D3.1.1 Transnational tourism context analysis

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Table of contents

List of figures

1. Introduction

The objective of WP3 is to integrate the outputs and results of past projects focusing on tourism and adapt them to the insular areas to develop the first draft of the WINTER MED strategy for off season tourism development. The rationale of testing activities is to consolidate the existing knowledge and lessons learned and embed them in an integrated eco-systemic approach to sustainable planning of Maritime & Coastal (M&C) tourism in islands OF the Mediterranean basin. The WP foresees three main actions that will lead to the first draft of the WM Strategy: a) Regional analysis and policy assessment, b) Assessment of outputs and results and c) Policy integration.

In the frame of this deliverable, a preliminary study and analysis of six WINTER MED partners locaetd in the pilot areas of Tuscany archipelago, Cyprus, Balearic Islands, Dubrovnik-Neretva County, Corse and South Aegean Region has been carried out. The materials used for implementation of this deliverable lay on the information provided by the six pilot areas, through a standard Questionnaire form that has been provided by Efxini Poli. Primary research has been conducted to a small extend, only in the case that information that was considered supplementary to the partners' input was missing. Also a brief literature overview has been conducted, to search for existing strategies that fight tourism seasonality (Annex I); this information might be useuful for future activities in the frame of WP3.

More analytically, in section 2 of this report, information concerning the socioeconomic conditions in each pilot area, policy context in relation to tourism, current tourism offer, further potential to design tourism products thanks to the natural and cultural assets, infrastructure, ICT as well as current challenges and impacts on sustainability of the areas, is presented. A SWOT analysis follows in section 3, conducted by each pilot area. An interregional SWOT analysis, in order to present the individual SWOT points in a more robust way is also presented in section 3. In the conclusions, a preliminary comparative assessment of the policy tools between the six areas has been attempted in ordet to feed the other two actions of WP3.

WP3 results will feed the transferring process (WP4), providing important insights for Plan of Transferability of Results and will set the ground for capacity building and policy learning. The strategic framework for policy recommendations will also be finalized and delivered in WP4, based on previous preliminary work of WP3.

2. Presentation of the areas

2.1 Tuscany

Figure 1: Tuscan Archipelago (source: https://sh.wikipedia.org/wiki/Elba_%28otok%29#/media/Datoteka:Tuscan_archipelago_es.svg)

The geography of the Tuscan Archipelago includes a chain of islands between the Ligurian Sea and Tyrrhenian Sea, west of Tuscany.

The Archipelago contains the islands of Elba (the largest island of the group, the third Italian island), Pianosa, Capraia, Montecristo, Giglio, Gorgona and Giannutri, all of which are **protected as part of the Tuscan Archipelago National Park**. The islands of the Tuscan Archipelago are included in **three different Areas:** Elba and Tuscan Islands, Livorno (Capraia Island) and Maremma Toscana South (Giglio). The biggest island is Elba (223.5 km^2) and the smallest is Gorgona (2.23 km^2). The island furthest from the mainland is Montecristo, at a distance of 68 km.

It encompasses a wide range of geological, geomorphological and biological diversity representative of the Mediterranean region. They have different geological provenance as magmatic, sedimentary and metamorphic rocks. Islands are covered by sclerophyllous evergreen forest, Mediterranean pine woods, maquis, scrub, and hardwood forest with deciduous oaks and chestnuts. [1]

The area expands in 295 km^2 and includes 11 Municipalities.

2.1.1 Demography

The official number of residents raizes up to 34,054 inhabitants during winter. Data regarding the population during summer do not exist. People that have summer residences often leave the residency all year for taxation reasons (they don't pay taxes for the principal house).

2.1.2 Socio-economic conditions

Tourism is the main economic activity, linked principally to bathing, and is therefore concentrated during the summer season. Other economic activities include agriculture and fishing, although these have only a minor impact at the environmental and socio-economic level. [1]

Tourism. The economy of the Archipelago is essentially based on tourism and receptivity: both businesses and workers in agriculture and industrial and manufacturing activities are decreasing. The development model that is being consolidated sees a progressive affirmation of larger production units with the expulsion of micro-enterprizes from the market. Although the tourist season faced some extension in past decades, the tourism-related economy determines long periods of inactivity. The percentage of tourism and related economic activities in terms of income is higher than 70%.

Fishing. In the Archipelago the fishing vessel is present only on the island of Elba, in Giglio and Capraria with boats almost exclusively intended for small-scale artisanal fishing. On the island of Elba, fishing has ancient roots, although the number of employees has decreased in recent decades. Between municipalities of Portoferraio, Porto Azzurro and Marina di Campo the flotilla reaches 87 boats for small-scale fishing. The presence of different backdrops (rocky coast, coastal shoals, etc.) has favored the spread of more types of artisanal fishing, with different target species according to the season. Much of the catch is marketed through the few wholesalers operating on the island. In summer the sale is often direct.

Agriculture. Agriculture is in the Archipelago in sharp contraction. The abandonment of agricultural activities, which took place in favor of an economy based on tourism and trade, is causing the progressive reduction of agricultural activities that represent a value and a cultural and landscape identity in the territory. The conditions in which the agricultural activity currently takes place, mostly small farms (on the Island of Elba 65% of the vineyards are less than one hectare), the presence of already recognized quality productions (such as DOC wines from Elba and Giglio) and some minor productions, **make** the area particularly suitable for the development of a niche agriculture strongly identified with the territory, for the application of production methods organic or with low environmental impact, to the integration of the cultivation activity with the agritourism accommodation, still marginally practiced with respect to its development potential. [1]

2.1.3 Strategy/ Policy/ Regulatory framework context in relation to tourism

The context is described in the **''Strategic Operational Document Destination Tuscany 2020''** for the 2017-2020 period, drafted by the regional agency Toscana Promozione Turistica.

The **objective** of this programming document is to define a strategy, in consultation with operators and stakeholders, for a **responsible, sustainable and accessible tourism development.** It identifies the strategic lines, the specific objectives and the lines of intervention that will allow the Region **to increase its tourist flows and at the same time increase the sustainability of the destinations**. The current strategy includes a five year action plan (2016-2020).

The **Action plan** for the Sustainable Tourism Development of the Tuscan Archipelago also exists. The National Park Authority has joined the European Charter for Sustainable Tourism (CETS) promoted by Europarc Federation. It includes a **methodological tool and a certification** that allows to improve the management of tourism in protected areas. The central element is the collaboration between all stakeholders to protect the natural and cultural heritage and the continuous improvement of tourism management in favor the environment, the local population, businesses and visitors.
Apart from that, **each Touristic Area delivers yearly an action plan**, with a quantitative and qualitative analysis of the tourist phenomenon of the previous year. The action plan identifies the reference markets and tourism offer each area intends to develop, indicating also which promotional fair events it intends to participate in. Toscana Promozione Turistica therefore defines the **annual Promotion Plan of the Tuscany Destination** by composing the various Areas' plans and identifies which promotion actions to take.

Within WINTER MED project these action plans will be upgraded with a strategy for a sustainable development of all year tourism in Tuscan islands.

Additionally, the Tuscany region, together with local public governments (Municipalities) has introduced **a Regional Law 86/2016** (Legge Regionale 86 del 20/12/2016). The Law redefined the touristic governance in the Tuscany Region. The **main points** of the reform are:

- The activity of tourism promotion is centralized at regional level and is carried out by a regional tourism promotion agency (called "Toscana Promozione Turistica") which has the task of promoting the Tuscan brand on international markets
- One of the strengths of the Toscana brand is that Tuscany is a "mosaic of offerings", where sea, villages, cities of art, mountains, spas, give shape to a unique landscape with a strong Mediterranean identity
- Division into 28 Touristic Areas - "Ambito turistico"), which represent 28 possible tourist destinations able to offer a particular experience of stay in Tuscany
- Within the Touristic Areas, public and private stakeholders must organize the local tourist offer, starting from the specific strengths of the territory and in coherence with regional promotion policies, in order to be able to enhance Tuscany performance in global tourism market

The **stakeholders** involved in the implementation of the Law are regional governments, regional tourist promotion agencies, Municipalities, Business support organizations, Academic institutions (Universities, R&D centers), while the main **beneficiaries** are: Municipalities, SMEs and other economic operators, residents, tourists, local associations.

The **multiannual funding** ranges from: €2.500.000 in 2019 to €2.000.000 in 2020, concerning support for the activities of the 28 Touristic Areas.

The **expected results** are a greater competitiveness of the Tuscan destination and a more homogeneous diffusion of the tourist phenomenon on the regional territory, measurable with the variation over time of the tourist presence in the various areas. The activity of the areas has just started and the **results cannot yet be fully assessed**.

The **main difficulties** in implementing the new governance model implied by the Law, consist of:

- the poor habit of the municipalities to work together within the Area
- the difficulty in establishing strong relationships between public and private stakeholders for the definition and construction of the tourism products of the Area
- the lack of specific skills spread across the territory (at the level of the individual areas)

2.1.4 Description of the tourism product

The **Sun&beach tourism** is the main type of tourism in all the Archipelago and all economic activities are highly dependent on it. The tourism offer includes several other types of tourism, and some of this offer is available also during the low season. The main type of tourism besides Sun&Sea is the **tourism based on activities in nature** and includes the visit and activities in the Tuscan Archipelago National Park. The Park covers over 600 km^2 of sea that go from Livorno to the Argentario promontory and it includes seven islands (Capraia, Elba, Giannutri, Giglio, Gorgona, Montecristo, Pianosa, Formiche of Grosseto and other small rocks).

The **tourism offer includes** trekking itineraries, whale and bird watching, naturalistic photography courses, events and itineraries, cycling routes, visits to sites of naturalistic, paleontologic, archaeological, cultural or historic importance, amongst others.

Cultural tourism: Most of the islands are full of historical testimonies of the Roman era (Giannutri and Pianosa), Medici, of Spanish domination, of the brief but important Napoleonic bracket. Significant museums are located in Portoferraio, Marciana, Rio nell'Elba. The islands have a number of churches, fortresses, monasteries etc. The cultural sites are included in the tourism offer of all islands.

Sports tourism includes various offers for all kinds of outdoor sports, land or water. The watersports tourism has the highest demand because it's tied to a wide range of activities by the sea, during the summer season. It includes diving, surfing, windsurfing, fishing, kayaking, sailing amongst others.

The **land sports** offer includes trekking, biking, mountain biking, free climbing and golf. There are numerous sports associations that organize competitions both at a national and international level. The events calendar goes all year round and covers all the archery, enduro, cycling, triathlon, rowing races and competitions, as well as the walking and trial running ones. [1]

Study and training. There are all sorts of courses all year round mainly on the Island of Elba: foreign languages (German, English, French and Spanish) and Italian for foreigners, photography, typical cuisine, sailing, scuba diving, tennis, free climbing, golf. During the summer months many schools organize study trips and courses for school students. [1]

The **tourist profiles** of the area are mostly Italians 61%. Main foreign markets: Germany, Switzerland, Netherlands and Austria.

The **main services** offered are:

- tourist information services
- hospitality / accommodation (hotels, guest houses, B&B, agritourism)
- transfer and transport (ferry, airports, car, boat, bike rentals)
- food and restoration (restaurants, bars, catering, food markets and shops)
- entertainment services (events, animation, shopping.)
- travel organization (bookings, organization of excursions, guided visits and tours)
- cultural services (promotion of performing arts and cultural events, cultural information services)
- sports services (rental of sports equipment, schools and training)
- ports and marinas (mooring, mooring assistance and connected services)
- commerce related services (shops, supermarkets, markets)

More information provided in the following table:

Number of Tourist beds available at the pilot area for 2018	36,954
Number of overnights spent in 2018 (including RBNB when possible)	2,883,287
Number of visitors for 2017	477,772
Amount of money spent per visitor/tourist for 2017	No data (the data are only available on regional level)
Months of the year covered by the high season	May-September

2.1.5 Natural and Cultural assets

In terms of heritage, the Archipelago contains **30 prehistoric sites** often situated in panoramic locations, **numerous Etruscan sites** connected to mining activities established in defensive positions and several **Roman findings,** linked to patrician villas. Outstanding examples include the Roman Villa of the Caves at Portoferraio, the areas of Monte Castello and Compo dell'Aia at Procchio, the Roman Villa at Cavo, the sites of Capel Rosso and Vigna Vecchia, the Roman ruins at the port of Giglio, the catacombs and the Villa of Agrippina on Pianosa. [1]

The Tuscan Archipelago National Park is also included in the International Sanctuary for the protection of Marine Mammals Pelagos, which is a protected marine area of approximately 87,500 km^2 between Italy, France and Monaco. It extends in the Corsican-Ligurian provincial basin from Punta Escampobariou (near Toulon) to Capo Falcone and Capo Ferro (Sardinia), up to the border between Tuscany and Lazio. It is an area characterized by a high biodiversity which includes, in addition to whales, sperm whales and dolphins, about 8,500 species of marine animals. The Archipelago is also **part of UNESCO MAB Biosphere Reserve.**

Figure 2: The island Elba (source: https://en.wikipedia.org/wiki/Elba)

The **island Elba** is an authentic mineralogical paradize: 150 varieties of its crystals are held in natural science museums around the world. With its triangular shape dominated over by the thousand-meter high Mount Capanne, the island is rich in gulfs, coves and hiking paths. The Butterfly Sanctuary is a must-see, located on Mount Perone, on the road between Sant'Illario and San Piero in Campo, where 50 species of butterflies, including the rarest varieties can be admired. [2]

The second largest island is **Giglio**, famous for its clear water rich in marine life and much beloved by scuba divers, where amidst thriving meadows of posidonia and vertical walls covered in blue sponges and red gorgoniidae one can also catch a glimpse of sea horses.

From the time of Italian Unification to 1998, Pianosa was the seat of a maximum-security prison and for this reason, it has remained largely untouched. Today, it is open to limited guided visits, with hiking excursions and snorkeling to discover the island's treasures.

Giannutri emerges from the sea like a limestone half-moon: 11 kilometers of rocky coast and a seabed rich in biodiversity, teeming with dolphins and rorqual whales, not to mention the splendid archeological site of the Roman Villa Domizi, built by the Domizi Enobarbi family. The public can access the island only in the summer season, when some shops and restaurants are open. [2]

Figure 3: Fortress of S.George, Capraia island (source: https://en.wikipedia.org/wiki/Capraia

Capraia is the third largest island in the Archipelago and the only one with volcanic origins, born nine million years ago from an underwater volcano. Regarding its plant life, the island is a true natural laboratory, with over 650 plant varieties including the Capraia centaurea, a type of cornflower, while the waters around the island are rich in marine life and the sea bottom is famous for snorkeling and scuba diving: amidst meadows of posidonia, sea anemones and sponges, one can observe large groupers or greater amberjacks. [2]

2.1.6 Infrastructure

The transport infrastructure **is partially developed,** and it mainly includes the road network. The road system on Elba (the only one articulated in the Archipelago), is mostly suitable for the traffic of residents and overcrowded in the summer season. Public road transport (buses) cost very high and is qualitatively inadequate in terms of frequencies, interchanges, and prices and is not competitive with respect to car use. Elba island has one small commercial airport, operating during the summer: The La Pila airport. It is a private civil airport open to commercial flights. The three airlines that do national and international flights to and from the airport are: Silver Air, SkyWork and Air-Glaciers. For tourists that travel without car, there is a booking system for renting several means of transport (cars, motorbikes, scooters or bikes). The islands are connected to the mainland by the **ferry services**. The main ferry ports in Tuscany are Livorno, Piombino and Porto San Stefano. Distance to departing points of the ferries: 25 km from Livorno, 109 km from Piombino and 200 km from Porto Santo Stefano. The main companies operating on the routes to the islands are Tirrenia Navigazioni, Trans Tirreno Express, Moby Lines, Sardinia Ferries and Toremar. During the summer months there are several more services.

There is also a network of marinas / ports and landing places, equipped nautical centres and multi buoy moorings.
In general, in order to reach the whole area by air, the closest airport is the Pisa International Airport Galileo Galilei.

2.1.7 ICT

Regarding the incorporation of ICT at local level, for tourism purposes, available knowledge is listed below:

- On regional level, the Tuscany Region is developing a digital tourism ecosystem (for the management of data and information) through the Smart Destination project and other projects. But still we are far from the "incorporation" phase
- On the local actors' side, some tourist areas of the region are testing ICT tools to support tourist information and reception (e.g. software for the management of tourist information and reception points on the network)
- There are private operators who have developed ICT tools (e.g. APP) for the marketing of tourism products and services

2.1.8. Challenges in relation to tourism activities

One of the most important challenges faced by Tuscany Archipelagos in relation to tourism, is **seasonality**. The main reasons why tourist choose the area as a summer destination are:

- favourable climate for sun & sea tourism
- proximity to the Tuscan coast and good transport services to the islands
- high quality of services related to tourism activities
- preserved nature
- diversified tourism offers for cultural, sports, nature tourism

Some of the services are available during the winter, but very reduced. Accommodation and transport services are very reduced. There are several months in the year (ranging from November till March) that the hotels are closed and it's difficult to find adequate accommodation. Transfer and transport services are reduced to a minimum necessary for the resident population.

Seasonality has impacts on the sustainability of the area, depicted in the table that follows:

Social impacts	Environmental impacts	Economic impacts
- Seasonal jobs (lack of steady employment) - Overcrowded destinations during the summer, with consequent lower quality of life for residents and lower quality of experience for tourists - Lack of services during the winter causes the depopulation in islands, the main economic activities are open only during the summer	- Increase of pollution (particularly the increase of waste and litter) - Increased water consumption, that is a scarce resource in all islands - Increased risk of forest fires with consequent pressure on biodiversity (the whole Tuscan archipelago is a protected nature area; this mitigates the habitat loss)	Seasonal turnover, only for a short period in the year, during the main season, with more benefits for tour operators than for resident population

However, the islands of the Archipelago could have all the prerequisites for all year-round tourism. The high-quality wine-gastronomic offer, small towns and villages rich in culture and traditions, and the truly suggestive natural environment make the islands attractive during the wintertime. The climate is mild all year round and the proximity to the coast enables the organization of the transfers.

The tourism offer during the winter could include:

- cultural tourist itineraries
- food & wine tourism offer
- possibility to practice outdoor sports
- naturalistic tourism services
- study tours and environmental education offered by the Park authorities
- cultural and sports events

2.2 Dubrovnik-Neretva County

Figure 4: Map of the pilot area (source: http://sightseeingcroatia.com/peljesac-peninsula-ston-orebic-trpanj)

The pilot area consists of the island of Korčula, peninsula Pelješac, island of Mljet and Elaphiti islands (Šipan, Lopud, Koločep, etc). The climate is Mediterranean.

The island of Korčula belongs to the central Dalmatian archipelago, separated from the Pelješac peninsula by a narrow Strait of Pelješac. With an area of 279 km^2, it is the sixth largest Adriatic island. The island is largely covered with Mediterranean flora including extensive pine forests. [3] **Pelješac is the second largest Croatian peninsula** (after Istria), located in the south of Croatia in Dubrovnik-Neretva County. In terms of the Islands Act (NN 116/18), the Pelješac peninsula is considered an island. The surface of Pelješac is 348 km^2. It is connected to the mainland by the Ston cover, which is 1450 m wide in the narrowest part. The vegetation cover of Pelješac is Mediterranean, rich and diverse. It has recorded more than 1,100 plant species and subspecies. **Mljet** is the southernmost and easternmost of the larger Adriatic islands of the Dalmatia region of Croatia.

Figure 5:Croatia islands (source: http://www.kairos-travel.eu/news/)

The **Elaphiti Islands or the Elaphites** (Croatian: Elafitski otoci or Elafiti) is a small archipelago consisting of several islands stretching northwest of Dubrovnik, in the Adriatic Sea. [4] The Elaphites have a total land area of around 30 km^2 and a population of 850 inhabitants. The islands are covered with characteristic Mediterranean evergreen vegetation and attract large numbers of tourists during the summer tourist season due to their beaches and pristine scenery. Only the three main islands (Šipan, Lopud, Koločep) are permanently inhabited, each of which supports a modest tourist industry. [3]

12 units of local government (cities and municipalities) exist in the pilot area: City of Korčula, City of Dubrovnik (Elaphiti islands), Municipalities of: Lumbarda, Smokvica, Blato, Vela Luka, Lastovo, Janjina, Orebić, Ston, Trpanj, Mljet.

2.2.1 Demography

There are 25,203 inhabitants in the area in the winter season (+ cca 850 inhabitants within Elaphiti islands area).

A decrease in the total population characterizes the entire pilot area. The average age of people in Dubrovnik-Neretva County is equal to the average age in Croatia and quite high (41.5 years in 2011). Island and peninsular municipalities have a lower share of the highly educated than the share of people with completed primary education.

2.2.2. Socio-economic conditions

Tourism is the most important economic branch in the pilot region and has a major impact on development and operations in other economic branches, such as construction, real estate business, transportation, agriculture, cultural activities, etc. Dubrovnik-Neretva County recorded 8,051,049 nights in 2018.

The pilot area has favourable climatic conditions for the cultivation of many Mediterranean crops, but there are also limitations due to the relatively small and dispersed agricultural land. According to the character of **agricultural production**, the area is a vegetable-fruit-wine growing area. The olive growing is also very important in the agriculture. Vineyards of Pelješac are significant in viticulture of Pelješac.

The area is also known for **fishing**. In the structure of the total catch is the largest share of blue fish, about 95%, other fish about 4%, while the rest is 1% wastes on crustaceans, mollusks and shellfish.

Mariculture, fish and shellfish farming, are especially developed in the bay of Mali Ston and the waters of the island of Mljet.

The structure of the economy also includes manufacturing, construction and stone cutting.

2.2.3 Policy context in relation to tourism

Dubrovnik Neretva Region is in charge of a **Strategy**, titled ''Tourism Development Strategy Dubrovnik-Neretvanska County, 2012 – 2022''. Dubrovnik-Neretva County launched a series of project activities at the end of 2010 related to the development of the County Tourism Development Strategy, which had the following fundamental objectives:

- Clear the dilemmas and controversies that have arizen in the previous period

- Divide the total area of the county into tourist clusters that are completely consistent in terms of experience
- Define the tourism growth model of the county and its clusters
- Set up a management model for tourism

The **concept of strategy relies on the market power of the city of Dubrovnik**, which already provides relatively easy commercialization of the city of the Dubrovnik cluster. By linking the county's value chain as an integral region, content and quality are being expanded offers tourist product, and by insisting on the brand of the city, the rest of the region facilitates access and image on the market demand.

Competitive positioning of an upscale destination involves the delivery of all elements of the selected tourist products at a highly competitive level of Mediterranean destinations according to a previously agreed plan.

Displacement of the traditional product in other clusters which on one hand resolves the fate of the tourist positioning the Dubrovnik cluster and releasing it for products based on culture and events on the other, feeds other clusters within the county and secures demand for a qualitatively repositioned solar product and a ''must'' in these clusters.

Cluster profiling is done according to clear attributes and realistic development scenarios that are on the one hand consistent with needs and market perceptions and on the other with local development capacity. A necessary criterion for positioning the cluster is a fit into the county's consistent system of experiences and products.

Unique management process and mechanism must ensure the **involvement of all cluster stakeholders**, as well as define responsibilities for all strategic and operational issues of tourism development.

Process:

- Involve actors in the development process
- Introduce missing links in the value chain
- Sustainable development of new accommodation facilities
- Develop missing products
- Management process and strategic goals
- Develop the missing tourism infrastructure
- Develop a modern destination marketing system
- Provide education and training for the future
- Prepare projects for EU funds

Goals:

- Increase in tourist volume (nights) from 60 to 70%

- Capacity occupancy increase of 50%
- Additional capacity increase of about 10,000 beds
- 50% increase in unit consumption
- Growth of MICE business volume, Rural & gastro and Nautica based on new investments (3 to 5 times)
- Product growth of events, touring and short vacation with the professional support of the destination management and marketing
- legal framework and implications
- description of measures, actions, tasks

Among the **stakeholders** for the implementation of the strategy there are regional / national authorities, development agencies, R&D institutions, business associations, universities, the Institute for Physical Planning of Dubrovnik-Neretva County; and Horwath Consulting Zagreb together with key stakeholders, and at some stages the general public of the Dubrovnik-Neretva County. Among the **beneficiarie**s, there are SMEs, clusters, R&D centers, business associations, as well as the local population of Dubrovnik-Neretva county, tourist stakeholders, local and regional public administration, tourists
The **timeline** for implementation is from June 2010 – 2022.

2.2.4 The tourism product

The pilot area contains, **"sun and beach'', cultural, natural, religious and gastro tourism.** There are many **cultural** (tangible and intangible) heritage in this area. On the peninsula of Pelješac are magnificent **Ston walls and Ston salt works**. Ston walls connect the cities of Ston and Mali Ston with a total length of 5,5km. They were reinforced with **5 fortresses and 40 towers** and represent one of the largest medieval fortification ventures. The rich history on the island of Korčula left **rich cultural heritage as architecture** of Korčula (cultural and historical urban unit, walls, palaces, courtyards, religious objects, castles, etc), **archaeological sites, parks and also intangible heritage** (folklore, brotherhoods, events, museums, galleries, etc). On the island of Korčula is also famous archaeological site Vela spila.

Additional information are provided in the following table:

Number of Tourist beds available at the pilot area for 2017	
Number of overnights spent in 2017 (including RBNB when possible)	2,404,229
Number of visitors for 2017	357,816 visitors of the pilot area
Amount of money spent per visitor/tourist for 2017	79 euros in 2017 97 euros in 2019
Months of the year covered by the high season	Mid June- Mid September

2.2.5. Natural and Cultural assets

Figure 6: Island of Korčula (Source: https://en.wikipedia.org/wiki/Korčula)

The island of Korčula has been inhabited since prehistoric times, with past traces of life being uncovered at many places on the island. The oldest findings were stone knives from the Neolithic age discovered on the islet of Badija near Korčula. The site with the richest Neolithic age finds is Vela spilja (Large Cave) at Vela Luka. Korčula is a historically fortified town on the protected east coast of the island of Korčula, with an approximate population of 2,900 inhabitants. The old city is surrounded by walls, and the streets are arranged in a herringbone pattern allowing free circulation of air but protecting against strong winds. The town's historic sites include the central Gothic and Renaissance Cathedral of St Mark, the Town Hall and the massive city fortifications. The 15th-century Franciscan monastery with a beautiful cloister is situated on the islet of Badija, near Korčula Town.[5]

The whole **island of Lastovo** with its associated islands has been declared **Nature park**. With exceptional translucency of the waters, the Park is rich in coastal cliffs and many plant and animal species. Its forest hides many caves, and pits.

Figure 7: Entrance to Mijet National Park (source: https://www.mljettravel.com/national-park/)

Mljet National Park includes the western part of the island, Veliko jezero, Malo jezero, Soline bay and a sea belt 500 m wide from the most prominent cape of Mljet covering an area of 54 km². The central parts of the park are Veliko jezero with the Isle of St. Mary, Malo jezero and the villages of Goveđari, Polače and Pomena. Mljet is of volcanic origin, with numerous chasms and gorges. Port Polače, the principal harbour in the north, is a port of call for tourist ferries. The northwestern part of the island includes an inland lake as well as a small island within it. It has been a national park since November 12, 1960. Over 84% of the island of 98.01 km^2 is forest. The island's geological structure consists of limestone and dolomite forming ridges, crests and slopes. A few depressions on the island of Mljet are below sea level and form non-permanent brackish lakes known as blatine ("mud-lakes") or slatine ("salt-lakes"). [3]

2.2.6. Infrastructure

The transport infrastructure is developed but not enough. This means that sometimes in the peak season there is necessity for more ferry lines, more bus lines, etc. The nearest airport is located near the city of Dubrovnik. Ferries run daily, but less frequently in winter season.

In the island of **Korčula** the main **road** runs along the spine of the island connecting all settlements from Lumbarda on the eastern to Vela Luka on the western end, except for Račišće, which is served by a separate road running along the northern coast. **Ferries** connect the city of Korčula with Orebić on the Pelješac peninsula. Another line connects Vela Luka with Split and the island of Lastovo. Fast passenger catamarans connect those two ports with Split and the islands of Hvar and Lastovo. The main Adriatic ferry line connects Korčula with Split, Dubrovnik, Zadar and Rijeka. During the summer there are direct ferries to Italian Adriatic ports.

Two state roads pass through **Pelješac**. Orebic is connected by bus to Dubrovnik and a few surrounding towns. Orebic is connected to the town of Korčula by **ferry line**. Another ferry line connects Trpanj with Ploče. The line from Prapratno (between Ston and Ponikve) leads to the island of Mljet. There are **makeshift heliports** in several places on the peninsula. An additional connection between Pelješac and the mainland is planned to be created through the proposal of the **Pelješac bridge**. Once completed, this bridge would physically connect all of Croatia, which is now interrupted by the strip of land belonging to Bosnia and Herzegovina at Neum municipality.

The island of **Mljet** has **no airport**. Dubrovnik airport on the mainland provides the main international connection for the island. Mljet has **ferry lines** with Pelješac peninsula and Dubrovnik. Transportation to the island is provided by Jadrolinija ferry service. Sobra, the main port on the island, is connected to Dubrovnik-Gruž and Ston via a car ferry. There are two type of ferries available: a car ferry and a faster catamaran ferry. The two-lane paved **road** runs throughout the island. Scheduled **buses** on Mljet travel just once or twice a day. [3]

Mljet National Park and Korčula island are quite accessible for tourists. Tourists come to the island of Mljet by boat or ferry from Dubrovnik or Pelješac peninsula. The island of Korčula is reached by a fast ferry from Dubrovnik or by ferry from Pelješac peninsula.

Island of Lastovo is less accessible. It is s reached by ferry from Vela Luka (island of Korčula).

2.2.7 ICT

No activities to report.

2.2.8 Challenges

The main challenge faced in this area in relation to tourism is **seasonality**.

The **causes** of seasonality are related to climate. Thus, "**Sun and sea**" tourism dominates in the pilot area - accommodations are located in a narrow coastal zone. Tourists mostly visit the islands for a swim in the clear sea, tourism products mainly based on sun and sea (kayaking, diving, etc). Many restaurants get closed in offseason (during winter months). Other **causes** of seasonality are holiday schedules, holidays, school holidays, not enough long tourist season and lack of facilities that would allow the season to be extended, tourist offer insufficiently diversified and adapted to the requirements of modern tourists.

The pilot area is **not attractive** during the winter months because:

- "sun and sea" tourism dominates in the pilot area
- most of tourism services are unavailable during the winter season
- ferries are less frequent than in summertime

The impacts of seasonality in relation to sustainability are depicted below:

Social Impacts	Environmental impacts	Economic impacts
Infrastructure overload of local communities (traffic, parking, services, prices increase).	The ecological consequences of seasonality of tourism imply transgression of ecologically carrying capacity of a tourist destination in the months of the season, which often results by excessive polluting the environment and disturbing the ecological balance.	The economic consequences of seasonality are consequences that imply variability of income, changeability in employment levels, difficulty in attracting investment, and the changeability of the level of service quality as it is difficult to maintain the standard of service quality due to difficulty in attracting quality staff to temporary jobs.

2.3 Cyprus

Figure 8: Map of the pilot area (source: https://en.wikipedia.org/wiki/File:Cy-map.png)

Cyprus is an island, with lot of plains and can be characterized as a semi-mountainous area. Hilly fields, fertile plains, covered with vineyards and coniferous forests in the mountains. Almost parallel to each other along the island are two mountain ranges: Kyrenia which is to the North and Troodos Mountains which is to the South. [6] 29 Municipalies are in the free part of the island.

2.3.1 Demography

The total Number of inhabitants in the area during winter season is 950,900. The total number of inhabitants in summer season including those who move from other places to work in the tourism sector is 1,415,900.

2.3.2. Socio-economic conditions

The **economy** of Cyprus is a high-income economy as classified by the World Bank. Cyprus has an open, free-market, service-based economy with some light manufacturing. Internationally, Cyprus promotes its geographical location as a "bridge" between East and West, along with its educated English-speaking population, moderate local costs, good airline connections, and telecommunications. [3]

The economy of Cyprus can be characterized as small, open and dynamic, with services constituting its engine power. The tertiary sector (services) is the biggest contributor to GDP, accounting for about 80,5%. **Tourism sector** has a 17% contribution to the GDP (direct). The indirect and induced contribution to GDP is 27% and is expected to raize to 21% and 32%, respectively. The **secondary sector** (manufacturing) contributes 16% of GDP. The **primary sector** (agriculture and fishing) is continuously shrinking and only reached 2.3% of GDP.

2.3.3. Policy context in relation to tourism

The Deputy Ministry of Tourism has introduced a **Strategy**. The following programmes exist:

- **Operational Programme (OP) "Competitiveness and Sustainable Development", [7]:** includes specific priorities and indicative categories of interventions which will be implemented during the period 2014-2020, contributing towards the strategic objective of the Partnership Agreement for the restructuring of the economy, the preservation and creation of new jobs and the safeguarding of social cohesion. Interventions planned contribute to the enhancement of economy's competitiveness through investment in the sectors of Research and Innovation and Information and Communication Technologies and SMEs support. Interventions are also planned in the sectors of Environment, Energy, Transport and Tourism as well as for promoting integrated sustainable urban development in deprived areas. The interventions include investments of the broader public sector, as well as grant schemes/incentives addressed to the private sector.
- **Operational Programme (OP) "Employment, Human Resources and Social Cohesion**": restructuring of the Cyprus economy, the preservation and creation of new jobs and the safeguarding of social cohesion. Interventions contribute to the promotion of employment, the preservation of social cohesion, the improvement of vocational education and training aiming at the matching of the skills with the labour market needs, the promotion and certification of lifelong learning and the enhancement of the administrative capacity of public authorities and stakeholders. The interventions include investments of the broader public sector, as well as grant schemes/incentives addressed to the private sector.
- **Programmes of the Deputy Ministry**: Support for Investment in Tourism, promotion of tourism awareness, education and training, implementation of tourism legislation and supervision of the tourism sector.

