

Report on existing legislations, policies, strategic documents and implementation plans

D3.1.1

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1. Introduction

This report analyses the state-of-the-art of the legislation and plans concerning tourism and culture in each partner area to obtain an overall view of the implemented policies on tourism development, cultural and natural attractions and what strategies have been designed to integrate culture and tourism. This information is crucial both for designing a transnational action plan and for implementing it. The aim of the report is to share the knowledge about each destination in terms of tourist fluxes, cultural, natural and tourist policies and legislation. A solid knowledge across all partner areas about the characteristics of tourism flows, the potential for tourism development and similarities in problems or opportunities are essential prerequisites to a proficient collaboration. This report is designed to provide the reader with a deeper understanding about tourism flows, legislation, and policies implemented in the other partner areas while, at the same time, stimulating the adoption of a comparative perspective in the analysis of each one's own location. To this aim, at the end of this report, we include also the Swot analyses already carried on in the different destinations. This part can be an important starting point to foster discussions and sharing of ideas for the new Swot analysis which must be realized by each Recolor partner.

2. A preliminary comparison

The six partner areas of the Recolor project are

- in Italy, North to South: Cividale del Friuli, Montefeltro, Campobasso
- in Croatia, North to South: Labin, Zadar, Šibenik

A primary distinction between Italian and Croatian location pertains to the status of mass tourist destination. A common feature of the Italian partner areas is to be proximity tourist destinations which aim at attracting tourists who are visiting a nearby mass tourism destination to inland towns or cities with a limited visibility. Cividale del Friuli is situated in Friuli-Venezia Giulia, a region in the North-East of Italy which borders with Austria and Slovenia. The nearby mass tourist destinations of Cividale are Lignano Sabbiadoro and Grado as the town is an hour's drive journey from both sea resorts. Lignano Sabbiadoro is administratively placed within the province of Udine and Grado within the province of Gorizia. Montefeltro covers an extensive land across the regions of Emilia Romagna and Marche. The Northern part of Montefeltro with the towns of Petrella Guidi and San Leo

stands in close proximity to the Rimini Riviera, a mass tourism destination in Emilia Romagna on the Adriatic Sea. The area then extends over the province of Pesaro-Urbino within the Regione Marche to the towns of Urbania and Montecopiolo. Campobasso is the regional chief city of the Regione Molise, in Southern Italy. Molise is a predominantly mountain region with access to the Adriatic Sea along its North-Eastern coast. The riviera is about 35 kilometres and the most famous destination is the city of Termoli within the province of Campobasso.

On the other hand, the Croatian partner areas are already well-known mass tourism destinations themselves, as it is the case of Zadar and *Šibenik in Dalmatia* and Labin in Istria. Therefore, the perspective of tourism development in these areas is to widen the offer of attractions and eventually to attract new segments of tourists interested in cultural tourism and in visiting outside the summer season.

The status of proximity tourist destination of the Italian partner areas requires the adoption of a broader perspective in the analysis of their tourism flows. Data should not be limited to the local, city level, but cover the area of the most proximate primary tourism destination so this report will analyse tourist flows in the provinces of Udine and Gorizia for Cividale, in the provinces of Rimini and Pesaro-Urbino for Montefeltro, and the whole province of Campobasso in Molise.

To measure the volume of tourism on the local economies, paragraph 3 provides a comparison of tourist arrivals, overnight stays, and the average length of stay in each partner area. Paragraph 4 analyses in great detail each town or city, its cultural attractions and tourist flows, and the strategies suggested by legislation and policies to connect culture and tourism development. The last paragraph represents the SWOT matrices published in the available documentation as a first step to the design of the Recolor SWOT.

The data used for tables and figures were either sent by partners in Excel format, taken from official documentation or – for some Italian data – retrieved from the database of the National Institute of Statistics ISTAT.

3. Tourism trends in the partner areas

Tourism is a major industry in both Italy and Croatia. The national Tourism Satellite Accounts estimate a direct contribution of tourism on Gross Domestic Product of 11.40% in Croatia and 5.5% in Italy in 2016. Both countries are also major mass tourism destination for coastal and maritime tourism along the Northern coasts of the Adriatic Sea. The partner areas of the Recolor project indeed are either mass tourism destinations

themselves, as it is the case for Labin, Zadar and Šibenik, or in the hinterland of mass tourist destination. Figures 1-3 show yearly overnight stays for the narrower available definition of the six partner areas: the cities of Labin, Zadar and Šibenik, the towns of Urbania and Montecopiolo (Montefeltro), and the province of Campobasso. Data for the Croatian cities in figure 1 confirm their status of mass tourism destination with overnights stays above the one million threshold and Zadar even reaching two millions in 2017. On the other hand, overnight stays in Cividale and Montefeltro in figures 2 confirm the status of peripheral tourist destination in particular for Montefeltro which is currently on a declining trend. The same trend is found in Campobasso in figure 3: arrivals in the province are still above 300.000 but they almost halved in the last six years.

Figure 1

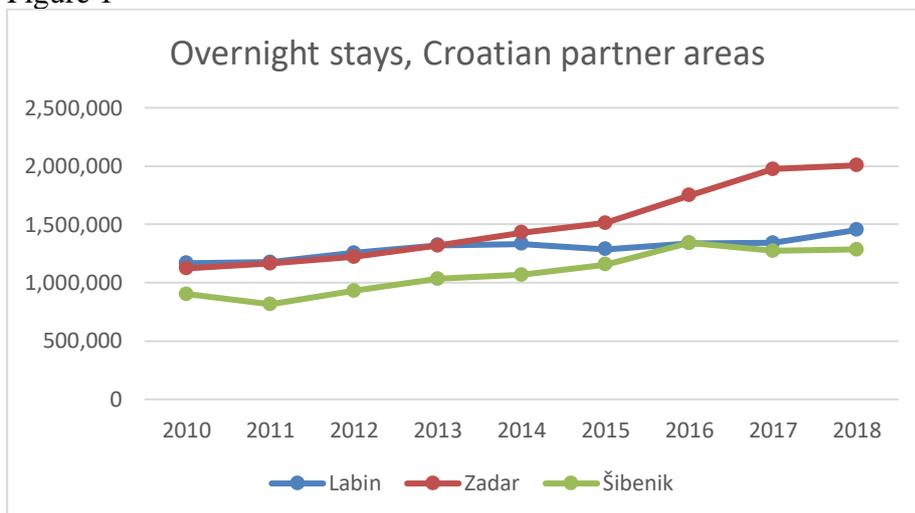


Figure 2

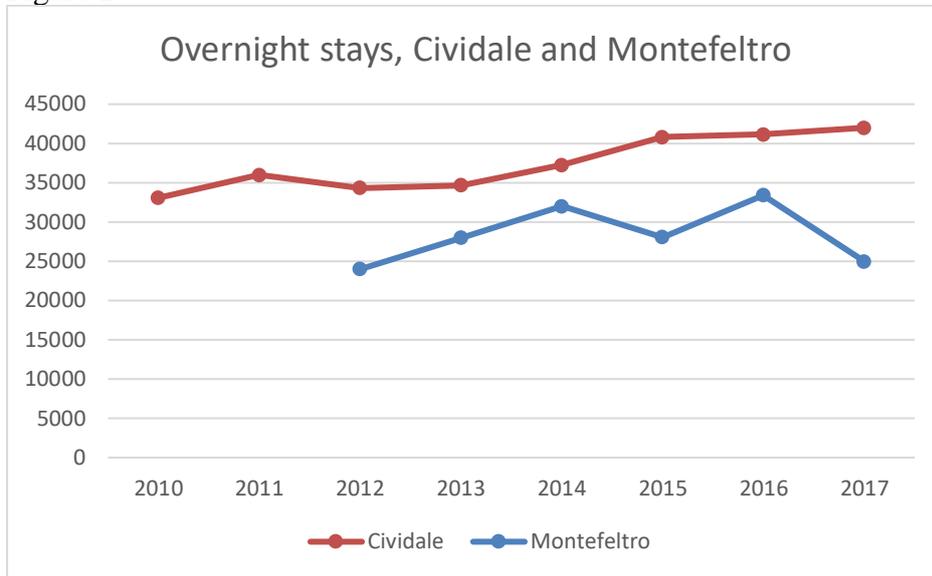
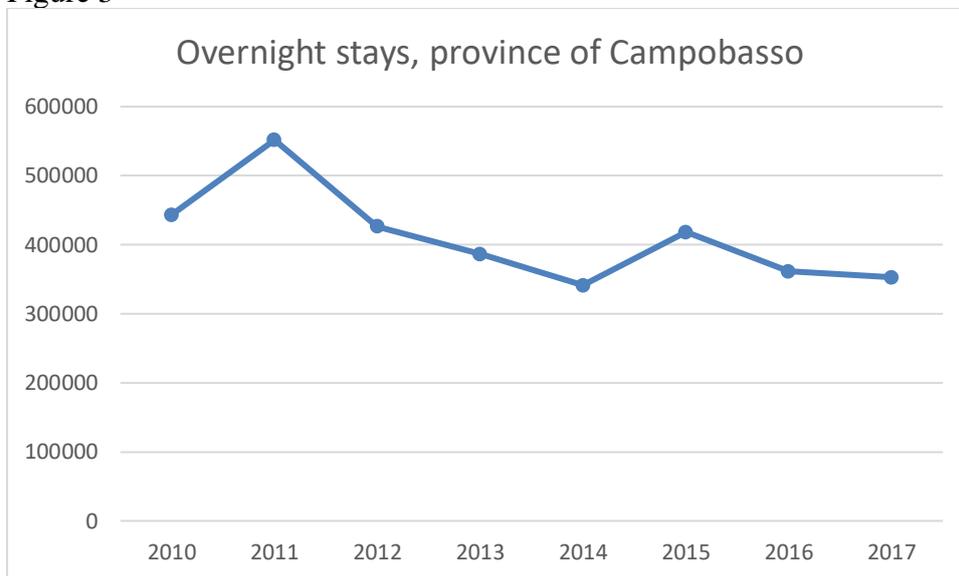


