation providers here in Fowey, the majority of our guests choose to stay for two reasons: it is Fowey itself and it is close to the Eden Project. Eden has enabled my business to stay open for the majority of the year when in the past we closed throughout the winter".[28]

As regards the **price** element in the marketing mix, it is clear that the Project Managers have been very conscious of, on the one hand, the price of entry for those ABC visitors who can afford it, and, on the other, the need to discriminate between different market segments to penetrate the served market more deeply by offering discounts and special rates for those who would not otherwise be able to visit the attraction and keep it busy during the low season (social tourism).

Ways in which price discrimination has worked to this end have been mentioned in the preceding paragraphs – they have focused mainly on the local community and socially disadvantaged groups.

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[28] The Eden Project Sustainability Report 2010/11, p.50

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Obtaining funds through public sources and donations has also enabled the core product to be delivered at what would probably have been a higher price than if it was a purely market based price.

The **promotional** element of the marketing mix has also been managed in a highly imaginative and creative way. Local community music festivals are held; there is participation in (for example) International Mine Closure Conferences; support for publication of a book "101 things to do with a hole in the ground"; there is an annual marathon; and recently a café has been opened in a new shopping mall in St Austell which is being trialled as a location for a successful community hub. Other initiatives include an annual "Sexy Green Car Show" and operating as a venue for weddings.

All these events promote the attraction to different segments in a way that makes the core message clear – sustainability - the relationship between person and planet – and supports its operations in various ways.

As far as **placing** the offer is concerned – the distribution channels, this is done through schools, universities and institutions and is linked with those promoting Cornwall. Eden's overall destination marketing approach is not to overpower the area's offer: it is marketed as an add-on to those visiting Cornwall, rather than an end in itself, and operates in collaboration with the surrounding area to that end.

The **people** element of the marketing mix is probably the most important element in delivering the marketing mix as a whole. This includes the contribution of all involved in delivering the vision – from the project promoter to those selling tickets, cleaning floors and watering the plants. Since an appreciable amount needs to be invested in staff to make them aware of all that is involved at Eden, obtaining the best return from that investment has also been a driving factor in extending the season. The mission of the project itself has meant that it has attracted enthusiastic and dedicated staff supporting the underlying vision of the project. This makes the challenges of managing human resources: recruiting, retaining, retraining and rewarding easier to deal with. Staff that "live the vision" are a key marketing ingredient contributing to the overall success of the Eden project.

The Eden brand certainly has significant marketing potential that has yet to be exploited, but a review of how the elements in the marketing mix as set out in the preceding paragraphs work together makes clear that all elements contribute in a major way to the success of the project.

Factors contributing to improved competitiveness

Drivers of success, limiting factors

The key factor in the success of the Eden Project has been the drive, inspiration, and vision of the project entrepreneur and his team. The availability of funding streams and access to Objective 1 funding (£144m or €170m, of which £19m came through SWRDA who provided information and expertise etc. for studies and due diligence) enabled the project to proceed, as did further sources of funds such as the Millennium Fund, the Big Lottery, the European Social Fund and other sources of finance.

The project team was also able to harness support for their cause from a wide range of institutions that bought into their vision – ranging from schools and charities to media celebrities.

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Budget/ funding

Detailed annual reports are made on sources and allocation of funds, and sustainability reporting, all of which is available on the project website.

Funding sources have included: EU Objective 1, The Objective 1 Partnership for Cornwall and Scilly; South West England Regional Development Agency (SWERDA); The National Lottery; Millennium Big Lottery Fund; Social Enterprise Training for People and Planet, as well as various other UK government funds.

The Millennium Fund was probably a key factor in getting the project off the ground, as was the Objective 1 status of the area.

Financial management: the project can fund current expenditure from current finance, and any surplus goes to finance educational programmes. For capital works the project managers need to approach firms or public-private partnerships because as a charity Eden cannot access public capital markets.

Main results and impacts anticipated

Activities and outputs are meticulously measured every year under main headings: visitors (schools, children, higher education, titles published); green energy/ carbon, etc.; financial statements; and, economic impact (incremental economic value)

As regards the anticipated economic benefits of the project, the target of some £1.1 billion turnover (€1.3 billion) seems to be already achieved with £1.2 billion generated over 11 years. Most of these benefits come to Cornwall – there is little leakage, and all is additionality – there is no deadweight.

There is an additional c£250 million (c € 194m) of benefit realised if indirect effects are added (using the Cambridge Econometrics Tourism Impact model). This can be compared to the estimate by Oxford Economics of the £1.4 billion impact of the Olympic Games over the period 2007-2017 which is spread over a population of close to 10 million people - as opposed to the 500,000 in the area: so the Eden Project has had a big impact on the lives of the people in the region.

Surveys suggest that some 3,000 people have felt the benefits – especially in the months of January, February and March when tourism in the region slows down. Eden makes extensive use of local sourcing: some 80% or more of the catering is locally sourced.

Impacts are also achieved and measured on a human level. For example, evaluation studies of participants on the "Great Day Out" programme for homeless people, offenders and excluded young people have found that participants showed improved confidence, self-esteem and personal health; positive shifts in behaviour, outlook and actions; and motivation to start volunteering, training or employment[29].

The Eden Project benchmarks itself against other organisations and technologies in several areas: from the efficiency of their own bio-digester to staff absence from work levels.

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[29] The Eden Project Sustainability Report, 2010/11, p.16.

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Anticipated spill-over effects

The projects impacts are felt as far away as Newquay, St Austell, and St Ives, where people spend money on accommodation and subsistence.

There are also project spill-overs elsewhere in the UK through initiatives undertaken such as A Great Day Out, with schools, families and communities.

The large influx of visits by organised groups has also led to the creation of a good hotel infrastructure in the area - with some firms setting up their corporate conference centre there.

The Eden Project also took over some of the data collection and management activities of South West Tourism when it was closed down in 2011, thereby acting as a region-wide information resource for Tourism and economic regeneration.

Some of the technologies developed to maintain the environmental management systems of the domes and the plants in them have proved of value to other organisations and have provided benefits beyond just the Eden project.

Features relating to the wider adaptation of good practice

Lessons learned

Several useful lessons can be learnt from this project. The first is that it is possible to create a highly successful, highly visible, tourism project based on no specific unique, natural or institutional feature, but by using inspired leadership and vision, drive, and public funds.

Secondly, tourism can be driven by an idea, not just a physical asset, if that idea is inspiring and its time has come.

The next lesson is that to create a sustainable business model in such a context requires continuous innovation, drive and dedication by the project team. Imaginative marketing across all the elements of the marketing mix is required.

The project managers have also used and collaborated with a wide range of supportive organisations, and a major ingredient of the success of the project has been its close links with the local community.

Sustainability

Maintaining the success of the project requires relentless, continuous effort. For example if the energy management system fails, the plants are under threat. The systems cannot be switched off or scaled down if visitor numbers decline. The project has to date proved its sustainability by surviving and even prospering in the current economic climate and achieving its targeted economic benefits.

Transferability

It is possible to transfer such a project, as potentially there are many locations for it. However success is related to the inspired vision of the entrepreneur and his team, and the availability of funds at the right time. Many Eden spin-offs have been started, but they have tended to be on a smaller scale and specialised in particular aspects, such as grasses, and none of them have as yet developed into the significant success that the Eden project has become.

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Further information

http://www.edenproject.com/

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