The Tourism Strategy of Cyprus 2017-2030 makes a specific point on the sustainability of the tourism sector. In particular, the strategy promotes the environmental sustainability and it is considered as a **key aspect for the tourism strategy** and is success. The strategy refers also to the implementation of a **monitoring tool perfectly adapted to the tourism** reality and the major sustainability challenges of Cyprus in order to monitor and improve the **sustainability of tourism** in the country in terms of all of its ecological, social, and cultural impacts. Also, the strategy provides actions on **technical support** for local authorities for continuous sustainability improvement in the tourism sector.

Also, all tourism development projects should be required to include the following **sustainability measures** in their development and operational plans. These should include as a minimum:

- Using renewable energy sources (RES), particularly solar, to generate a share of the resorts' power requirement – the share of such power to be defined

- Designing and implementing a strict solid waste management policy that includes maximising the volume of recycling. All projects should have targets that operators are obligated to meet, or face penalties
- Providing cycle lanes adjacent to or near all roads to encourage the use of alternative means of transport
- Using Recycled water for use in the irrigation of all soft landscapes, including sports fields and golf courses
- Installing energy efficient lighting systems, particularly for external areas of resorts
- Integration of Cyprus Style elements into architecture and landscaping

The **stakeholders** involved are:

- Ministry of Education and Culture
- Ministry of Agriculture, Rural Development and Environment
- Ministry of Interior, Dept. of Town Planning and Housing
- Ministry of Interior, Dept. of Lands and Surveys
- Regional Authorities
- Ministry of Finance
- Tourism Boards
- Tourism Associations
- Cyprus Investment Promotion Agency
- Promoters of Paralimni Marina, Ayia Napa Marina, Limassol Marina, Poseidon Grand Marina (Pafos)
- Schools, colleges, universities (University of Cyprus)

The **beneficiaries** involved are:

- SMEs
- Business associations
- Regional & Local Government Authorities of Cyprus
- Universities
- Private Institutions

The **financial funding** raizes up to 20milEur, up to 2030.

There is no evidence of success yet, while the **challenges** that encountered are:

- Cyprus should make significant economic and political efforts to improve its competitiveness as a tourist destination by improving its value proposition, air capacity and levels of cooperation and governance.
- Cyprus is currently assuming a very dangerous 'triple risk'. The island must reduce its seasonality by way of a Separate Action Plan as well as reducing the relative weight of

UK and Russian demand, which will mean increasing the market share of other selected source markets. At the same time, it should increase the weight of FIT tourists.

- The amount of unique and memorable tourism experiences Cyprus offers is almost non-existent: This is a huge weakness, as the demand for experiences is one of the most important demand trends that there are. Major efforts will be required here to excellently develop and operate a menu of unique and memorable experiences.
- The authorities must protect the consumer and prevent the development in Cyprus of “all-inclusive” formulas which are not such or offer very low quality of services, especially of food and beverage. The NTA must deny those licenses.
- The legal and regulatory framework is an obstacle to Cyprus’ competitiveness: the current situation does not change dramatically; it will be very difficult to attract the significant volume of investment and MSME development that is required.
- The low performance of governance, leadership, and cooperation mechanisms: The current situation does not facilitate realistic consensus among key Cyprus stakeholders at all, making it almost impossible to implement consistent and protracted policies over time. Cyprus must completely transform this situation by increasing the level of government involvement, promoting efficient partnerships within the private sector and creating the necessary government bodies to manage the island’s tourism system.
- Absence of efficient collaboration mechanisms between public and private bodies

Each region in Cyprus has its own Tourism Board and they all have their action plans where in the action plans there are measures that support the sustainable development.

2.3.4. The tourism product

The tourism product in Cyprus consists of:

- tourist excursions to different towns, sightseeing’s and monasteries of Cyprus
- travel organizations for groups
- transfer and transport services
- mini cruizes and boat trips
- hiking, biking trips and excursions
- agritourism experience
- accommodations services
- food services
- entertainment services

Most of the tourists are coming from Europe (70,1%) and other EU countries (20,5%) and that is mostly from UK, Russia, Israel, Germany and Greece. 95% is arriving to Cyprus with the plane and only 5% with cruize tourism.
More information is depicted in the following table:

Number of Tourist beds available at the pilot area for 2017	791 with 84,500 beds
Number of overnights spent in 2017 (including RBNB when possible)	17,400 overnight stays
Number of visitors for 2017	3,652,073
Amount of money spent per visitor/tourist for 2017	688,2 per visitor (includes accommodation and additional expenses)
Months of the year covered by the high season	May-October

Mostly visitors are young people and families with their kids. During the wintertime older people visit Cyprus due to its good climate conditions.

2.3.5. Natural and Cultural assets

Cyprus is a small island with a **long history and a rich culture** that spans 10.000 years, making it one of the oldest civilizations in the Mediterranean. [8] Situated at the crossroads of three continents - Europe, Asia and Africa - the island's unique geographic position has played an important part in its turbulent past since antiquity. Its Prehistoric Age inhabitants were joined 3,500 years ago by the Mycenaean Greeks, who introduced and established their civilization, thus permanently instilling the island's Greek roots. Many other cultures followed thereafter, including Phoenicians, Assyrians, Egyptians, Romans, Franks, Venetians, Ottomans and British, who all left behind visible remnants of their passage, and have thus created a mosaic of different cultures and periods. [9]
Important **historical sites**:

- Choirokoitia Neolithic Settlement (UNESCO)
- Painted Churches in the Troodos Region (UNESCO)
- Paphos (UNESCO) and its archeological park
- Kykkos Monastery
- Kourion
- Tomb of the Kings

Apart from the **historical sites** and the medieval castles and interesting archaeological sites to other **cultural spots** which include beautiful villages, churches, monasteries and local wineries found in various locations of the island.
Apart from these Cyprus has amazing beaches and coasts in which tourism and locals can spend enjoying their time relaxing and sun, beach and crystal turquoize waters. Also, Cyprus is offering mountains and fresh air and a lot of resorts are in the Troodos mountain range.

There are hundreds of **attractions and things to do** in Cyprus and some of the main tourist attractions are the following [3]:

- Petra of Romiou (Paphos District): known as Aphrodite's Rock is one of the most famous beaches in Cyprus. According to one legend, this rock is the site of the birth of the goddess Aphrodite.
- Akamas Peninsula (Paphos District): a national forest park, protected with a unique geology and rich flora and fauna. An area unaffected by development.
- Baths of Aphrodite (Paphos District): an area here the Goddess of Love used to take her bath.
- Choirokitia Neolithic Settlement (Larnaca District): World Heritage Site by UNESCO since 1998. The site is known as one of the most important and best-preserved prehistoric sites of the eastern Mediterranean
- Kolossi Castle (Limassol district): A reminder of Cyprus's crusading history, the Kolossi Medieval Castle in Limassol served as a stopping point for knights heading to Jerusalem.
- Kourion Archeological Site (Limassol District): an important ancient city-state on the southwestern coast of Cyprus. [10]
- Larnaca Salt Lake (Larnaca District): the most important wetlands of Cyprus and it has been declared a Ramsar site, Natura 2000 site, Special Protected Area under the Barcelona Convention and an Important Bird Area (IBA). It is surrounded by halophytic scrubland and on its bank lies the Hala Sultan Tekke, one of the holiest of shrines within Ottoman Islam. It houses the tomb of Umm Haram, Muhammad's 'wet-nurse'.
- Paphos Ancient theatre, castle and mosaics(Paphos District): Ancient temples, rock-cut tombs and Roman villas which are included in the UNESCO heritage list.
- Troodos Mountain range (Limassol District): largest mountain range in Cyprus with beautiful traditional villages.
- Kykkos Monastery (Nicosia District): one of the most known monasteries in Cyprus dated from the 11th century. A byzantine monastery.
- Cape Greko national park (Famagusta District) a national park with important marine environment.
- Stavrovouni Monastery (Larnaca District): a Greek Orthodox monastery which stands on the top of a hill called Stavrovouni. The monastery is one of the

Figure 9: Stavrovouni Monastery (slirce: https://larnakaregion.com/directory/product/stavrovouni-monastery-)

few places where one can see a piece of the Holy Cross. Stavrovouni Monastery was founded by Saint Helena in around 327–329 AD and therefore it is one of the oldest monasteries in the world. [3]

In Cyprus there are 40 areas for species and habitats and 30 areas for birds that are under **Natura 2000** in the following Natura 2000 sites: Akamas Peninsula; Cape Greko; Salt Lake of Limassol and Larnaca; Sea Caves – Protaras; Dasos Paphou.

2.3.6. Infrastructure [3, 11,12]

Visitors with mobility problems can enjoy a range of services during their stay in Cyprus. Cypriot cities allow people with mobility problems to operate independently, with equality and dignity through a series of well-designed tourist products, services and environments. A large number of facilities in Cyprus are now upgraded and accessible to people with mobility problems, such as:

- Hotels: Some accommodations provide facilities that meet the needs of people with disabilities. Some of the facilities are: Special parking spaces, Specially designed rooms, Ramps with Lights.
- Beaches: There are many beaches on the island, accessible by wheelchair users.
- Some sightseeing places have accessibility to people with mobility problems.

However, more effort needs to be done and upgrading the infrastructure so as Cyprus can be accessible to all.

The road network of Cyprus comprizes of about 11,419 km of **roads** of which 268 km motorways. About 2,178 km national and more than 8,973 km of paved and unpaved roads constitute the primary road network within Cyprus and link the towns and villages.

Four lane motorways connect the capital Lefkosia (Nicosia) with the main coastal cities. During the decade 2008 - 2018 there has been a 118% increase in the total length of motorways in Cyprus from 120 to 268 km.

Cyprus has a dense road-network. The density of motorways in Cyprus (28km/1000km^2) is twice as high as the EU average and the highest among the new member states.

The domestically operating passenger transport sector in Cyprus is characterized by a majority of small and medium sized companies. In 2018 there were 2,870 buses and coaches operating in domestic passenger transport, the majority of which are comparatively old vehicles.

In order to shift passenger traffic from private cars to public transport, the Ministry of Communications & Works gives particular emphasis to encouraging the use of intercity and rural-buses, and taxi’s by:

- Upgrading and modernizing the bus and taxi fleet

- Encouragement of merging and expansion of the private bus companies
- Planning new bus stations at the outskirts of the urban areas
- Adoption of integrated ticketing

The aim of the Government is to increase the share of public transport from 6% to 13% in 2020.

Cyprus has **no railways** and currently there are no government plans to invest in rail transport.

Being an island country, **passenger transport by sea** is highly important for Cyprus. Passenger transportation by sea accommodates domestic mini cruize lines for tourists visiting Cyprus, as well as international Mediterranean passenger cruize between countries. Limassol is one of Europe's important cruize ports.

Cyprus has several **heliports and two international airports**: Larnaca International Airport and Paphos International Airport. Cyprus has a wide network of air routes connecting Cyprus with Europe, Africa and Asia. It has become a major international transit station, with excellent connections within the entire region. The main international airports in Cyprus are Larnaca and Paphos. Cyprus is the third most important new member state in terms of total passenger air transport.

2.3.7. ICT

Limited use of ICT in the tourism sector.

2.3.8 Challenges

Cyprus is a destination that built its branding on the **sun and sea concept** with all the activities and services to be offered on a full range at this time of year as well all the tour operators to have agreements to bring tourists on the summer season.

The main reasons why tourist choose the area as a summer destination are:

- Beautiful sandy beaches with clean waters
- Sun all year around and excellent climate conditions
- Excellent food mixture of a Mediterranean cuisine
- It offers all kind of activities
- Hospitality
- High quality of accommodation infrastructure and services
- Peaceful and safe island (one of the safest countries in Europe)
- Travel to the past with historical monuments
- Good road connection between the cities

However, **there are also tourist services during winter**: the Troodos mountain range in winter that can offer accommodation and touristic services. Excursions, hiking, biking, skiing, visits to the local wineries.

2.4 South Aegean Region

Figure 10: The Aegean Basin (source: http://basins.ghkates.com/aegean-basin/)

The South Aegean Region extends over vast maritime zone from the coast of Attica (Makronisos) to the southern coast of Turkey (Kastelorizo). It consists of 79 islands, of which 52 are inhabited and 178 islets. Its total area is 5,286 km^2 (4% of Greece's surface).

The South Aegean Region comprises of two island complexes, the Cyclades and the Dodecanese. The island complex of the Dodecanese has an area of 2,714 km^2 and a permanent population of 190,988 inhabitants. The Cyclades island complex has an area of 2,572 km^2 and 118,027 permanent inhabitants.

Rhodes is the largest island of South Aegean Region and the fourth largest in Greece. Its area is 1,401,46 km^2 and its shape is narrow with a maximum length of 77 km and a maximum width of 37 km. Its coastline is 220 km. There are 34 municipalities in the South Aegean region. The most popular islands are: Rhodes, Santorini, and Mykonos.

2.4.1 Demography

The South Aegean Region has 309,015 permanent residents.

2.4.2 Socio-economic conditions [13,14]

The South Aegean Region is among the most vibrant and converging Regions in Greece, when taking into consideration economic and welfare indicators. During the last decade both the regional GDP and its contribution to the national GDP have significantly increased while the per capita regional GDP has been higher than the Greek average and is characterized by a dynamic extroverted economy as one of the 'most developed' Regions in the country.

Nevertheless, this enhanced picture disguises important intra-regional and intra-prefectural differences. The multi-fragmentation of space and the island character of the region prevent the spill over of income and know-how to the whole of the geographic space leading to different levels of development and significant dissimilarities.

The economic dynamism is due to **tourism** and is found in a limited number of famous islands which are tourist destinations of international scope. The most important economic activities taken place in the South Aegean Region are the following:

Tourism: Tourism is by far the most dynamic sector in the spectrum of opportunities for economic development in the Region of South Aegean: for this reason, this region has the leading position in Greek tourism. Speaking of the dynamism of the sector, there is a fact that for 2015, the Region of South Aegean accounted for 2,076 accommodation facilities – 21% of the overall national capacity – translating in 195,648 beds (24.9% of the overall national capacity). Thirty-one point seven percent (31.7%) of the total number of hotel facilities, 29.2% of the total number of rooms and no less than 29.7% of the total number of beds available at 5-star Hotels in Greece are indeed to be found within the Region of South Aegean (as per data supplied by the Hellenic Chamber of Hoteliers on 31.12.2015).

The direct contribution of tourism activities to South Aegean's GDP for 2017 was 77%[1].

Fishing: The Region of South Aegean is one of the 3 Hellenic Regions to have been formally classified as Regions Depending on Fishing; in Europe, there are 11 Regions to have in total been classified as such. For that reason, fishing is **considered to be a crucial sector for the economy of the Region**, even more since fishing is contributing to a great extent to the preservation of the economic and social tissue within insular communities while helping at the same time to maintain a base of production, especially on those islands where possibilities for tourist or agricultural development remain limited. According to data collected and estimated by the Fisheries Service departments around the Region of South Aegean, there are some 4,700 people currently active in the sector of professional fishing, yielding an overall production of 6,000 tons in catches. Out of such volume, more than 400 tons account for Swordfish, 280 for Long-Finned Tuna and about 120 tons for Bluefin Tuna; all such quantities being almost entirely exported. A significant percentage of population on the islands of Amorgos, Kythnos, Milos, Paros, Iraklia, Schinousa, Kalymnos, Kasos, Karpathos, Kos and Lipsi is professionally active in fishing-related activities that most of the times also constitute a family trend from one generation to the next.

Agriculture: Agriculture is a traditional sector of economic activity all over the Region of South Aegean. The highest concentration of farming activities may be found on the more sizeable islands of the Region, specifically Rhodes, Santorini, Paros, Naxos, Kos, Andros and

[1] Source: INSETE study, 2017

Tinos. When it is a question of specific domains in farming, the highest interest for the Region of South Aegean is focused on wine-producing grapes, citrus and most and above all, olive groves. Speaking in terms of tonnage, the yearly production volumes for the Region of South Aegean (source: General Direction of Regional Agricultural Economy and Animal Health, 2015) were: Olive oil: 3,433 tons; Grapes: 6,000 tons; White and Red Wine: 3,440 tons (the greatest part of wines produced in the Region are PDO or PGI certified); Citrus Fruit: over 11,000 tons produced.

Animal Husbandry: Livestock breeding fares first amongst the various domains of economic activity in the primary sector, its role being all the more pronounced in the Cyclades. The most important areas for animal husbandry are in Amorgos, Andros, Kythnos, Naxos, Tinos, Kasos, Karpathos and Kos, the highest interest being placed on ovine and caprine breeding, swine raising and cattle breeding. Dairy production is also quite important. In terms of tonnage, the yearly production volumes for the Region of South Aegean (source: General Direction of Regional Agricultural Economy and Animal Health, 2015) were: Ovine and Caprine: 69,778 carcasses; Swine: 5,276 carcasses; Cattle: 4,370 carcasses; Poultry: 64,8 tons of meat; Eggs: 38,325,000 units.

Apiculture: Apiculture is yet another important domain of activity for the Region of South Aegean. There were 96,211 beehives registered in 2015 and 1,088 tons of honey produced (source: General Direction of Regional Agricultural Economy and Animal Health).

Winery: Vine and wine culture are very closely connected to the history of Aegean and have played a significant role in the development of the economy and the expanding trade in the islands. Writings of Homer, as well as discoveries made in the prehistoric settlement of Akrotiri in Thera, witness the long winemaking tradition in the archipelago and this tradition revived in many islands in the recent decades. Rhodes and Santorini, as well as Paros are on top of the list. The viticulture shows development in Leros, Kos, Mykonos, Tinos, Sifnos and Milos as well. The wine was part of the ancient Greeks' life who worshiped Dionysus, the god of wine, revelry and theatre, and illustrated him in many vessels, holding a bunch of grapes, or a cup of wine. At their feasts, lasting hours or whole days, the wine flowed abundant. It was a way to facilitate communication between the diners and the philosophical debates, always accompanied by fine food.

Wine has important role in everyday lives of the islanders; it is a habit firmly rooted in their tradition –in fact it is often themselves who produce it. With the hospitable spirit that distinguishes them, they offer their guests wine and their own 'raki'; also, a lot of festivities, festivals and celebrations are organized at the churches and chapels of the islands. The hotels in the Dodecanese and the Cyclades welcome the visitors from all around the world with branded local wines while the restaurants always offer wines produced in the vineyards of the Aegean in their menus.

Also, the South Aegean has a relative regional **industrial specialization in construction** and is also well placed in **quarrying of stone**. The region is thus specialized in rather low-tech sectors.

2.4.3 Policy context in relation to tourism

The thriving, in quantitative terms, conventional tourist model has not led to a sustainable and secure local development. There is no wide agreement as to the direction or the priorities to be set towards a sustainable model of tourism development on the Aegean islands. However, there is a general understanding that the (re)connection of the local tourism with the local agri-food base should be a priority. Regional authorities are called to implement a strategy for sustainable growth within the framework of the EU policy for smart specialization. Food tourism is an integral part of this strategy. In the context of the **Regional Smart Specialization Strategy-RIS** there is a Strategy for the development of innovation in tourism experience.

More specifically, the South Aegean's RIS strategy **focuses on**: cross-sectoral technology upgrading, adaptation of production processes to reduce energy use, reduction of material input and waste generated, and higher value products and services related to tourism.

The upgrade strategy aims on **four axes**:

1)**Expanding the value chain**: It seeks to attract more activities in the value chain of tourism by developing interconnections with the rural economy and processing of agricultural products, exploitation of culture and the interconnection of cultural products businesses with tourism;

2)**Orientation of the local craft** in the production of products utilized by tourism enterprizes (e.g. equipment) or the production of products for them tourists (jewelry, handicrafts, etc.)

3)**Differentiation of tourism product** - development of tourism experience: Differentiation from the sun and sea model and mass tourism utilizing the opportunities offered by its natural, gastronomic and cultural richness of the Region. As set out in the Strategy of the Region **"The triptych: Traditional Products - Traditional Arts and Culture"** should be our flagship priorities in highlighting the destination.

The significant differentiation of the islands' tangible and intangible assets gives the ability on the one hand to show a unique identity for each island or group of the islands and on the other hand the development of a unique mix of young tourists' experience products that include:

- nature tourism
- gastronomic (culinary) tourism
- geotourism

- agrotourism
- cultural tourism
- religious tourism
- city breaks (Rhodes)
- student excursions
- conference tourism
- marine tourism (diving, sailing, etc.)
- artistic tourism

Destinations are unique and each one offers a unique set of experiences. Creating experience involves creating a myth which the visitor will experience through a set of activities. Creating experience requires active involvement of both tourists and the local community who will give life in myth.

4) **Upgrading to a higher level of service**: Upgrading services provided by the accommodation (hotels and rooms to let) it is related both to the upgrading of the accommodation and their upgrading category (stars or keys) as well as obtaining quality labels, e.g. local quality label, eco-labels etc.

Also, the **use of ICT** allows for increased productivity, direct promotion of services, independence from tour operators and travel agencies and direct booking management.

Finally, the adoption of **clean and energy saving technologies** allows for lower costs, reducing environmental impacts and create an environmentally friendly image that can then is the ticket to enter eco-friendly markets.

Stakeholders are: South Aegean Region, regional managing authority, national managing authority. **Beneficiaries**: SMEs, business associations.

The development of sustainable tourism is very important for the Region and an initial set of **targeted actions** has been designed:

- Promotion aimed at attracting tourists throughout the year, focusing on niche markets, such as nature lovers, climbers, etc
- Maximizing the use of ICT applications and social networking tools
- Better collaboration of stakeholders with the creation of PPPs, exploitation of new funding tools (eg fast track framework), exchange of views etc
- Strengthening of tourism businesses with the development of appropriate incentives.
- Rational management of the tourist accommodation issue
- Redesigning the transport system and revising the transport pricing systems
- The establishment of measures to strengthen the cruize tourism and sailing
- Effective protection of the environment (natural and structured) and landscapes

- Timely response to natural disasters and threats
- Upgrading tourism education and improving tourism training
- The emergence of alternative forms of tourism based on nature and culture
- Enhancing the visibility of PDO/PGI products and restaurants to enhance gastronomic tourism
- Enhancing MICE tourism with a focus on science conferences and summer schools
- The reorganization of health services with the aim of developing medical tourism

The promotion of alternative or special types of tourism throughout the year encourages the development of winter tourism in the area.

2.4.4 Tourism product

The dominant type of tourism in the Region is **conventional,** however various attempts have been done over recent years, towards a more alternative and balanced model.

Cyclades complex, probably the most famous island group in the Aegean Sea, comprizes some of the most beautiful islands in the world. Gorgeous sandy beaches, architecture in white and blue, traditional lifestyle, folk music, warm, hospitable people and barren landscapes with isolated chapels. Mykonos is definitely one of the most famous destinations worldwide; it is also a well-known jet- setters choice destination.

Figure 11: Santorini (Source: travel-smart.gr)

This beautiful island is famous for its landscapes, amazing sandy beaches, its windmills, country chapels and the Cycladic architecture. Crescent-shaped Santorini, the precious gem of the Aegean, is actually a group of volcanic islands; the Minoan eruption (sometimes called the Thera eruption), one of the largest volcanic eruptions in recorded history, occurred about 3,600 years ago at the height of the Minoan civilization. The eruption left a large caldera surrounded by volcanic ash deposits hundreds of meters deep. The sunset in Santorini is one of the most famous and most beautiful sunsets worldwide.

Anafi island of Cyclades is a paradize of natural and still untouched beauty and “exotic” beaches. The legend says that the island had emerged from the Aegean Sea to give refuge to the Argonauts. Ios island, the birthplace of Homer's mother and the place of his own tomb. Delos, the birth place of Apollo and Artemis, used to be a religious centre for the whole of Greece in the ancient times, at the same time is was main trading port in the Eastern Mediterranean during the roman times. Today, Delos is uninhabited and is listed as a UNESCO world heritage site, receiving a lot of visitors coming to admire remarkable monuments and impressive mosaics.

Unrivalled natural beauty, beaches of crystal clear waters, "unique" Byzantine footpaths connecting traditional villages and breath taking landscapes make Paros, located at the heart of Cyclades, one of the most popular holiday destinations in Greece.

Among the island of **Dodecanese complex**, Rhodes and Kos are larger and more cosmopolitan islands. Rhodes is probably most famous for the Colossus of Rhodes, a statue of the Greek sun god Helios that was destroyed by an earthquake in 226 BC. Rhodes offers visitors a unique opportunity to explore well preserved ancient temple ruins as well as beautiful sandy beach while contemplating the marvels of an earlier world. [14]

Figure 12:Rhodes town (source: http://www.thegreektravel.com/rhodes/photos.html)

An overview of the top attractions in Rhodes [14,15]:

1.Medieval Town: The largest inhabited medieval town in Europe. During the centuries, many different occupiers have left their stamp on the Medieval Town, which dates back hundreds of years before the birth of Christ. The Palace of the Grand Masters represents one of the greatest monuments built in the Middle Ages. The Upper Town, with its Street of the Knights and 4 km (2.5 mile) long wall, is considered a very beautiful example of Gothic architecture The Lower Town features embellishments such as mosques and public baths dating from the Ottoman period. It is one of the rare survivors of the medieval world; In 1988, it became an UNESCO world cultural heritage monument.

2.Acropolis of Lindos: The Acropolis of Lindos is an archaeological site, occupied by many forces during history. It's also an impressive site since it sits on 115 meters (380-foot) high rock overlooking the sea. The access, although a very steep footpath, is worth the trip. Once at the top, visitors will find a well-preserved Acropolis with 20 white Hellenistic columns and remains of the temple to Athena.

3.Tsambika Beach: Tsambika Beach is considered one of the most beautiful beaches on Rhodes. Owned by the Orthodox church, Tsambika Beach is overlooked by a peak where stands the Tsambika Monastery. Turquoize blue waters lap on the half-mile of pure golden sand beach. Because of its shallow water and fine sand, Tsambika is a perfect place for families to have fun in the sun and enjoying water sports.

4.Ancient Kamiros: Kamiros is an ancient city on the northwest coast of Rhodes. It is one of three Doric cities that combined with two others to form the city-state of Rhodes. Its residents, however, slowly abandoned Kamiros to move to the city of Rhodes. The area was covered by forests until 1929 when an excavation had started and ancient graves were discovered. The ancient city was built on tree levels: The Acropolis with a temple to Athena on top, residents in the middle, and water storage on the bottom; it is supposed that the temple of Athena was destroyed in earthquake in 226 BC.

5.Mandraki harbor: Mandraki Harbor is one of three harbors on Rhodes and the only yacht harbor. It is believed that the statue of Colossus, one of Seven Wonders of the Ancient World, once stood in this harbour. Today, visitors can find deer statues, medieval windmills and the St. Nicholas fortress at the entrance. The windmills were once used to grind grain brought to the harbor by ancient cargo ships; most have disintegrated, but three of them have been renovated. Mandraki was once the military port for Rhodes. Nowadays the harbor is full of yachts and fishing boats.

Located in **Kos** town in Kos island, the Hippocrates Plane Tree is situated next to the Ancient Agora, standing opposite of the fortress. According to legend, this is the oldest and largest tree of its kind in the whole Europe. The same legend says that the ancient Greek physician Hippocrates once taught his pupils in the shade of this tree, some 2,400 years ago. Many attractive villages are dispersed all over the island of Kos.

Kalymnos island is well-known as the "island of the sea sponge harvesters", an internationally known alternative tourism destination. Main tourist attractions are the castle of Chrissoheria and the Archaeological Museum. The International Climbing Festival in May is a unique festival that thrill every year the visitors. The culinary enthusiasts should taste mouth-watering delights, such as thyme honey, juicy tangerines, homemade mizithra cheese, delicious sea-dried lobster tail, sea ray preserved in sea water etc.

Patmos is a small holy island in the Aegean Sea, part of the Dodecanese islands, which obtained new habitats in the 11th century, quite popular among Greek orthodox people and called "Jerusalem of the Aegean" or "The island of the Apocalypse". In Patmos, Saint John the Theologian (exiled by Emperor Domitian) had a vision and he wrote the Book of Revelation ("Apocalypsis Tou Ioanni"), a Christianity's most ancient pilgrimage sites.

Also, the South Aegean is now included among European regions with a long tradition in **gastronomy.**

Regarding the **tourists' profile**, the German market is the most important revenue market in South Aegean Region. The mean amount of money spent by the German tourists per visitor was 665€, in 2017 with mean period of residence 8,6 overnights per visit. The British market is quite important, too. The mean amount of money spent by the British tourists per visitor was 716€ in 2017 (compared to 633€, in 2016/increase 13%) with mean period of residence 8,3 overnights per visit. Also, there are French, American, Italian and Russian tourists.

More information in the following table:

Number of Tourist beds available at the pilot area for 2017	The number of tourist beds in the South Aegean Region according to INSETE report was 116.548 for 2017, in 7,333 establishments with 5,046 rooms.
Number of overnights spent in 2017 (including RBNB when possible)	Number of overnights spent at hotels/similar establishments and tourist campsites in South Aegean Region in 2017 (Source: Hellenic Statistical Authority according to the registrations to the Hellenic Chamber of Hotels): 21,310,044 and 144,462, respectively in total 21,454,506.
Number of visitors for 2017	In 2017 the region attracted about 5.8 million visits from foreign travellers (31 million arrivals for Greece as a whole. In more specific, number of visits in 2017 in South Aegean Region 5,841(in thousands), 18.8% of a total 31,021 visits in Greece.
Amount of money spent per visitor/tourist for 2017	Amount of money spent per visitor for 2017 in South Aegean Region: Inbound tourists spent on average €625.5 per trip well above the national average of €457.8 (Source: INSETE, 2017).
Months of the year covered by the high season	The high season in Dodecanese lasts from mid-June to the end of August. In Cyclades, generally, the high season lasts from the end of June until early September.

2.4.5 Natural and Cultural assets

Delos is a small island and archaeological site that is part of the Cyclades island group. It has been made a WHS (World Heritage Site inscribed in 1990) because of its role in early **archaeology**, its part in Aegean history, its important role as cosmopolitan Mediterranean port from the 4th to the 1st century BC, it being the mythological birthplace of Apollo and Artemis.

The **Medieval City of Rhodes** is the oldest inhabited medieval town in Europe, was inscribed on the **UNESCO World Heritage** List in 1988, constituting a mosaic of different cultures and civilizations. The main monuments/attractions in the Old Town are the Palace of the Grand Master, the Archaeological Museum, the Byzantine Monastery of Saint George, the Church of Our Lady of the Bourg, the Suleiman Mosque and the Moat. The places in the region which have been integrated in the European Network of Natural Protected Areas **NATURA 2000** are:

Figure 13: Medieval City of Rhodes, the knights castle. Source: http://www.thegreektravel.com/rhodes/photos.html

In Cyclades: an area in Sifnos, from the mountain of Profitis Ilias, with the homonymous monastery, up to the western coasts of the island hosts 19 rare, mainly endemic, plant and animal species and the presence of 39 bird species has been recorded. In its onshore part different kinds of cedars, pistachio plants, aromatic plants and wild olive trees grow and important water springs are recorded.

2.4.6 Infrastructure

The transport infrastructure is quite developed in the region of South Aegean. However, along with a sense of isolation for residents and tourists, the **accessibility of islands** at different times creates several **problems** in terms of services availability**, especially in winter.**
Due to the nature of the island area and, by extension, the disproportionately large number of transport infrastructures, in relation to the size of the islands, there are a number of problems. The **infrastructure of maritime transport** on several islands need expansion (low capacity, limited and low-altitude piers, small port arms, need for dredging, etc.). The **basic airport infrastructure** (boarding-dizembarkation rooms, runways, aircraft parking floors, broadcasting infrastructure) of the main airports of the region are relatively adequate.

However, some of the smaller airports are at the "limits" of the aviation market due to the international trend to charter larger vessels in smaller regional markets. Some airports create the need to extend the runway and other facilities. There is also a **shortage in the interregional connections**, since the connections of the prefecture of Dodecanese with the prefecture of Cyclades are rare. This creates major **problems in interregional communication, cohesion and strengthening of the local production system**, in the smooth service of users by the social services provided, etc. These problems concern not only the relative needs of tourists, but also to permanent residents, workers, entrepreneurs, public servants, etc.

For Cyclades, there are regular (mostly daily) flights from Athens to Mykonos, Paros, Naxos, Santorini, Milos and Syros . In high season there are also less frequent flights from Rhodes, Crete (Heraklion) and Volos. From May till October charter airlines fly directly to Santorini and Mykonos from many European airports. [3]

For Dodecanese, the access to Rhodes and Kos is easy, with airlines serving both domestic and international transportation, connecting the region directly with most major European cities. Frequent domestic flights are also available throughout the year, to the airports of Karpathos, Kassos and Leros. [16]

2.4.7 ICT

The local touristic product has been upgraded the last years using **ICT technologies** as a result of the intensified efforts recently by the local actors and by the Regional Administration as well, so the extend can be estimated as "significant". Regarding the private sector, over 98% of the total hotels use WiFi network for all the clients and over 20% of the hotels use optical fiber. The local public authorities use mobile applications, city guides and touristic/ thematic portal to promote the local places.

2.4.8 Challenges

South Aegean islands have been among the first to evolve into **sea and sun** tourist destinations, being recognized as exceptional with worldwide appeal. The complexes consist of numerous islands with a great variety in size and crowdedness (so they fit well in the different needs of the visitors) **during summer time**, surrounded by sea, each one with its own unique beauty powered by the area's inconsistency itself, they are tiny private 'paradizes'. In addition to the great natural and historical assets of the area, the provided tourist services are quite attractive, covering a wide range of expectations and desires.