Figure 3



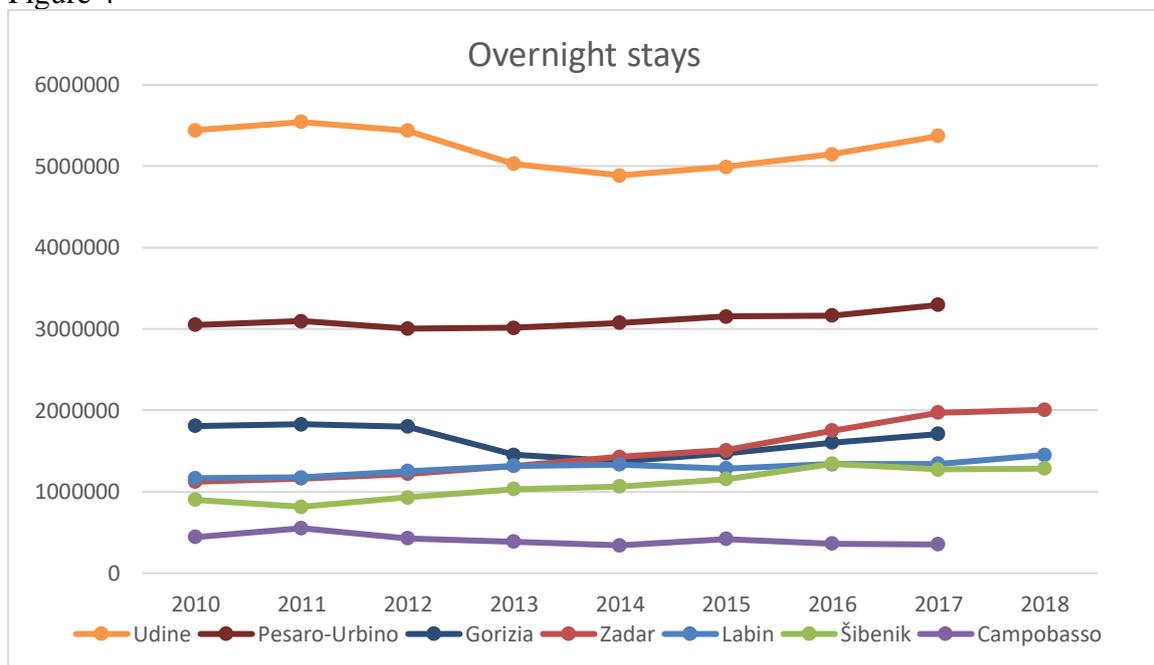
The catchment area of the Italian towns is not limited to their own surroundings, but instead is marked by wider areas. To better compare the tourism dynamics of Italian and Croatian partner areas, it is necessary to compare the overnight stays of figure 1 and 3 to the Italian province level data for Cividale and Montefeltro: the provinces are Udine and Gorizia for Cividale, Rimini and Pesaro-Urbino for Montefeltro.

The province of Rimini is the major Italian mass tourism destination with more than 15 million overnight stays on a yearly basis in the last ten years as shown below:

	2010	2011	2012	2013	2014	2015	2016	2017
Rimini	15.572.253	16.242.831	15.987.166	15.504.706	15.070.414	15.322.874	15.573.708	15.967.490

To ensure readability, figure 4 shows overnight stays in Croatian cities and Italian provinces but Rimini.

Figure 4

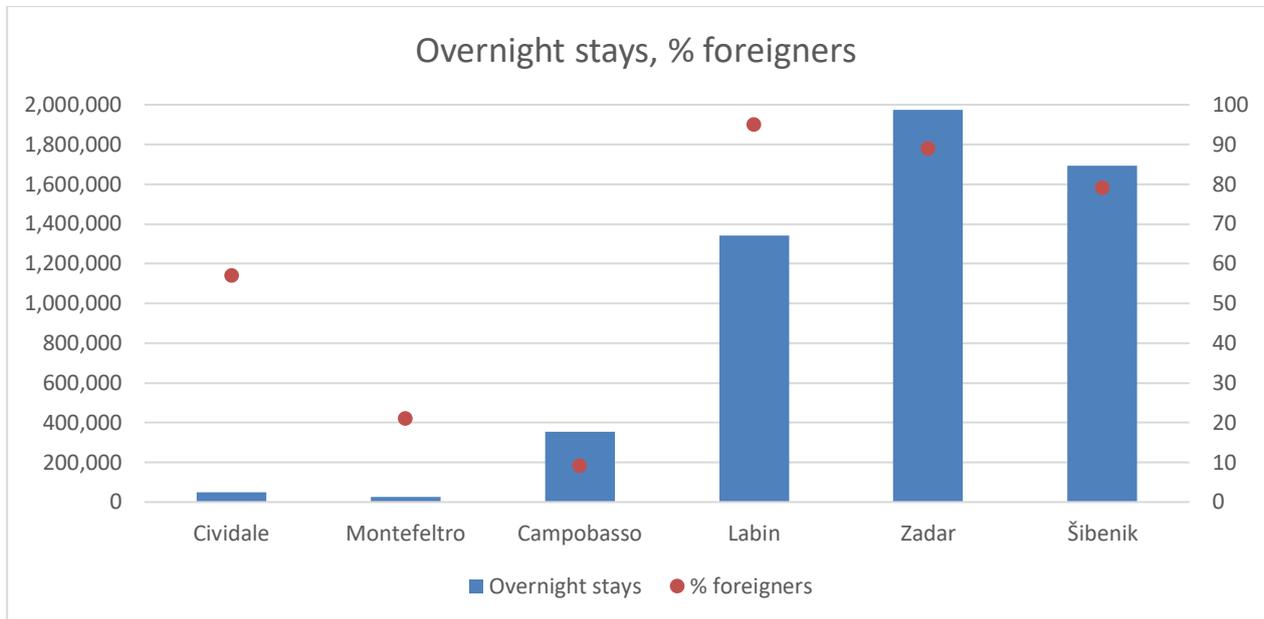


Using province level data provides important information and in a sense a reversed view on the capability of the Italian partner areas but Campobasso. Thanks the tourist flows of Rimini and Pesaro-Urbino, Udine and Gorizia, the towns of Montefeltro and Cividale stand within the top two catchment areas among the six partners. Regional data from Friuli-Venezia Giulia show a total of nine million overnight stays in 2012, a contribution of 10% to regional product and about 35.000 people working in the hospitality sector. The tourist offer is wide and spreads between seaside tourism, mountain tourism and city excursions. The largest regional recipients of tourists is the province of Udine with more than half of total regional arrivals and overnights stays and the most important sea resort is Lignano Sabbiadoro.

The province of Pesaro-Urbino had a good performance in the last ten years with less variability with respect to Udine and Gorizia. Urbino is the chief city of Regione Marche and in 1998 the city centre has been inscribed in the Unesco World Heritage List. A common evidence of the Italian provinces which instead does not show in Croatia is the decline faced by tourist flows soon after the global economic crisis in the years 2011-2015. As of 2016-2017 however, all provinces but Gorizia catch up with pre-crisis levels.