Main reasons of seasonality: Islands of South Aegean as a tourist destination have been linked with sea and sun as a Tourism product. This practically means that all big Tourist operators **stop the charter flight** to the Greek Islands during the Fall and winter; in order to change this, **actions have to be taken in order to diversify** our touristic product and offer possibilities to the visitors for alternative activities during the off-season period.

At the same time another issue has to do with the weather conditions during the Winter months. The weather conditions compared with the available infrastructure of the small islands (ports and airports) create difficulties as very **often our islands cannot be approached with plane or boat for many days.** Thus, during wintertime, there are various issues to be solved i.e difficulties with transportation, development of activities other than the ones offered during summer time, decision making by the stakeholders and local actors with regard to the viability of their operational period.

Impacts of seasonality on sustainability are depicted in the following table:

Social	Environmental	Economic
In South Aegean Region Tourism is the main source of income of our inhabitants. According to last information gathered, 97% of South Aegean Region income is linked directly or indirectly with Tourism. This means that our economy has been formed around Tourism with very big hotel units and many SMEs that offer different services to support Tourism (souvenir shops, small travel agencies and tourism offices, rent a car, transport services etc.).	The big number of visitors during the high season causes big pressure to popular attractions like the Medieval Town of Rhodes - a UNESCO world heritage monument, the expenses to preserve the monuments increase, the number of permanent residents in the medieval town declines. The destination struggles to manage the tourist flows in order to offer the visitors a good experience and at the same time offer a viable environment to the residents. Same problems can be found in the Ancient city of Lindos, in Santorini island and in smaller scale also in other islands.	Due to the seasonality of Tourism the majority of South Aegean work force is unemployed during the winter months were unemployment rate skyrockets to more than 50%. The expansion of the Tourist season will also offer to our residents more months of work during the year, higher income and better quality of life.

2.5 Balearic Islands

Figure 14: Pilot area (Source: https://en.wikipedia.org/wiki/Action_of_19_February_1801)

Within Spain, the archipelago of the Balearic Islands constitutes the second most important tourist region in Spain (Catalonia region is on the 1st place), and it is one of the **top leading tourist destinations** in the world, and one of the main hubs of tourism knowledge. In 2018 the Balearic Islands received 16,583M tourists (of which 13,86 were international tourists and 2,723M were national tourists), generating a total of 16,365.3 M€ in revenue.

Within the archipelago, the island of Mallorca is the largest island and the most important tourist destination in the Balearic Islands (with 72.04% of the total number of tourist arrivals).

2.5.1 Demography

1,128,908 inhabitants Balearic Islands (01/01/2018). Although there is no official statistics, it is estimated that in the summer months the population doubles in regards to the winter months, especially on peak days.

2.5.2 Socio-economic conditions

Balearic Islands have an economy highly dependent on the **services sector**, which is estimated to account for 81.7% of the total Gross Domestic Product of the Balearic Islands, and generating about 76.6% of employment. More specifically, **the tourism sector** is estimated to account for around 48% of Balearic GDP (directly or indirectly) and 32% of employment. These data show the great importance that the tourism sector represents for the Balearic economy and its society.

2.5.3 Policy context in relation to tourism

Balearic Islands Government has **two major tourist Strategies** in place to achieve the sustainability of the destination:

1. ''BETTER IN WINTER'': focused on attracting tourist off-season[2]
2. ''SUSTAINABLE TOURISM TAX'': a tourist tax implied by the Balearic Government for almost all visitors to Mallorca (except children under 16 years old). The tax was introduced to help inject funds into conserving the environment and to make tourism more sustainable for the islands.[3]

The ''AGENCIA D'ESTRATEGIA TURISTICA DE LES ILLES BALEARS'' (Balearic Islands Government) has introduced an **Action Plan** for the tourism of the Balearic Islands titled ''ACTION PLAN 2020''. Two main **goals** of this Action Plan:

1. Develop a sustainable tourism strategy that guarantees the improvement of the global competitiveness of the tourism sector in the Balearic Islands, considering the following aspects:

- Sustainability
- Air connectivity
- Diversification
- Shared Prosperity
- Deseasonalization
- Putting in value the tourist products
- Interinstitutional collaboration
- Accessibility of the destination

2. To carry out an appropriate management of the Funds coming from the Sustainable Tourism Tax[4]

Among the **stakeholders**, there are: the Regional Agency for Tourism (AETIB), Tourism Business Associations, Mallorca, Menorca, Ibiza and Formentera Island Councils, Tourism companies and institutions. Among the **beneficiaries** there are: SMEs, business associations, tourists visiting the islands.

It is early to showcase evidence of success and discuss about challenges.

2.5.4 Tourism product

The tourist model of the Balearic Islands is highly focused on mass **sun & beach tourism**. This model, developed in the Balearic Islands during the '60s and '70s, has constituted (and still constitutes today) the main market for the islands. This segment of tourism is highly

[2] More information on: https://illesbalears.travel/experience/en/illesbalears/better-in-winter
[3] www.illessostenibles.travel
[4] Document available at: https://www.caib.es/sites/transparenciaatb/ca/pla_daccio-83893/

related to the weather conditions of the destination; therefore, tourists do concentrate **mostly during the summer months** (from June to September, mainly). The high seasonal component in tourist arrivals is repeated annually on a systematic basis. In 2018 62.58% of tourists who visited the islands did concentrate in a period of 4 months (June to September - high season), while the mid- and low season months (January, March, April, May, October, November and December) only received 37.42% of tourists in 2018. This strong seasonal component in the arrival of tourists has **significant effects** on the island's natural resources, mainly due to excessive levels of human pressure and congestion occurring in the summer months.

The tourist sector of the Balearic Islands is mainly focused on the sun & beach segment, 100% originated in the European Union, with a remarkable presence of German and British tourists. In 2018 German tourists accounted for 28.17% of the total number of tourists arrivals, then British (22.30%), and third market Spaniards (16.42%).

54.2% of tourists travel with family, 43.9% with friends and 1.9% travel alone. 57.1% of tourists have completed university studies, 34.1% secondary and 8.8% only primary.

One of the main **characteristics of tourists** visiting the Balearic Islands is their high-fidelity level. Almost 60% of tourists had visited the islands before, with a very high percentage of tourists visiting the islands on more than 10 occasions in their lives. On average the tourists interviewed stay for around 7 days on the islands.

For many years, the most common form of travel organization has been through the tour package, typically marketed by tour operators. However, in the recent years the percentage of tourists using tour package has significantly been reduced, to currently 37.8% of the total, compared to **62.2% of individual travelers**.

The accommodation option usually chosen by tourists is hotels (65.3% of the total), although it is true that this option has experienced a significant setback in recent years in favour of other forms of accommodation, such as the home rentals and friends & relative's homes.

More information is depicted in the following table:

Number of Tourist beds available at the pilot area for 2017	436,315 beds
Number of overnights spent in 2017 (including RBNB when possible)	117,270,091 overnights
Number of visitors for 2017	16,339,756 tourists
Amount of money spent per visitor/tourist for 2017	16,023,1 M€ total Tourist Expenditure 136,8 Daily expenditure per person (€)
Months of the year covered by the high season	April - September

The **average stay of tourists** is around 6.2 nights, usually on a half board (two meals included per day: breakfast and lunch or dinner), and with an average daily expenditure of 146 Euros per tourist per day (including transport expense, accommodation and other travel-related expenses).

2.5.5 Natural and Cultural assets

There is an important number of protected areas,marine and terrestrial areas of the Balearic Islands, declared as such in the manner provided by Law 5/2005 of 26 May, for the conservation of the spaces of environmental significance (LECO), attending their representativeness, uniqueness, fragility or interest of their elements or natural system. These are listed as follows: Parc nacional marítimoterrestre de l'arxipèlag de Cabrera, Parc natural de s'Albufera de Mallorca, Parc natural de Mondragó, Parc natural de s'Albufera des Grau, Parc Natural de marítimoterrestre Es Trenc-Salobrar de Campos, Parc natural de sa Dragonera, Parc natural de ses Salines d'Eivissa i Formentera, Parc natural de la península de Llevant, Paratge natural de la Serra de Tramuntana, Reserves naturals des Vedrà, es Vedranell i dels illots de Ponent, Reserva natural de s'Albufereta, Monument natural de les fonts Ufanes, Monument natural del torrent de Pareis.

Balearic Islands have **two** Tramuntana Mountains in Mallorca and Dalt Vila in Ibiza are recognized **UNESCO sites**. Minorca island is a Biosphere reserve. Also more than 45% of the territory and spaces of the Balearic Islands are protected by Law and by nature protection figures. For more information: *http://es.balearsnatura.com/*

2.5.6 Infrastructure

One of the priorities of the Regional Government is to achieve that the Balearic Islands become an accessible tourist destination with a universal **accessibility environment**. Although there are a few accessible hotels and services, **there is a need to stimulate the offer for more accessible tourism** products and services at all levels and also to educate and train the tourist sector to cater for the needs of people with disabilities.

Due to the great importance of tourism in the economic life of the Balearic Islands, the main mobility centres generating flows are around the tourist resorts. Therefore, the majority of tourists travel from the **different airports** of the islands (Palma, Mahon and Ibiza) and, to a lesser extent, from the **ports** to their holiday resorts, and this generates a high number of transfers, either in **collective transport** (buses) or in private cars (taxis or car rentals). Only 28.1% use non-motorized media (bicycle and by foot). In the case of mechanical media, rented cars represent 34.9%, public transport accounts for 22.3%, discretionary bus transport services 8.2% and 6.5% are private transport. Thus, the rental car is the most used mode of transport. On the contrary, the use of the bicycle and the train is very residual. Therefore, transit on the roads of the Balearic Islands has increased by 42% while in Spain it is reduced by 6% between 2005 and 2015.

As an instrument for strategic sustainable mobility for tourists, since 1999 the Agency for Tourism of the Balearic Islands (AETIB) has consistently improved the existing tertiary network roads to convert them into **cycling routes** that connect the different municipalities inside the islands, so that cycling tourism can be promoted.

2.5.7 ICT

Companies in the sector have turned to the fight to meet the needs of consumers who are 'online' on a constant basis, and this has been possible thanks to the incorporation of ICT. Besides Balearic Islands are "exporting ICT knowledge to other countries (specially South America) through technology clusters in tourism such as TURISTEC and the T Cluster.

2.5.8 Challenges

The main challenge in terms of tourism, is **seasonality**. The reasons why tourists choose the area as a summer destination are:

- Weather
- Lack of good & frequent air transport connections
- Insularity problem
- Sun&Sea destination popular for summer - linked to an historical high dependence of Tour Operators

For the last years tourist companies in the Balearic Islands have tried to differentiate their services and to pouch customers from competition through more sophisticated, unique and personal experiences. **During winter**, there are many things to offer. The mild winters of the Balearic Islands offer a host of cultural experiences - museums, heritage, entertainment and more. And it's also a time to enjoy its nature and landscapes, such as the magnificent almond blossom in February. Impacts of seasonality on the sustainability of the are depicted here:

Social impacts	Environmental impacts	Economic impacts
Labour market seasonality, Job insecurity and low wages.	Pressure on water resources and on the infrastructures Perceived saturation of places in high season.	"Closed for winter" and "Sundays closed" are terms that may be hindering tourist development in the medium and low season. - Lack of new experiences that could provide wider content to the current agenda of possible activities to be undertaken by tourists during their stay.

2.6 Corse

Figure 15: Map of the pilot area (Source: https://www.worldatlas.com/webimage/countrys/europe/corsica.htm)

Corse is a mountain island, 183 km in length and 83 km maximum width. The geographic coverage of the pilot area is 8722 km^2 and in the area, 360 municipalities exist.

2.6.1 Demography

Total number of inhabitants of the region during the winter season is 336,000 and in the summer this number raizes up to 730,000.

2.6.2 Socio-economic conditions

The tertiary sector represents 50% of the wealth created in Corsica, the e GDP Corsica totaled EUR 8,87milliards and tourism contributes up to 31% of or 2.5 billion € (transport included. Next comes the non-commercial service sector, which is over-represented in the region with 33%. This proportion is Corsica in the top of the national rankings, it is well above the French average (10points higher than metropolis and 7 points higher than province). Another important sector on the island territory, is construction that represents 9% of the wealth produced in Corsica against 6% in Provincial average.

2.6.3 Policy in relation to the tourism sector

PADDUC - Corsican sustainable development and development plan) Guidance 2018/202, Guide to aid to tourism 2016/2020.

Several important issues raize:

Issue 1: Place tourism back at the center of the island's economic concerns, considering its leverage effect on all agricultural production (short circuits) on all heritage rehabilitation policies and reactivation of identities and local know-how, on all policies for the protection and development of natural sites, on development and service policies (water resources, energy, etc.)... a logic to be developed.

Issue 2: Establish a culture of sustainable tourism development and build a unifying plan built on our major achievements and focused on the future, combining social, economic and environmental aspects. A plan that takes into account the existing pressures on certain sites but also the spatial development of tourism, which is still too concentrated on the coast. A perception to share (including to tourists) or even to instill.

Issue 3: Promote the trades and act on vocational training because any activity whatsoever, and tourism obviously does not escape it, cannot develop without a pool of trained human resources: it is a decisive social issue taking into account the need of employment in the sector which requires, among other things, proposals on flexibility. Making tourism attractive to young people requires **skilled jobs** in a production economy that creates added value.

Issue 4: Support the competitiveness of the product and service offer in a competitive international competition, encourage investment and innovation corresponding to the chosen axes, orient it towards quality and sustainable tourism to justify a differentiated competitive positioning, creating "better tourism" vs "more tourism", building and disseminating the concept of " green island" in the Mediterranean. Consider innovation and technology as the key factors for increasing the competitiveness and sustainability of tourism.

Issue 5: Maintain and develop the attractiveness of the destination, in particular internationally, considering that half of the overall tourist stays are first stays that need to be convinced, which means having sufficient means of promotion to usefully raise the profile of the island and rethink accessibility to the island and in particular its costs - a real entry barrier - to be adapted according to the seasons. Building, beyond specific actions, a real coordinated strategy of accessibility in " incoming " transport correlated to the targeted markets and objectives.

Issue 6: Adapt a certain number of national standards and normative rules to the specificities of the island to both protect the natural resource, control the uncontrolled extension of second homes and the sprawl of buildings but also to produce the financial resource necessary to precisely support investments and attractiveness actions. The taxation of tourism, to rethink on our territory, constitutes among other things one of the challenges of the harmonious development desired by a majority of the population.

Issue 7: Adapting to digital era and new requirements and potentials, the success of public policies depends both on the relevance of the strategies but also on the capacities of the systems to implement them. The technological transformations in which the sector is a pioneer and the breakthroughs in such a competitive field today require better adapted operating modes, both more flexible and more reactive, more shared with the professional world and better profiled to ensure engineering. necessary to support the project. The challenge is to move from a “community tool” logic to a “community operator” by transforming the Agency into a real “Destination Management Company” by integrating a public / private co-production .

Stakeholders are: Corsica Tourism Agency , Corsican Community, Professional Syndicates, University, French State.

For the promotion of the framework described above, the **financial allowance** is €3.6M and for the development, € 4M.

Challenges in the implementation of this policy framework are linked to ecological and digital transitions.

In terms of **regional or local action plan** that supports the development of sustainable tourism in the region, the Corsica Tourism Agency has adopted a tourism aid regulation: the Guide des Aides. This document is intended to be in conformity with the reference frameworks constituted by the PADDUC and its annexes, in particular the Orientation Scheme for Tourist Development and the mountain plan.

It incorporates the many previous reflections with shared observations today on the realities of Corsican tourism, a way of asking the question of the impact of public policies and especially their operational translation to orient the sector towards the set objectives.

Public support for tourism, if it has made it possible to structure the territory and consolidate the sector while allowing it to remain competitive, has thus far not really succeeded in significantly impacting the tourist fact in Corsica, which remains very unbalanced on many points of view. The sprawl of the territory has been considerably accentuated with a non-market rental sector which has seriously developed to represent 2/3 of the offer today.

The pressure on certain major sites increased during the seasonal peak while the rural space, outside the outskirts of the cities, remained rather in decline.

The Corsica Development Plan of 1993 had already pointed out in tourism's main objective the spread over time "to break the inevitability of seasonality" and in space "necessary rebalancing between coast and inland areas to operate". It also transcribed the notions of identity development, re-distributive economy of preservation of the resource in the face of the risks of pressure on the environment in seasonal peak.

The aid regulations which have followed one another over the years (plan contracts, project contracts, etc.) have shown great consistency in the measures proposed.

Faced with the major challenges facing Corsican tourism both from the point of view of preserving the resource and from the point of view of implementing a real tourism economy through development that reduces crowding out and perverse effects , the point is therefore clearly to review the paradigm and bring public support to projects likely to develop Corsican tourism towards the desired objectives, namely:

• The spread over time and space which remains more relevant than ever and which requires an enrichment of the tourism offer, today very insufficient and especially very unstructured, to develop flows of stays out of the summer season. However, the supply landscape is today very dispersed. The additional stays cannot be reduced to the mere attractiveness of the landscapes and must imperatively integrate the logic of sectors to be organized and developed to convey them in real specific destination on the markets.

• The decrease in pressures on the territory which endanger the resource in the first place in certain emblematic areas and require special attention to management plans to avoid suffering the negative effects. The enhancement of other sites and heritages which Corsica does not miss should constitute one of the responses adapted to the distribution of flows while favoring the spread in spacel

• The increase in unit revenue per stay, which constitutes a strategic necessity, since Corsica chooses a differentiated tourism in the face of mass tourism which it cannot bear, the fragility of its ecosystem and its low resident population would then generate imbalances. This requires a product / target approach that encourages updating the offer to build products based on the enhancement of its own assets irrigating the entire territory and to distribute them to perfectly targeted source markets.

2.6.4 Tourism product

Corsica remains, in the eyes of demand, **a sea-sun destination**. It is the main element of attractiveness of the Corsica destination with the beauty of the sites and the preserved character of the natural environment:

- UNESCO West Coast site
- GR 20, renowned hiking trail in Europe

Corsican tourism is contemplative asset advantage: people come to advantage in Corsica the pleasure of discovery rather than to practice an activity. 3.2 million visitors visit to Corsica every year, 73% French (51% by plane, 49% by boat), 27% foreigners (55% by boat, 45% by plane). Corsica is considered to be a family destination; it is divided equally between the middle classes and the upper classes.

More information about Corsica in the following table:

Number of tourist beds available in the pilot area for 2017	163 000
Number of nights spent in 2017 (including RBNB if possible)	35 million
Number of visitors for 2017	3 .2 million
Amount spent per visitor / tourist for 2017	833 €
Months of the year covered by the high season	1 st July to 31 August

2.6.5 Natural and Cultural assets

Corse has the following **natural and cultural** assets:

- One UNESCO World Heritage Site (Gulf of Portu : Calan che de Piana / Gulf of Ghjirulatu / Scandula Reserve).
- Seven nature reserves covering a total area of 86,624 hectares
- Two sites labeled "Grands Sites de France"
- 40% of the territory (350,000 ha) is covered by the Regional Natural Park of Corsica (PNRC)
- 1,000 km of coastline, including 200 km, or 23% of the coastline and 19,700 ha, are protected by the coastal conservatory

2.6.6 Infrastructure

The sites of Corsica have **good accessibility** whether by land (hiking trails) or by sea (boatmen services or boat rentals). Corsica has four international airports (Ajaccio, Bastia, Calvi, Figari) and four main ports, 23 organized marinas and moorings offering more than 7,000 rings.

2.6.7 ICT

The use of ICT is limited to the use of websites of Corsican tourism providers (accommodation, activity providers, tour operators, etc.) i.e. ATC and Tourist Offices institutional sites.

2.6.8 Challenges

The main challenge faced by Corse is **seasonality**. The reasons why tourists choose the region as their summer destination are:

- Weather conditions (sun and sea destination)
- Calendar (major religious celebrations or other festivals attracting visitors, etc.)
- Poor air service between November and May

The destination may be attractive in winter. Over a hundred hotels are open in winter.

Winter would be an opportunity to discover " The real Corsica ".

The impacts of seasonality on sustainability are:

Social	Environmental	Ecological
Precarity of employment Few managerial jobs Per capita income below the French average	Concentration of traffic on certain sites, traffic jams, pollution, tourismophobia	Difficulties to manage investments Fable leverage on other sectors Wealth distribution problem

3. Regional and Interregional SWOT analysis

This section presents the SWOT analysis as these were provided by the six areas – Regions that participate in WITNER MED project and and interregional analysis, to raise the most common strengths, weaknesses, opportunities and threats of the pilot areas.

3.1 Regional SWOT: Tuscany

Strengths	● High quality tourism offer already existing, in particular nature and sports tourism ● Proximity to mainland ● Highly protected natural environment (whole archipelago included in the National Park, and part of the marine sanctuary Pelagos) ● Mild climate all year round ● Road infrastructure developed
Weaknesses	● Very reduced connection with the mainland during the winter and complete absence of interconnection between islands ● Lack of integrated and joint planning for whole archipelago ● Scarce involvement of stakeholders, in particular economic operators in developing the tourism offer for the winter season ● Very few services, in particular accommodation available during the winter ● Reluctancy of local population to open during the winter, due to the overexploitation and negative impact of tourism during the summer season ● Weak presence on the international markets (tourists predominantly from the domestic market)
Opportunities	● Possibility to take advantage of the strong regional support in marketing and promotion activities on domestic and foreign markets (Tuscany Region and the regional agency Toscana Promozione Turistica) ● Possibility to develop additional tourism offer (diversification) and reach different types of tourists ● Take advantage from the proximity of the Pisa International Airport, with very good connections all year round ● Take advantage of the attractiveness of the Tuscany region on global level, possibility to develop tourism packages that integrate activities on the mainland ● area particularly suitable for the development of a niche agriculture strongly identified with the territory (food & wine offer)
Threats	● Lack of interest from private operators to extend their economic activities beyond the main season ● Tourists connect the tourism on the Archipelago only with the Sun & Sea tourism, the complete image change is necessary ● Scarce willingness of collaboration between municipalities ● Possible negative impacts on natural environment that is already under pressure during the summer season

3.2 Regional SWOT: Dubrovnik- Neretva County

Strengths	• Rich intangible cultural heritage of island • The old town of Korcula and Moreška candidates for the UNESCO list • Excellently preserved cultural heritage • Places rich in cultural heritage they are relatively close to each other • Fostering traditional values and customs • Famous world traveller and merchant Marko Polo birth place • Maintaining numerous cultural manifestations and events • Existing tourist offer • Numerous accommodation capacities of different category • Suitable climatic factors
Weaknesses	• Insufficient promotion • Poor awareness of tourists and locals about cultural heritage • Numerous ''unused'' cultural resources • Sun and sea tourism preference instead of cultural • Poor investment and underdevelopment of cultural tourism products • Poor off-season tourist offer • Non-investment in cultural objects in need of renovation • Non-cooperation of tourist and cultural facilities / agencies • Non-renewed hotel facilities • Lack of educated tourist workers • Administrative division of the island
Opportunities	• Huge potential, especially in the field of cultural tourism • Notice the options to sign up for various competitions from the area financing of cultural and tourism projects (EU funds, different Foundation) • Young, educated and creative people to be kept on the island • Increasingly successful seasons • Raising awareness of cultural wealth heritage promotion and creation of cultural and tourist product • Expanding to new markets
Threats	• Neglect of cultural tourism and cultural elements • Departure of young, creative people with island • Severe seasonality • Neglect and carelessness about the cultural heritage • Isolation of the island • Non-motivation and non-involvement of cultural subjects in tourism season • Interest of cultural subjects for the development of cultural tourism • Damage to the indigenousness of the old city cores • Spatial devastation

3.3 National SWOT: Cyprus

Strengths	• Outstanding climatic conditions during winter; Relaxation and beach activities are possible practically all year round • Diversity of tourism assets and experiences • Safety, comfort, and convenience • Attractive and trustworthy place for business • Extensive experience in tourism management
Weaknesses	• High seasonality • Weak sector performance • Low experiential value of the offer • High level of visual pollution • Weaknesses in air capacity: There is no national carrier actively serving the interests of the Cyprus government and enterprises – unless you count Charlie Airlines, which recently purchased the now-defunct Cyprus Airways logo to use on their Cyprus-routed planes for the next decade • Lack of a clear Strategy • Poor branding and marketing performance • Weak industry innovation, intelligence, and technology support processes • Lack of stakeholder trust and collaboration; the complicated relationship between national, regional, and local authorities adds to these issues
Opportunities	• Significant opportunities for targeting new markets and improving the CVP: Cyprus is still relatively unknown in many markets. • International trade and airline interest in Cyprus: Tour operator and airline interviews have clearly shown that there is a general interest in Cyprus across many markets.
Threats	• High market and product portfolio risk: The UK and Russia alone account for 59% of tourist arrivals in Cyprus. No other competing Mediterranean destination depends so heavily on just two markets. • Decreasing net value of the customer journey • Low commitment towards 'wise tourism' • Deficiently managed Human Capital • Weak legal, regulatory, and administrative system: Because of its lack of transparency, high degree of complexity, and number of outdated regulations, the legal and regulatory system related to hospitality and tourism has been the subject of criticism in the past.

3.4 Regional SWOT: South Aegean

Strengths	• High Specialization in Tourism with developed supported services, all year round • High-quality natural environment • Significant cultural assets (WHS sites, wealth of historical monuments etc.) • Favorable natural environment for renewable energy sources • Significant number of ports and airports • Large IT penetration in businesses • Population increase and high percentage of economically active population • Many islands have a powerful brand name in tourism • Second richest region in Greece • High indices of biodiversity in the broad marine area • Significant internal market due to tourism
Weaknesses	• 'Double' insularity • High cost of transportation • Serious deficiencies in water resources and energy • Low education level of employees and low rate of degree-holders among the population • Low participation in life-long learning • Low investments in research on the part of businesses • Low capacity of businesses to absorb innovations • Specialization in only one sector due to tourism/lack of variety in economy • Domination of mass tourism • Digital seclusion of small islands and settlements • Health care shortages for emergency response as well as the absence of professionals/staff/infrastructure. The problem is particularly intensified in small islands • Specialized staff in the tourist professions exist in the larger islands, while in the smaller the lack of specific specialties (hotel employees, chefs, marketing specialists,etc.) and especially those associated with the planning and implementing actions for specific forms of tourism
Opportunities	• Differentiation of tourism product and development of experience tourism. • Development of synergies with agriculture food industry-livestock farming • Provision of specialised IT applications and services • Development and implementation of integrated marine environment management systems • Better exploitation of renewable energy sources
Threats	• Adverse economic environment due to the economic crisis • Geopolitical challenges, especially from Turkey • Significant obstacles to entrepreneurship • Significant international competition in the specialization sectors, particularly due to cost and lack of variety in the local production • Retention of the cost of production and transportation at high levels due to fuel prices • Delays in the energy interconnection of islands • Delays in the implementation of the National Strategy for Digital Development, which will broaden the digital gap of small islands

3.5 Regional SWOT: Balearic Islands

Strengths	• Top leading tourist destination at European and global scale • Balearic Islands have moved towards sustainability putting in place strategies and restrictive legislation such as the climate change Law, the Plastic Law, Waste management Law, Diesel reductions, etc. • Very appealing to visitors that generates high overall satisfaction of stay and high recommendation rates (repeat visitors is a significant segment, 76%). • Well-known destination • Increased tourist assessment values against competitor destinations: Canary Islands, Italy, Spain, Portugal and Greece, in the majority of attributes, but especially in regards to beaches, natural settings, weather, food and culture, socialization-presence of compatriots, tourist attractions diverse and adequate, friendliness and security in all aspects: physical, legal, sanitary, religious and political. It is considered a safe destination. (Source: Balearic Islands Tourism Barometer 2016). • Friendly popular destination with a great variety of economic visitor profiles: from low-cost to luxury-high spending • High degree of efficiency and good value for money • Proximity to outbound travel markets and easy access, with direct flights from and to the main European cities throughout the year, is an advantage that no other competitor in the Mediterranean can offer. • Excellent accommodation and tourist facilities, good health services & infrastructures and fast and efficient public transport • Worldwide leading Majorcan hotel companies maintain main offices in the region • More than 50 years of tourism know-how • Relaxed Mediterranean culture and quiet atmosphere • Strong R&D infrastructure able to develop/deliver innovative tourism products and services • Highly specialised and professional services
Weaknesses	• Geographically limited capabilities of growth through physical expansion • Strong dependence on 3S (sea-sun-sand tourism) • Job insecurity and low wages • Low level of internationalization in SMEs and of products different than 3S • Perceived saturation of places in high season • Expensive commercial offer and high prices outside hotels. • "Closed for winter" and "Sundays closed" may hinder tourist development in the medium and low season • Lack of new experiences that could provide wider content to the current agenda of possible activities to be undertaken by tourists during their stay. • Dispersion in the communication efforts made by Public Administrations and the various tourist associations. This could be interpreted as a cause of destination marketing inefficiency.
Opportunities	• Sustainability, circular economy, waste treatment, water efficiency management, plastic recycling, etc • The Balearic Islands still have a great potential to be directly sold to individual travellers (although this trend is progressively increasing) due to the current preponderance of Tour Operators'intermediation • Room for improvement in accessibility (facilities for disabled people) and also in facilities addressed to the young and elderly people (segments with great potential, as no Spanish tourist destination completely fulfils their needs)

	• New ways of tourism promotion to put in value heritage, natural or cultural resources, allowing to diversify the present tourist offer • The tourism sector is growing at international level • Exploitation of ICT • Slow movement: slow city, slow holiday, slow food, slow life... • Greater social environmental conscience. Circular economy • Easier access to information and easier web content sharing • More integrated tourism services to addresse new needs • Increasing awareness of customers on requirements for energy savings and environmentally friendly technologies • MICE product can achieve greater presence in Mallorca due to the recent opening of the Palma Congress Palace (1st April 2017) • Diversification of outbound tourist markets • Improving policies in regards to environmental respect, to create a better balance between consumption and economic development
Threats	• Large competition destinations • New emerging destinations • Lower rating with regards to commercial offer and cultural activities in relation: Canary Islands, mainland Spain and Italy • 3S tourists in high season complaint about excessive prices and too much people • Balearic Islands should be able to continue managing different tourist profiles in regards to spending and motivations in all tourist seasons • Concentration of demand in major tour operators • Loss of tourists and loss of benefits per tourist for the growing competence of other destinations, not only in price, but also in quality • High degree of seasonal variation, with very strong traffic during summer • Impacts on environment and natural resources • Insularity • Tourism industry still not part of knowledge economy

3.6 Regional SWOT: Corse

Strengths	• Climate • Safe destination • Heritage natural and cultural (gastronomy , Oen geology, archeology ...) • roximity Sea / Mountain which makes it a unique destination in the Mediterranean, • Preserved nature • Central location in the Mediterranean less than 2 hours from European capitals
weaknesses	• Accessibility transport (no foreign flights and France from 01/11 to 31/03 except Paris, Marseille and Nice) • Lack of positioning destinatio n in winter • Little or no offer on the whole tourist chain • Bad relation between price and quality of services
opportunities	• Work on an eco-tourism positioning • Preserve the territory (nature, landscape, architecture…) • Strong identity (faires, language, tradition, culture ...) • Tourism services and products offering experiences to the tourists
Threats	• High competition • Fragmented economy (31% of GDP) • Large dependence on Grench tourists (70%) • Insularity

3.7 Interregional SWOT analysis

The interregional SWOT analysis that follows is based on the input provided by each pilot area partner, depicted in the previous sections of this report. Areas share several common and some unique issues in each category (strengts, weaknesses, opportunities, threats). An attempt to categorize the common aspects for these areas is presented in this section.

The pilot areas seem to agree that the strong points they have in common are those that derive from the Mediterranean identity they are sharing. Partners have emphasized in common on the following points:

- Climate conditions: Outstanding climatic conditions during summer. This has favoured the ability to offer great gastronomic experiences to the visitors and has also boosted the development of the 3S model.
- Rich natural environment and (tangible and intangible) cultural heritage and well preserved, close to each other, assets; this, together with history and traditions, raize the levels of attractiveness of all the areas, favours the implementation of festivals and events
- Numerous accomondation and tourist services for the summer season, providing different options for a great variety of visitor profiles

In addition, several areas have stressed the fact that they already have good reputation and are well known internationally, as destinations offering services of high quality in particular in terms of nature and sports (Tuscany), safety (Corse, Cyprus, Balearic, and also trustworthy in terms of the development of businesses, mentioned for example in the case of Cyprus). The easiness to reach in general the pilot areas is discussed as a strong point for some of them (i.e. Tuscony, Balearic, Corse, South Aegean). The level of ICT penetration and use in the tourism sector seems to differ as it is only stated as a strong point only in the cases of South Aegan and Balearic, which have also stressed the fact that they are well-known destinations (some islands constitute famous brands and top leading destinations worldwide). Tourism offer during winter time, is highlighted as a storng point only in the case of Cyprus (thanks to the favourable climatologic conditions) and South Aegean. The high level of English spoken in Cyprus, is also stated as an asset. Last but not least, the movement towards the adaptation of strategies and restrictive legislation reflecting sustainability is depicted as a strong point, in the case of the Balearic islands.

In terms of weaknesses, almost all areas (except for the South Aegean) agree on:

- the high dependence of the areas on the 3S model, leading to seasonality, poor tourism and accomondation services offered during winter and to high concentration of mass tourists during the summer, accompanied by all relevant adverse environmental impacts

In relation to the point depicted above, reluctancy of local tourism entrepreneurs to open during winter is recorded in the case of Tuscany, while lack of educated employees in the sector of tourism is stated in the cases of Dubrovnik and South Aegean. Especially, in the case of South Aegean, the lack of specific specialties, i.e. hotel, employess, chefs, marketing specialists, etc is noted.

- the lack of participatory approach towards the decision making, is stressed in the cases of Tuscony, Cypris, Dubrovnik and Balearic

To this extend, the lack of a clear strategy for integrated and joined planning is stated only in the cases of Tuscony and Cyprus. The poor branding and marketing performance as well as the low promotion of the cultural heritage, the poor awareness of tourists and locals about cultural heritatgee and the numerous ''unused'' cultural resources concern the cases of Cyprus and Dubrovnik respectively. In the case of Dubrvonik, the poor investment (i.e. on renovation of cultural objects and on renewal of hotel facilities) and underdevelopment of cultural tourism products is noted. The Balearic stresses the lack of new products' offer that could increase the marketing diversification. The South Aegean stresses the low level of investments in research, digital inclusion as well as in the health care sector's services, especially in the cases of small islands and settlements.

- connection with the mainland during the winter and absence of interconnection between the islands is also highlighted in the cases of Tuscany, Corse, South Aegean, whereas in the case of Cyprus, difficulties to reach island due to bad air connections exist all year round.

Other weak points, discussed, concern the motivation of highly educated, specialized personnel that is difficult. Indicatively, Balearic highlight job insecurity and low wages as weak points and South Aegean suffers from the low ability of the tourism working pesonnel to absorb innovation. Additionally, the effectivenss of the tourism sector performance in terms of economic benefits is put into question in the case of Cyprus, while in the case of Corse the balance between quality and costs of the tourism product is considerd as a weak point. Another aspect in relation to the attractiveness of the destination is mentioned in the case of Balearic, linked to the high commercial costs met outside the hotels. The significant dependence of the economy from the tourism sector as well as the, per case, dependance of the economy on the national market (i.e in the cases of Tuscony and Corse), is acknowledged as a weakness. Finally, the administrative division of the island is highlited as a weakness, in the case of Dubrovnik.

Unique opportunities exist for all areas, in order to deal with the weak points and face the threats. These, indicatively, are related to the: proximity of each area to international airports, ability to improve the positioning of the areas in the international tourism market, ability to work in an integrated way with the Authorities to favour the development of the tourism sector, ability to use and exploit ICT, raising awareness and interest on culture, young educated and creative people (mentioned in the case of Dubrovnik, as well as available options to sign up for various competitions from the area financing cultural and tourism products) etc. The point that seems to be common for all areas seem to be:

- the possibility to develop additional tourism products and diversify the offer, reaching different types of tourists (i.e. cultural heritage, in the case of Dubrovnik, agri-tourism in the case of the South Aegean, MICE in Balearic, eco-tourism in Corse)

In the same sense, there are a lot of unique threats, faced by the areas, such as: competition by other markets, adequacy of resources (human, natural, i.e. water, energy, tourism infrastructure); geopolitical issues, maturity and commitment to impose integrated innovative strategies to face the weaknesses and exploit the opportunities; low willingness to apply participatory approach; internal legal, regulatory, and administrative system often conflicting with strateiges; isolation; loose of the unique characteristics of the areas (or worse, devastation) etc. But even more importantly, the high dependence of the the pilot areas' tourism economies by tourism, and especially by tourism services and products designed and offered only in a specific season (summer) introduces great risks in case of the occurance of unexpected natural events, physical catastropies, pandemies as the one that we are experiencing nowadays, with the COVID-19. This situation introduces a great threat to local and global economies.

In general, some threats mentioned by the parnters are listed below:

- increased impacts on the sustainability of the areas in terms of enviorment, economy, society and spatial dimension, deriving from uncontrolled tourism activities
- low awareness/ carelessness about cultural heritage
- young and creative people not motivated to stay in the areas
- conflicting interests between different stakeholders (i.e. residents and tourism entrepreneurs and between politicians and entrepreneurs or even between different neighbouring administrations) pose difficulties towards the design of integrated strategies and implementation of participatory approach
- adverse economic impacts, in case of strong dependence of the economy from the tourism sector (i.e. the recent pandemic situation will affect seriously the areas that ate strongly dependant from the tourism product)

4. General conclusions

This report has been initially designed to constitute a preliminary analysis of the state of the art of tourism and relevant thematics that are considered important, towards sustainable development of the tourism offer and minimization of the negative effects, in six pilot areas representing regional governance level in most cases (and national level in the case of Cyprus). An important incident has occurred from the time of the submission of the application form to date. This is linked to the recent pandemie that has affected greatly the whole globe. Flows of people and goods are eliminated and tourism is one if not THE ONE sector that is importantly affected. This new reality will be taken into consideration in all the next steps and deliverables of WINTER MED, as now, it is more imperative than ever, to create products and services that can be offered all year round, in the most creative way. All tools and creativity should be used to increase the responsiveness of destinations to such events.

Based on the data that have been provided by the pilot areas which was prior to the increase of the COVID-19 wave in Europe, there is an agreement that all partners share very similar strengths. Climate conditions, natural and cultural heritage, quality of life, gastronomy and all the Mediterranean characteristics formulate a strong tourism product, able to deliver high quality services. However, despite the beautiness and the strong points of the destinations, poor accessibility of the areas during the winter time is a weak point towards the development of off season products and tourism services. Low level of integration and joint strategic planning is highlighted in some cases. Scarce involvement of stakeholders, in particular economic operators in developing the tourism offer for the winter season, low number of services, particularly accommodation available in winter, as well as reluctancy of local population to open during the winter, due to the overexploitation and negative impact of tourism during the summer season are points that will need to be overcome, in order to fight seasonality. Poor off-season tourist offer and low investments, as well as shortages (in culture and heritage, in the health sector, in tourism accommodation and innovative services etc) and the "Closed for winter" and "Sundays closed" syndrome, are some additional weakness factors.

In addition to the weaknesses depicted above, there are several threats faced by the pilot areas, most importantly linked to seasonality. Tourists connect their activities in these areas only with the 3S model and most importantly, there is low interest by the tourist operators to change this image. However, integrated and participatory collaboration, including all necessary levels of governance (residents, local authorities, regional and national entities, private sector and academics) is almost scarce. Additionally, there is a strong fear that if tourism is extended in the winter season, environmental and social impacts on the identity of the areas will occur. Last by not least, the inappropriateness of hotels to operate during winter conditions (i.e. little or no insulation) might affect the ratings of the customers and impact on the image of the destination.

However, a lot of opportunities exist, in order to fight seasonality, extent the economic benefits deriving from the tourism sector, while of course maintaining the identity of the area and the environmental sustainability. These opportunities are again linked to the rich Mediterranean natural, cultural characteristics of these areas and the possibility to exploit new tourism models, but also to the potential to exploit the young creative people, ICT developments and cultural assets, in the most sustainable way, investing also in awareness raising activities both for tourists and residents, training for employers in the sector and expanding in new markets with new, innovative products.

Having in mind the above, it might be interesting to make a first assessment of the strategies and policies that are already in place in the six pilot areas that will help to boost their transitions towards more sustainable tourism models and specifically towards fighting seasonality. Based on the partners' input, a preliminary assessment depicts that Tuscany, Corse and Balearic islands have already introduced either a roadmap and a strategy and action plan respectively, targeting specific areas of focus in the wider topic of tourism. More specifically, Corse has introduced a roadmap, built around two pillars: the digital transition and ecological tourism. This roadmap is operationally translated through actions such as environmental labeling, the development of the European eco-label, a policy of public aid for sustainable tourism. Moreover, the Balearic islands Government has introduced two major tourist strategies to achieve the sustainability of the destination, one focused on off season tourism and one (supported also by action plan) focused on tax regulations. In addition, Tuscany has introduced a strategic operational plan for sustainable and accessible tourism and specifically the pilot area has designed an action plan for the management of tourism in protected areas. It is important that touristic areas are already designing yearly action plans to identify new markets and touristic offer. It is also important that Tuscany has acknowledged to upgrade three action plans into one all year round strategy for sustainable tourism development.

In Dubrovnik pilot area, there is no action plan yet, although there is a Tourism Development Strategy. Dubrovnik-Neretva County launched a series of project activities at the end of 2010 related to the development of the County Tourism Development Strategy, which had fundamental objectives and very clear goals: Increase in tourist volume (nights) from 60 to 70%; Capacity occupancy increase of 50%; Additional capacity increase of about 10,000 beds; 50% increase in unit consumption; Growth of MICE business volume, Rural & gastro and Nautica based on new ones investment (3 to 5 times); Product growth of events, touring and short; vacation with the professional support of the destination; management and marketing; legal framework and implications; description of measures, actions, tasks.

In the South Aegean Region, there is no wide agreement as to the direction or the priorities to be set towards a sustainable model of tourism development on the Aegean islands, although the South Aegean Region percieves the (re)connection of the local tourism with the local agri-food base as a priority. Regional authorities are called to implement a strategy for sustainable growth within the framework of the EU policy for smart specialization. So, for the South Aegean Region the only document that refers at strategic level to tourism is RIS3. In Cyprus there is a national strategy for tourism, which provides actions on technical support for local authorities for sustainable tourism. Cyprus identifies two programmes, at operational level that touch the thematic of tourism. So, even if there is a national strategy and even if the partner has identified operational programmes that affect tourism, there is no operational plan or action plan yet, dedicated to tourism.

Concluding, pilot partners seem to have different levels of readiness in terms of strategic design to develop sustainable tourism models and boost the transition from the summer to the all year round tourism offer. Seasonality and its negative effects, new business models that raise new demands based on diversified offer will not be faced easily if regional strategies, policies and lastly action plans, designed respecting all types of integration and using participatory approach. Also, marketing activities are crucial in order to implement counter-seasonal strategies successfully, as it is important that consumers are aware of the advantages, and availability, of off-peak season holidays. Facilitation by the politicians through investment in infrastructure such as transportation to increase accessibility to the location does help make any location more attractive to visitors. Further product development strategies need to be put in place within the context of the overall tourism development strategy so that the ultimate level of integration is achieved.

Concluding, it is aknowledged that tools are needed to be seeked, transferred and applied, in order to influence and ultimately change the traditional model towards more sustainable tourism products in the six pilot areas and beyond. The exploitation of the Mediterranean characteristics and the development of offer and demand during a more extended period of time around year, is a great challenge and WINTER MED partners are determined to tackle it. However, this is cannot be easily conquered. As in all cases, transitions need time and most importantly, involvement, engagement and active participation. Successful involvement starts with tackling topics, issues that need to be taken into consideration, and relevant persons. To this end, different existing policies that affect the topic tackled and relevant governance levels (regional, national, local, territorial) need to be considered and a strategy, an operational plan backed potentially by legislation, is essential. And as a next step, all stakeholders, all the actors around these different types of integration, need to be engaged both in the design of the strategy but also for its implementation that usually is detailed through actions, included in operational plans, roadmaps and action plans. This approach is communicated by the EU as a principal that affects all transitions (New Urban Agenda).

An overview of existing strategies to combat seasonality depicted through a short literature overview has been considered helpful and is provided in Annex I. Different strategies to combat seasonality have been proposed in the literature. Also, strategies and tools have also been developed and tested in the frame of past EU projects. The key question is under what circumstances and to what extent can strategies or tools that are effective in one place be transferred to another. In the frame of WINTER MED, this will be studied and analysed throughout deliverables D3.1.2 and D3.1.3.

It is once again stressd that the new situation related to COVID-19 will be taken into consideration.

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Annex I: Strategies addressing seasonality

Author	Strategy	Activity
Goulding, Baum and Morrison, 2004; Baum and Hagen, 1999; Baum, 1998; Witt and Moutinho, 1995	Introduction or development of festivals and events	Traditional or artificially created events, festivals, special celebrations in order to boost demand during off-peak seasons. Movement of well-established events and festivals can from main season and to shoulder or off-peak periods.
Jang, 2004; Jeffrey and Barden, 1999; Witt and Moutinho, 1995	Diversifying into niche products	Special interest weekends, getaway breaks, health, sport and activity-based holidays, culture and heritage tourism, educational, rural or ecological tours.
Jeffrey and Barden, 1999	Offering off-sea son holiday packages	Special occasion packages for accommodation, restaurants, activities to encourage greater visitation, repeat visitation or to lengthen stay in order to sustain and expand expenditure to compensate for low seasons.
Lundtorp et al., 1999	Business travel	Meetings, incentives, conferences and exhibitions since business travellers are usually not influenced seasonal pattern.
Cooper et al., 2005; Goeldner and Ritchie, 2003; Witt et al., 1991; Sutcliffe and Sinclair, 1980; BarOn, 1975	Multiple use schemes	Ski resort used as trekking course or Mediterranean beach resorts sell accommodation to long-stay, generally elderly Northern European visitors during the off-season.
Allock, 1994	Circuits' attractions, twin attractions or two-centre holidays	Circular tours or shifting of stay - one week spent at the seaside and one week in the countryside.
Jang, 2004; Goeldner and Ritchie, 2003; Commons and Page, 2001; Weaver and Oppermann, 2000; Jeffrey and Barden, 1999; Witt and Moutinho, 1995; Allcock, 1989; BarOn, 1973	Special price offers – seasonal pricing	Discounted prices are offered during off-peak seasons, while high price in peak seasons. Introduction of entrance fees to protected areas
Jeffrey & Barden, 1999	Group booking offers	Discounting packaged holiday activities. Align with tour operators or travel agents to sell product/service

Witt & Moutinho, 1995	Marketing campaigns to attract different markets in different season	Awaken consumer awareness of the availability and advantages of off-peak season holidays.
Goulding, Baum and Mor rison, 2004; Batchelor, 2000; Witt & Moutinho, 1995	Staggering of holidays over a longer period	Change in the UK school system from the traditional three-term year to a five-term year.
Goulding, Baum and Morrison, 2004	Improved and expanded regional infrastructure	Roads, signage, amenities, air services, utility infrastructure.
Goulding, Baum and Morrison, 2004; Baum and Hagen, 1997	Development of local business networks and partnerships	Developing, marketing (e.g. branding) and promotion of new attractions and venues.

Annex II: Questionnaire Template

D3.1.1 – Transnational tourism context analysis

For each Pilot Region where WINTER MED strategy is going to be applied, partners are requested to fill the following template providing all the required information (1 template for each pilot area).

1. General information		
Data of the pilot areas **Tuscan Archipelago**	Country	
	Nuts 2 /Name	
Total Number of Inhabitants in the area during winter season.		
Total Number of Inhabitants in summer season including those who move from other places to work in the tourism sector.		
Geographical coverage of the pilot area		
Geomorphological characteristics of the pilot area (mountainous, etc)		
Number of municipalities in the pilot area		

2. Pilot area description and Visitors Profile	
Please describe the socio-economic profile of the pilot area. *(Please mention the most important economic activities taken place in the area as well as the percentage of tourism activities in the local economy in terms of income produced)*	
Type of tourism (please tick the most appropriate types) X Sun & beach X Cultural o Religious X Natural X Other: Sports, Study	*Provide a short description of main tourist attractions in the Pilot City/Territory* *[short description – max 1000 characters]*
Please describe the profile of the visitors *(Please refer to the number, countries of origin, nationalities, means of traveling, age groups)*	
What kind of services are mainly offered by the local actors active in tourism sector?	
Are some of these services available during winter?	
Number of Tourist beds available at the pilot area for 2018	

Number of overnights spent in 2018 (including RBNB when possible)	
Number of visitors for 2017	
Amount of money spent per visitor/tourist for 2017	
Months of the year covered by the high season	
Please mention the main reasons why tourist choose the area as a summer destination.	
Do local businesses/actors/agents sell any customised touristic products/experiences?[5]	
Is the area attractive in winter time ? Why? Are there any touristic services provided in winter time?	
Please describe the main natural, cultural and other assets of the area which are part of the cultural heritage of the area, regardless if they are visited by tourists or not. Please make a special reference in case of protected areas (UNESCO sites, NATURA 2000 etc.)	
How would you rate the accessibility of the above mentioned assets in terms of accessibility? (from 1 -10)	
Is the transport infrastructure developed in the pilot area? *(boats, yachts facilities, local buses, airport, taxis…)*	
Please mention if there are any airports close to pilot area.	
To what extend do you think that ICT has been incorporated to local touristic product in order to increase the quality of touristic services provided, both from the local actors side and from the Regional Administration side.	

[5] *According to «experience economy» concept, companies may not simply deliver goods and services, but also engage customers in a more personal way staging unique, memorable experiences. These experiences are usually co-created between the company and the consumer.*

Is there any policy in place for promoting a sustainable tourism in the pilot case area?	

3. Seasonality	
Main reasons of Seasonality:	*Please justify your answer here:*
Please mention the main **social** impacts and implications of seasonality in the pilot area?	
Please mention the main **environmental** impacts and implications of seasonality in the pilot area?	
Please mention the main **economic** impacts and implications of seasonality in the pilot area?	

4. Pilot Area SWOT Analysis	
Please provide a brief SWOT analysis of the pilot areas in terms of its capacity to become an all year round destination.	
Strengths	
Weaknesses	
Opportunities	
Threats	

5. Policy 1	
Public authority in charge of the policy	
Type of the policy	
Please name the policy instrument that primarily affects the touristic product of the pilot area.	
Stakeholders involved	

Beneficiaries	
Financial allocation	
Financial framework	
Timescale (start/end date)	
Evidence of success	
Challenges encountered	
Is there any Regional or Local action plan which supports the development of sustainable tourism in the area? Yes or No	

References
Please mention any bibliographical reference, websites or other resource of information you used to answer the above questions.

Annex III: Completed Questionnaires

D3.1.1 – Transnational tourism context analysis

For each Pilot Region where WINTER MED strategy is going to be applied, partners are requested to fill the following template providing all the required information (1 template for each pilot area).

6. General information		
Data of the pilot areas **Tuscan Archipelago**	Country	Italy
	Nuts 2 /Name	Tuscany Region
Total Number of Inhabitants in the area during winter season.	34054 official residents. We don't have data for summer / winter. In some areas the inhabitants during the winter are much lower. People that have summer residences often leave the residency all year for taxation reasons (they don't pay taxes for the principal house).	
Total Number of Inhabitants in summer season including those who move from other places to work in the tourism sector.	No data. (see above).	
Geographical coverage of the pilot area	295 km2	
Geomorphological characteristics of the pilot area (mountainous, etc)	The geography of the Tuscan Archipelago includes a chain of islands between the Ligurian Sea and Tyrrhenian Sea, west of Tuscany. The archipelago contains the islands of Elba (the largest island of the group, the third Italian island), Pianosa, Capraia, Montecristo, Giglio, Gorgona and Giannutri, all of which are protected as part of the Tuscan Archipelago National Park. It encompasses a wide range of geological, geomorphological and biological diversity representative of the Mediterranean region. They have have different geological provenance as magmatic, sedimentary and metamorphic rocks. Islands are covered by sclerophyllous evergreen forest, Mediterranean pine woods, maquis, scrub, and hardwood forest with deciduous oaks and chestnuts.	
Number of municipalities in the pilot area	11	

7. Pilot area description and Visitors Profile	
Please describe the socio-economic profile of the pilot area. *(Please mention the most important economic activities taken place in the area as well as the percentage of tourism activities in the local economy in terms of income produced)*	More than 30,000 people live permanently in the archipelago (2014). Tourism is the main economic activity, linked principally to bathing, and is therefore concentrated during the summer season. Other economic activities include agriculture and fishing, although these have only a minor impact at the environmental and socio-economic level.

	Tourism. The economy of the Archipelago is essentially based on tourism and receptivity: both businesses and workers in agriculture and industrial and manufacturing activities are decreasing. The development model that is being consolidated sees a progressive affirmation of larger production units with the expulsion of micro-enterprises from the market. Although the tourist season faced some extension in past decades, the tourism-related economy determines long periods of inactivity. The percentage of tourism and related economic activities in terms of income is higher than 70%. **Fishing.** In the Archipelago the fishing vessel is present only on the island of Elba, in Giglio and Capraria with boats almost exclusively intended for small-scale artisanal fishing. On the island of Elba, fishing has ancient roots, although the number of employees has decreased in recent decades. Between municipalities of Portoferraio, Porto Azzurro and Marina di Campo the flotilla reaches 87 boats for small-scale fishing. The presence of different backdrops (rocky coast, coastal shoals, etc.) has favored the spread of more types of artisanal fishing, with different target species according to the season. Much of the catch is marketed through the few wholesalers operating on the island. in summer the sale is often direct. **Agriculture.** Agriculture is in the Archipelago in sharp contraction. The abandonment of agricultural activities, which took place in favor of an economy based on tourism and trade, is causing the progressive reduction of agricultural activities that represent a value and a cultural and landscape identity in the territory. The conditions in which the agricultural activity currently takes place, mostly small farms (on the Island of Elba 65% of the vineyards are less than one hectare), the presence of already recognized quality productions (such as DOC wines from Elba and Giglio) and some minor productions, make the area particularly suitable for the development of a niche agriculture strongly identified with the territory, for the application of production methods organic or with low environmental impact, to the integration of the cultivation activity with the agritourism accommodation, still marginally practiced with respect to its development potential.
Type of tourism (please tick the most appropriate types)	*Provide a short description of main tourist attractions in the Pilot City/Territory*

X Sun & beach X Cultural o Religious X Natural X Other: Sports, Study	*[short description – max 1000 characters]* The Sun&beach tourism is the main type of tourism in all the Archipelago and all economic activities are highly dependent on it. The tourism offer includes several other types of tourism, and some of this offer is available also during the low season. The main type of tourism besides Sun&Sea is the tourism based on activities in nature and and includes the visit and activities in the Tuscan Archipelago National Park. The Park covers over 600 square kilometres of sea that go from Livorno to the Argentario promontory, and it includes seven islands in all: Capraia, Elba, Giannutri, Giglio, Gorgona, Montecristo, Pianosa, as well as the Formiche of Grosseto and other small rocks. The biggest island is Elba (223,5 square km), and the smallest is Gorgona (2,23 square km). The island furthest from the mainland is Montecristo, at a distance of 68 km. The tourism offer includes trekking itineraries, whale and bird watching, naturalistic photography courses, events and itineraries, cycling routes, visits to sites of naturalistic, paleontologic, archaeological, cultural or historic importance, amongst others. Cultural tourism: Most of the islands are full of historical testimonies of the Roman era (Giannutri and Pianosa), Medici, of Spanish domination, of the brief but important Napoleonic bracket. Significant museums are located in Portoferraio, Marciana, Rio nell'Elba. The islands are home to a number of churches, fortresses, monasteries etc. The cultural sites are included inthe tourism offer of all islands. Sports tourism includes various offers for all kinds of outdoor sports, land or water. The water sports tourism offers has the highest demand because it's tied to a wide range of activities that can be done by the tourists that are predominantly involved in activities by the sea during the summer season It includes: diving, surfing, windsurfing, fishing, kayaking, sailing amongst others. The land sports offer includes trekking, byking, running mountain biking, free climbing and golf. There are numerous sports associations that organize competitions both at a national and international level. The events calendar goes all year round and covers all the archery, enduro, cycling, triathlon, rowing races and competitions as well as the walking and trial running ones. Study and training. There are all sorts of courses all year round mainly on the Island of Elba: foreign languages

	(German, English, French and Spanish) and Italian for foreigners, photography, typical cuisine, sailing, scuba diving, tennis, free climbing, golf. During the summer months many schools organize study trips and courses for school students.
Please describe the profile of the visitors *(Please refer to the number, countries of origin, nationalities, means of traveling, age groups)*	Italian 61% Foreign 39% Main foreign markets: Germany, Switzerland, Netherlands and Austria
What kind of services are mainly offered by the local actors active in tourism sector?	The main services offered are: - tourist information services - hospitality / accommodation (hotels, guest houses, B&B, agritourisme) - transfer and transport (ferry, airports, car, boat, bike rentals) - food and restoration (restaurants, bars, catering, food markets and shops) - entertainment services (events, animation, shopping.) - travel organisation (bookings, organisation of excursions, guided visits and tours) - cultural services (promotion of performing arts and cultural events, cultural information services) - sports services (rental of sports equipment, schools and training) - ports and marinas (mooring, mooring assistance and connected services) - commerce related services (shops, supermarkets, markets)
Are some of these services available during winter?	Some of the services are available during the winter, but very reduced. Most hotels are closed out of the main season. Transfer and transport services are reduced to a minimum necessary for the resident population.
Number of Tourist beds available at the pilot area for 2018	36.954
Number of overnights spent in 2018 (including RBNB when possible)	2.883.287
Number of visitors for 2017	477.772
Amount of money spent per visitor/tourist for 2017	No data (the data are only available on regional level)
Months of the year covered by the high season	5 months (May-September)

Please mention the main reasons why tourist choose the area as a summer destination.	- favourable climate for sun & sea tourism - proximity to the tuscan coast and good transport services to the islands - high quality of services related to tourism activities - preserved nature - diversified tourism offer for cultural, sports, nature tourism, as well
Do local businesses/actors/agents sell any customised touristic products/experiences?[6]	Yes, several local tourism service providers offer personalised products and experiences. Those vary from organisation of specific thematic guided visits / itineraries, organisation of private events, private boating / yachting services etc.
Is the area attractive in winter time ? Why? Are there any touristic services provided in winter time?	The island of the Archipelago have all the prerequisites for all year round tourism. The high quality enogastronomic offer, small towns and villages rich in culture and traditions, and the truly suggestive natural environment make the islands attractive during the winter time. The climate is mild all the year, and the proximity to the coast makes possible the organisation of the transfers. The tourism offer during the winter includes: - cultural tourist itineraries - food&wine tourism offer - possibility to practice outdoor sports - naturalistic tourism services - study tours and environmental education offered by the Park authorities - cultural and sports events Nevertheless, the accommodation and transport services are very reduced. There are several months in the year (ranging from november till march) that the hotels are closed and it's difficult to find adequate accommodation.
Please describe the main natural, cultural and other assets of the area which are part of the cultural heritage of the area, regardless if they are visited by tourists or not. Please make a special reference in case of protected areas (UNESCO sites, NATURA 2000 etc.)	Tuscan Archipelago forms the National Park that covers over 600 square kilometres and it includes seven islands in all: Capraia, Elba, Giannutri, Giglio, Gorgona, Montecristo, Pianosa, as well as the Formiche of Grosseto and other small rocks. It encompasses a wide range of geological, geomorphological and biological diversity representative of the Mediterranean region. Islands are covered by sclerophyllous evergreen forest,

[6] *According to «experience economy» concept, companies may not simply deliver goods and services, but also engage customers in a more personal way staging unique, memorable experiences. These experiences are usually co-created between the company and the consumer.*

	Mediterranean pine woods, maquis, scrub, and hardwood forest with deciduous oaks and chestnuts. The main types of habitat are evergreen forests of sclerophyll, Mediterranean pine woods and Mediterranean scrubs, as well as chestnut and deciduous oak woods. Rare and endemic species on the islands include the Peregrine falcon (*Falco peregrinus*), the Mediterranean horseshoe bat (*Rhinolophus euryale*) and the critically endangered red-rumped swallow (*Cecropis daurica*). In terms of heritage, the Archipelago contains 30 prehistoric sites often situated in panoramic locations, numerous Etruscan sites connected to mining activities established in defensive positions, and a number of Roman finds linked to patrician villas. Outstanding examples include the Roman Villa of the Caves at Portoferraio, the areas of Monte Castello and Compo dell'Aia at Procchio, the Roman Villa at Cavo, the sites of Capel Rosso and Vigna Vecchia, the Roman ruins at the port of Giglio, the catacombs and the Villa of Agrippina on Pianosa. The Tuscan Archipelago National Park is also included in the International Sanctuary for the protection of Marine Mammals Pelagos which is a protected marine area of approx 87,500 sq km between Italy, France and Monaco. It extends in the Corsican-Ligurian provincial basin from Punta Escampobariou (near Toulon) to Capo Falcone and Capo Ferro (Sardinia), up to the border between Tuscany and Lazio. It is an area characterized by a high biodiversity which includes, in addition to whales, sperm whales and dolphins, about 8,500 species of marine animals. The Archipelago is also part of UNESCO MAB Biosphere Reserve. A short description of main assets for each island: The largest island is **Elba**, an authentic mineralogical paradise: 150 varieties of its crystals are held in natural science museums around the world. With its triangular shape dominated over by the thousand-meter high Mount Capanne, the island is rich in gulfs, coves and hiking paths. The Butterfly Sanctuary is a must-see, located on Mount Perone, on the road between Sant'Illario and San Piero in Campo, where 50 species of butterflies, including the rarest varieties can be adired. The second largest island is **Giglio**, famous for its clear water rich in marine life and much beloved by scuba divers, where amidst thriving meadows of posidonia and

	vertical walls covered in blue sponges and red gorgoniidae one can also catch a glimpse of sea horses. From the time of Italian Unification to 1998, **Pianosa** was the seat of a maximum-security prison and for this reason, it has remained largely untouched. Today, it is open to limited guided visits, with hiking excursions and snorkelling to discover the island's treasures. **Giannutri** emerges from the sea like a limestone half-moon: 11 kilometers of rocky coast and a seabed rich in biodiversity, teeming with dolphins and rorqual whales, not to mention the splendid archeological site of the Roman Villa Domizi, built by the Domizi Enobarbi family. The public can access the island only in the summer season, when some shops and restaurants are open. **Capraia** is the third largest island in the Archipelago and the only one with volcanic origins, born nine million years ago from an underwater volcano. Regarding its plant life, the island is a true natural laboratory, with over 650 plant varieties including the Capraia *centaurea*, a type of cornflower, while the waters around the island are rich in marine life and the sea bottom is famous for snorkelling and scuba diving: amidst meadows of posidonia, sea anemones and sponges, one can observe large groupers or greater amberjacks.
How would you rate the accessibility of the above mentioned assets in terms of accessibility? (from 1 -10)	*Accessibility rate: 6* The above mentioned assets are accessible by the visitors, but there are restrictions in the natural protected areas. In addition some island can be visited only in summer, and with previous booking because the access is limited. **Giannutri island:** The public can access the island only in the summer season, when some shops and restaurants are open. The island is divided in two zones, one is a strictly protected area where access, navigation, parking, anchoring, fishing and diving are prohibited. **Gorgona** is the smallest island in the Archipelago and the home of a farming penal colony. For this reason, it is totally managed by the penitentiary administration, who authorizes excursions with up to 75 visitors per day for 4 days a week according to an agreement with the Park

	Authority. Visits are possible only in small groups accompanied by a guide certified in nature excursions. **Montecristo island**: To protect this oasis, only one thousand people are allowed to visit Montecristo per year on a nature excursion and in the company of the State Forestry Corps, but it is not possible to go swimming. Given the high number of requests, long waits are common. For visiting **Pianosa** it is necessary to contact the Agency Park of the Tuscany Archipelago or the municipality of Campo in Elba, and make a reservation.
Is the transport infrastructure developed in the pilot area? *(boats, yachts facilities, local buses, airport, taxis…)*	The transport infrastructure is partially developed and it includes the road network. The road system on Elba (the only one articulated in the Archipelago), is mostly suitable for the traffic of residents and overcrowded in the summer season. Public road transport (buses) has very high costs and heavily underutilized routes, and is qualitatively inadequate in terms of frequencies, interchanges, and prices and is not competitive with respect to car use. The islands are connected to the mainland by the ferry services. The main ferry ports in Tuscany are; Livorno, Piombino and Porto San Stefano. The main companies operating on the routes to the islands are Tirrenia Navigazioni, Trans Tirreno Express, Moby Lines, Sardinia Ferries and Toremar. During the summer months there are many more services. Elba island has one small commercial airport, operating during the summer (see below). For tourists that travel without the car, there is a booking system for renting several means of transport (cars, motorbikes, scooters or bikes). There is also a network of marinas / ports and landing places, equipped nautical centres and multi buoy moorings.
Please mention if there are any airports close to pilot area.	The La Pila airport - Elba Island. It is a private civil airport open to commercial flights. The 3 airlines that do national and international flights to and from the airport are: Silver Air, SkyWork and Air-Glaciers. Operates during the summer.

	Pisa International Airport Galileo Galilei. It's the main Tuscan airport. Distance to departing points of the ferries: 25 km from Livorno, 109 km from Piombino and 200 km from Porto Santo Stefano.
To what extend do you think that ICT has been incorporated to local touristic product in order to increase the quality of touristic services provided, both from the local actors side and from the Regional Administration side.	*Please justify your answer here:* We don't have data to asses the exact level of incorporation of ICT at local level, but we can list the available knowledge: 1) On regional level, the Tuscany Region is developing a digital tourism ecosystem (for the management of data and information) through the Smart Destination project and other projects. But still we are far from the "incorporation" phase 2) On the local actors side, some tourist areas of the region are testing ICT tools to support tourist information and reception (e.g. software for the management of tourist information and reception points on the network) 3) There are private operators who have developed ICT tools (e.g. APP) for the marketing of tourism products and services
Is there any policy in place for promoting a sustainable tourism in the pilot case area?	*Provide a short description of main policies for sustainable tourism which are in place.* [short description – max 1000 characters] 1) The Strategic Operational Document Destination Tuscany 2020 for the 2017-2020 period, of the regional agency Toscana Promozione Turistica. The objective of this programming document to define a strategy, in consultation with operators and stakeholders, for a responsible, sustainable and accessible tourism development. It identifies the strategic lines, the specific objectives and the lines of intervention that will allow the Region to increase its tourist flows and at the same time increase the sustainability of the destinations. 2) Action plan for the Sustainable Tourism Development of the Tuscan Archipelago: the National Park Authority has joined the **European Charter for Sustainable Tourism (CETS)** promoted by Europarc Federation, a methodological tool and a certification that allows to improve the management of tourism in protected areas. The central element of the Charter is the collaboration between all stakeholders to develop a common strategy and the action plan for tourism development, in the common objective of protecting the natural and cultural heritage and the continuous improvement of tourism

	management in favor the environment, the local population, businesses and visitors. The current strategy includes a five year plan 2016-2020.