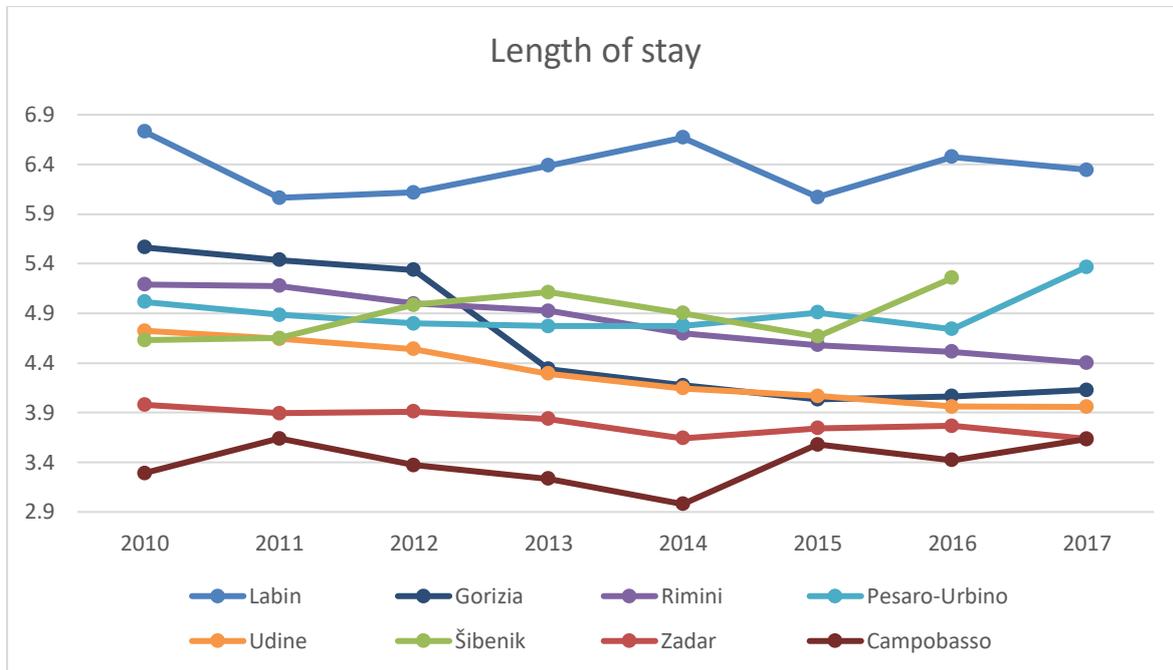
Croatian and Italian partner areas also differ in the share of foreign tourists. The left axis of figure 5 measures total overnight stays while the right axis displays the percentage of foreigners. The gap between Italian and Croatian destinations is impressive. In all Croatian destinations more than 80% of overnight stays are foreigners, with Labin at 96% of international tourists, while in Italy only Cividale and the province of Udine reach 50%. One fourth of overnight stays in the towns of Montefeltro and in the province of Rimini are foreigners, while the share in Campobasso is only 10%.

Figure 5



The gaps in the average length of stay are less marked than differences by nationality and not homogeneous across time or areas as shown in figure 6. The partner area with the longest stay is Labin where the average length of stay is today 6 days after ten years of variations in both directions. Zadar and Šibenik experienced less variability and tourists stay on average 3.5 days in Zadar and 5 in Šibenik. In Italy, Campobasso confirms its struggles in the tourism sector although the length of stay is slightly increasing in the last three years. Gorizia and Udine are today at the same level of 4 days after a sharp decline in the province of Gorizia. The average stay decreased by one day in the province of Rimini in the last ten years and is now at 4.5 days, while Pesaro-Urbino reached 5.5 days in the last couple of years after ten years of stability around 5 days.

Figure 6

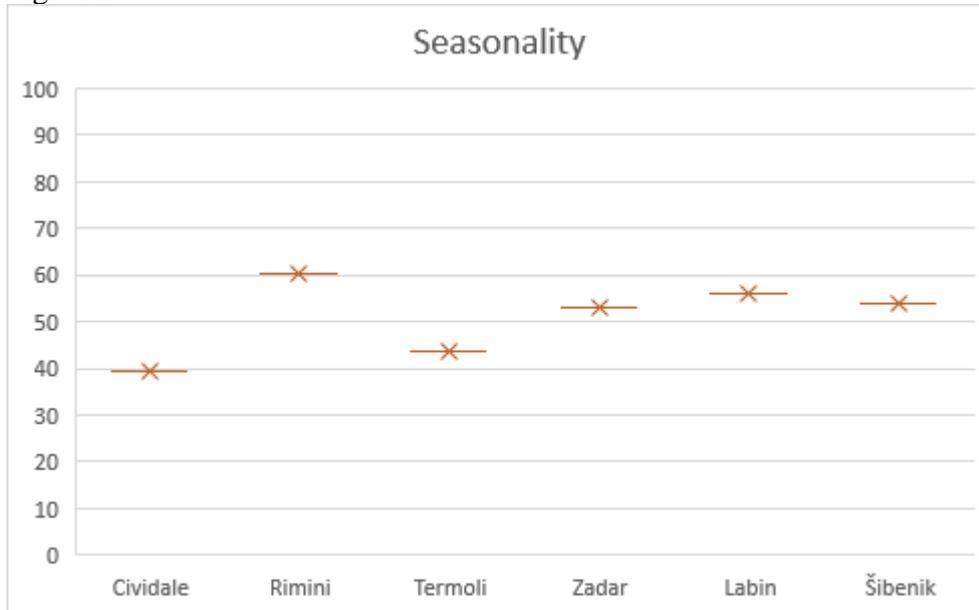


Data for the Italian towns highlight the status of proximity destinations of Cividale, Urbania and Montecopiolo as all locations display an average length of stay which is about half with respect to the reference province.

	2010	2011	2012	2013	2014	2015	2016	2017
Cividale	3,03	2,9	2,9	2,8	2,6	2,6	2,4	2,4
Montefeltro			3	2,9	2,9	2,9	2,7	3,2

The degree of seasonality is high in all destinations as all partner areas host the majority of tourists in the summer months with peaks in August. Figure 7 plots the share of yearly arrivals hosted in the months of June, July, and August in Cividale, Termoli and the province of Rimini for Italy; Zadar, Labin, and Šibenik for Croatia. Rimini is the tourism destination with the highest degree of seasonality as 60% of its arrivals and overnight stays are accounted for in June, July, and August. Cities in Croatia stand between 50 and 60 percent. Cividale and Termoli, which is the beach tourism destination nearby Campobasso, host between 40 and 45 percent of arrivals and overnight stays in the summer months.

Figure 7



Several conclusions can be drawn from the evidence on the trends of tourism flows. The starting point is the different type of tourism destinations in Croatian and Italian partner areas where only the Croatian partner areas identify as mass tourism destinations. First, the comparison between overnight stays in the six locations gives a picture where the Italian areas have significantly lower visits and shorter stays with respect to Labin, Zadar, and Šibenik. *A broader view on the nearby tourism destinations reverses the trend for Cividale and Montefeltro thanks to the volume in the provinces of Rimini, Pesaro-Urbino and Udine. Tourism and cultural policies should be designed to fully exploit this potential into two highlighting both the distinctive attractions of the inland areas and their proximity and accessibility to the main destination.* Second, international tourists in Croatia account for more than 80% of total overnight stays. The share in Labin is slightly less than the total. This evidence points to the strength of the Croatian marketing and branding strategies in international markets while also decreasing the risks associated to a national or international economic downturn; on the other hand, a vast majority of foreign tourists concentrated in the summer months does not facilitate the mitigation of seasonality which all locations hope to achieve. Finally, the high degree of seasonality is high in both countries as all locations but Termoli and Cividale – which is a growing cultural tourism destination – host more than half of total tourist flows in the months of June, July, and August.

4. Cultural attractions and tourism in the partner areas

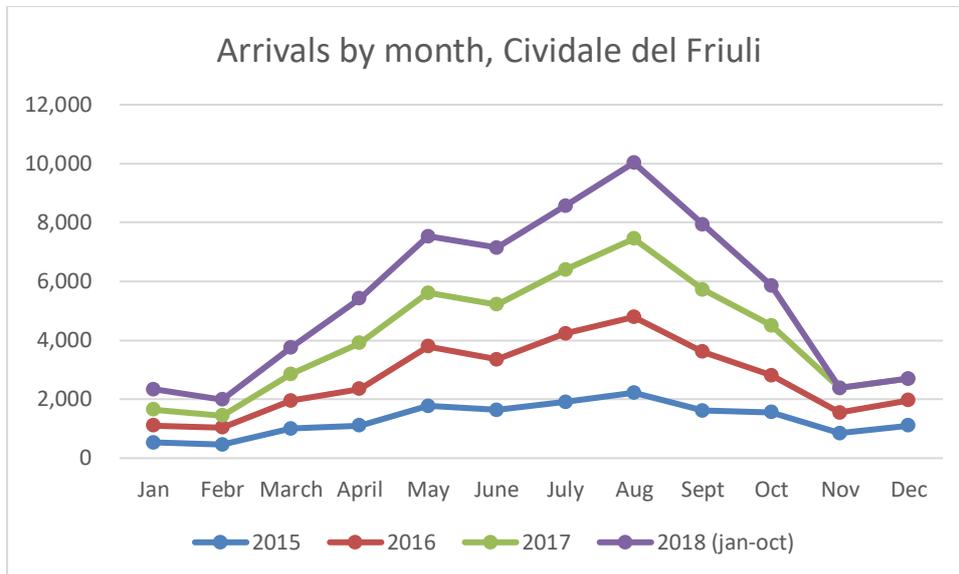
Integrating tourism and culture stands at the core of the Recolor project and the adoption of a clear legal, planning and management framework is an essential tool to design concrete actions. Building upon the comparative analysis of tourism trends, this paragraph provides further information on the accessibility and tourist offer of each city and illustrates their cultural attractions. The analysis of the available legislation and local plans should be read in view of the identification of the strategies and actions adopted in each city to promote cultural tourism and to integrate tourism and the local cultural sector. Each paragraph ends with a list of the available documentation on tourism and culture received from the partners.