8. Seasonality	
Main reasons of Seasonality: ❑ Weather conditions ❑ Calendar (big religious celebrations or other festivals attracting visitors etc.) ❑ Other reasons	*Please justify your answer here:* - very well known destinations for summer sun&sea tourism - lack of alternative tourism offer out of the main season (April-September) - lack of tourist infrastructure (closed during the winter) - lack of frequent transport connections out of the main season
Please mention the main **social** impacts and implications of seasonality in the pilot area?	- seasonal jobs (lack of steady employment) - overcrowded destinations during the summer, with consequent lower quality of life for residents and lower quality of experience for tourists - the lack of services during the winter causes the depopulation in islands, the main economic activities are open only during the summer
Please mention the main **environmental** impacts and implications of seasonality in the pilot area?	- increase of pollution (particularly the increase of waste and litter) - increased water consumption, that is a scarce resource in all islands - increased risk of forest fires with consequent pressure on biodiversity (the whole Tuscan archipelago is a protected nature area, this mitigates the habitat loss)
Please mention the main **economic** impacts and implications of seasonality in the pilot area?	Negative impact: economic benefits only for a short period in the year, during the main season, with more benefits for tour operators than for resident population Benefits: - economic benefits for residents during the summer season (employment and business generation, contribution to local economies) - contribution to local government revenues (the municipalities collect the disembarkation / landing tax for tourists and in some cases fees for boat docks / marinas)

9. Pilot Area SWOT Analysis	
Please provide a brief SWOT analysis of the pilot areas in terms of its capacity to become an all year round destination.	
Strengths	● High quality tourism offer already existing, in particular nature and sports tourism ● Proximity to mainland

	● Highly protected natural environment (whole archipelago included in the National Park, and part of the marine sanctuary Pelagos) ● Mild climate all year round ● Road infrastructure developed
Weaknesses	● Very reduced connection with the mainland during the winter and complete absence of interconnection between islands ● Lack of integrated and joint planning for whole archipelago ● Scarce involvement of stakeholders, in particular economic operators in developing the tourism offer for the winter season ● Very few services, in particular accommodation available during the winter ● Reluctancy of local population to open during the winter, due to the overexploitation and negative impact of tourism during the summer season ● Weak presence on the international markets (tourists predominantly from the domestic market)
Opportunities	● Possibility to take advantage of the strong regional support in marketing and promotion activities on domestic and foreign markets (Tuscany Region and the regional agency Toscana Promozione Turistica) ● Possibility to develop additional tourism offer (diversification) and reach different types of tourists ● Take advantage from the proximity of the Pisa International Airport, with very good connections all year round ● Take advantage of the attractiveness of the Tuscany region on global level, possibility to develop tourism packages that integrate activities on the mainland ● area particularly suitable for the development of a niche agriculture strongly identified with the territory (food & wine offer)
Threats	● Lack of interest from private operators to extend their economic activities beyond the main season ● Tourists connect the tourism on the Archipelago only with the Sun & Sea tourism, the complete image change is necessary ● Scarce willingness of collaboration between municipalities ● Possible negative impacts on natural environment that is already under pressure during the summer season

10.Policy 1	
Public authority in charge of the policy	*Tuscany region, Local public governments (Municipalities)*
Type of the policy	*Law*

Please name the policy instrument that primarily affects the touristic product of the pilot area.	*Regional Law 86/2016 (Legge Regionale 86 del 20/12/2016)* The law redefined the touristic governance in the Tuscany Region. The main points of the reform are: ● The activity of tourism promotion is centralized at regional level, and is carried out by a regional tourism promotion agency (called "Toscana Promozione Turistica") which has the task of promoting the Tuscan brand on international markets. ● One of the strengths of the Toscana brand is that Tuscany is a "mosaic of offerings", where sea, villages, cities of art, mountains, spas, give shape to a unique landscape with a strong Mediterranean identity; ● With the new regional law, the Tuscan territory has been divided into 28 Touristic Areas - "Ambito turistico"), which represent 28 possible tourist destinations able to offer a particular experience of stay in Tuscany; ● Within the Touristic Areas, public and private stakeholders must organize the local tourist offer, starting from the specific strengths of the territory and in coherence with regional promotion policies, in order to be able to enhance Tuscany performance in global tourism market. So, a strong brand (Tuscany), a regional destination (Tuscany) composed of "a mosaic of local offerings", 28 touristic areas which define the plurality of the Tuscan tourism offer. Questa riforma ha come obiettivi quelli di consentire la crescita di destinazioni meno conosciute, alleggerendo la pressione turistica sulle destinazioni mature e sfruttando i flussi turistici in arrivo sui grandi attrattori turistici toscani (Firenze in primis) per sviluppare turisticamente altri territori.
Stakeholders involved	Regional government, Regional tourist promotion agency, Municipalities, Business support organisations, Academic institutions (Universities, R&D centers).

Beneficiaries	Municipalities, SMEs and other economic operators, residents, tourists, local associations.
Financial allocation	YES
Financial framework	Multiannual: 2.500.000 € in 2019 e 2.000.000€ in 2020. Support for the activities of the 28 Touristic Areas.
Timescale (start/end date)	2016 – ongoing
Evidence of success	The expected results are a greater competitiveness of the Tuscan destination and a more homogeneous diffusion of the tourist phenomenon on the regional territory, measurable with the variation over time of the tourist presence in the various areas. The activity of the areas has just started and the results cannot yet be fully assessed.
Challenges encountered	The main difficulties in implementing the new governance model consist in the poor habit of the municipalities to work together within the Area, in the difficulty in establishing positive relationships between public and private stakeholders for the definition and construction of the tourism products of the Area, in the lack of specific skills spread across the territory (at the level of the individual areas)
Is there any Regional or Local action plan which supports the development of sustainable tourism in the area? Yes or No	Yes. Each Touristic Area delivers yearly Action Plan, with a quantitative and qualitative analysis of the tourist phenomenon of the previous year. The Action Plan identifies the reference markets and tourism offer each Area intends to develop, indicating also which promotional fair events it intends to participate in. Toscana Promozione Turistica therefore defines the annual Promotion Plan of the Tuscany Destination by composing the various Area plans and identifies which promotion actions to take. The islands of the Tuscan Archipelago are included in three different Areas: Elba and Tuscan Islands, Livorno (Capraia Island) and Maremma Toscana South (Giglio). Within WINTER MED project these Action Plans will be upgraded with a strategy for a sustainable development of all year tourism in Tuscan islands.

References
Please mention any bibliographical reference, websites or other resource of information you used to answer the above questions. **Action plan for the Sustainable Tourism Development of the Tuscan Archipelago 2016-2020** *https://issuu.com/auroraciardelli/docs/piano_azione_totale* **Strategic Operational Document - Destination Tuscany 2020** *https://www.toscana-notizie.it/documents/735693/1421823/Destinazione+Toscana+2020+documento+strategico/b3c60138-69ac-4dd7-9803-76b7ac3cc0c6* **Tuscan Archipelago National Park Guide 2020: Experience the Park 2020** *http://www.islepark.it/visitare-il-parco/attivit%C3%A0-ed-eventi-con-il-parco* **Tuscan Archipelago National Park** http://www.islepark.it/ **Visit Tuscany - Tuscany Official Tourism Website** https://www.visittuscany.com/it/ **Island of Elba: detailed and informative tourist guide** https://www.infoelba.com/ **Toscana Promozione Turistica - Regional Agency for the Tourism Promotion** http://www.toscanapromozione.it/

D3.1.1 – Transnational tourism context analysis

For each Pilot Region where WINTER MED strategy is going to be applied, partners are requested to fill the following template providing all the required information (1 template for each pilot area).

1. General information		
Data of the pilot areas	Country	Croatia
	Nuts 2 /Name	Adriatic Croatia
	Nuts 3 /Name	
Total Number of Inhabitants in the area during winter season.	25203 (+ cca 850 inhabitants within Elaphiti islands area- census is done by municipalities and Elaphiti islands are administrative part of city of Dubrovnik)	
Total Number of Inhabitants in summer season including those who move from other places to work in the tourism sector.	N/A In the Republic of Croatia we do not keep population statistics by season. The census is done every 10 years.)	
Geographical coverage of the pilot area	938.09 km^2	
Geomorphological characteristics of the pilot area (mountainous, etc)	The island of Korčula belongs to the central Dalmatian archipelago, separated from the Pelješac peninsula by a narrow Strait of Pelješac, between 900 and 3,000 metres (3,000 and 9,800 feet) wide. It stretches in the east-west direction, in length of 47 kilometres (29 miles); on average, it is 8 km (5.0 miles) wide. With an area of 279 square kilometres (108 sq mi), it is the sixth largest Adriatic island. The highest peaks are Klupca, 568 metres (1,864 ft) and Kom, 510 metres (1,670 ft) high. The climate is Mediterranean; an average air temperature in January is 9.8 °C (49.6 °F) and in July 26.9 °C (80.4 °F); the average annual rainfall is 1,100 mm (43.3 in). The island is largely covered with Mediterranean flora including extensive pine forests. The main road runs along the spine of the island connecting all settlements from Lumbarda on the eastern to Vela Luka on the western end, with the exception of Račišće, which is served by a separate road running along the northern coast. Ferries connect the city of Korčula with Orebić on the Pelješac peninsula. Another line connects Vela Luka with Split and the island of Lastovo. Fast passenger catamarans connect those two ports with Split and the islands	

	of Hvar and Lastovo. The main Adriatic ferry line connects Korčula with Split, Dubrovnik, Zadar and Rijeka. During the summer there are direct ferries to Italian Adriatic ports. Peljesac is the second largest Croatian peninsula (after Istria), located in the south of Croatia in Dubrovnik-Neretva County. In terms of the Islands Act (NN 116/18), the Peljesac peninsula is considered an island.It extends almost parallel to the direction of the coast, from its junction with the mainland in Mali Ston to the extreme cape of Loviste, 77 km long. The surface of Peljesac is 348 km2. It is connected to the mainland by the Ston cover, which is 1450 m wide in the narrowest part. The coating is predominantly sandy and is apparently formed by deposits, indicating that Peljesac was once an island. The structure of Peljesac is hilly with many karst fields. Peljesac belongs to the Adriatic type of Mediterranean climate characterized by long, dry and warm summers with clear and calm days. Winter is mild and humid. Air temperatures are relatively high throughout the year, and only in January and February are temperatures below 10 ° C. The highest precipitation is recorded during October and March and the lowest during July and August. The average hours of sunshine in Peljesac are also over 2500 in some places, which indicates a large number of sunny days, which is among the largest in Croatia. The vegetation cover of Peljesac is Mediterranean, rich and diverse. It has recorded more than 1,100 plant species and subspecies. Extremely diverse vegetation is explained by the relatively large area (355 km2) and the difference in altitude (1 to 961 m). Two state roads pass through Peljesac. Orebic is connected by bus to Dubrovnik and a few surrounding towns. Orebic is connected to the town of Korcula by ferry line. Another ferry line connects Trpanj with Ploče. The line from Prapratno (between Ston and Ponikve) leads to the island of Mljet. There are makeshift heliports in several places on the peninsula.

	An additional connection between Pelješac and the mainland is planned to be created through the proposal of the Pelješac bridge. Once completed, this bridge would physically connect all of Croatia, which is now interrupted by the strip of land belonging to Bosnia and Herzegovina at Neum municipality. Mljet is the southernmost and easternmost of the larger Adriatic islands of the Dalmatia region of Croatia. The National Park includes the western part of the island, Veliko jezero, Malo jezero, Soline bay and a sea belt 500 m wide from the most prominent cape of Mljet covering an area of 54 km2. The central parts of the park are Veliko jezero with the Isle of St. Mary, Malo jezero and the villages of Goveđari, Polače and Pomena. Mljet lies south of the Pelješac peninsula, from which it is divided by the Mljet Channel. Its length is 37 kilometres (23 mi); its average breadth 3.2 kilometres (2.0 mi). It is of volcanic origin, with numerous chasms and gorges, of which the longest, the Babino Polje, connects the north and south of the island. Port Polače, the principal harbour in the north, is a port of call for tourist ferries. Mljet contains one hotel—The Odisej (from the Greek Odysseus) in the north-west corner of the island. The northwestern part of the island includes an inland lake as well as a small island within it. It has been a national park since November 12, 1960. Over 84% of the island of 98.01 square kilometres (37.84 sq mi) is forest. The island's geological structure consists of limestone and dolomite forming ridges, crests and slopes. A few depressions on the island of Mljet are below sea level and form non-permanent brackish lakes known as blatine ("mud-lakes") or slatine ("salt-lakes"). The climate is Mediterranean; an average air temperature in January is 9 °C (48 °F) and in July about 24 °C (75 °F). Precipitation (mostly falling between October and April) averages between 35 and 45 inches annually, with the hills receiving the highest amounts. The island of Mljet has no airport. Dubrovnik airport on the mainland provides the main

	international connection for the island. Mljet has ferry lines with Pelješac peninsula and Dubrovnik. Transportation to the island is provided by Jadrolinija ferry service. Sobra, the main port on the island, is connected to Dubrovnik-Gruž and Ston via a car ferry. There are two type of ferries available: a car ferry and a faster catamaran ferry. The two-lane paved road runs throughout the island. Scheduled buses on Mljet travel just once or twice a day. The Elaphiti Islands or the Elaphites (Croatian: Elafitski otoci or Elafiti) is a small archipelago consisting of several islands stretching northwest of Dubrovnik, in the Adriatic Sea. The Elaphites have a total land area of around 30 square kilometres (12 square miles) and a population of 850 inhabitants. The islands are covered with characteristic Mediterranean evergreen vegetation and attract large numbers of tourists during the summer tourist season due to their beaches and pristine scenery. Only the three main islands (Šipan, Lopud, Koločep)are permanently inhabited, each of which supports a modest tourist industry. They are connected with the mainland via daily ferry lines operated out of Dubrovnik.
Number of municipalities in the pilot area	12 units of local government City of Korčula City of Dubrovnik (Elaphiti islands) Municipalities - Lumbarda, Smokvica, Blato, Vela Luka, Lastovo, Janjina, Orebić, Ston, Trpanj, Mljet

2. Pilot area description and Visitors Profile	
Please describe the socio-economic profile of the pilot area. *(Please mention the most important economic activities taken place in the area as well as the percentage of tourism activities in the local economy in terms of income produced)*	According to the 2011. census report, there were 25203 inhabitants on the pilot area (island of Korčula, peninsula Pelješac, island of Mljet, Elaphiti islands). The decrease in the total population characterizes the entire pilot area. For the pilot area, there is a significant natural decline in population, intensive emigration processes after 2010. An intense aging process caused by a natural decline and emigrating primarily the young population. The average age of people in Dubrovnik-Neretva County is equal to the average age in Croatia and quite high (41.5 years in 2011). Island and peninsular municipalities have a lower share of the

	highly educated than the share of people with completed primary education. High concentration of cultural events during the tourist season and significantly less cultural activities during the rest of the year characterizes the pilot area. Tourism is the most important economic branch in the pilot region and has a major impact on development and operations in other economic branches, such as construction, real estate business, transportation, agriculture, cultural activities, etc. Dubrovnik-Neretva County recorded 8,051,049 nights in 2018. The pilot area has favourable climatic conditions for the cultivation of many Mediterranean crops, but there are also limitations due to the relatively small and dispersed agricultural land. According to the character of agricultural production, the area is a vegetable-fruit-wine growing area. The olive growing is also very important in the agriculture. Vineyards of Peljesac are significant in viticulture of Peljesac. The area is also known for fishing. In the structure of the total catch is the largest share of blue fish, about 95%, other fish about 4%, while the rest is 1% wastes on crustaceans, molluscs and shellfish. Mariculture, fish and shellfish farming, are especially developed in the bay of Mali Ston and the waters of the island of Mljet. The structure of the economy also includes manufacturing, construction and stone cutting.
Type of tourism (please tick the most appropriate types) o Sun & beach o Cultural o Religious o Natural o Other [Specify .....]	*Provide a short description of main tourist attractions in the Pilot City/Territory* *[short description – max 1000 characters]* The pilot area contains, "sun and beach'', cultural, natural, religious and gastro tourism. Peljesac belongs to the Adriatic type of Mediterranean climate characterized by long, dry and warm summers with clear and calm days. Winter is mild and humid. This affects the development of the „sun and beach'' tourism. Also nature conservation (a large number of natural beaches), and a rich gastronomic offer of local products attract a large number of tourists. There are many cultural (tangible and intangible) heritage in this area. On the peninsula of Peljesac are magnificent Ston walls and Ston salt works. Ston walls connect the cities of Ston and Mali Ston with a total length of 5.5km.They were reinforced with 5 fortresses and 40 towers and represent one of the largest medieval fortification ventures.

	The rich history on the island of Korcula left rich cultural heritage as architecture of Korcula (cultural and historical urban unit, walls, palaces, courtyards, religious objects, castles, etc.), archaeological sites, parks and also intangible heritage (folklore, brotherhoods, events, museums, galleries, etc.). On the island of Korcula is also famous archaeological site Vela spila. The whole island of Lastovo with its associated islands has been declared Nature park. With exceptional translucency of the waters, the Park is rich in coastal cliffs and many plant and animal species. Its forest hides many caves, and pits. Mljet National park is a protected and unique natural entity whose specifics are reflected in the natural phenomena of the Great and Small lakes. On the mainland of the national park there is extremely rich in flora and fauna and there is true abundance of endemic and rare species under the park.
Please describe the profile of the visitors *(Please refer to the number, countries of origin, nationalities, means of traveling, age groups)*	357816 visitors
What kind of services are mainly offered by the local actors active in tourism sector?	Accommodation and food services (traditional gastronomic offer)
Are some of these services available during winter?	Yes, some of accommodation and food services are avliable during the winter
Number of Tourist beds available at the pilot area for 2017	
Number of overnights spent in 2017 (including RBNB when possible)	2404229
Number of visitors for 2017	357816 visitors of the pilot area
Amount of money spent per visitor/tourist for 2017	79 euros in 2017. 97 euros in 2019. **
Months of the year covered by the high season	3 Mid June- Mid September
Please mention the main reasons why tourist choose the area as a summer destination.	“Sun and sea” tourism dominates in the pilot area - accommodations are located in a narrow coastal zone, tourists mostly visit the islands for a swim in the clear sea, tourism products mainly based on sun and sea (kayaking, diving, etc), a large number of restaurants get closed in offseason (during winter months)

Do local businesses/actors/agents sell any customised touristic products/experiences?[7]	*YES, local tourist agencies sell customised touristic experiences.*
Is the area attractive in winter time? Why? Are there any touristic services provided in winter time?	The pilot area is not attractive during the winter months because: - "sun and sea" tourism dominates in the pilot area - most of tourism services are unavailable during the winter season - ferries are less frequent than in summer time
Please describe the main natural, cultural and other assets of the area which are part of the cultural heritage of the area, regardless if they are visited by tourists or not. Please make a special reference in case of protected areas (UNESCO sites, NATURA 2000 etc.)	**The island of Korčula** has been inhabited since prehistoric times, with past traces of life being uncovered at many places on the island. The oldest finds were stone knives from the Neolithic age discovered on the islet of Badija near Korčula. The site with the richest Neolithic age finds is Vela spilja (Large Cave) at Vela Luka. Korčula is a historically fortified town on the protected east coast of the island of Korčula, with an approximate population of 2900 inhabitants. The old city is surrounded by walls, and the streets are arranged in a herringbone pattern allowing free circulation of air but protecting against strong winds. The town's historic sites include the central Gothic and Renaissance Cathedral of St Mark, the Town Hall and the massive city fortifications. The 15th-century Franciscan monastery with a beautiful cloister is situated on the islet of Badija, near Korčula Town. **The Lastovo** islands are located in the Croatian part of the Adriatic Sea, 14 km towards the south from the island of Korčula. It is a part of the outer group of southern Dalmatian islands and comprises the southernmost Croatian populated island of Lastovo with adjoining islands, the island group of Lastovnjaci and Vrhovnjaci and the island of Sušac. on 29 September 2006 the Croatian Parliament declared the Lastovo archipelago a nature park, which makes it the eleventh and youngest nature park in Croatia. Situated on the island of the same name**, Mljet National Park** is the most important protected area of the Dalmatian south. It is the oldest National Park at the Adriatic.

[7] *According to «experience economy» concept, companies may not simply deliver goods and services, but also engage customers in a more personal way staging unique, memorable experiences. These experiences are usually co-created between the company and the consumer.*

How would you rate the accessibility of the above mentioned assets in terms of accessibility? (from 1 -10) **5**	Mljet National Park and Korčula Island are quite accessible for tourists. Tourists come to the island of Mljet by boat or ferry from Dubrovnik or Peljesac peninsula. The island of Korcula is reached by a fast ferry from Dubrovnik or by ferry from Pelješac peninsula. Ferries run daily, but less frequent in winter season. Island of Lastovo is less accessible. It is s reached by ferry from Vela Luka (island of Korčula).
Is the transport infrastructure developed in the pilot area? (boats, yachts facilities, local buses, airport, taxis…)	The transport infrastructure is developed but not enough. This means that sometimes in peak season there is necessity for more ferry lines, more bus lines, etc.
Please mention if there are any airports close to pilot area.	The nearest airport is located near the city of Dubrovnik.
To what extend do you think that ICT has been incorporated to local touristic product in order to increase the quality of touristic services provided, both from the local actors side and from the Regional Administration side.	N/A
Is there any policy in place for promoting a sustainable tourism in the pilot case area?	YES- Tourism development strategy Dubrovnik-Neretva County – described within table no 5.

3. Seasonality	
Main reasons of Seasonality: ❑ Weather conditions ❑ Calendar (big religious celebrations or other festivals attracting visitors etc.) ❑ Other reasons	The causes of seasonality are related to climate, therefore air and sea temperature, precipitation, annual insolation etc.. Other causes of seasonality are holiday schedules, holidays, school holidays, not enough long tourist season and lack of facilities that would allow the season to be extended, tourist offer insufficiently diversified and adapted to the requirements of modern tourists.
Please mention the main **social** impacts and implications of seasonality in the pilot area?	Infrastructure overload of local communities (traffic, parking, services, prices increase).
Please mention the main **environmental** impacts and implications of seasonality in the pilot area?	The ecological consequences of seasonality of tourism imply transgression of ecologically carrying capacity of a tourist destination in the months of the season, which often results by excessive polluting the environment and disturbing the ecological balance.
Please mention the main **economic** impacts and implications of seasonality in the pilot area?	The economic consequences of seasonality are consequences that imply variability of income, changeability in employment levels, difficulty in attracting investment, and the changeability of the level

	of service quality as it is difficult to maintain the standard of service quality due to difficulty in attracting quality staff to temporary jobs.

4. Pilot Area SWOT Analysis	
Please provide a brief SWOT analysis of the pilot areas in terms of its capacity to become an all year-round destination.	
Strengths	● Rich material cultural heritage of the island ● Rich intangible cultural heritage of island ● The old town of Korcula and Moreška candidates for the UNESCO list ● Excellently preserved cultural heritage ● Places rich in cultural heritage they are relatively close to each other ● Fostering traditional values and customs ● Famous world traveller and merchant Marko Polo birth place ● Maintaining numerous cultural manifestations and events ● Existing tourist offer ● Numerous accommodation capacities of different category ● Suitable climatic factors
Weaknesses	● Insufficient promotion ● Poor awareness of tourists and locals about cultural heritage ● Numerous unused cultural resources ● Sun and sea tourism preference instead of cultural ● Poor investment and underdevelopment cultural tourism products ● Poor off-season tourist offer ● Non-investment in cultural objects in need of renovation ● Non-cooperation of tourist and cultural ● facilities / agencies ● Non-renewed hotel facilities ● Lack of educated tourist workers ● Administrative division of the island
Opportunities	● Huge potentials in tourism, especially in the field of cultural tourism ● Notice the options to sign up for various competitions from the area financing of cultural and tourism projects (EU funds, different Foundation) ● Young, educated and creative people to be kept on the island ● Increasingly successful seasons ● Raising awareness of cultural wealth heritage ● promotion and creation of cultural and tourist product

	• Expanding to new markets
Threats	• Neglect of cultural tourism and cultural elements • Departure of young, creative people with island • Severe seasonality • Neglect and carelessness about the cultural heritage • Isolation of the island • Non-motivation and non-involvement of cultural subjects in tourism season • Interest of cultural subjects for the development of cultural tourism • Damage to the indigenousness of the old city cores • Spatial devastation

5. Policy	
Public authority in charge of the policy	*Dubrovnik Neretva Region*
Type of the policy	*Law / Policy / **Strategy** / Action plan / Programme / Other (if other please specify)*
Please name the policy instrument that primarily affects the touristic product of the area.	Title: TOURISM DEVELOPMENT STRATEGY DUBROVNIK-NERETVANSKA COUNTY 2012 - 2022 What is the goal of this strategy/plan: Dubrovnik-Neretva County launched a series of project activities at the end of 2010 related to the development of the County Tourism Development Strategy, which had the following fundamental objectives: - Clear the dilemmas and controversies that have arisen in the previous period; - Divide the total area of the county into tourist clusters that are completely consistent in terms of experience; - Define the tourism growth model of the county and its clusters; - Set up a management model for tourism. [Please describe briefly its content Strategic concept: It relies on the market power of the city of Dubrovnik, which already provides relatively easy commercialization of the city of the Dubrovnik cluster. By linking the county's value chain as an integral region, content and quality are being expanded offers tourist product, and by insisting on the brand of the city, the rest of the region facilitates access and image on the market demand. - Competitive positioning of an upscale destination involves the delivery of all elements of the selected tourist

	products at a highly competitive level of Mediterranean destinations according to a previously agreed plan. In addition to the county and cluster strategy, this includes agreement on the type, location and content of investment required tourism management projects and mechanism. - Displacement of the traditional product in other clusters which on one hand resolves the fate of the tourist positioning the Dubrovnik cluster and releasing it for products based on culture and events, on the other feeds other clusters within the county and secures demand for a qualitatively repositioned solar product and must in these clusters. - Cluster profiling according to clear attributes and realistic development scenarios that are on the one hand consistent with needs and market perceptions and on the other with local development capacity. A necessary criterion for positioning the cluster is a fit into the county's consistent system of experiences and products. - Unique management process and mechanism that must ensure the involvement of all cluster stakeholders, as well as define responsibilities for all strategic and operational issues of tourism development PROCES: - Involve actors in the development process - Introduce missing links in the value chain - Sustainable development of new accommodation facilities - Develop missing products - Management process and strategic goals - Develop the missing tourism infrastructure - Develop a modern destination marketing system - Provide education and training for the future - Prepare projects for EU funds GOALS: - Increase in tourist volume (nights) from 60 to 70% - Capacity occupancy increase of 50% - Additional capacity increase of about 10,000 beds - 50% increase in unit consumption - Growth of MICE business volume, Rural & gastro and Nautica based on new ones investment (3 to 5 times) - Product growth of events, touring and short vacation with the professional support of the destination management and marketing - legal framework and implications - description of measures, actions, tasks... ***(half page max)**:]*

Stakeholders involved	As policy deliverers (e.g. regional / national authority, development agency, R&D institution, business association, university, etc) Institute for Physical Planning of Dubrovnik-Neretva County; and Horwath Consulting Zagreb together with key stakeholders, and at some stages the general public of the Dubrovnik-Neretva County
Beneficiaries	Target group(s) e.g. SMEs, clusters, R&D centers, business associations, etc: Local population of Dubrovnik-Neretva county, tourist stakeholders, local and regional public administration, tourists
Financial allocation	Yes/no N/A
Financial framework	Amount of funding/financial resources /financing models / N/A
Timescale (start/end date)	e.g. June 2010 – 2022 / ongoing
Evidence of success	Results achieved / expected N/A Please provide evidence of (measurable) outputs/results if available
Challenges encountered	Please specify challenges or difficulties and lessons learned while implementing the policy. N/A
Is there any Regional or Local action plan which supports the development of sustainable tourism in the area? Yes or No	In case the answer is YES, please describe the most important topics of the plan which support the development of sustainable tourism. Can you identify any measure in this plan which encourages the development of winter tourism in the area? Please justify your answer briefly. N/A

References
Please mention any bibliographical reference, websites or other resource of information you used to answer the above questions. Development strategy of Dubrovnik Neretva County 2014-2020 Tourism development strategy Dubrovnik Neretva County 2012 – 2022 Visit Dubrovnik web page - https://visitdubrovnik.hr/hr/o-nama/statistika/#2018-godina Bureau of Statistics - https://www.dzs.hr/

D3.1.1 – Transnational tourism context analysis

For each Pilot Region where WINTER MED strategy is going to be applied, partners are requested to fill the following template providing all the required information (1 template for each pilot area).

6. General information		
Data of the pilot areas	Country	Cyprus
	Nuts 2 /Name	Kipros
Total Number of Inhabitants in the area during winter season.	950.900	
Total Number of Inhabitants in summer season including those who move from other places to work in the tourism sector.	1.415.900 (maximum in the high season month)	
Geographical coverage of the pilot area	Whole country	
Geomorphological characteristics of the pilot area (mountainous, etc)	An island, with lot of plains, and can be characterized as a semi-mountainous area. Hilly fields, fertile plains, covered with vineyards and coniferous forests in the mountains. Almost parallel to each other along the island are two mountain ranges: Kyrenia which is to the North and Troodos Mountains which is to the South.	
Number of municipalities in the pilot area	29 (free part of Cyprus)	

7. Pilot area description and Visitors Profile	
Please describe the socio-economic profile of the pilot area. *(Please mention the most important economic activities taken place in the area as well as the percentage of tourism activities in the local economy in terms of income produced)*	The economy of Cyprus is a high-income economy as classified by the World Bank. Cyprus has an open, free-market, service-based economy with some light manufacturing. Internationally, Cyprus promotes its geographical location as a "bridge" between East and West, along with its educated English-speaking population, moderate local costs, good airline connections, and telecommunications. The economy of Cyprus can be characterized as small, open and dynamic, with services constituting its engine power. The tertiary sector (services) is the biggest contributor to GDP, accounting for about 80,5%. Tourism sector has a 17% contribution to the GDP (direct). The indirect and induced contribution to GDP is 27% and is expected to rise 21% and 32%, respectively. The secondary sector (manufacturing) contributes 16% of GDP. The primary sector (agriculture and fishing) is continuously shrinking and only reached 2,3% of GDP.
Type of tourism (please tick the most appropriate types) √ Sun & beach	*Provide a short description of main tourist attractions in the Pilot City/Territory* *[short description – max 1000 characters]*

√ Cultural √ Religious √ Natural o Other [Specify …..]	There are many Cyprus attractions varying from historical attractions such as medieval castles and interesting archaeological sites to other cultural attractions which include beautiful villages, churches, monasteries and local wineries found in various locations of the island. Apart from these Cyprus has amazing beaches and coasts in which tourism and locals can spend enjoying their time relaxing and sun, beach and crystal turquoise waters. Also, Cyprus is offering mountains and fresh air and a lot of resorts are in the Troodos mountain range. There are hundreds of attractions and things to do in Cyprus and some of the main tourist attractions are the following: 1. Petra of Romiou(Paphos District): known as Aphrodite's Rock is one of the most famous beaches in Cyprus. According to one legend, this rock is the site of the birth of the goddess Aphrodite. 2. Akamas Peninsula (Paphos District): a national forest park, protected with a unique geology and rich flora and fauna. An area unaffected by development. 3. Baths of Aphrodite (Paphos District): an area here the Goddess of Love used to take her bath. 4. Choirokitia Neolithic Settlement (Larnaca District): World Heritage Site by UNESCO since 1998. The site is known as one of the most important and best-preserved prehistoric sites of the eastern Mediterranean 5. Kolossi Castle (Limassol district): A reminder of Cyprus's crusading history, the Kolossi Medieval Castle in Limassol served as a stopping point for knights heading to Jerusalem. 6. Kourion Archeological Site (Limassol District): an important ancient city-state on the southwestern coast of Cyprus. 7. Larnaca Salt Lake (Larnaca District): the most important wetlands of Cyprus and it has been declared a Ramsar site, Natura 2000 site, Special Protected Area under the Barcelona Convention and an Important Bird Area (IBA). It is surrounded by halophytic scrubland and on its bank lies the Hala Sultan Tekke, one of the holiest of shrines within Ottoman Islam. It houses the tomb of Umm Haram, Muhammad's 'wet-nurse'. 8. Paphos Ancient theatre, castle and mosaics(Paphos District): Ancient temples, rock-cut tombs and Roman villas which are included in the UNESCO heritage list.

	9. Troodos Mountain range (Limassol District): largest mountain range in Cyprus with beautiful traditional villages. 10. Kykkos Monastery (Nicosia District): one of the most known monasteries in Cyprus dated from the 11^{th} century. A byzantine monastery. 11. Cape Greko national park (Famagusta District) a national park with important marine environment. 12. Stavrovouni Monastery (Larnaca District): a Greek Orthodox monastery which stands on the top of a hill called Stavrovouni. The monastery is one of the few places where one can see a piece of the Holy Cross. Stavrovouni Monastery was founded by Saint Helena in around 327–329 AD and therefore it is one of the oldest monasteries in the world
Please describe the profile of the visitors *(Please refer to the number, countries of origin, nationalities, means of traveling, age groups)*	Total number of visitors for the year 2018 is 3.976.777 which has increase by 39,6% compare to 2008. Most of the tourists are coming from Europe (70,1%) and other EU countries (20,5%) and that is mostly from UK, Russia, Israel, Germany and Greece. 95% is arriving to Cyprus with the plane and only 5% with cruise tourism. High season months is May to October with an average overnight stays 10,2 days. Mostly visitors are young people and families with their kids. During the wintertime we have older people that visit Cyprus due to its good climate conditions.
What kind of services are mainly offered by the local actors active in tourism sector?	-tourist excursions to different towns, sightseeing's and monasteries of Cyprus - travel organizations for groups - transfer and transport services - mini cruises and boat trips -hiking, biking trips and excursions - agrotourism experience - accommodations services - food services - entertainment services
Are some of these services available during winter?	Most of this service are not available on winter. Most of the hotels and restaurants are closing during wintertime as well as there is not any offer of any excursions. Also, the transport services are not offered any more and the public transportation is very limited
Number of Tourist beds available at the pilot area for 2017	791 with 84,500 bed
Number of overnights spent in 2017 (including RBNB when possible)	17,400 overnight stays
Number of visitors for 2017	3.652.073
Amount of money spent per visitor/tourist for 2017	688,2 per visitor (includes accommodation and additional expenses)

Months of the year covered by the high season	April-October
Please mention the main reasons why tourist choose the area as a summer destination.	-Beautiful sandy beaches with clean waters - Sun all year around and excellent climate conditions - Excellent food mixture of a Mediterranean cuisine - It offers all kind of activities - Hospitality - High quality of accommodation infrastructure and services - Peaceful and safe island (one of the safest countries in Europe) - Travel to the past with historical monuments - Good road connection between the cities
Do local businesses/actors/agents sell any customised touristic products/experiences?[8]	Yes, they have this opportunity during the summertime.
Is the area attractive in winter time ? Why? Are there any touristic services provided in winter time?	We have the Troodos mountain range in winter that can offer accommodation and touristic services. Excursions, hiking, biking, skiing, visits to the local wineries.
Please describe the main natural, cultural and other assets of the area which are part of the cultural heritage of the area, regardless if they are visited by tourists or not. Please make a special reference in case of protected areas (UNESCO sites, NATURA 2000 etc.)	We have 40 areas for species and habitats and 30 areas for birds that are under Natura 2000. -Akamas Peninsula – Natura 2000 - Cape Greko – Natura 2000 - Salt Lake of Limassol and Larnaca (Natura 2000) - Sea Caves – Protaras (Natura 2000) - Dasos Paphou (Natura 2000) Cyprus is a small island with a long history and a rich culture that spans 10.000 years, making it one of the oldest civilisations in the Mediterranean. Situated at the crossroads of three continents - Europe, Asia and Africa - the island's unique geographic position has played an important part in its turbulent past since antiquity. Its Prehistoric Age inhabitants were joined 3,500 years ago by the Mycenaean Greeks, who introduced and established their civilisation, thus permanently instilling the island's Greek roots. Many other cultures followed thereafter, including Phoenicians, Assyrians, Egyptians, Romans, Franks, Venetians, Ottomans and British, who all left behind visible remnants of their passage, and have thus created a mosaic of different cultures and periods. - Choirokoitia Neolithic Settlement (UNESCO) - Painted Churches in the Troodos Region (UNESCO)

[8] *According to «experience economy» concept, companies may not simply deliver goods and services, but also engage customers in a more personal way staging unique, memorable experiences. These experiences are usually co-created between the company and the consumer.*

	- Paphos (UNESCO) and its archeological park. -Kykkos Manastery - Kourion - Tomb of the Kings
How would you rate the accessibility of the above mentioned assets in terms of accessibility? (from 1 -10)	Please justify your answer here: Accessibility rate: 6 Visitors with mobility problems can enjoy a range of services during their stay in Cyprus. Cypriot cities allow people with mobility problems to operate independently, with equality and dignity through a series of well-designed tourist products, services and environments. A large number of facilities in Cyprus are now upgraded and accessible to people with mobility problems. Hotels: Some accommodations provide facilities that meet the needs of people with disabilities. Some of the facilities are: Special parking spaces, Specially designed rooms, Ramps with Lights. Beaches: There are many beaches on the island, accessible by wheelchair users. Some sightseeing places have accessibility to people with mobility problems. However, more effort needs to be done and upgrading the infrastructure so as Cyprus can be accessible to all.
Is the transport infrastructure developed in the pilot area? *(boats, yachts facilities, local buses, airport, taxis…)*	The road network of Cyprus comprises about 11,419 km of roads of which 268 km motorways. About 2,178 km national and more than 8,973 km of paved and unpaved roads constitute the primary road network within Cyprus and link the towns and villages. Four lane motorways connect the capital Lefkosia (Nicosia) with the main coastal cities. During the decade 2008 - 2018 there has been a 118% increase in the total length of motorways in Cyprus from 120 to 268 km. Cyprus has a dense road-network. The density of motorways in Cyprus (28km/1000km^2) is twice as high as the EU average and the highest among the new member states. The road freight transport sector is characterized by a majority of small and medium sized companies. In domestic transport the competition is intense, mainly because of the high number of operators. In international goods transport by road the level of competition is fairly high but restricted by the cost of performing transport from an island.

	Domestic goods are transported by road transport, since there is no railway or inland waterway infrastructure. The domestic transport of goods by road is about 43 million of tonnes, mostly crude and manufactured minerals. In international transport of goods about 15 million of tonnes were transported by Cypriot vehicles. The main goods imported and exported by road are fruits, vegetables and foodstuff. The domestically operating passenger transport sector in Cyprus is characterised by a majority of small and medium sized companies. In 2018 there were 2,870 buses and coaches operating in domestic passenger transport, the majority of which are comparatively old vehicles. In order to shift passenger traffic from private cars to public transport, the Ministry of Communications & Works gives particular emphasis to encouraging the use of intercity and rural-buses, and taxi's by: • Upgrading and modernising the bus and taxi fleet • Encouragement of merging and expansion of the private bus companies • Planning new bus stations at the outskirts of the urban areas • Adoption of integrated ticketing The aim of the Government is to increase the share of public transport from 6% to 13% in 2020. Cyprus has no railways and currently there are no government plans to invest in rail transport. Cyprus is an international transshipment centre for Europe-Far East trade. Due to its excellent strategic location, it is very important for the country to maintain and improve its maritime links with the rest of the world. Cyprus has 6 commercial seaports with Limassol and Larnaca as multipurpose ports and the major gateways for Cyprus to international shipping. Cyprus has also port facilities with the industrial port of Vasiliko and the oil terminals in Larnaka, Dhekelia and Moni. Cypriot ports became important cargo transshipment and cruise liner hubs. Limassol is one of the container ports in the Mediterranean Sea.

	Cyprus has one of the biggest merchant fleets within the EU. Most of the merchant ships flying under Cypriot flag (1,780) belonged to foreign owners (1,689) in 2018 Being an island country, passenger transport by sea is highly important for Cyprus. Passenger transportation by sea accommodates domestic mini cruise lines for tourists visiting Cyprus, as well as international Mediterranean passenger cruise between countries. Limassol is one of Europe's important cruise ports. Cyprus has several heliports and two international airports: Larnaca International Airport and Paphos International Airport. Cyprus has a wide network of air routes connecting Cyprus with Europe, Africa and Asia. It has become a major international transit station, with excellent connections within the entire region. The main international airports in Cyprus are Larnaca and Paphos. Cyprus is the third most important new member state in terms of total passenger air transport. Traffic growth through Cyprus airports has been robust over the years, with an average growth of 14% per annum. Cyprus' main airport, Larnaca, currently handles 6.8 million passengers annually and Paphos 2.6 million passengers. About 85% of the total passengers are foreign leisure travellers. Since 1990 the Cyprus' airports have doubled the movements of passengers by air transport and the expectations are a continuing growth of 15% per annum in air passenger transport.
Please mention if there are any airports close to pilot area.	Cyprus has two airport, the airport of Larnaca (main airport of the island) and the airport of Paphos (very active during summer time)
To what extend do you think that ICT has been incorporated to local touristic product in order to increase the quality of touristic services provided, both from the local actors side and from the Regional Administration side.	*Please justify your answer here:* Limited ICT in the tourist product.
Is there any policy in place for promoting a sustainable tourism in the pilot case area?	The Tourism Strategy of Cyprus 2017-2030 makes a specific point on the sustainability of the tourism sector. In particular, in the strategy there is a promotion of the environmental sustainability and it is considered as a key aspect for the tourism strategy and is success. The strategy refers also to the implementation of a monitoring tool perfectly adapted to the tourism reality and the major sustainability challenges of Cyprus in order to monitor and improve the sustainability of

	tourism in our country in terms of all of its ecological, social, and cultural impacts. Also, the strategy provides actions on technical support for local authorities for continuous sustainability improvement in the tourism sector. Also, all tourism development projects should be required to include the following sustainability measures in their development and operational plans. These should include as a minimum: • Using renewable energy sources (RES), particularly solar, to generate a share of the resorts' power requirement – the share of such power to be defined; • Designing and implementing a strict solid waste management policy that includes maximising the volume of recycling. All projects should have targets that operators are obligated to meet, or face penalties; • Providing cycle lanes adjacent to or in close proximity to all roads to encourage the use of alternative means of transport; • Using Recycled water for use in the irrigation of all soft landscapes, including sports fields and golf courses; • Installing energy efficient lighting systems, particularly for external areas of resorts. • Integration of Cyprus Style elements into architecture and landscaping

8. Seasonality	
Main reasons of Seasonality: √Weather conditions ❑ Calendar (big religious celebrations or other festivals attracting visitors etc.) ❑ Other reasons	*Please justify your answer here:* Cyprus is a destination that built its branding on the sun and sea concept with all the activities and services to be offered on a full range at this time of year as well all the tour operators to have agreements to bring tourists on the summer season.
Please mention the main **social** impacts and implications of seasonality in the pilot area?	It creates high unemployment rate during winter since most of the hotels, restaurants, tourism operators/ services they close in winter. Also, during high season we see higher prices that also affects the local people.
Please mention the main **environmental** impacts and implications of seasonality in the pilot area?	- Pressures to natural environment to local natural species – harm to ecosystem. - Higher waste - Higher consumption of water - Higher consumption of electricity. - Increase in noise - Pollution

	- over exploitation of certain natural resources (water, landscape aggression, over construction)
Please mention the main **economic** impacts and implications of seasonality in the pilot area?	- Unemployment - Limited economic expansion of the tourism industry -limited investments - during the winter the problem in terms of price / cost of the offered tourist the product and the perceived value it gives (value for money)

9. Pilot Area SWOT Analysis	
Please provide a brief SWOT analysis of the pilot areas in terms of its capacity to become an all year- round destination.	
Strengths	• Outstanding climatic conditions during winter: Cyprus boasts 330 sunny days per year and the warmest sea temperatures of all European beach destinations. Relaxation and beach activities are possible practically all year round. • Diversity of tourism assets and experiences: Within Cyprus, tourists can find its warm climate, great beaches, beautiful landscapes, vibrant towns and idyllic small villages, a rich cultural heritage spanning thousands of years, friendly people, good food, mountains, and much more – a hugely diverse range of tourist activities. • Safety, comfort, and convenience: Staying on and travelling around Cyprus is generally easy and comfortable, due to its excellent road system and the relatively small size of the island. High level of English spoken by its inhabitants. • Attractive and trustworthy place for business: Many services and sectors are highly developed and very professional. Additionally, the high level of English spoken amongst the majority of Cypriot professionals bolsters communication with international business-people. • Extensive experience in tourism management.
Weaknesses	• High seasonality: Despite its good climate all year around, the tourism sector in Cyprus suffers from high seasonality which has been getting worse over the past decade. Most income is generated between June and September - a major problem for investors, entrepreneurs, and employees. This lowers attractiveness, income, and profitability for those involved in the sector. • Weak sector performance: The financial situation and profitability of many tourist businesses in Cyprus has arguably been weak and investment remains somewhat low. Averages in lengths of stay, occupancy rates, and above all daily spending, especially outside of hotels, are registering negative trends. Cyprus' product and its competitiveness are both in decline.

	• Low experiential value of the offer: Concern has been expressed about the lack of Cyprus' experiential value, reinforcing what is perceived as a loss of Cypriot identity and Mediterranean personality. This leads to a lower return rate of tourists and a deterioration in Cyprus' competitiveness as a destination. • High level of visual pollution: "Visual pollution" presents two threats to the development of Cyprus' tourism: the lack of cultural identity (e.g. "soulless" architecture), pollution through unplanned building activity, unregulated advertising and pollution through illegal waste disposal. Similarly, noise pollution causes problems for tourism development throughout the country. • Weaknesses in air capacity: There is no national carrier actively serving the interests of the Cyprus government and enterprises – unless you count Charlie Airlines, which recently purchased the now-defunct Cyprus Airways logo to use on their Cyprus-routed planes for the next decade. For many international airlines, traffic to Cyprus is too low to justify additional connections. New local airlines are mainly serving existing key markets and neglecting new potential markets. A general interest in Cyprus among airlines exists, however this needs to be developed further before they increase connections. • Lack of a clear Strategy: Cyprus today lacks a clear, comprehensive, and duly budgeted strategy. This prevents reasonable consensus amongst key stakeholders as well as the alignment of their actions, which is essential. Without a clear and viable strategy, it will be impossible for Cyprus to produce its necessary growth and development. Nor will it be feasible to implement the key initiatives that make this growth and development possible. Finally, without a precise and strongly endorsed strategy, it is impossible to establish the political efforts required to successfully put it into practice. • Poor branding and marketing performance: Market development in Cyprus has been hindered in recent years by low marketing budgets and little effort being made. The private sector is almost absent when it comes to common or even supported marketing activities and Cyprus' brand positioning is rather generic. • Weak industry innovation, intelligence, and technology support processes: Cyprus, like many other areas that lack research and innovation, presents a low degree of modernisation and persistent inability to adapt to worldwide trends. • Lack of stakeholder trust and collaboration: The tourism sector is always highly dependent on collaboration between a range of different ministries and private sector

	stakeholders. In Cyprus, public-private collaboration is weakened by the mutual distrust mentioned above and unrealistic expectations of the private sector regarding public support. The complicated relationship between national, regional, and local authorities adds to these issues.
Opportunities	• Significant opportunities for targeting new markets and improving the CVP: Cyprus is still relatively unknown in many markets. Tour operators and travel agencies in sometimes desperate search of new destinations – especially with the current political crises in various formerly strong destinations – give it a lot of room to grow. By focusing on other markets, not only on the UK and Russia, the CVP will be strengthened as it will be less reliant on merely two markets. • International trade and airline interest in Cyprus: Tour operator and airline interviews have clearly shown that there is a general interest in Cyprus across many markets. Cyprus is perceived as an attractive potential growth candidate.
Threats	• High market and product portfolio risk: The UK and Russia alone account for 59% of tourist arrivals in Cyprus. No other competing Mediterranean destination depends so heavily on just two markets. Some incompatibility between the current product and the requirements of tourists from other markets is inevitably due to the current product focusing heavily on targeting these two markets, as well as a lack of Cypriot personality in the current portfolio. • Decreasing net value of the customer journey: Cyprus is competing with many other destinations that often have newer and more modern products, more effective marketing and stronger brands, better connections, more efficient strategies and implementation processes, governance, and management systems, to name the most important ones. This has led to a deterioration of the customer experience which must be restored and improved. • Low commitment towards 'wise tourism' and criticism of the current tourism model: An excessive concentration on the Sun & Sea segment, the negative effects of high seasonality, the saturation of coastal areas, environmental pollution, and a loss of authenticity in the tourist product, are in strong disagreement with the current leading development model, and exhibit a lack of commitment towards developing smart tourism. • Deficiently managed Human Capital: Experienced tourism professionals in Cyprus have accumulated great knowledge and experience over the years. However, this

	knowledge must be updated and adapted to meet travellers' needs in todays' highly competitive world of tourism. The absence of innovation and the fact that many can be seen as "stuck in their ways" make it very difficult to have an open and critical collaboration amongst the people involved in the industry. • Weak legal, regulatory, and administrative system: Because of its lack of transparency, high degree of complexity, and number of outdated regulations, the legal and regulatory system related to hospitality and tourism has been the subject of criticism in the past.

10. Policy	
Public authority in charge of the policy	*Deputy Ministry of Tourism*
Type of the policy	*Law / Policy / **Strategy*** / Action plan / *Programme / Other (if other please specify)*
Please name the policy instrument that primarily affects the touristic product of the area.	There are two operational programmes and the programmes from the Deputy Ministry of Tourism. It is a mixture of all of them. ✓ Operational Programme (OP) "Competitiveness and Sustainable Development": includes specific priorities and indicative categories of interventions which will be implemented during the period 2014-2020, contributing towards the strategic objective of the Partnership Agreement for the restructuring of the economy, the preservation and creation of new jobs and the safeguarding of social cohesion. Interventions planned contribute to the enhancement of economy's competitiveness through investment in the sectors of Research and Innovation and Information and Communication Technologies and SMEs support. Interventions are also planned in the sectors of Environment, Energy, Transport and Tourism as well as for promoting integrated sustainable urban development in deprived areas. The interventions

	include investments of the broader public sector, as well as grant schemes/incentives addressed to the private sector. ✓ Operational Programme (OP) "Employment, Human Resources and Social Cohesion": restructuring of the Cyprus economy, the preservation and creation of new jobs and the safeguarding of social cohesion. Interventions planned contribute to the promotion of employment, the preservation of social cohesion, the improvement of vocational education and training aiming at the matching of the skills with the labour market needs, the promotion and certification of lifelong learning and the enhancement of the administrative capacity of public authorities and stakeholders. The interventions include investments of the broader public sector, as well as grant schemes/incentives addressed to the private sector. ✓ Programmes of the Deputy Ministry: Support for Investment in Tourism, promotion of tourism awareness, education and training, implementation of tourism legislation and supervision of the tourism sector.
Stakeholders involved	✓ Ministry of Education and Culture ✓ Ministry of Agriculture, Rural Development and Environment ✓ Ministry of Interior, Dept. of Town Planning and Housing ✓ Ministry of Interior, Dept. of Lands and Surveys ✓ Regional Authorities, ✓ Ministry of Finance ✓ Tourism Boards ✓ Tourism Associations ✓ Cyprus Investment Promotion Agency ✓ Promoters of Paralimni Marina, Ayia Napa Marina, Limassol Marina, Poseidon Grand Marina (Pafos).

	✓ Schools, colleges, universities (University of Cyprus).
Beneficiaries	✓ SMEs, ✓ Business associations ✓ Regional & Local Government Authorities of Cyprus ✓ Universities ✓ Private Institutions
Financial allocation	YES
Financial framework	Amount of funding: approximately 20 million euros
Timescale (start/end date)	2017-2030
Evidence of success	The Strategy is rather new and now we are at the first steps of its implementation
Challenges encountered	Some challenges for implementing the strategy are the following: ✓ Cyprus should make significant economic and political efforts to improve its competitiveness as a tourist destination by improving its value proposition, air capacity and levels of cooperation and governance. ✓ Cyprus is currently assuming a very dangerous 'triple risk'. The island must reduce its seasonality by way of a Separate Action Plan as well as reducing the relative weight of UK and Russian demand, which will mean increasing the market share of other selected source markets. At the same time, it should increase the weight of FIT tourists. ✓ The amount of unique and memorable tourism experiences Cyprus offers is almost non-existent: This is a huge weakness, as the demand for experiences is one of the most important demand trends that there are. Major efforts will be required here to excellently develop and operate a menu of unique and memorable experiences. ✓ The authorities must protect the consumer and prevent the development in Cyprus of "all-inclusive" formulas which are not such or offer very low quality of services, especially of food and beverage. The NTA must deny those licenses. ✓ The legal and regulatory framework is an obstacle to Cyprus' competitiveness: the current situation does not change dramatically; it will be very difficult to

	attract the significant volume of investment and MSME development that is required. ✓ The low performance of governance, leadership, and cooperation mechanisms: The current situation does not facilitate realistic consensus among key Cyprus stakeholders at all, making it almost impossible to implement consistent and protracted policies over time. Cyprus must completely transform this situation by increasing the level of government involvement, promoting efficient partnerships within the private sector and creating the necessary government bodies to manage the island's tourism system. ✓ Absence of efficient collaboration mechanisms between public and private bodies
Is there any Regional or Local action plan which supports the development of sustainable tourism in the area? Yes or No	Yes, each region in Cyprus has its own Tourism Board and they all have their action plans where in the action plans there are measures that support the sustainable development.

References
Cyprus Tourism Strategy: Final Report, For: Republic of Cyprus, Document No. 27

D3.1.1 – Transnational tourism context analysis

For each Pilot Region where WINTER MED strategy is going to be applied, partners are requested to fill the following template providing all information required (1 template for each pilot area).

11. General information		
Data of the pilot areas	Country	Greece
	Nuts 2 /Name	EL42 South Aegean Region
	Nuts 3 /Name	EL421 Dodecanese EL422 Cyclades
Total Number of Inhabitants in the area during winter season.	309.015 permanent residents	
Total Number of Inhabitants in summer season including those who move from other places to work in the tourism sector.	Not available	
Geographical coverage of the pilot area	5.286 sq.km.	
Geomorphological characteristics of the pilot area (mountainous, etc)	The South Aegean Region extends over vast maritime zone from the coast of Attica (Makronisos) to the southern coast of Turkey (Kastelorizo). It consists of 79 islands, of which 52 are inhabited and 178 islets. Its total area is 5,286 sq. km. (4% of Greece's surface). The South Aegean Region comprises two island complexes, the Cyclades and the Dodecanese. The island complex of the Dodecanese has an area of 2,714 sq. km. and a permanent population of 190,988 inhabitants. The Cyclades island complex has an area of 2,572 sq. km. and permanent population 118,027 inhabitants. Rhodes is the largest island of South Aegean Region and the fourth largest in Greece. Its area is 1.401,46 sq. km. and its shape is narrow with a maximum length of 77 km and a maximum width of 37 km. Its coastline is 220 km.	
Number of municipalities in the pilot area	34 municipalities in South Aegean Region	

12. Pilot area description and Visitors Profile	
Please describe the socio-economic profile of the pilot area. *(Please mention the most important economic activities taken place in the area as well as the percentage of tourism activities in the local economy in terms of income produced)*	The South Aegean Region, in demographic terms, constitutes one of the most dynamic Greek regions; at the same time, it is among the most vibrant and converging ones when taking into consideration economic and welfare indicators. During the last decade both the regional GDP and its contribution to the national GDP have significantly increased while the per capita regional GDP has been higher than the Greek average and is characterized by a dynamic extroverted economy as one of the 'most developed' Regions in the country. Nevertheless, this enhanced picture disguises important intra-regional and intra-prefectural differences. The multi-fragmentation of space and the island character of the region prevent the spill over of income and know-how to the whole of the geographic space leading to different levels of development and significant dissimilarities. The economic dynamism is due to tourism and is found in a limited number of famous islands which are tourist destinations of international scope. Citing Bank of Greece figures for 2019, regional authorities said the year was the best in the history of the Region's tourism industry, exceeding 2018 figures which was also a winning year. According to central bank data for the January-September 2019 period, the South Aegean islands outshined the country's 12 remaining regions in the number of arrivals, overnight stays, and revenues, contributing in the meantime, 40 percent of the sector's share to Greek GDP. The most important economic activities taken place in the South Aegean Region are the following: **Tourism** Tourism is by far the most dynamic sector in the spectrum of opportunities for economic development in the Region of South Aegean: for this reason, this region has the leading position in Greek tourism. Speaking of the dynamism of the sector, there is a fact that for 2015, the Region of South Aegean accounted for 2076 accommodation facilities – 21% of the overall national capacity – translating in 195.648 beds (24.9% of the overall national capacity). Thirty-one point seven percent (31.7%) of the total number of hotel facilities, 29.2% of the total number of rooms and no less than 29.7% of the total number of beds available at 5-star Hotels in Greece are indeed to be found within the Region of South Aegean (as per data supplied by the Hellenic Chamber of Hoteliers on 31.12.2015).

	Achieving increasing numbers of arrivals and revenues for the fourth consecutive year, the South Aegean Region, which includes popular islands (like Rhodes, Santorini, and Mykonos) 2019 was its best year until now, according to the official data . Tourist arrivals in the islands of the South Aegean reached new historic levels in 2019, surpassing the record performance of 2018, the South Aegean Region said in an announcement, according to ANA. The direct contribution of tourism activities to South Aegean's GDP for 2017 was 77% (Source: INSETE study, 2017). **Fishing** The Region of South Aegean is one of the 3 Hellenic Regions to have been formally classified as Regions Depending on Fishing; in Europe, there are 11 Regions to have in total been classified as such. For that reason, fishing is considered to be a crucial sector for the economy of the Region, even more since fishing is contributing to a great extent to the preservation of the economic and social tissue within insular communities while helping at the same time to maintain a base of production, especially on those islands where possibilities for tourist or agricultural development remain limited. According to data collected and estimated by the Fisheries Service departments around the Region of South Aegean, there are some 4700 people currently active in the sector of professional fishing, yielding an overall production of 6000 tons in catches. Out of such volume, more than 400 tons account for Swordfish, 280 for Long-Finned Tuna and about 120 tons for Bluefin Tuna; all such quantities being almost entirely exported. A significant percentage of population on the islands of Amorgos, Kythnos, Milos, Paros, Iraklia, Schinousa, Kalymnos, Kasos, Karpathos, Kos and Lipsi is professionally active in fishing-related activities that most of the times also constitute a family trend from one generation to the next. **Agriculture** Agriculture is a traditional sector of economic activity all over the Region of South Aegean. The highest concentration of farming activities may be found on the more sizeable islands of the Region, specifically Rhodes, Santorini, Paros, Naxos, Kos, Andros and Tinos. When it is a question of specific domains in farming, the highest interest for the Region of South Aegean is focused on wine-producing grapes, citrus and most and above all, olive groves. Speaking in terms of tonnage, the yearly

	production volumes for the Region of South Aegean (source: General Direction of Regional Agricultural Economy and Animal Health, 2015) were: •Olive oil: 3.433 tons •Grapes: 6.000 tons •White and Red Wine: 3.440 tons (the greatest part of wines produced in the Region are PDO or PGI certified) •Citrus Fruit: over 11.000 tons produced **Animal Husbandry** Livestock breeding fares first amongst the various domains of economic activity in the primary sector, its role being all the more pronounced in the Cyclades. The most important areas for animal husbandry are in Amorgos, Andros, Kythnos, Naxos, Tinos, Kasos, Karpathos and Kos, the highest interest being placed on ovine and caprine breeding, swine raising and cattle breeding. Dairy production is also quite important. In terms of tonnage, the yearly production volumes for the Region of South Aegean (source: General Direction of Regional Agricultural Economy and Animal Health, 2015) were: • Ovine and Caprine: 69.778 carcasses • Swine: 5.276 carcasses • Cattle: 4.370 carcasses • Poultry: 64,8 tons of meat • Eggs: 38.325 000 units **Apiculture** Apiculture is yet another important domain of activity for the Region of South Aegean. There were 96.211 beehives registered in 2015 and 1.088 tons of honey produced (source: General Direction of Regional Agricultural Economy and Animal Health). **Winery** Vine and wine culture are very closely connected to the history of Aegean and have played a significant role in the development of the economy and the expanding trade in the islands. Writings of Homer, as well as discoveries made in the prehistoric settlement of Akrotiri in Thera, witness the long winemaking tradition in the archipelago and this tradition revived in many islands in the recent decades. Rhodes and Santorini, as well as Paros are on top of the list. The viticulture shows development in Leros, Kos, Mykonos, Tinos, Sifnos and Milos as well. The wine was part of the ancient Greeks' life who worshiped Dionysus, the god of wine, revelry

	and theatre, and illustrated him in many vessels, holding a bunch of grapes, or a cup of wine. At their feasts, lasting hours or whole days, the wine flowed abundant. It was a way to facilitate communication between the diners and the philosophical debates, always accompanied by fine food. Wine has important role in everyday lives of the islanders; it is a habit firmly rooted in their tradition –in fact it is often themselves who produce it. With the hospitable spirit that distinguishes them, they offer their guests wine and their own 'raki'; also, a lot of festivities, festivals and celebrations are organized at the churches and chapels of the islands. The hotels in the Dodecanese and the Cyclades welcome the visitors from all around the world with branded local wines while the restaurants always offer wines produced in the vineyards of the Aegean in their menus. Also, the South Aegean has a relative regional industrial specialisation in construction and is also well placed in quarrying of stone. The region is thus specialised in rather low-tech sectors.
Type of tourism (please tick the most appropriate types) o Sun & beach ✓ o Cultural✓ o Religious✓ o Natural✓ o Other [Sport, Culinary, Wine, Marine Tourism)]	*Provide a short description of main tourist attractions in the Pilot City/Territory [short description – max 1000 characters]* The dominant type of tourism in the Region is conventional, however various attempts have been done over recent years, towards a more alternative and balanced model. Cyclades complex, probably the most famous island group in the Aegean Sea, comprises some of the most beautiful islands in the world. Gorgeous sandy beaches, architecture in white and blue, traditional lifestyle, folk music, warm, hospitable people and barren landscapes with isolated chapels. Mykonos is definitely one of the most famous destinations worldwide; it is also a well-known jet- setters choice destination. This beautiful island is famous for its

	landscapes, amazing sandy beaches, its windmills, country chapels and the Cycladic architecture. Crescent-shaped Santorini, the precious gem of the Aegean, is actually a group of volcanic islands; the Minoan eruption (sometimes called the Thera eruption), one of the largest volcanic eruptions in recorded history, occurred about 3,600 years ago at the height of the Minoan civilization. The eruption left a large caldera surrounded by volcanic ash deposits hundreds of meters deep. The sunset in Santorini is one of the most famous and most beautiful sunsets worldwide. Anafi island of Cyclades is a paradise of natural and still untouched beauty and “exotic” beaches. The legend says that the island had emerged from the Aegean Sea to give refuge to the Argonauts. Ios island, the birthplace of Homer’s mother and the place of his own tomb. Delos, the birth place of Apollo and Artemis, used to be a religious centre for the whole of Greece in the ancient times, at the same time is was main trading port in the Eastern Mediterranean during the roman times. Today, Delos is uninhabited and is listed as a UNESCO world heritage site, receiving a lot of visitors coming to admire remarkable monuments and impressive mosaics. Unrivalled natural beauty, beaches of crystal clear waters, “unique” Byzantine footpaths connecting traditional villages and breath taking landscapes make Paros, located at the heart of Cyclades, one of the most popular holiday destinations in Greece. Among the island of Dodecanese complex, Rhodes and Kos are larger and more cosmopolitan islands. Rhodes is probably most famous for the Colossus of Rhodes, a statue of the Greek sun god Helios that was destroyed by an earthquake in 226 BC. Rhodes offers visitors a unique opportunity to explore well preserved ancient temple ruins as well as beautiful sandy beach while contemplating the marvels of an earlier world. An overview of the top attractions in Rhodes: **1.Medieval Town** The largest inhabited medieval town in Europe. During the centuries, many different occupiers have left their stamp on the Medieval Town, which dates back hundreds of years before the birth of Christ. The Palace of the Grand Masters represents one of the greatest monuments built in the Middle Ages. The Upper Town, with its Street of the Knights and 4 km (2.5 mile) long wall, is considered a very

	beautiful example of Gothic architecture The Lower Town features embellishments such as mosques and public baths dating from the Ottoman period. It is one of the rare survivors of the medieval world; In 1988, it became an UNESCO world cultural heritage monument. **2.Acropolis of Lindos** The Acropolis of Lindos is an archaeological site, occupied by many forces during history. It's also an impressive site since it sits on 115 meters (380-foot) high rock overlooking the sea. The access, although a very steep footpath, is worth the trip. Once at the top, visitors will find a well-preserved Acropolis with 20 white Hellenistic columns and remains of the temple to Athena. **3.Tsambika Beach** Tsambika Beach is considered one of the most beautiful beaches on Rhodes. Owned by the Orthodox church, Tsambika Beach is overlooked by a peak where stands the Tsambika Monastery. Turquoise blue waters lap on the half-mile of pure golden sand beach. Because of its shallow water and fine sand, Tsambika is a perfect place for families to have fun in the sun and enjoying water sports. **4.Ancient Kamiros** Kamiros is an ancient city on the northwest coast of Rhodes. It is one of three Doric cities that combined with two others to form the city-state of Rhodes. Its residents, however, slowly abandoned Kamiros to move to the city of Rhodes. The area was covered by forests until 1929 when an excavation had started and ancient graves were discovered. The ancient city was built on tree levels: The Acropolis with a temple to Athena on top, residents in the middle, and water storage on the bottom; it is supposed that the temple of Athena was destroyed in earthquake in 226 BC. **5.Mandraki harbor** Mandraki Harbor is one of three harbors on Rhodes and the only yacht harbor. It is believed that the statue of Colossus, one of Seven Wonders of the Ancient World, once stood in this harbour. Today, visitors can find deer statues, medieval windmills and the St. Nicholas fortress at the entrance. The windmills were once used to grind grain brought to the harbor by ancient cargo ships; most have disintegrated, but three of them have been renovated. Mandraki was once the military port for Rhodes. Nowadays the harbor is full of yachts and fishing boats.