4.1 Italian partner areas

4.1.1 Cividale del Friuli

Cividale del Friuli is situated in the North-East of Italy within the Region Friuli-Venezia Giulia. In 2017 the resident population was 11.157. Cividale is a one hour's drive journey from the renowned sea resorts Lignano Sabbiadoro and Grado and half an hour's train journey from Udine. The city has three hotels and about 50 complementary tourism facilities in town and surrounding areas offering almost 800 bed places. In 2017, the ratio between arrivals and resident population was 1.5. Arrivals by month for the last four years in figure 8 show an increase in the overall number of arrivals from about 16.000 in 2015 to 17.300 in 2017. The data also show a mild increase in seasonality from 47% in 2015 to 51% of total arrivals between June and September in 2017.

Figure 8



Albeit not a traditional tourism destination, in the last ten years the city made important investments in cultural tourism. Since 2011, seven groups of historical buildings dating back to the settlement of the Longobards in Italy are inscribed as Unesco World Heritage Site “Longobards in Italy: Places of Power (568-774 A.D.)”. The monuments in Cividale include the area of the Gastaldaga with the small Longobard Temple annexed to the Monastery of Santa Maria in Valle, and the Episcopal Complex which includes the basilica, the Baptistery of St. John, and the remains of the Patriarch’s Palace hosted in the Nation Archaeological Museum. Other cultural attraction are the Celtic Hypogeum, in the underground of the city centre, and the Square of Paolo Diacono. These attractions are preserved by the Ministry of Cultural Heritage.

The most famous cultural attraction is the Longobard Temple which in 2018 set the record at 50.081 visits which occurred mostly in April (7.000 visits), May, and August. The National Archaeological Museum, which raised 42.000 euros in 2017, had 26.000 visitors in 2016 and almost 34.000 in 2017. An integrated city ticket valid for 72 hours gives access to the Monastery of Santa Maria in Valle, the annexed Longobard Temple, the National Archaeological Museums, and the Cathedral with the Christian Museum and the Treasure of the Cathedral. In addition, the regional tourist card FVGcard allows entrance to museums and churches in Cividale.

The existing body of legislation and policies at the regional and local level is extensive in Friuli-Venezia Giulia and Cividale. As stated in the Regional Tourism Plan and the Strategic Regional Plan, the Region must move towards typologies of tourism capable of providing added value to the territory and ensuring economic, environmental, cultural and social sustainability for the future. It is necessary to intervene in different areas, using specific strategies. The challenge faced by Friuli-Venezia Giulia is the transition from a model of tourism destination (Grado and Lignano Sabbiadoro are clear examples of a standard offer of seaside tourism) to an experiential model. The STP eventually acknowledges that the high degree of loyalty of the three regional strategic markets (Italy, Austria, Germany), albeit a powerful signal of tourists' satisfaction, also turned into a weak point for tourism development because it has given limited incentives to invest in marketing activities towards new segments or markets in the past.

Culture and art cities are set as a priority in the regional development strategy and four strategic assets should drive tourism development in Friuli Venezia Giulia:

- geopolitical location. The region is a consolidated trade node in Northern Italy. Regional tourism policies should take advantage of the strategic location of Friuli Venezia Giulia to increase connections and offers to Northern and Eastern Europe;
- cultural richness. Thanks to its cultural heritage and multiple identities, the region - and in particular Cividale - have a high potential to attract tourists off-season;
- synergic and transversal management. The regional tourist appeal is made up of numerous destinations, which operate independently, with limited dialogue between complementary sectors;
- cooperation between actors

The region can be divided into five thematic areas: the coastline, cities, mountains, central Friuli, and food and wine. The territorial area of cities and cultural tourism is mainly represented by Trieste. The region also has an important offer of small cities with a high cultural potential, such as Cividale, which however had limited visibility so far.

The tourism policies to be implemented move along two main axes: destination management and destination marketing. One of the weaknesses of the Friuli-Venezia Giulia Region – and indeed Italy as a whole - is the limited cooperation between

stakeholders operating in different sectors, e.g. tourism and culture. The policies which must be adopted should point to the creation of business networks, more services to the tourism operators, and higher support to public and private operators for European funds applications and management.

Destination marketing should move towards online marketing and a rationalization of the system of local Info Points to have all-year services for tourists in cultural destinations. Cividale is a good example of the application of this policy at the local level with its City Info Point opened all-year and the availability of guided tours, brochures and online information.

Legislation and other ad hoc policies for the archaeological buffer zone of the Unesco site are illustrated in the Unesco Management Plan, and the Regional Landscape Plan includes ad hoc sections and annexed material for the preservation of landscape of the Unesco Heritage site. The novel role of Cividale as a strategic core for tourism development is raised also in the Strategic Plan for Local Tourism Development of Gal Torre Natisone, the mountain area located between Cividale and Slovenia, as Cividale has been the leading city of the Territorial Unit of Natisone since 2014.

Most importantly, like the STP, the Plan of Torre Natisone raises a critical issue which is the need for a high degree of collaboration and the establishment of networks between stakeholders in the tourism sector and in the cultural sector (both public and private actors such as museums' managers, cultural associations, associations of local artisans, etc.) to define long-term development strategies.

Available documentation on culture and tourism

- Regional Tourism Plan, Regional Landscape Plan, Strategic Regional Plan
- Regional Law (RL) on the Valorization of the Historical-Cultural Heritage of the First World War
- RL on the Establishment of the Regional Authority for Cultural Heritage ERPAC
- RLs on Cultural Activities, on Cultural Heritage, Policies for the Tourism Sector and Regional Attractiveness, and on the Institution of Eco-museums
- Unesco Management Plan: in 2011, Cividale del Friuli has been inscribed in the Unesco World Heritage List together with other Italian cities as "Italia Langobardorum – Places of Power and Worship (568-774 a. D.)"
- Strategic Plan for Local Tourism Development of Gal Torre Natisone, the mountain area located between Cividale and Slovenia

4.1.2. Montefeltro

The area of Montefeltro is not limited to one city but instead includes several locations where the famous “Renaissance Sights” have been established. The towns are Petrella Guidi and San Leo within the region Emilia-Romagna, Villagrande di Montecopiolo and Urbania with its neighborhood of Pieve del Colle within the region Marche.

Petrella Guidi and San Leo are small towns within the province of Rimini. Petrella Guidi stands within the municipality of Sant’Agata Feltria. The municipality has 3.000 residents and Petrella Guidi counts about 20 persons. The population of San Leo is about 3.000 residents as Sant’Agata Feltria. Both towns have a rich offer of nearby hotels and farm-stays thanks to their proximity to Rimini. Rimini is a renowned destination for coastal and maritime tourism and all towns highly benefit from their near proximity to the Riviera Romagnola. The province of Rimini has more than 2.200 hotels and 1.700 complementary facilities offering 175.000 bed places.

Urbania and Montecopiolo are situated in the Regione Marche, within the province of Pesaro-Urbino, and belong to the Local Action Group GAL Montefeltro, the stakeholder partner of Recolor. The distance between the two towns is 37 kilometres. The province of Urbino provides almost 48.000 bed places distributed into 1.200 hotels and complementary facilities. The number of hotels has been decreasing since 2010 opposite to complementary facilities which now hosts 60% of total bed places.

Montecopiolo is a small town with 1.100 residents situated in the hills, 900 metres above the sea level. The distance from both Urbino and Rimini is 45 kilometres. The town has 4 hotels and 37 complementary facilities offering almost 300 bed places. In March 2019, the Chamber of Deputies of the Italian Parliament approved a law to annex Montecopiolo to Emilia Romagna following a local referendum in 2007.

Urbania has 7.000 residents. The distance from Urbino is 24 kilometres while Rimini is 85 kilometres to the north-east. The town has two hotels, 37 complementary facilities, and offers more than 1.800 bed places.

The main attractions for cultural tourism in the area of Urbania and Montecopiolo are the historic city centre of Urbino, inscribed in the Unesco World Heritage List in 1998, and the Renaissance Sights which inspired the creation of the Recolor project. The Regional Tourism Plan of Regione Marche set “Culture – The Genius of Marche” as one of the pillars of the regional tourism strategy. The promotional targets in Urbino includes the involvement of citizens, local stakeholders and entrepreneurs in the fields of tourism and culture to define a long-term marketing strategy and a calendar of events for the 500th anniversaries of Leonardo’s death in 2019 and Raffaello’s death in 2020. The National Gallery of Regione Marche and Palazzo Ducale had almost 170.000 visitors in 2017 and 562.000 euros revenues, but as visitors decreased by 14% between 2016 and 2017, defining a new promotion strategy is now a vital issue. The city had a tourist card which has been dismissed and applies a tourist tax which made 182.000 euros revenues in 2018.