	Located in Kos town in Kos island, the Hippocrates Plane Tree is situated next to the Ancient Agora, standing opposite of the fortress. According to legend, this is the oldest and largest tree of its kind in the whole Europe. The same legend says that the ancient Greek physician Hippocrates once taught his pupils in the shade of this tree, some 2,400 years ago. Many attractive villages are dispersed all over the island of Kos. Kalymnos island is well-known as the "island of the sea sponge harvesters", an internationally known alternative tourism destination. Main tourist attractions are the castle of Chrissoheria and the Archaeological Museum. The International Climbing Festival in May is a unique festival that thrill every year the visitors. The culinary enthusiasts should taste mouth-watering delights, such as thyme honey, juicy tangerines, homemade mizithra cheese, delicious sea-dried lobster tail, sea ray preserved in sea water etc. Patmos is a small holy island in the Aegean Sea, part of the Dodecanese islands, which obtained new habitats in the 11th century, quite popular among Greek orthodox people and called "Jerusalem of the Aegean" or "The island of the Apocalypse". In Patmos, Saint John the Theologian (exiled by Emperor Domitian) had a vision and he wrote the Book of Revelation ("Apocalypsis Tou Ioanni"), a Christianity's most ancient pilgrimage sites. Also, the South Aegean is now included among European regions with a long tradition in gastronomy. Despite the fact that all the islands of the two complexes have a lot of interesting tourist attractions, we mentioned only the main ones.

Please describe the profile of the visitors *(Please refer to the number, countries of origin, nationalities, means of traveling, age groups)*	The German market is the most important revenue market in South Aegean Region. The mean amount of money spent by the German tourists per visitor was 665€, in 2017 with mean period of residence 8,6 overnights per visit. The British market is quite important, too. The mean amount of money spent by the British tourists per visitor was 716€ in 2017 (compared to 633€, in 2016/increase 13%) with mean period of residence 8,3 overnights per visit. French market. The mean amount of money spent by the French tourists per visitor was 660€, in 2017 with mean period of residence 8,0 overnights per visit. USA. The mean amount of money spent by the American tourists per visitor was 778€, in 2017 with mean period of residence 6,7 overnights per visit. Italy. The mean amount of money spent by the Italian tourists per visitor was 506€, in 2017 with mean period of residence 8,0 overnights per visit. Russia. The mean amount of money spent by the Russian tourists per visitor was 497€, in 2017 with mean period of residence 9,5 overnights per visit.
What kind of services are mainly offered by the local actors active in tourism sector?	The main tourism services offered are Hotel Services (i.e: Reservations, Reception and Accommodation, Housekeeping, Food and Beverage, Entertainment and Wellbeing, Sport facilities), Food & Beverage by restaurants & bars, Retail commerce, Transport Services and Incoming tourism agencies which offer Reservation Management, Transfers, Excursion Packages, Escorting. Also, Sport, Activities and Event services are offered by local actors.
Are some of these services available during winter?	Most of the hotels, several tourist shops, restaurants, bars, museums, archaeological sites etc. are closed during winter time but there are still some open, especially in the principal districts and in more populated areas.
Number of Tourist beds available at the pilot area for 2017	The number of tourist beds in the South Aegean Region according to INSETE report was 116.548 for 2017, in 7.333 establishments with 51.046 rooms.

Number of overnights spent in 2017 (including RBNB when possible)	Number of overnights spent at hotels/similar establishments and tourist campsites in South Aegean Region in 2017 (Source: Hellenic Statistical Authority according to the registrations to the Hellenic Chamber of Hotels): 21.310.044 and 144.462, respectively in total 21.454.506.
Number of visitors for 2017	In 2017 the region attracted about 5.8 million visits from foreign travellers (31 million arrivals for Greece as a whole. In more specific, number of visits in 2017 in South Aegean Region 5.841(in thousands), 18,8% of a total 31.021 visits in Greece.
Amount of money spent per visitor/tourist for 2017	Amount of money spent per visitor for 2017 in South Aegean Region: Inbound tourists spent on average €625.5 per trip well above the national average of €457.8 (Source: INSETE, 2017).
Months of the year covered by the high season	The high season in Dodecanese lasts from mid-June to the end of August. In Cyclades, generally, the high-season lasts from the end of June until early September.
Please mention the main reasons why tourist choose the area as a summer destination.	South Aegean islands have been among the first to evolve into sea and sun tourist destinations, being recognised as exceptional with worldwide appeal. The complexes consist of numerous islands with a great variety in size and crowdedness (so they fit well in the different needs of the visitors) during summer time, surrounded by glorious and clean emerald sea, each one with its own unique beauty powered by the area's inconsistency itself, they are tiny private 'paradises'. In addition to the great natural and historical assets of the area, the provided tourist services are quite attractive, covering a wide range of expectations and desires.
Do local businesses/actors/agents sell any customised touristic products/experiences?[9]	Wedding planning and management is a quite popular customized touristic service in the region. Especially, Rhodes Island in the Dodecanese and Santorini Island in Cyclades offer a lot of exquisite and unforgettable wedding venues to host wedding ceremonies for visitors. Also, many Dodecanese and Cyclades islands offer scuba diving as an activity which combines both tangible and intangible goods and services. Intangibles include education and skill development, dive charter services and guide services on dives.
Is the area attractive in winter time? Why?	The area is quite attractive during winter time, however there are various issues to be solved i.e difficulties with transportation, development of activities other than the ones offered during summer time, decision making by the

[9] *According to «experience economy» concept, companies may not simply deliver goods and services, but also engage customers in a more personal way staging unique, memorable experiences. These experiences are usually co-created between the company and the consumer.*

Are there any touristic services provided in winter time?	stakeholders and local actors with regard to the viability of their operational period.
Please describe the **main natural, cultural and other assets** of the area which are part of the cultural heritage of the area, regardless if they are visited by tourists or not. Please make a special reference in case of protected areas (UNESCO sites, NATURA 2000 etc)	Delos is a small island and archaeological site that is part of the Cyclades island group. It has been made a WHS (World Heritage Site inscribed in 1990) because of its role in early archaeology, its part in Aegean history, its important role as cosmopolitan Mediterranean port from the 4th to the 1st century BC, it being the mythological birthplace of Apollo and Artemis. The Medieval City of Rhodes is the oldest inhabited medieval town in Europe, was inscribed on the UNESCO World Heritage List in 1988, constituting a mosaic of different cultures and civilizations. The main monuments/attractions in the Old Town are the Palace of the Grand Master, the Archaeological Museum, the Byzantine Monastery of Saint George, the Church of Our Lady of the Bourg, the Suleiman Mosque and the Moat The places in the region which have been integrated in the European Network of Natural Protected Areas NATURA 2000 are: In Cyclades: 1) an area in Sifnos, from the mountain of Profitis Ilias, with the homonymous monastery, up to the western coasts of the island hosts 19 rare, mainly endemic, plant and animal species and the presence of 39 bird species has been recorded. In its onshore part different kinds of cedars, pistachio plants, aromatic plants and wild olive trees grow and important water springs are recorded.
How would you rate the accessibility of the above-mentioned assets in terms of accessibility? (from 1 -10)	*Please justify your answer here:* The above-mentioned places are partially or fully accessible by the visitors. So, the rating varies from 8-10.
Is the transport infrastructure developed in the pilot area? *(boats, yachts facilities, local buses, airport, taxis…)*	The transport infrastructure is quite developed in the region of South Aegean. However, along with a sense of isolation for residents and tourists, the accessibility of islands at different times creates a number of problems in terms of services availability, especially in winter. Due to the nature of the island area and, by extension, the disproportionately large number of transport infrastructures, in relation to the size of the islands, there are a number of problems. The infrastructure of maritime transport on several islands need (low capacity, limited and low-altitude piers, small port arms, need for dredging, etc.). The basic airport infrastructure (boarding-disembarkation rooms, runways, aircraft parking floors, broadcasting infrastructure) of the main airports of the region are relatively adequate. However, some of the

	smaller airports are at the "limits" of the aviation market due to the international trend to charter larger vessels in smaller regional markets. Some airports create the need to extend the runway and other facilities. There is also a shortage here in the interregional connections, since the connections of the prefecture of Dodecanese with the prefecture of Cyclades are rare. This creates major problems in interregional communication, cohesion and strengthening of the local production system, in the smooth service of users by the social services provided, etc. It goes without saying, of course, that these problems concern not only the relative needs of tourists, but also to permanent residents, workers, entrepreneurs, public servants, etc.
Please mention if there are any airports close to pilot area.	For Cyclades, there are regular (mostly daily) flights from Athens to Mykonos, Paros, Naxos, Santorini, Milos and Syros . In high season there are also less frequent flights from Rhodes, Crete (Heraklion) and Volos. From May till October charter airlines fly directly to Santorini and Mykonos from many European airports. For Dodecanese, the access to Rhodes and Kos is easy, with airlines serving both domestic and international transportation, connecting the region directly with most major European cities. Frequent domestic flights are also available throughout the year, to the airports of Karpathos, Kassos and Leros.
To what extend do you think that ICT has been incorporated to local touristic product in order to increase the quality of touristic services provided, both from the local actors side and from the Regional Administration side.	*Please justify your answer here:* The local touristic product has been upgraded the last years using ICT technologies as a result of the intensified efforts recently by the local actors and by the Regional Administration as well, so the extend can be estimated as "significant". Regarding the private sector, over 98% of the total hotels use WiFi network for all the clients and over 20% of the hotels use optical fiber. The local public authorities use mobile applications, city guides and touristic/ thematic portal to promote the local places.
Is there any policy in place for promoting a sustainable tourism in the pilot case area?	*Provide a short description of main policies for sustainable tourism which are in place. [short description – max 1000 characters]* The thriving, in quantitative terms, conventional tourist model has not led to a sustainable and secure local development. There is no wide agreement as to the direction or the priorities to be set towards a sustainable model of tourism development on the Aegean islands. However, there

	is a general understanding that the (re)connection of the local tourism with the local agri-food base should be a priority. Regional authorities are called to implement a strategy for sustainable growth within the framework of the EU policy for smart specialization. Food tourism is an integral part of this strategy.
13. Seasonality	
Main reasons of Seasonality: X Weather conditions ❑ Calendar (big religious celebrations or other festivals attracting visitors etc.) X Other reasons	Islands of South Aegean as a tourist destination have been linked with sea and sun as a Tourism product. This practically means that all big Tourist operators stop the charter flight to the Greek Islands during the Fall and winter; in order to change this, actions have to be taken in order to diversify our touristic product and offer possibilities to the visitors for alternative activities during the off-season period. At the same time another issue has to do with the weather conditions during the Winter months. The weather conditions compared with the available infrastructure of the small islands (ports and airports) create difficulties as very often our islands cannot be approached with plane or boat for many days.
Please mention the main **social** impacts and implications of seasonality in the pilot area?	In South Aegean Region Tourism is the main source of income of our inhabitants. According to last information gathered, 97% of South Aegean Region income is linked directly or indirectly with Tourism. This means that our economy has been formed around Tourism with very big hotel units and many SMEs that offer different services to support Tourism (souvenir shops, small travel agencies and tourism offices, rent a car, transport services etc.).
Please mention the main **environmental** impacts and implications of seasonality in the pilot area?	The big number of visitors during the high season causes big pressure to popular attractions like the Medieval Town of Rhodes - a UNESCO world heritage monument, the expenses to preserve the monuments increase, the number of permanent residents in the medieval town declines. The destination struggles to manage the tourist flows in order to offer the visitors a good experience and at the same time offer a viable environment to the residents. Same problems can be found in the Ancient city of Lindos, in Santorini island and in smaller scale also in other islands.
Please mention the main **economic** impacts and implications of seasonality in the pilot area?	Due to the seasonality of Tourism the majority of South Aegean work force is unemployed during the winter months were unemployment rate skyrockets to more than 50%. The expansion of the Tourist season will also offer to

	our residents more months of work during the year, higher income and better quality of life.

14. Pilot Area SWOT Analysis	
Please provide a brief SWOT analysis of the pilot areas in terms of its capacity to become an all-year-round destination.	
Strengths	•High Specialization in Tourism and with developed supported services, all year round • High-quality natural environment • Significant cultural assets (WHS sites, wealth of historical monuments etc.) • Favorable natural environment for renewable energy sources • Significant number of ports and airports • Large IT penetration in businesses • Population increase and high percentage of economically active population • Many islands have a powerful brand name in tourism • Second richest region in Greece • High indices of biodiversity in the broad marine area • Significant internal market due to tourism
Weaknesses	• 'Double' insularity • High cost of transportation • Serious deficiencies in water resources and energy • Low education level of employees and low rate of degree-holders among the population • Low participation in life-long learning • Low investments in research on the part of businesses • Low capacity of businesses to absorb innovations • Specialization in only one sector due to tourism, and lack of significant variety in economy • Domination of mass tourism • Digital seclusion of small islands and settlements

	• Health care shortages for emergency response as well as the absence of professionals/staff/infrastructure. The problem is particularly intensified in small islands •Specialized staff in the tourist professions exist in the larger islands, while in the smaller the lack of specific specialties (hotel employees, chefs, marketing specialists, etc.) and especially those associated with the planning and implementing actions for specific forms of tourism (mountain guides, lifeguards, diving instructors etc.).
Opportunities	•Differentiation of tourism product and development of experience tourism. • Development of synergies with agriculture food industry-livestock farming •Provision of specialised IT applications and services, in particular about tourism • Development and implementation of integrated marine environment management systems • Better exploitation of renewable energy sources
Threats	• Adverse economic environment due to the economic crisis •Geopolitical challenges, especially from Turkey • Significant obstacles to entrepreneurship • Significant international competition in the specialization sectors, particularly due to cost and lack of variety in the local production • Retention of the cost of production and transportation at high levels due to fuel prices • Delays in the energy interconnection of islands • Delays in the implementation of the National Strategy for Digital Development, which will broaden the digital gap of small islands

15.Policy	
Public authority in charge of the policy	1)The Region of South Aegean (second-level local self-government). 2)Central Government
Type of the policy	*Law / Policy / **Strategy** / Action plan / Programme / Other (if other please specify)*
Please name the policy instrument that primarily affects the touristic product of the area.	***[Title:]*** Strategy for the development of innovation in tourism experience (in the context of the Regional Smart Specialization Strategy-RIS)

	[What is the goal of this strategy/plan:] In more specific, the South Aegean's RIS strategy focuses on: cross-sectoral technology upgrading, adaptation of production processes to reduce energy use, reduction of material input and waste generated, and higher value products and services related to tourism. The upgrade strategy aims on four axes: 1)Expanding the value chain: It seeks to attract more activities in the value chain of tourism by developing interconnections with the rural economy and processing of agricultural products, exploitation of culture and the interconnection of cultural products businesses with tourism; 2)Orientation of the local craft in the production of products utilized by tourism enterprises (e.g. equipment) or the production of products for them tourists (jewelry, handicrafts, etc.) 3)Differentiation of tourism product - development of tourism experience: Differentiation from the sun and sea model and mass tourism utilizing the opportunities offered by its natural, gastronomic and cultural richness of the Region. As set out in the Strategy of the Region “The triptych: Traditional Products - Traditional Arts and Culture should be our flagship priorities in highlighting the destination. ***[Please describe briefly its content*** ***- legal framework and implications*** ***- description of measures, actions, tasks...*** ***(half page max):]*** The significant differentiation of the islands' tangible and intangible assets gives the ability on the one hand to show a unique identity for each island or group of the islands and on the other hand the development of a unique mix of young tourists experience products that include: • nature tourism • gastronomic (culinary) tourism

	• geotourism • agrotourism • cultural tourism • religious tourism • city breaks (Rhodes) • student excursions • conference tourism • marine tourism (diving, sailing, etc.) • artistic tourism Destinations are unique in that each one offers a unique set experience opportunities. Creating experience involves creating a myth which the visitor will experience through a set of activities.. Creating experience requires active involvement of both tourists and the local community who will give life in myth. Upgrading to a higher level of service: Upgrading services provided by the accommodation (hotels and rooms to let) it is related both to the upgrading of the accommodation and their upgrading category (stars or keys) as well as obtaining quality labels, e.g. local quality label, eco-labels etc. Use of information and communication technologies (ICT) and clean Technologies: The use of ICT allows for increased productivity. the direct promotion of services. independence from tour operators and travel agencies) and direct booking management. Also the adoption of clean technologies and energy saving technologies allows for lower costs. reducing environmental impacts and create an environmentally-friendly image that can then is the ticket to enter eco-friendly markets.
Stakeholders involved	*South Aegean Region, regional managing authority, national managing authority*
Beneficiaries	*SMEs, business associations.*
Financial allocation	***no***
Financial framework	-

Timescale (start/end date)	*ongoing*
Evidence of success	*Results achieved / expected* *Please provide evidence of (measurable) outputs/results if available*
Challenges encountered	*Please specify challenges or difficulties and lessons learned while implementing the policy.*
Is there any Regional or Local action plan which supports the development of sustainable tourism in the area? **Yes** or No	*In case the answer is YES, please describe the most important topics of the plan which support the development of sustainable tourism.* According to the Operational Plan of the South Aegean Region the main strategic objective for the realization of the Region's vision is the sustainable economic upgrading of tourism and related sectors, i.e. moving businesses to activities and markets that are more profitable, skills-intensive, technology-driven and developed at harmony with the natural and cultural environment. The development of sustainable tourism is very important for the Region and a initial set of targeted actions has been designed: -Promotion aimed at attracting tourists throughout the year, focusing on niche markets, such as nature lovers, climbers, etc. -Maximizing the use of e-tourism applications and social networking tools -Better collaboration of stakeholders with the creation of PPPs, exploitation of new funding tools (eg fast track framework), exchange of views etc. -Strengthening of tourism businesses with the development of appropriate incentives. -Rational management of the tourist accommodation issue. - -Redesigning the transport system and revising the transport pricing systems

	-The establishment of measures to strengthen the cruise tourism and sailing -Effective protection of the environment (natural and structured) and landscapes. -Timely response to natural disasters and threats. -Upgrading tourism education and improving tourism training. -The emergence of alternative forms of tourism based on nature and culture. -Enhancing the visibility of PDO/PGI products and restaurants to enhance gastronomic tourism. -Enhancing MICE tourism with a focus on science conferences and summer schools. -The reorganization of health services with the aim of developing medical tourism. *Can you identify any measure in this plan which encourages the development of winter tourism in the area? Please justify your answer briefly.* Yes, for example, the promotion of alternative or special types of tourism throughout the year.

References
Please mention any bibliographical reference, websites or other resource of information you used to answer the above questions. https://news.gtp.gr/2020/01/15/south-aegean-region-2019-best-year-for-tourism/ https://www.statistics.gr/documents/20181/658333dd-a13f-48f0-9023-433d0721d8cb 2018_SymvolhTourismou-2017_EN-Summary.pdf https://news.gtp.gr/2018/07/30/elstat-greece-sees-high-rise-in-2017-tourist-arrivals-overnight-stays/ 2018_balance_of_travel_services_by_region_2017.pdf https://ejournals.epublishing.ekt.gr/index.php/ekke/article/viewFile/21716/18655

D3.1.1 – Transnational tourism context analysis

For each Pilot Region where WINTER MED strategy is going to be applied, partners are requested to fill the following template providing all the required information (1 template for each pilot area).

16. General information		
Data of the pilot areas	Country	SPAIN
	Nuts 2 /Name	Balearic Islands
Total Number of Inhabitants in the area during winter season.	TOTAL POPULATION: 1.128.908 inhabitants Balearic Islands (01/01/2018) No data available for summer/winter season	
Total Number of Inhabitants in summer season including those who move from other places to work in the tourism sector.	Although there are no statistics about it, it is widely known that in the summer months the population doubles in regards to the winter months, especially on peak days.	
Geographical coverage of the pilot area	Total Number of Inhabitants in summer season including those who move from other places to work in the tourism sector.	
Geomorphological characteristics of the pilot area (mountainous, etc)	Total Number of Inhabitants in summer season including those who move from other places to work in the tourism sector.	
Number of municipalities in the pilot area	Total Number of Inhabitants in summer season including those who move from other places to work in the tourism sector.	

17. Pilot area description and Visitors Profile	
Please describe the socio-economic profile of the pilot area. *(Please mention the most important economic activities taken place in the area as well as the percentage of tourism activities in the local economy in terms of income produced)*	Within Spain, the archipelago of the Balearic Islands constitutes the second most important tourist region in Spain (Catalonia region is on the 1st place), and it is one of the top leading tourist destinations in the world, and one of the main hubs of tourism knowledge. In 2018 the Balearic Islands received 16,583M tourists (of which 13,86 were international tourists and 2,723M were national tourists), generating a total of 16,365.3 M€ in revenue. Within the archipelago, the island of Mallorca is the largest island and the most important tourist destination in the Balearic Islands (with 72.04% of the total number of tourist arrivals). These important figures have caused the Balearic Islands to have an economy highly dependent on the services sector, which is estimated to account for 81.7% of the total Gross Domestic Product of the Balearic Islands, and generating about 76.6% of employment. More specifically, the tourism sector is estimated to account for

	around 48% of Balearic GDP (directly or indirectly) and 32% of employment. These data show the great importance that the tourism sector represents for the Balearic economy and its society.
Type of tourism (please tick the most appropriate types) o Sun & beach o Cultural o Religious o Natural o Other [Specify .....]	The tourist model of the Balearic Islands is highly focused on mass sun & beach tourism. This model, developed in the Balearic Islands during the 60s and 70s, has constituted (and still constitutes today) the main market for the islands. This segment of tourism is highly related to the weather conditions of the destination, therefore, tourists do concentrate mostly during the summer months (from June to September, mainly). The high seasonal component in tourist arrivals is repeated annually on a systematic basis. In 2018 62.58% of tourists who visited the islands did concentrate in a period of 4 months (June to September - high season), while the mid- and low season months (January, March, April, May, October, November and December) only received 37.42% of tourists in 2018. This strong seasonal component in the arrival of tourists has significant meffects on the island's natural resources, mainly due to excessive levels of human pressure and congestion occurring in the summer months. In this context, it is key to develop new products and initiatives that allow the Balearic Islands new business models and tourism segments such as culture, nature, sports, gastronomy, MICE, luxury... that generate added value for the destination, and that allow to reduce the seasonality levels, improving occupancy levels during the mid- and low-season months.
Please describe the profile of the visitors *(Please refer to the number, countries of origin, nationalities, means of traveling, age groups)*	The tourist sector of the Balearic Islands is mainly focused on the sun & beach segment, 100% originated in the European Union, with a remarkable presence of German and British tourists. In 2018 German tourists accounted for 28.17% of the total number of tourists arrivals, then British (22.30%), and third market Spaniards (16.42%). 54.2% of tourists travel with family, 43.9% with friends and 1.9% travel alone. 57.1% of tourists have completed university studies, 34.1% secondary and 8.8% only primary. One of the main characteristics of tourists visiting the Balearic Islands is their high fidelity level. Almost 60% of tourists had visited the islands before, with a very high

	percentage of tourists visiting the islands on more than 10 occasions in their lives. On average the tourists interviewed stay for around 7 days on the islands. For many years, the most common form of travel organization has been through the tour package, typically marketed by tour operators. However, in the recent years the percentage of tourists using tour package has significantly been reduced, to currently 37.8% of the total, compared to 62.2% of individual travellers. The accommodation option usually chosen by tourists is hotels (65.3% of the total), although it is true that this option has experienced a significant setback in recent years in favour of other forms of accommodation, such as the home rentals and friends& relatives homes. The average stay of tourists is around 6.2 nights, usually on a half board (two meals included per day: breakfast and lunch or dinner), and with an average daily expenditure of 146 Euros per tourist per day (including transport expense , accommodation and other travel-related expenses).
What kind of services are mainly offered by the local actors active in tourism sector?	Impossible to tell, our tourism sector is too large.
Are some of these services available during winter?	Not all of them, activities related to nature, culture, gastronomy, MICE, health &wellness, sports, active tourism, shopping, short breaks... are open in winter. Nautical sports have less offer. Fit&repair is especially important in winter.
Number of Tourist beds available at the pilot area for 2017	436.315 beds
Number of overnights spent in 2017 (including RBNB when possible)	117.270.091 overnights
Number of visitors for 2017	16.339.756 tourists
Amount of money spent per visitor/tourist for 2017	16.023,1 M€ total Tourist Expenditure 136.8 Daily expenditure per person (€)
Months of the year covered by the high season	April - September
Please mention the main reasons why tourist choose the area as a summer destination.	Climate, good infrastructure and hotel services
Do local businesses/actors/agents sell	Yes, a lot. for the last years tourist companies in the Balearic Islands have tried to differentiate their services and to pouch customers from competition through more sophisticated,

any customised touristic products/experiences?[10]	unique and personal experiences. Example: *essentiallymallorca.com*
Is the area attractive in winter time ? Why? Are there any touristic services provided in winter time?	Yes, many things to offer . The mild winters of the Balearic Islands offer a host of cultural experiences - museums, heritage, entertainment and more. And it's also a time to enjoy its nature and landscapes, such as the magnificent almond blossom in February.
Please describe the main natural, cultural and other assets of the area which are part of the cultural heritage of the area, regardless if they are visited by tourists or not. Please make a special reference in case of protected areas (UNESCO sites, NATURA 2000, etc)	Balearic Islands have 2 UNESCO sites: Tramuntana Mountains in Mallorca and Dalt Vila in Ibiza. And Minorca island is a Biosphere reserve. Also more than 45% of the territory and spaces of the Balearic Islands are protected by Law and by nature protection figures. For more information: *http://es.balearsnatura.com/*
How would you rate the accessibility of the above mentioned assets in terms of accessibility? (from 1 -10)	One of the priorities of the Regional Government is to achieve that the Balearic Islands become an accessible tourist destination with a universal accessibility environment. Although there are a few accessible hotels and services, there is a need to stimulate the offer for more accessible tourism products and services at all levels and also to educate and train the tourist sector to cater for the needs of people with disabilities. (5)
Is the transport infrastructure developed in the pilot area? *(boats, yachts facilities, local buses, airport, taxis...)*	Due to the great importance of tourism in the economic life of the Balearic Islands, the main mobility centres generating flows are around the tourist resorts. Therefore, the majority of tourists travel from the different airports of the islands (Palma, Mahon and Ibiza) and, to a lesser extent, from the ports to their holiday resorts, and this generates a high number of transfers, either in collective transport (buses) or in private cars (taxis or car rentals). Besides, the demand for public transport services increases significantly during the summer months, due to the high season and the largest influx of tourists (more than 330.000 users in summer). Of the 1,285,011 journeys made by tourists to the Balearic Islands in one day of July only 28.1% use non-motorized media (bicycle and by foot). In the case of mechanical media, rented cars represent 34.9%, public transport accounts for 22.3%, discretionary bus transport services 8.2% and 6.5% are private transport.

[10] *According to «experience economy» concept, companies may not simply deliver goods and services, but also engage customers in a more personal way staging unique, memorable experiences. These experiences are usually co-created between the company and the consumer.*

	Thus, the rental car is the most used mode of transport. On the contrary, the use of the bicycle and the train is very residual. Therefore, transit on the roads of the Balearic Islands has increased by 42% while in Spain it reduced by 6% between 2005 and 2015. As an instrument for strategic sustainable mobility for tourists, since 1999 the Agency for Tourism of the Balearic Islands (AETIB) has consistently improved the existing tertiary network roads to convert them into cycling routes that connect the different municipalities inside the islands, so that cycling tourism can be promoted.
Please mention if there are any airports close to pilot area.	There are 3 airports in the Balearic islands: Palma de Mallorca, Mahón (Minorca) and Ibiza.
To what extend do you think that ICT has been incorporated to local touristic product in order to increase the quality of touristic services provided, both from the local actors side and from the Regional Administration side.	Balearic Islands is currently the second mostvisited destination in Spain, which makes it one of the leading regions when it comes to satisfying the needs of travellers. Companies in the sector have turned to the fight to meet the needs of consumers who are 'online' on a constant basis, and this has been possible thanks to the incorporation of ICT. Besides Balearic Islands are "exporting ICT knowledge to other countries (specially South America) through technology clusters in tourism such as TURISTEC and the T Cluster.
Is there any policy in place for promoting a sustainable tourism in the pilot case area?	Balearic Islands Government has 2 major tourist strategies in place to achieve the sustainability of the destination: - BETTER IN WINTER: focused on attracting tourist off-season. More information on: *https://illesbalears.travel/experience/en/illesbalears/better-in-winter* - SUSTAINABLE TOURISM TAX: a tourist tax levied by the Balearic Government for almost all visitors to Mallorca (except children under 16 years old). The tax was introduced to help inject funds into conserving the environment and to make tourism more sustainable for the islands.

18.Seasonality	
Main reasons of Seasonality: X Weather conditions ❑ Calendar (big religious celebrations or other festivals attracting visitors etc.)	Majority of tourists arrive between April to October. Reasons: - Weather - Lack of good & frequent air transport connections - Insularity problem - Sun&Sea destination popular for summer - linked to an historical high dependence of Tour Operators.

X Other reasons	
Please mention the main **social** impacts and implications of seasonality in the pilot area?	- Labour market seasonality, Job insecurity and low wages.
Please mention the main **environmental** impacts and implications of seasonality in the pilot area?	- Pressure on water resources and on the infrastructures - Perceived saturation of places in high season.
Please mention the main **economic** impacts and implications of seasonality in the pilot area?	- "Closed for winter" and "Sundays closed" are terms that may be hindering tourist development in the medium and low season. - Lack of new experiences that could provide wider content to the current agenda of possible activities to be undertaken by tourists during their stay.

19. Pilot Area SWOT Analysis	
Please provide a brief SWOT analysis of the pilot areas in terms of its capacity to become an all year round destination.	
Strengths	• Top leading tourist destination at European and global scale. • Balearic Islands have moved towards sustainability putting in place strategies and restrictive legislation such as the climate change Law, the Plastic Law, Waste management Law, Diesel reductions, etc. • It is a destination very appealing to visitors that generates high overall satisfaction of stay and high recommendation rates (repeat visitors is a significant segment, 76%). • Well-known destination for the customer. • Balearic Islands overcome the tourist assessment values of main competitor destinations: Canary Islands, Italy, Spain, Portugal and Greece, in the majority of attributes, but especially in regards to beaches, natural settings, good weather, food and culture, socialization-presence of compatriots, tourist attractions diverse and adequate, friendliness and security (in all aspects: physical, legal, sanitary, religious and political. Balearic Islands is considered a safe destination, and this is a main advantage). (Source: Balearic Islands Tourism Barometer 2016). • It is a friendly popular destination with a great variety of economic visitor profiles: from low-cost to luxury-high spending. • High degree of efficiency and good value for money. • Proximity to outbound travel markets and easy access, with direct flights from and to the main European cities throughout the year, is an advantage that no other competitor in the Mediterranean can offer.

	• Excellent accommodation and tourist facilities, good health services & infrastructures and fast and efficient public transport. • Worldwide leading Majorcan hotel companies that maintain main offices in the region. • More than 50 years of tourism know-how which has been exported to other worldwide tourist destinations. • Relaxed Mediterranean culture and quiet atmosphere, with magical sunsets, dinners by the sea, sea breezes, “terrazas”, quality of time and relaxed living. • There is strong R&D infrastructure able to develop and deliver much needed innovative tourism products and services. • Highly specialised and professional services.
Weaknesses	• Mature destination with geographically limited capabilities of growth through physical expansion. • Strong dependence on 3S (sea-sun-sand tourism) although many efforts are currently being done to develop alternative off-season products. • Job insecurity and low wages. • Low level of internationalization in SMEs and of products different than Sun and Beach. • Perceived saturation of places in high season. • Two elements are worse rated in comparison to other emerging competitor destinations: expensive commercial offer and high prices outside hotels. • "Closed for winter" and "Sundays closed" are terms that may be hindering tourist development in the medium and low season. • Lack of new experiences that could provide wider content to the current agenda of possible activities to be undertaken by tourists during their stay. • Dispersion in the communication efforts made by Public Administrations and the various tourist associations. This could be interpreted as a cause of destination marketing inefficiency.
Opportunities	• Sustainability, circular economy, waste treatment, water efficiency management, plastic recycling, etc. • The Balearic Islands still have a great potential to be directly sold to individual travellers (although this trend is progressively increasing) due to the current preponderance of Tour Operators'intermediation. • There is room for improvement in accessibility (facilities for disabled people) and also in facilities addressed to the young and elderly people (segments with great potential, as no Spanish tourist destination completely fulfils their needs). • New ways of tourism promotion will help putting in value heritage, natural or cultural resources, allowing to diversify the present tourist offer and adding value to it.

	• The tourism sector is growing at international level (more people travelling more often). • ICT technologies are the key for new tourism business models. • Slow movement: slow city, slow holiday, slow food, slow life... • Greater social environmental conscience. Circular economy. • Development of next generation ICT technology . • Easier access to information and easier web content sharing. • Tourists change their profiles and require more tourism service integration. • Increasing awareness of customers on requirements for energy savings and environmentally friendly technologies. • MICE product can achieve greater presence in Mallorca due to the recent opening of the Palma Congress Palace (1st April 2017) which is becoming more and more popular. • Diversification of outbound tourist markets. • Improving policies in regards to environmental respect, to create in our limited territory a better balance between consumption and economic development.
Threats	• Competitor destinations geographically close or offering similar tourist products. • Three competitor destinations: Canary Islands, mainland Spain and Italy, have higher consumer ratings in regards to commercial offer and cultural activities. • The sun & beach tourist in high season complaints about excessive prices and too much people. Maybe this is a threat since that might stop him/her from repeating stay. • Balearic Islands should be able to continue managing for all tourist seasons, different tourist profiles in regards to spending and motivations. • Concentration of demand in major tour operators. • Loss of tourists and loss of benefits per tourist for the growing competence of other destinations, not only in price, but also in quality. • New emerging destinations. • High degree of seasonal variation, with very strong tourism traffic during summer. • Impacts of tourism on environment and natural resources. • Insularity problem. • Tourism industry still not part of knowledge economy.