The Renaissance Sights of Montefeltro define the core of the Recolor project. The promotional activities target the landscapes which inspired some of the most renowned and famous paintings by Piero della Francesca, Raffaello, and Leonardo for the Mona Lisa. Both towns could benefit much from their proximity to Urbino and the Recolor route of Montefeltro which travels through Montecopiolo and Urbina on its hour's drive south from San Leo (Rimini) to Pieve del Colle. Defining a promotion strategy and integrating culture and tourism imperative in light of the negative trends in arrivals and overnight stays in both towns in figures 9 and 10. The ratio between arrivals and resident population was 1 in 2017.

Figure 9

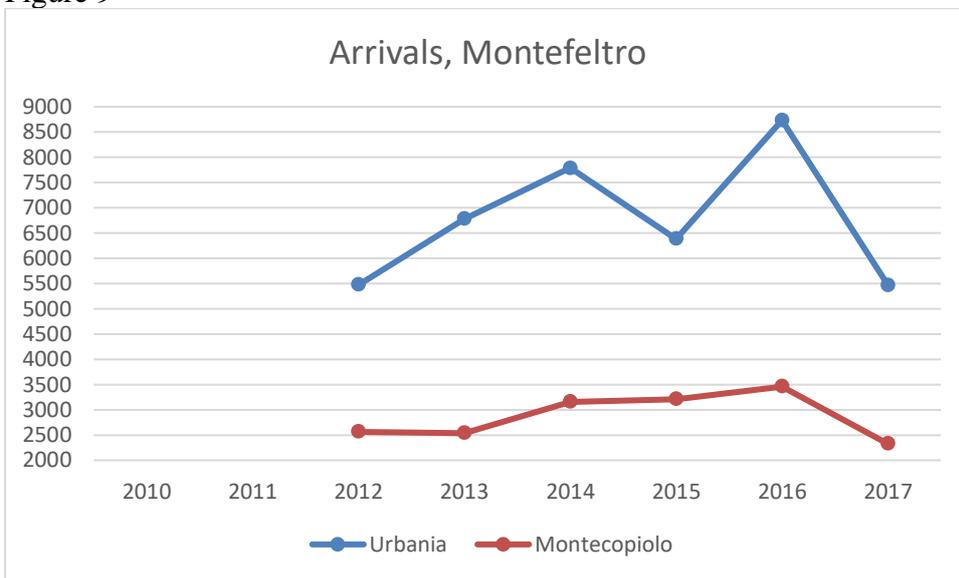
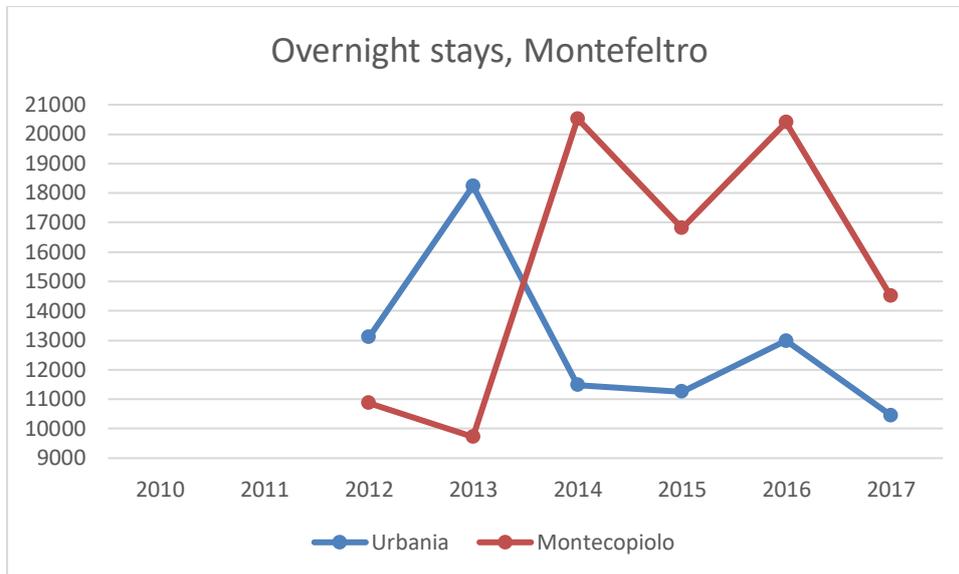


Figure 10



Montefeltro is located within the regions Emilia Romagna and Marche and each region adopts and enforces its own policies and legislation. The traditional tourism products in the Regional Tourism Plan for Emilia-Romagna are the Apennines and natural parks, baths and wellness, and art cities. The Plan aims to consolidate the positive results of the recent years, to achieve a higher internationalization of the tourist flows and to offer new products and experiences such as bike routes, cultural visits and the new project of the Renaissance Sights with the neighbourhood Regione Marche.

The Regional Tourism Plan of Regione Marche (RTP) identifies six main tourism clusters: sea, mountains and small towns, culture, parks and nature, local craftsmanship, spiritual and religious tourism. The marketing strategies adopted by Regione Marche for tourism promotion in the national and international markets gave positive results for coastal and mountain tourism, but still only 3% of visits are motivated by cultural tourism.

The RTP identifies strength and weakness of the regional tourism sector:

- the richness of its cultural offer; the positive opinions of tourists on transports, traffic, availability of tourist information; parks and natural areas;
- on the other hand, the region has low visibility in foreign markets with respect to other Italian regions, a high dependency from national tourist flows, and

tourists' scores on welcoming services, quality and costs are lower than the national average.

The RTP also identifies policies for tourism promotion and to integrate culture and tourism:

- creation of clusters and product networks;
- digital marketing and promotion of the brand “Destinazione Marche” on the radio, television and newspapers;
- implementation of the regional card Marche Tourism Multicard;
- spending review on local and European funds (e.g. ERDF, EARFD) to promote cultural tourism products such as local fairs and renovations of cultural heritage

In addition, GAL Montefeltro publishes its own Local Development Plan (LDP). Cultural and landscape tourism are two pillars of the local development strategy to attract new segments and markets. The area suffers from a sparse visibility online and in international markets, a high degree of seasonality due to the status of proximity destination, and the limited accessibility of inland locations for tourists traveling with public transports. The LDP identifies three priority assets which have been defined through participatory processes with local communities and stakeholders:

- valorisation of the territory of the GAL in its environmental, cultural, landscape and manufacturing components
- sustainable tourism
- improvements in the standards of living of the local population

The territory of GAL Montefeltro has implemented numerous successful policies which encompass all three assets such as the inter-gal project “Brand Marche”, the Urbino and Montefeltro cultural district, the pilot project "Lower Pesarese Apennines - Ancona" for the internal areas of the Marche Region, and the area project "Navigare Appennino".

The geographical dispersion of the GAL towns calls for a local bottom-up branding strategy to promote the areas of GAL Montefeltro through funding opportunities for cultural start-ups, digitalization, and valorisation of the uniqueness of the local Renaissance heritage and landscape.

The LDP also highlights two critical policies which go beyond the definition of strategies or action and refer to the local social capital: the need for a cooperative attitude between stakeholders in the tourism and cultural sectors, and the importance of community participation in the definition of plans. The experience of the *Barco – Officina Creativa* represents a successful practice to realize these policies. Barco – Officina Creativa is a creative hub realized within the premises of the Barco Ducale to encourage collaboration,

sharing of ideas and entrepreneurial activities, partnerships and synergies between professionals in the fields of creativity and innovation with the private and public stakeholders of the local cultural heritage.

Available documentation on culture and tourism

- Plan of the Agency for Tourism Promotion of Regione Emilia Romagna (Piano Apt Servizi)
- Programme for the Regional System of Protected Areas and Sites “Siti Natura”, Regione Emilia Romagna
- Management and Valorization Plan of the Inter-regional Park of Sasso Simone and Simoncello, Provinces of Pesaro-Urbino and Rimini
- Regional Laws on Libraries, Archives, Museums and Cultural Heritage, for the Institution of the Authority for Cultural and Natural Heritage, for Management and Planning of Tourism, Regione Emilia Romagna
- Guidelines for the Fruition of Cultural and Natural Heritage by Persons with Special Needs, Regione Emilia Romagna
- Yearly Tourism Planning for the Provinces of Ferrara, Forlì-Cesena, Ravenna and Rimini, Regione Emilia Romagna
- Regional Strategic Plan for Tourism, Regione Marche
- Rural Development Plan, Regione Marche
- Law on “Siti Natura” for Montefeltro, Regione Marche
- Law on Preservation of Cultural Heritage, Regione Marche
- Local Development Plan, GAL Montefeltro

4.1.3. Campobasso

The city of Campobasso is the regional chief town of the region Molise, in Southern Italy. It is situated near the Apennines at 700 metres above the sea level and its population in 2018 was about 50.000 residents. The distance from Termoli to Campobasso is 60 kilometres, a two hour’s bus journey delivered by the national railways service Trenitalia. The main attractions of Campobasso are the Castello Monforte, built in the XV century, and several churches such as Santa Maria Maggiore, the Church of St. George, the Cathedral Church of the Holy Trinity and the Church of San Bartolomeo. After 40 years of researches and studies, the Archaeology Superintendence and archaeologists from the

University of Molise discovered the remains of a Samnite city (IV-III century B.C.) in the nearby area of Monte Vairano. The city hosts also the Samnite Museum with permanent expositions of archaeological finds and research findings on the origins of the area. The Museum had 2.960 visitors in 2012 and reached 8.020 visitors in 2015. The archaeological heritage is preserved and promoted within the policies and legislation of the national archaeological authorities; at the local level, its promotion is included among the objectives of the Strategic Plan of the Urban Area of Campobasso. To promote its immaterial cultural heritage, the city organizes a yearly fair on the day of the Catholic celebrations for Corpus Domini called “Sagra dei Misteri” with a procession of machinery built in the XVIII century which parades through the city.

Campobasso is not a renowned tourist destination and Molise was the Italian region with the lowest tourist flows in the national statistics for 2013. Tourist flows are limited and most arrivals are for business reasons. The city has six hotels and 604 bed places.

The city of Termoli, along the Adriatic coast, is the reference area for Campobasso. Tourists are mostly nationals with a high degree of seasonality in the summer months. In the last ten years the composition of hospitality facilities shifted from traditional hotels - the number decreased from 22 to 19 - to complementary facilities which almost doubled from 27 to 46.

Data in table 1 reveal a critical trend in arrivals and overnight stays for the province of Campobasso and the region as a whole. Both indicators are decreasing in their domestic and international component and the ratio of arrivals to resident population in the province is currently 0.44.

Table 1

	2008		2015		2017	
	Arrivals	Ovn. stays	Arrivals	Ovn. stays	Arrivals	Ovn. stays
Domestic	134.798	498.752	106.463	372.620	88.344	318.038
International	10.615	38.214	10.400	39.520	8.715	30.502
Total	145.413	536.966	116.863	412.140	97.059	348.540

Campobasso does not have a city tourism plan and Regione Molise has commissioned the drafting of a Regional Tourism Plan to the agency Invitalia. A report published by the

Centre for Tourism Studies of the University of Molise in 2006 already acknowledged the struggles of the regional tourism sector and talked about “inventing tourism” in Molise. The report lists two main sets of initiatives and actions to be implemented: first, destination management actions to help the development of territorial infrastructures; second, actions on the supply side to improve the quality perceived by tourists. The peculiarity of Molise in the national tourism scene and the high degree of competitiveness with the other Italian regions make the creation of a strong territorial brand a priority. A fundamental prerequisite for a systemic approach is the identification of geographical districts with homogeneous characteristics - such as maritime tourism along the coast and archaeological tourism in inland areas - and products’ clubs to promote within each district. A complementary step should be the creation of structures which must in charge of tourism development, marketing, and management and the regional and local levels in the identified tourist districts.

Tourism policies had a great impulse in 2017 with the adoption of the Strategic Tourism Plan for Eastern Molise and the Strategic Plan of the Urban Area of Campobasso. Both plans recognize the contribution that tourism could give to the struggling regional economy. Molise has a good cultural tourism potential thanks to its Samnite archaeological heritage offering 50 sites, museums, natural landscape and local fairs. The objectives of the district point to development and strengthening of local attractors, improvements in the quality of products and services, promotion of the territory and its products with planned interventions. Most of the policies designed at the regional level involves infrastructures: the realization of the regional tourism web portal and an app, the realization of virtual tours, GIS and paper maps, interventions to improve the accessibility of the region through public transports (Molise has no airport and many places can be reached only with private car). Tourism policies for branding and promotion will involve the participation to national fairs such as BIT in Milan, TTG in Rimini, and other international fairs in Europe, Russia and Japan.

The Strategic Plan of the Urban Area of Campobasso sets four pillars for the development of the city: innovation and smart city, culture and tourism, environment and urban planning, and welfare and education. Within these four pillars, several tourism policies have been defined and some of them already implemented:

- regeneration of public urban areas and structures to stimulate the creation of places for culture, creativity and innovation;
- requalification of the existing historical-cultural heritage and promotion of the intangible city heritage;
- definition and implementation of a destination marketing project;

- promotion of traditional fairs and identification of new tourist routes, e.g. linked to the Samnite culture and Monte Vairano;
- promotion of the traditional sheep tracks and the spring ritual of *transumanza*, the traditional herding of sheep and cows to the mountains pastures. In 2018, Molise, Greece and Austria applied to inscribe the *transumanza* into the Unesco Immaterial World Heritage List. The decision is expected in late 2019;
- creation of a tourist Info Point in the city center;
- actions aimed at promoting a sustainable mobility system through the creation of cycling routes to rationalize traffic

The success of all these policies will pass through the implementation of operational activities in ICT, infrastructures, and even social capital: data collection, integration between the different types of tourist offer, data digitalization, training of qualified figures for the organization and promotion of events, cooperation between stakeholders, associations, private and public institution working in culture and in tourism.

Available documentation on culture and tourism

- Strategic Plan of the Urban Area of Campobasso 2014-2020
- Regional Strategic Development Plan for Eastern Molise
- Report on the Current Issues for Tourism Development, realized by the University of Molise and Regione Molise in 2006
- Drafting of a Regional Strategic Plan for Tourism is in progress

4.2 Croatian partner areas

4.2.1 Labin

The area of Labin and Rabac is situated in the eastern part of the Istrian peninsula. Rabac is one of the most famous Croatian sea resorts and the old Medieval town of Labin stands just above the nearby hill at 3 kilometres from the sea. The town can be reached by car from Trieste on an hour's journey or by plane via airports in North-East Italy, Slovenia and Croatia. Labin has a population of 11.700 residents, 13.000 including Rabac, and in 2018 the ratio between arrivals and resident population was almost 21, an impressive value

compared to the Italian partner areas and immediate evidence on the status of Labin in the national tourism scene. The town applies a tourist tax which collected almost 610.000 euros in 2018. Labin has almost 1.650 facilities, both hotels and complementary facilities, offering 15.000 bed places.

The Sculpture Park Dubrova, the Old Town, Podlabin with the mining complex Pijacal and the mining underground areas form a unique example of historical and cultural heritage which gives great opportunities to positioning the town as a cultural tourism destination. The Sculpture Park Dubrova is a symbol of Labin and one of the most significant examples of monument park sculptures in Croatia. In 45 years, the park has collected 94 sculptures of famous Croatian and foreign artists such as Raul Goldoni, Dušan Džamonja, Marija Ujević and Jooste Barbiers. The Management Plan of the Park underlines the current status of the park as a undervalued tourist resource which could gain recognition through creative activities. The management authorities do not collect statistics on daily visits and due to limited marketing and signals, most visitors are locals and students. The park is occasionally used for public events but the municipality still does not valorized it properly as a cultural asset.

The Old Town with monuments, churches and palaces is protected in accordance with the National Law on Protection and Conservation of the Cultural Heritage and the policies of the Protected Cultural Heritage of the Town of Labin. The Old Town also hosts the Labin City Museum. The museum is located in a baroque palace with a mining tunnel and the reproduction of a coal mine to remind visitors of the industry which has been the main economic activity of the area in Labin for decades. The museum had 22.000 visits in 2018. The Strategic Development Plan and the Strategic Plan for Sustainable Tourism Development (SPSTD) set several priorities to promote tourism development in Labin according to economic, ecological and socio-cultural criteria:

- Limiting the negative impact of the mining industry on the environment;
- Improvement in transports and connectivity of the town;
- Conservation of natural and cultural resources;
- Reduction of seasonality - especially in the case of private accommodations which reach full capacity in the summer season

Two priorities pose particular challenges. The first one is the valorisation of the mining industry as social heritage and cultural resource, the second one are the efforts to reduce seasonality in the summer months. Labin hosts several cultural associations which organize events in collaboration with public institutions to increase arrivals through the whole year although the fragmentation of the cultural offer does not ease the process.

Mining and other heavy industries are the economic drivers of the area, but spreading the role of the mining industry as an economic driver and social cohesion factor for the town in the last century is hindered along the way by the damages that heavy industries cause to the natural environment and landscape. According to the Tourism Development Strategy of the Republic of Croatia and local policies, the implementation of green technologies is the key policy to integrate environmental sustainability and tourism development.