20.Policy	
Public authority in charge of the policy	AGENCIA D'ESTRATEGIA TURISTICA DE LES ILLES BALEARS (Balearic Islands Government)
Type of the policy	ACTION PLAN for the tourism of the Balearic Islands

Please name the policy instrument that primarily affects the touristic product of the area.	ACTION PLAN 2020 Two main goals of this Action Plan: 1. To develop a sustainable tourism strategy that guarantees the improvement of the global competitiveness of the tourism sector in the Balearic Islands, taking into account the following aspects: • Sustainability • Air connectivity • Diversification • Shared Prosperity • Deseasonalisation • Putting in value the tourist products • Interinstitutional collaboration • Accessibility of the destination 2. To carry out an appropriate management of the Funds coming from the Sustainable Tourism Tax. Document available at: *https://www.caib.es/sites/transparenciaatb/ca/pla_daccio-83893/*
Stakeholders involved	Regional Agency for Tourism (AETIB), Tourism Business Associations, Mallorca, Menorca, Ibiza and Formentera Island Councils, Tourism companies and institutions.
Beneficiaries	SMEs, business associations, tourists visiting the islands
Financial allocation	YES
Financial framework	
Timescale (start/end date)	Ongoing
Evidence of success	Ongoing Plan
Challenges encountered	Early to tell
Is there any Regional or Local action plan which supports the development of sustainable tourism in the area? Yes or No	YES SUSTAINABLE TOURISM TAX. *www.illessostenibles.travel*

References
- Agència d'Estratègia Turística de les Illes Balears, AETIB (2017, 2018, 2019). *Anuaris de Turisme.* *www. illesbalears.travel* *www.illessostenibles.travel* - Agència d'Estratègia Turística de les Illes Balears, AETIB (2019) *ACTION PLAN.* *https://www.caib.es/sites/transparenciaatb/ca/pla_daccio-83893/* - Direcció General de Transports (2019). *Pla director sectorial de mobilitat.* - Institut d'Estadística de les Illes Balears, IBESTAT. *https://ibestat.caib.es/ibestat/inici*

D3.1.1 - Analyse du contexte du tourisme transnational

Pour chaque région pilote où la stratégie WINTER MED sera appliquée, les partenaires sont priés de remplir le modèle suivant en fournissant toutes les informations requises (1 modèle pour chaque zone pilote).

1. informations générales		
Données des zones pilotes	Pays	CORSE
	Noix 2 / Nom	
	Noix 3 / Nom	
Nombre total d'habitants de la région pendant la saison d'hiver.	336 000	
Nombre total d'habitants pendant la saison estivale, y compris ceux qui déménagent ailleurs pour travailler dans le secteur du tourisme.	730 000	
Couverture géographique de la zone pilote	8722 km^2	
Caractéristiques géomorphologiques de la zone pilote (montagneuse, etc.)	Une île de montagne 183 km de longueur 83 km - largeur maximale	
Nombre de municipalités dans la zone pilote	360	

2. Description de la zone pilote et profil des visiteurs	
Veuillez décrire le profil socio-économique de la zone pilote. *(Veuillez mentionner les activités économiques les plus importantes qui ont eu lieu dans la région ainsi que le pourcentage des activités touristiques dans l'économie locale en termes de revenus produits)*	Le tertiaire marchand représente 50% de la richesse créée en Corse, le PIB de la Corse s'élève à 8,87milliards d'euros et le tourisme y contribue à hauteur de 31% de soit 2.5 Mds € (transport inclus). Vient ensuite le tertiaire non marchand qui est surreprésenté dans la région avec 33% de la valeur ajoutée. Cette proportion situe la Corse en haut du classement national, elle est bien supérieure à la moyenne française (10points de plus qu'en métropole et 7points de plus qu'en province). Autre secteur important sur le territoire insulaire, le BTP représente 9% de la richesse produite en Corse contre 6% en Moyenne de province.
Type de tourisme (veuillez cocher les types les plus appropriés) x Soleil et plage Culturel Religieux x Naturel x Autre : Sportif, d'affaires, gastronomique, eonologique	La Corse reste, aux yeux de la demande, une destination mer-soleil. C'est le principal élément d'attractivité de la destination Corse avec la beauté des sites et le caractère préservé de l'environnement naturel : - Site UNESCO de la côte Ouest - GR 20, sentier de randonnée réputé en Europe - ... Le tourisme corse est d'avantage contemplatif qu'actif : on vient d'avantage en Corse pour le plaisir de la découverte plutôt que pour pratiquer une activité.
Veuillez décrire le profil des visiteurs *(Veuillez vous référer au nombre, pays d'origine, nationalités,*	3.2 millions de visiteurs : 73% français (51% en avion, 49%en bateau) 27 % étrangers (55% en bateau, 45% en avion) 45 % de primo-touristes

moyens de déplacement, tranches d'âge)	21 % d'affinitaires (famille, amis, ...) 39 % de 50-64 ans 33 % résidence secondaire/famille/ amis La clientèle de la destination corse est à dominante familiale, elle est répartie également entre les classes moyennes et les classes supérieures.
Quels types de services sont principalement proposés par les acteurs locaux actifs dans le secteur du tourisme?	Hébergement, restauration, activités de pleine nature, nautisme, gastronomie, musées …
Certains de ces services sont-ils disponibles en hiver?	Hôtellerie, gastronomie, randonnées, musées
Nombre de lits touristiques disponibles dans la zone pilote pour 2017	163 000
Nombre de nuitées passées en 2017 (y compris RBNB si possible)	35 millions
Nombre de visiteurs pour 2017	3.2 millions
Montant dépensé par visiteur / touriste pour 2017	833€
Mois de l'année couverts par la haute saison	2 mois : 1er juillet au 31 aout
Veuillez mentionner les principales raisons pour lesquelles les touristes choisissent la région comme destination d'été.	Destination hélio-centrée, calendrier scolaire avec plus de 75 % de touristes français, plage, soleil, nature, beauté des paysages, retour de la diaspora
Les entreprises / acteurs / agents locaux vendent-ils des produits / expériences touristiques personnalisés?	Le tourisme expérientiel est peu développé en corse
La région est-elle attrayante en hiver ? Pourquoi? Y a-t-il des services touristiques fournis en hiver ?	Oui, la destination pourrait-être attractive en hiver mas la fréquentation est faible voire nulle malgré un climat agréable, des produits locaux de saison (charcuterie, fromage). Plus d'une centaine d'hôtels sont ouverts en hiver. L'hiver serait l'occasion de découvrir « La vraie Corse ».
Veuillez décrire les principaux atouts naturels, culturels et autres de la région qui font partie du patrimoine culturel de la région, qu'ils soient visités par des touristes ou non. Veuillez faire une référence spéciale en cas d'aires protégées (sites UNESCO, NATURA 2000 etc.)	1 site classé au patrimoine mondial de l'humanité de l'UNESCO (Golfe de Portu: Calanche de Piana/golfe de Ghjirulatu/réserve de Scandula). 7 réserves naturelles couvrant une superficie totale de 86 624 hectares. 2 sites labélisés « Grands Sites de France ». 40% du territoire (350 000 ha) est couvert par le Parc Naturel Régional de la Corse (PNRC).

	1000km de cotes dont 200 km, soit 23% du linéaire côtier et 19 700 ha, sont protégés par le conservatoire du littoral
Comment évalueriez-vous l'accessibilité des actifs mentionnés ci-dessus en termes d'accessibilité? (de 1 à 10)	8/10 Les sites de Corse présentent une bonne accessibilité que ce soit par terre (sentiers de randonnée) ou par mer (services de bateliers ou locations de bateaux)
L'infrastructure de transport est-elle développée dans la zone pilote? *(bateaux, installations de yachts, bus locaux, aéroport, taxis...)*	4 aéroports internationaux et 5 ports principaux. 23 ports de plaisances et mouillages organisés proposant plus de 7000 anneaux. Taxis Transports en commun (train, autocars)
Veuillez indiquer s'il y a des aéroports à proximité de la zone pilote.	Ajaccio, Bastia, Calvi, Figari
Dans quelle mesure pensez-vous que les TIC ont été intégrés aux produits touristiques locaux afin d'augmenter la qualité des services touristiques fournis, tant du côté des acteurs locaux que du côté de l'administration régionale.	Sites institutionnels de l'ATC et des Offices de Tourisme Sites des prestataires du tourisme corse (hébergements, prestataires d'activités, voyagistes, …).
Y a-t-il une politique en place pour promouvoir un tourisme durable dans la zone pilote?	La feuille de route de l'Agence du Tourisme de la Corse est construite sur deux axes : la transition écologique et numérique du tourisme corse. Cette feuille de route trouve une traduction opérationnelle au travers d'actions telles que l'affichage environnemental, le développement de l'écolabel européen, une politique d'aides publiques au tourisme durable.

3. Saisonnalité	
Principales raisons de saisonnalité: X Conditions météorologiques X Calendrier (grandes célébrations religieuses ou autres festivals attirant des visiteurs, etc.) X Autres raisons	Destination héliocentrique Calendrier scolaire français (plus de 75 % de touristes français) Mauvaise desserte aérienne entre novembre et mai
Veuillez mentionner les principaux impacts **sociaux** et implications de la saisonnalité dans la zone pilote.	Précarité de l'emploi Peu d'emplois managériaux Revenu par habitant inférieur à la moyenne française
Veuillez mentionner les principaux impacts **environnementaux** et les implications de la saisonnalité dans la zone pilote.	Concentration de la fréquentation sur certains sites, embouteillages, pollution, tourismophobie

Veuillez mentionner les principaux impacts **économiques** et implications de la saisonnalité dans la zone pilote.	Difficultés à gérer les investissements Faible effet de levier sur les autres secteurs d'activité Problème de répartition des richesses

4. Analyse SWOT de la zone pilote	
Veuillez fournir une brève analyse SWOT des zones pilotes en termes de capacité à devenir une destination toute l' année .	
Forces	Climat Destination sécuritaire Patrimoine naturel et culturel (gastronomie, œnologie, archéologie ...) Proximité Mer/Montagne qui en fait une destination unique en Méditerranée, Nature préservée Position centrale en méditerranéen à moins de 2h des capitales européennes
Faiblesses	Accessibilité transports (pas de vols étrangers et France du 01/11 au 31/03 hormis Paris, Marseille et Nice) Notoriété (pas de positionnement de la destination en hiver) Peu ou pas d'offre sur l'ensemble de la chaine touristique Rapport qualité/prix défavorable Mono-clientèle : 70% de clientèle française
Opportunités	Travailler sur un positionnement éco-touristique Préserver le territoire (nature, paysage, architecture ...) Identité forte (savoirs-faires, langue, tradition, culture, ...) Tourisme expérientiel à développer
Des menaces	Bassin touristique fortement concurrentiel Mauvaise image à cause d'un rapport qualité/prix défavorable Mono-économie (31% du PIB) Mono-clientèle (70% Française) Obsolescence de l'offre

5. Politique	
Autorité publique en charge de la politique	**Collectivité de Corse**
Type de police	PADDUC (Plan d'aménagement et de développement durable de la Corse) Feuille de route 2018/2021 Guide des aides au tourisme 2016/2020
Veuillez nommer l'instrument politique qui affecte principalement le produit touristique de la région.	Un certain nombre d'enjeux majeurs comme autant de défis sont à décliner. Enjeu n°1 : Remettre le tourisme au centre des préoccupations économiques de l'île considérant son effet de levier sur l'ensemble de la production agricole (circuits

- Plan d'Aménagement et de Développement Durable de la Corse (PADDUC) - Feuille de Route ATC - Guide des Aides au Tourisme	courts) sur l'ensemble des politiques de réhabilitation du patrimoine et de réactivation des identités et savoir-faire locaux, sur l'ensemble des politiques de protection développement des sites naturels, sur les politiques d'aménagement et de services (ressources en eau, énergie,…)… une logique à faire évoluer. Enjeu n°2 : Implanter une culture du développement durable du tourisme et construire un plan rassembleur bâti sur nos acquis majeurs et porté vers l'avenir, conjuguant aspects sociaux, économiques et environnementaux. Un plan qui prenne en compte les pressions existantes sur certains sites mais aussi le développement spatial du tourisme toujours trop concentré dans ses flux de séjour sur le littoral. Une perception à faire partager (y compris aux touristes) voire à inculquer. Enjeu n°3 : Valoriser les métiers et agir sur la formation professionnelle car une activité quelle qu'elle soit, et le tourisme n'y échappe bien évidement pas, ne peut se développer sans un vivier de ressources humaines formées : c'est un enjeu social déterminant compte tenu de la tension de l'emploi dans le secteur qui exige entre autres des propositions sur la flexibilité. Rendre le tourisme attractif pour les jeunes suppose, dans une économie de production créatrice de valeur ajoutée, des emplois qualifiés. Enjeu n°4 : Soutenir la compétitivité de l'offre de produits et services dans une compétition internationale disputée, encourager les investissements et l'innovation correspondant aux axes retenus, l'orienter vers des logiques de qualité et de tourisme durable pour justifier d'un positionnement concurrentiel différencié, créateur d'un « mieux tourisme » vs d'un « plus tourisme », construire et diffuser le concept d' « île verte » en Méditerranée. Considérer l'innovation et la technologie comme les facteurs clés pour accroitre la compétitivité et la durabilité du tourisme. Enjeu n°5 : Maintenir et développer l'attractivité de la destination en particulier à l'international considérant que la moitié des séjours touristiques globaux sont des premiers séjours qu'il convient de convaincre, ce qui suppose de disposer des moyens de promotion suffisants pour porter utilement le rayonnement de l'île et de repenser l'accessibilité à l'île et notamment ses coûts – véritable barrière d'entrée- à adapter en fonction des saisons. Construire, au-delà des actions ponctuelles, une véritable stratégie coordonnée d'accessibilité transport en « incoming » corrélée aux marchés et objectifs visés.

	Enjeu n°6 : Adapter un certain nombre de dispositifs et règles normatives nationales aux spécificités de l'île pour à la fois protéger la ressource naturelle, maîtriser l'extension incontrôlée des résidences secondaires et le mitage du bâti mais aussi pour produire la ressource financière nécessaire pour précisément accompagner les investissements et actions d'attractivité. La fiscalité du tourisme, à repenser sur notre territoire, constitue entre autres l'un des enjeux du développement harmonieux voulu par une majorité de la population. Enjeu n°7 : Adapter notre organisation aux mutations numériques et nouvelles exigences et potentialités, le succès des politiques publiques dépendant à la fois de la pertinence des stratégies mais également des capacités des systèmes à les mettre en œuvre. Les transformations technologiques dont le secteur est pionnier et les ruptures dans un domaine aussi concurrentiel demandent aujourd'hui des modes opératoires mieux adaptés, à la fois plus souples et plus réactifs, plus partagés avec l'univers professionnel et mieux profilés pour assurer l'ingénierie nécessaire à l'accompagnement du projet. Le challenge consiste à passer d'une logique « outil de la Collectivité » à « opérateur de la Collectivité » en transformant l'Agence en véritable « Destination Management Compagnie » en intégrant une coproduction public/privé.
Parties prenantes impliquées	Agence du Tourisme de la Corse, Collectivité de Corse, Syndicats professionnels, Université, Etat français…
Les bénéficiaires	Public et privé
Allocation financière	Oui
Cadre financier	Promotion : 3.6 millions € Développement : 4 millions €
Calendrier (date de début / fin)	En cours
Preuve de succès	Indicateurs : fréquentation et développement durable
Défis rencontrés	Transitions écologique et numériques
Existe-t-il un plan d'action régional ou local qui soutient le développement du tourisme durable dans la région? Oui	L'Agence du Tourisme de la Corse a adopté un règlement d'aide au tourisme : le Guide des Aides. Ce document se veut en conformité avec les cadres de référence constitués par le PADDUC et ses annexes en particulier le Schéma d'Orientation pour le Développement Touristique et le plan montagne. Il intègre les nombreuses réflexions antérieures avec des constats aujourd'hui partagés sur les réalités du tourisme corse, une manière de poser la question de l'impact des politiques publiques et surtout de leur traduction opérationnelle pour orienter le secteur vers les objectifs fixés. Les soutiens publics au tourisme, s'ils ont permis de structurer le territoire et consolider le secteur en lui

	permettant de rester compétitif, n'ont donc pas vraiment réussi jusqu'ici à impacter concrètement de manière significative le fait touristique en Corse qui reste très déséquilibré sur nombre de points de vue. Le mitage du territoire s'est considérablement accentué avec un secteur locatif non marchand qui s'est sérieusement développé pour représenter aujourd'hui 2/3 de l'offre. La pression sur certains sites majeurs s'est accentuée en pointe saisonnière pendant que l'espace rural, hors périphérie des villes, restait plutôt en déprise. Le Plan de Développement de la Corse de 1993 avait déjà pointé en objectif principal du tourisme l'étalement dans le temps « briser la fatalité de la saisonnalité » et dans l'espace « rééquilibrage nécessaire entre littoral et intérieur à opérer ». Il transcrivait également les notions de développement identitaire, d'économie re-distributive de préservation de la ressource face aux risques de pression sur l'environnement en pointe saisonnière. Les règlements d'aides qui se sont succédé au fil des ans (contrats de plan, contrats de projet, etc.) ont montré une grande constante dans les mesures proposées. Face aux défis majeurs auxquels est confronté le tourisme corse tant du point de vue de la préservation de la ressource que du point de vue de mise en œuvre d'une véritable économie du tourisme par un développement minorant les effets d'éviction et les effets pervers, le propos consiste donc clairement à revoir le paradigme et porter les soutiens publics vers les projets de nature à faire évoluer le tourisme corse vers les objectifs recherchés, à savoir : • L'étalement dans le temps et dans l'espace qui reste plus que jamais d'actualité et qui exige un enrichissement des contenus d'offres, aujourd'hui très insuffisants et surtout très peu structurés, pour développer des flux de séjours hors saison estivale. Or, le paysage de l'offre est aujourd'hui très dispersé. Les séjours additionnels ne peuvent se réduire à la seule attractivité des paysages et doivent impérativement intégrer des logiques de filières à organiser et développer pour les véhiculer en véritable destination spécifique sur les marchés • La diminution des pressions sur le territoire qui mettent en danger la ressource en premier lieu sur certains espaces emblématiques et commandent une attention particulière sur les plans de gestion pour éviter d'en subir les effets négatifs. La mise en valeur d'autres sites et patrimoines dont ne manque pas la Corse devrait

	constituer une des réponses adaptée à la répartition des flux tout en favorisant l'étalement dans l'espace • L'augmentation de la recette unitaire par séjour qui constitue une nécessité stratégique, dès lors que la Corse fait le choix d'un tourisme différencié face à un tourisme de masse qu'elle ne peut supporter, la fragilité de son écosystème et sa faible population résidente engendrerait alors des déséquilibres. Cela passe par une approche produit/cible qui incite à actualiser l'offre pour construire des produits fondés sur la mise en valeur des atouts propres irriguant l'ensemble du territoire et de les diffuser vers des marchés sources parfaitement ciblés.

6. Analyse SWOT des politiques	
Veuillez fournir une brève analyse SWOT de la politique / plan d'action / stratégie susmentionnée en place concernant le secteur du tourisme	
Forces	Transition écologique Transition numérique
Faiblesses	Formation des hommes Eclatement des compétences Multiplicité des intervenants Politique des transports
Opportunités	Organisation politique régionale (compétence tourisme pleine et entière à la Collectivité de Corse) Organisation politique intercommunale (réforme de l'intercommunalité et transfert de la compétence tourisme des communes à l'intercommunalité)
Des menaces	Concentration spatiale Concentration temporelle Concentration de la richesse Absence d'effet de levier
Les références	
Veuillez mentionner toute référence bibliographique, site Web ou autre ressource d'information que vous avez utilisée pour répondre aux questions ci-dessus. Plan d'Aménagement et de Développement Durable de la Corse Feuille de Route du Tourisme Corse 2018-2021 Guide des Aides au Tourisme 2016-2020	

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[1] *Selon le concept d '«économie de l'expérience», les entreprises peuvent non seulement fournir des biens et des services, mais aussi engager les clients de manière plus personnelle en organisant des expériences uniques et mémorables. Ces expériences sont généralement co-créées entre l'entreprise et le consommateur.*

D3.1.1 - Analysis of the context of transnational tourism - english version

For each pilot region where the WINTER MED strategy will be applied, the partners are requested to complete the following template by providing all the required information (1 template for each pilot area).

1. general information		
Pilot area data	Country	CORSICA
	Nuts 2 / Name	
	Nuts 3 / Name	
Total number of inhabitants of the region during the winter season.	336,000	
Total number of inhabitants during the summer season, including those who move elsewhere to work in the tourism sector.	730,000	
Geographic coverage of the pilot area	8722 km²	
Geomorphological characteristics of the pilot area (mountainous, etc.)	A mountain island 183 km in length 83 km - maximum width	
Number of municipalities in the pilot area	360	

2. Description of the pilot area and visitor profile	
Please describe the socio-economic profile of the pilot area. *(Please mention the most important economic activities that took place in the region as well as the percentage of tourism activities in the local economy in terms of income generated)*	The e tertiary merchant represents 50% of the wealth created in Corsica, the e GDP Corsica totaled EUR 8,87milliards and tourism contributes up to 31% of or 2.5 billion € (transport included) . Next comes the non-commercial service sector, which is over-represented in the region with 33% of the added value . This p roportion is Corsica in the top of the national rankings , it is well above the m French ean (10points higher than m e metropolis and 7 points higher than province). Another important sector on the island territory , construction represents 9% of the wealth produced in Corsica against 6% in Provincial average.
Type of tourism (please tick the most appropriate types) x Sun and beach Cultural Religious x Natural x Other : Sports, business, gastronomic, eonological	Corsica remains, in the eyes of demand, a sea-sun destination. It is the main element of attractiveness of the Corsica destination with the beauty of the sites and the preserved character of the natural environment : - UNESCO West Coast site - GR 20, renowned hiking trail in Europe -... Corsican tourism is contemplative asset advantage : people come to advantage in Corsica for the pleasure of discovery rather than to practice an activity.
Please describe the visitor profile *(Please refer to the number, country of origin, nationalities, means of travel, age groups)*	3 .2 million visitors : 73% French (51% by plane, 49% by boat) 27% foreigners (55% by boat, 45% by plane) 45% of first-time tourists

	21% of affinity (family, friends ...) 39% of 50-64 years 33% second home / family / friends The clientele of the Corsican destination is predominantly family, it is divided equally between the middle classes and the upper classes.
What types of services are mainly offered by local players active in the tourism sector ?	H ccommodation , catering, activities outdoor, boating, dining , museums ...
Are any of these services available in winter?	Hotels, gastronomy, hiking , museums
Number of tourist beds available in the pilot area for 2017	163 000
Number of nights spent in 2017 (including RBNB if possible)	35 m illio
Number of visitors for 2017	3 .2 million
Amount spent per visitor / tourist for 2017	833 €
Months of the year covered by the high season	2 months : 1 st July to 31 August
Please mention the main reasons why tourists choose the region as their summer destination.	Helio - centered destination , school calendar with more than 75 % of French tourists, beach, sun, nature, scenic beauty , return of the diaspora
Do local companies / actors / agents sell personalized tourism products / experiences ?	Experiential tourism is poorly developed in Corsica
Is the region attractive in winter ? Why? Are tourist services provided in winter ?	Yes, the destination may be attractive in winter farmhouse the attendance is low or zero despite a pleasant climate, the seasonal local produce (meats, cheese) . Over a hundred hotels are open in winter. Winter would be an opportunity to discover " The real Corsica ".
Please describe the main natural, cultural and other assets of the region which are part of the cultural heritage of the region, whether they are visited by tourists or not. Please make a special reference in the case of protected areas (UNESCO sites, NATURA 2000 etc.)	1 UNESCO World Heritage Site (Gulf of Portu : Calan che de Piana / Gulf of Ghjirulatu / Scandula Reserve). 7 nature reserves covering a total area of 86,624 hectares. 2 sites labeled "Grands Sites de France". 40% of the territory (350,000 ha) is covered by the Regional Natural Park of Corsica (PNRC). 1,000 km of coastline, including 200 km, or 23% of the coastline and 19,700 ha, are protected by the coastal conservatory

How would you rate the accessibility of assets mentioned above in terms of accessibility? (from 1 to 10)	8/10 The sites of Corsica have good accessibility whether by land (hiking trails) or by sea (boatmen services or boat rentals)
Is the transport infrastructure developed in the pilot area ? *(boats , yacht installations, local buses, airport, taxis, etc.)*	4 international airports and 5 main ports. 23 organized marinas and moorings offering more than 7000 rings. taxis Public transport (train, coach)
Please indicate if there are airports near the pilot area.	Ajaccio, Bastia, Calvi, Figari
To what extent do you think that ICTs have been integrated into local tourism products in order to increase the quality of tourism services provided, both on the side of local actors and on the side of regional administration.	ATC and Tourist Offices institutional sites Sites of Corsican tourism providers (accommodation, activity providers, tour operators, etc.) .
Is there a policy in place to promote sustainable tourism in the pilot area ?	The roadmap of the A gency of T ourism the C Orse is built on two pillars : the digital transition and ecological tourism Corsican. This roadmap finds an operational translation through actions such as environmental labeling , the development of the European eco-label, a policy of public aid for sustainable tourism.
3. seasonality	
Main reasons for seasonality: X Weather conditions X Calendar (major religious celebrations or other festivals attracting visitors, etc.) X Other reasons	Heliocentric destination C has school French lendrier (more than 75 % of French tourists) Poor air service between November and May
Please mention the main **social** impacts and implications of seasonality in the pilot area .	P recarity of employment P eu managerial jobs Per capita income below the French average
Please mention the main **environmental** impacts and the implications of seasonality in the pilot area .	Concentration of traffic on certain sites, traffic jams, pollution , tourismophobia
Please mention the main **economic** impacts and implications of seasonality in the pilot area .	D ifficultés to manage investments F aible leverage on other sectors P wealth distribution roblem

4. SWOT analysis of the pilot area	
Please provide a brief SWOT analysis of the pilot areas in terms of ability to become a destination throughout the year .	
Strengths	C l imat Safe destination P eritage natural and cultural (gastronomy , Oen geology, archeology ...) P roximity Sea / Mountain which makes it a unique destination in the Mediterranean, Preserved nature Central location in the Mediterranean less than 2 hours from European capitals
weaknesses	A ccessibility transport (no foreign flights and France from 01/11 to 31/03 except Paris, Marseille and Nice) N otoriété (no positioning destinatio n in winter) Little or no offer on the whole tourist chain R app ort / quality unfavorable price Single clientele : 70% French clientele
opportunities	Work on an eco-tourism positioning Preserve the territory (nature, landscape, architecture…) Strong identity (ie s -faires, language, tradition, culture ...) T ourism experiential to develop
Threats	B assin touris tick highly competitive M auvaise picture because of ' u n quality ratio e / unfavorable price M ono - omitted economy (31% of GDP) M ono-clientè le (70% French) Supply obsolescence

5. Politics	
Public authority in charge of policy	**Community of Corsica**
Type of policy	PADDUC (Corsican sustainable development and development plan) F euille drive 2018/2021 Guide to aid to tourism 2016/2020
Please name the political instrument which mainly affects the tourism product of the region. - Corsican Development and Sustainable Development Plan (PADDUC) - ATC Roadmap	A number of major issues such as so many challenges are to be declined. Issue 1: Put tourism back at the center of the island's economic concerns, considering its leverage effect on all agricultural production (short circuits) on all heritage rehabilitation policies and reactivation of identities and local know-how, on all policies for the protection and development of natural sites, on development and service

- Guide to Aid to Tourism	policies (water resources, energy, etc.)... a logic to be developed. Issue # 2: Establish a culture of sustainable tourism development and build a unifying plan built on our major achievements and focused on the future, combining social, economic and environmental aspects. A plan that takes into account the existing pressures on certain sites but also the spatial development of tourism, which is still too concentrated in its stay flows on the coast. A perception to share (including to tourists) or even to instill. Issue n ° 3: Promote the trades and act on vocational training because any activity whatsoever, and tourism obviously does not escape it, cannot develop without a pool of trained human resources: it is a decisive social issue taking into account the tension of employment in the sector which requires, among other things, proposals on flexibility. Making tourism attractive to young people requires skilled jobs in a production economy that creates added value. Issue n ° 4: Support the competitiveness of the product and service offer in a competitive international competition, encourage investment and innovation corresponding to the chosen axes, orient it towards quality and sustainable tourism to justify a differentiated competitive positioning, creating "better tourism" vs "more tourism", building and disseminating the concept of " green island" in the Mediterranean. Consider innovation and technology as the key factors for increasing the competitiveness and sustainability of tourism. Issue n ° 5: Maintain and develop the attractiveness of the destination, in particular internationally, considering that half of the overall tourist stays are first stays that need to be convinced, which means having sufficient means of promotion to usefully raise the profile of the island and rethink accessibility to the island and in particular its costs - a real entry barrier - to be adapted according to the seasons. Building, beyond specific actions, a real coordinated strategy of accessibility in “ incoming ” transport correlated to the targeted markets and objectives. Issue n ° 6: Adapt a certain number of national standards and normative rules to the specificities of the island to both protect the natural resource, control the uncontrolled extension of second homes and the sprawl of buildings but also to produce the financial resource necessary to precisely support investments and attractiveness actions. The taxation of tourism, to rethink on our territory, constitutes among other things one of the

	challenges of the harmonious development desired by a majority of the population. Issue n ° 7: Adapting our organization to digital changes and new requirements and potentials, the success of public policies depends both on the relevance of the strategies but also on the capacities of the systems to implement them. The technological transformations in which the sector is a pioneer and the breakthroughs in such a competitive field today require better adapted operating modes, both more flexible and more reactive, more shared with the professional world and better profiled to ensure engineering. necessary to support the project. The challenge is to move from a "community tool" logic to a "community operator" by transforming the Agency into a real "Destination Management Company" by integrating a public / private co-production .
Stakeholders involved	Corsica Tourism Agency , Corsican Community, Professional Syndicates , University, French State ...
Beneficiaries	Public and private
Financial allowance	Yes
Financial framework	Promotion : 3.6 m illions € Development : € 4 million
Calendar (start / end date)	In class
Proof of success	Indicators : attendance and sustainable development
Challenges encountered	Ecological and digital transitions
Is there a regional or local action plan that supports the development of sustainable tourism in the region? Yes	The Corsica Tourism Agency has adopted a tourism aid regulation : the Guide des Aides. This document is intended to be in conformity with the reference frameworks constituted by the PADDUC and its annexes, in particular the Orientation Scheme for Tourist Development and the mountain plan. It incorporates the many previous reflections with shared observations today on the realities of Corsican tourism, a way of asking the question of the impact of public policies and especially their operational translation to orient the sector towards the objectives set. Public support for tourism, if it has made it possible to structure the territory and consolidate the sector while allowing it to remain competitive, has thus far not really succeeded in significantly impacting the tourist fact in Corsica, which remains very unbalanced on many points of view. The sprawl of the territory has been considerably accentuated with a non-market rental sector which has seriously developed to represent 2/3 of the offer today.

The pressure on certain major sites increased during the seasonal peak while the rural space, outside the outskirts of the cities, remained rather in decline.
The Corsica Development Plan of 1993 had already pointed out in tourism's main objective the spread over time "to break the inevitability of seasonality" and in space "necessary rebalancing between coast and interior to operate". It also transcribed the notions of identity development, re-distributive economy of preservation of the resource in the face of the risks of pressure on the environment in seasonal peak.
The aid regulations which have followed one another over the years (plan contracts, project contracts, etc.) have shown great consistency in the measures proposed.
Faced with the major challenges facing Corsican tourism both from the point of view of preserving the resource and from the point of view of implementing a real tourism economy through development that reduces crowding out and perverse effects , the point is therefore clearly to review the paradigm and bring public support to projects likely to develop Corsican tourism towards the desired objectives, namely:

• The spread over time and space which remains more relevant than ever and which requires an enrichment of the content of offers, today very insufficient and especially very unstructured, to develop flows of stays out of season summer. However, the supply landscape is today very dispersed. The additional stays cannot be reduced to the mere attractiveness of the landscapes and must imperatively integrate the logic of sectors to be organized and developed to convey them in real specific destination on the markets.

• The decrease in pressures on the territory which endanger the resource in the first place in certain emblematic areas and require special attention to management plans to avoid suffering the negative effects. The enhancement of other sites and heritages which Corsica does not miss should constitute one of the responses adapted to the distribution of flows while favoring the spread in space

• The increase in unit revenue per stay, which constitutes a strategic necessity, since Corsica chooses a differentiated tourism in the face of mass tourism which it cannot bear, the fragility of its ecosystem and its low resident population would then generate imbalances. This requires a product / target approach that encourages

	updating the offer to build products based on the enhancement of its own assets irrigating the entire territory and to distribute them to perfectly targeted source markets.

6. SWOT analysis of policies	
Please provide a brief SWOT analysis of the above mentioned tourism sector policy / action plan / strategy in place	
Strengths	Ecological transition Digital transition
weaknesses	Men's training E bursting skills M ultiplicité stakeholders Transport policy
opportunities	Regional political organization (full tourism competence at the Collectivity of Corsica) Inter-municipal political organization (reform of the inter-municipality and transfer of tourism responsibility from the municipalities to the inter-municipality)
Threats	Spatial concentration Temporal concentration Concentration of wealth No leverage
The references	
Please include any bibliographic references, websites or other information resources that you used to answer the questions above. Corsican Development and Sustainable Development Plan Corsica Tourism Roadmap 2018-2021 Guide to Aid to Tourism 2016-2020	

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[1] *Under the concept of the " experience economy ", businesses can not only provide goods and services, but also engage customers in a more personal way by organizing unique and memorable experiences. These experiences are generally co-created between the company and the consumer.*

D3.1.1 Transnational tourism context analysis