Interestingly, the SPSTD includes also the minimization of the negative impacts of tourism activities on the environment as a general principle to be followed when designing an action plan thus pointing to the detrimental effect that all human activities put on the fragile coastal and maritime environment.

Istria is defined as “the region of culture” in the County Strategic Cultural Plan (CSCP) thanks to its diverse expressions in architecture, language, and landscape. The actors of the cultural sector are generally small associations or art organizations. For Istria to be a functional region of culture it is necessary to develop networks that will include contemporary cultural production, cultural heritage, cultural industries, tourism, and the educational sector.

The Plan relies upon three strategies:

- networking
 - e.g. replicating the successful networking of Istrian museums and libraries in the organization of exhibitions
- diversification of funds
 - as national budgets for culture shrink due to financial crisis or reductions in private investments, it is necessary to develop high-quality projects that have the opportunity to receive EU funds
- positioning of culture in the public sector
 - the problem is twofold: first, the space of culture and science is generally very reduced in public media; second, the focus is mainly on culture in Zagreb thus few resources make to it other cities

Labin has successfully achieved both networking and diversification of funds so far through the valorisation of its historical heritage: the City of Labin is a partner of the European Project “Atrium - Architecture of the Totalitarian Regimes of the XX Century in Urban Management”, the European Cultural Route which drives citizens and tourists through the traumatic historical events of the XX century and its architecture.

The CSCP defines several policies and two of them underline the relevant role of Labin in the Croatian cultural sector:

- building a new cultural infrastructure for artistic production, education, presentation and preservation of materials, e.g. the realization of the House of Traditional Trades in Labin;
- efficiently manage cultural infrastructure, institutions, services and projects. The City of Labin will be involved by the Istrian County in the organization and management of the Mediterranean Cultural Symposium

The City of Labin adopts its own Strategic Cultural Plan with vision and policies to motivate citizens and tourists to actively participate in the city's cultural life, to create networks between actors of different sectors, and to create better conditions for art productions. The City is committed to investments in cultural infrastructure, in particular to promote its mining tradition and the interaction between the industrial past and contemporary art sector. This vision will allow to mitigate the seasonality of tourist flows through a continuous offer of exhibitions and events in local museums, to increase the participation of residents in the life of the city, and to invest in the renewal of public spaces. To label Labin as a mining centre, the Plan highlights the necessity to rearrange public spaces in several areas of the city such as Podlabin and the Rudar monument in the city centre. In particular the project "Underground City", which has received EU and national funding, aims to protect the coal mine areas in Labin and Raša and their industrial and architectural heritage, part of which has already been recognized as national cultural monument. The creation of an underground city could become a leading tourist attraction for Labin and also attract artists and ideas for the whole region.

Available documentation on culture and tourism

- Tourism policies: Strategic Development Plan, Strategic Plan for Sustainable Tourism Development, Landscape Background Plan of the Southern Coast, Local Development Strategy, Study of Absorption Capacities; Master Plan of Tourism Development in Istria
- Cultural policies: Istrian Cultural Strategy; Cultural Strategic Plan of the City of Labin, Management Plan of Sculpture Park Dubrova

4.2.2 Zadar

The city of Zadar is situated in Northern Dalmatia, on the Adriatic Sea. It is the chief city of the homonym county and the fifth largest city in Croatia with 75.200 residents in 2018. The city's airport is well connected with Croatian and European cities especially in the summer months. Zadar can be reached also by bus, or ferry from Italian ports. The total number of accommodation facilities, both hotels and complementary facilities, is 5.201 offering more than 35.000 bed places. The ratio of arrivals to resident population was 7 in 2017. The municipality of Zadar applies a tourist tax of 1.30 euro/day and has a tourist card called Zadar Card (daily, three-day card, weekly or annual) which offers discounts in restaurants, shop, museums and excursions.

Zadar is a famous sea tourism destination and the Croatian partner area of the Recolor project with the highest value of overnight stays in the last ten years. The city reached two million overnight stays in 2018 with an average length of 3.5 days. As half of arrivals are accounted for in the months of June, July, and August, the aim of the local tourism policies is to decrease seasonality and the crowding effects which are typical of the summer months by offering cultural attractions to tourists through the whole year.

The city has a rich architectural and cultural heritage. The historic centre with its churches and palaces is protected under the Register of Cultural Goods of the Republic of Croatia while the Defensive system of Zadar is inscribed since 2017 in the Unesco World Heritage List as “Venetian Works of Defence between the 16th and 17th Centuries: *Stato da Terra* – Western *Stato da Mar*” with other locations in Croatia (the Fort of St. Nikola in Šibenik), Italy and Montenegro. The city hosts a variety of museums such as the Gallery of Fine Arts, the National Museum of Zadar with an ethnographic department, the Museum of Ancient Glass and the Archaeological Museum.

A unique attraction of Zadar is its Dalmatic Sphinx, which is a short boat ride from Zadar's Old Town. The area is rich of mansions built up in the Belle Epoque period and the Sphinx stands in front of one of them. Built in 1901 by local artist Giovanni Smirich, the concrete sculpture is inscribed in the Register of Cultural Goods of the Republic of Croatia. It is now the target of promotional activities aiming at reducing seasonality, e.g. the implementation of a project involving the University of Zadar as a tour guide. Two architectural installation have recently become great attractions for tourists in Zadar as cited by the Strategic Plan for Tourism Development: the Sea Organ and Greeting to the Sun. The sea organ, in the city harbor, create sounds when touched by water waves. Along the Sea Organ, at the very top of the Zadar peninsula, tourists find also the Greeting to the

Sun, a spatial installation that projects lights game through the solar-powered energy absorbed during daytime.

In 2019 the city has financed cultural projects such as films, audio-visual activities, scientific research, publication of cultural books, programs to preserve and restore monuments; applicants can be independent artists, art organizations, associations, institutions performing cultural activities. Thanks to the reconstruction performed with European funds in 2014-2016, the Rector's Palace is now a fully equipped cultural centre with a museum space, concert hall, a video gallery which hosts exhibitions and workshops throughout the year.

The city of Zadar is implementing several major and capital EU projects directly related to culture and tourism. An example is Zadar Baštini which can be translated as "From Zadar to its Heritage", co-financed by the European Regional Development Fund. The main goal of the project is to create a new integrated cultural and tourism product of the city of Zadar through the reconstruction and tourist valorisation of immovable cultural assets, as well as improving the system for managing and promoting the tourist destination.

The city of Zadar is currently also working on creating a Strategic Plan for Cultural Development to reunite under the same roof the policies which are now scattered across several plans. The City Strategic Plan and the Strategic Plan for Tourism Development acknowledge the vital role of tourism for the socio-economic development of Zadar thanks to its long tradition of tourism destination, its wide accessibility and infrastructures, and its favourable location with well-preserved beaches and landscape. The Strategic Plan for Development of the City of Zadar (SPD) proposes a set of goals, priorities and measures to be achieved by 2020, which have the ultimate goal to increase the quality of life of citizens, to improve the economic environment and to increase the efficiency of the city management. The development strategy is made up of several development goals and strategic goals. Two are especially relevant for tourism:

- increasing economic competitiveness;
- sustainable development of the rural area and islands

Development of Zadar's tourism in Zadar is one of the priorities of the first goal. The main problem of tourism in Zadar and other mass tourism destinations is the seasonal character of tourist flows and the perceived homogeneity among destinations. Further development of tourism in the city should be directed towards the development of a tourist identity, better management of the existing tourist offer, and development of tourist infrastructure. Tourism policies should be directed to

- a more efficient use of existing urban resources such as city markets, beaches, parks, concert halls, architectural cultural heritage;

- creating a visual identity and implementing a communication strategy;
- construction of new public tourist infrastructures such as tourist info centres; beaches, promenades, thematic trails, bathing resorts, congress halls, hotels.

Tourism policies could also support rural areas through a diversification of the local economic activities e.g. creating thematic routes and promoting activities related to creative tourism such as carpentry workshops, workshops for the construction and repair of small boats.

Despite its extensive architectural heritage, a survey recently conducted in Zadar shows that only 4% of tourists had cultural reasons as the primary motive for visiting. The Strategic Plan for Tourism Development elaborates on the aforementioned strategies and goals introducing several policies to position Zadar as a cultural tourism destination. Zadar enjoys also a vibrant independent cultural scene which however lacks visibility due to its fragmentation and limited institutional support and financial resources. Interestingly, despite its non-institutionalized nature, the Strategic Plan for Development of the Independent Cultural Sector vastly shares weaknesses, objectives and policies with the institutional plan.

The city should design a marketing strategy capable to highlight culture as a primary reason to visit, not necessarily associated to beach tourism. The implementation of modern technologies and information in English in all museum is a necessity as the vast majority of tourists in Zadar is international.

Other ongoing or starting policies – the time span of the Plan is 2016-2026 – can be summarized into three main groups:

- creation of networks: design of a marketing action plan for destination management and an information-communication system for networking destinations; development and implementation of measures to attract investors in tourism and creation of a quality network of entrepreneurs in tourism;
- infrastructures: renovation of hotels and private houses for business purposes; international connection to European capital cities by air and railway transports all-year long, improvements in the city mobility system with bike and pedestrian roads;
- extension of the tourism offer through the organization of cultural and sports events from September to May

Available documentation on culture and tourism

- County of Zadar: Tourism Development Plan, Cultural and Historical Heritage Plan
- City of Zadar: Strategic Plan for Development, Strategic Plan for Tourism Development; Strategic Plan for Development of Independent Cultural Sector

4.2.3 Šibenik

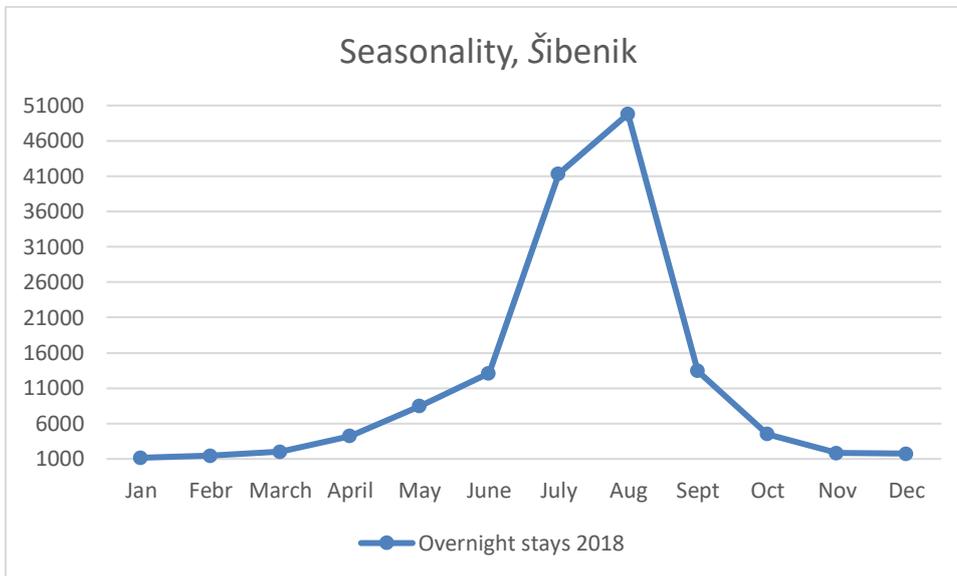
Šibenik is situated in Dalmatia, within the county of Šibenik-Knin, on the Adriatic Sea. The city has a population of 47.000 residents and had more than 1.3 million overnight stays in 2017. The ratio between arrivals and resident population is 5.5. The number of accommodation facilities in 2018 was 2647 offering 14.000 bed places. The city applies a tourist tax of about one euro per day which raised more than 600.000 euros in 2018. A city card called Šibenik Card which costs about 21 euros provides free admission to museums, other tourist attractions, discounts in the National Park Krka, boat tours, bike rentals and other services for four days.

The city of Šibenik has been very effective in branding its own tourist resources over the last few years and through the organization of numerous gastronomic, cultural, sports and other events has created a very recognizable brand based on the medieval city center. Two of the most important examples of architectural heritage are St. Michael's Fortress and the Renaissance Church of St. John. Used for 600 years for military purposes, the Fortress was badly damaged. Renovations started in 2012 with European and local funds and the Fortress was reopened in 2014 as a cultural centre. Today the building hosts a theatre with 1.077 seats, concerts and other events and has more than 120.000 visitors per year.

The Church of St. John is located in John Paul II's Square. The stairs on the southern side of the church are decorated with a bass-relief by the local architect Ivan Pribislavić while Renaissance master Nikola Firentinac constructed the balustrade. The rationale for the support to the promotion of the Church of St. John dates back to the Statute of Šibenik, which stated that the ships found in the port on St. John's day were obliged to give a sail to create a shade in the whole square. It also hosted a weekly fair which however was suspended in the XVIII century.

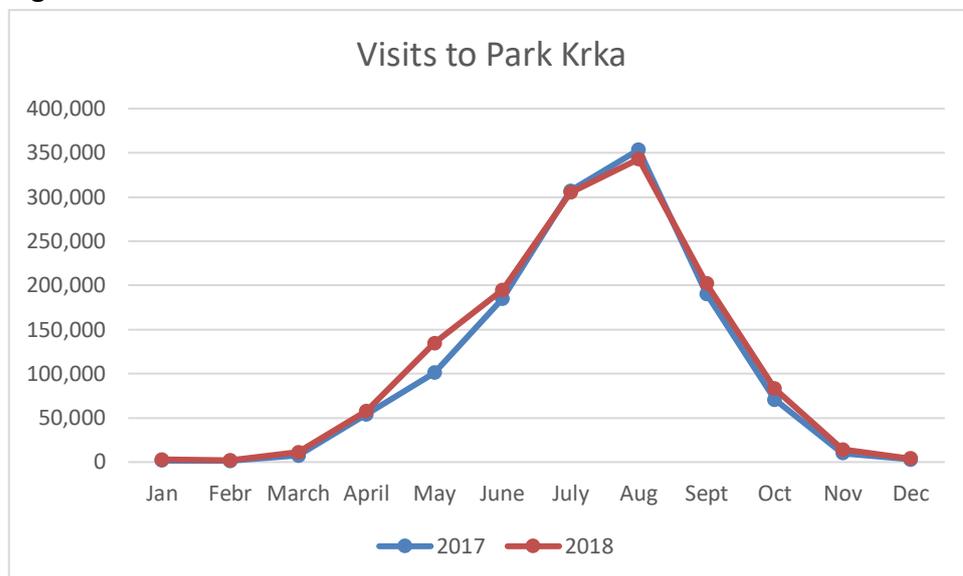
Šibenik is now recognized as a cultural tourism center in Croatia and engages in international projects and networks. In 2017, the Fort of St. Nikola was inscribed in the Unesco World Heritage List as “Venetian Works of Defence between the 16th and 17th Centuries: *Stato da Terra – Western Stato da Mar*” with other locations in Croatia (the Defensive System in Zadar), Italy and Montenegro. The City of Šibenik is also partner in the Interreg Europe project SHARE “Sustainable Approach to Cultural Heritage for the Requalification of Urban Areas in Europe” which started in 2017 and will last for three years. A survey realized for SHARE among tourists in August-September 2017 in the city centres and the fortresses shows that the main motive to visit Šibenik was the history of the town for 25% of tourists while 15% visited for cultural reasons. In addition, the project of branding family accommodations has created the prerequisites for strengthening and extending the tourist season. However, tourism flows in Šibenik still face the trends of seasonality which are typical of summer tourism destinations. The distribution of monthly arrivals in figure 11 shows a peak in July and August with 63% of total arrivals throughout the year 2018 concentrated in those two months.

Figure 11



The city also has natural attractions such as the National Park Krka. In 2019 the Park Authority commissioned a research to identify the socio-demographic profile of the Park’s visitors and ask about ideas and recommendations for improving the park's services as well as criticisms of the existing park's tourist offer. The visitors generally expressed positive views on the park itself highlighting the beauty of it and the relaxing experience of enjoying an excursion. On the other hand, critics mostly related to the crowd, the need for upgrades in infrastructure, and the high price of tickets. The park indeed had more than one million visitors in the last two years and visits, shown in figure 12 below, have the same seasonal trend as overnight stays in figure 11 with a peak in the summer months.

Figure 12



Reducing seasonality emerges as a compelling issue to tackle to upgrade the position of Šibenik in the national and international markets as a cultural tourism destination. The Regional Master Plan for Tourism of the Šibenik-Knin County introduces branding and promotion as the primary activities to carry out to achieve higher tourist flows, an increase of the quality of tourism products, and an extension of tourist season through development of selective forms of tourism and the introduction of new products. Administrative marketing through local tourism boards, promotion of destination through physical infrastructure design, maintenance of events and development of local tourist products, an increase in online marketing and participation in international fairs will strengthen the role

of the county as a coastal and cultural destination. The promotion is largely based on the rich natural and cultural heritage as the main tourist resources of the county.

The City Strategic Plan for Development of Innovative Tourism recognizes the challenges faced by policy makers in the valorisation of cultural heritage in destinations where coastal tourism is the primary attraction. There are a number of cultural attractions in the area of Šibenik which could significantly improve their relevance with specific policies. The agency in charge of tourism promotion is the Tourist Board which performs a series of activities such as marketing, design and communication of events, distribution and sales. Marketing materials include printed brochures, internet advertising and presentation of tourism attractions, sales of souvenirs and information to tourists. The Board participates to national and international fairs in cooperation with other local and regional boards. The city has recently established a Society for the Preservation of Šibenik heritage based on a model successfully applied in Dubrovnik to manage its fortifications. Participation is voluntarily and earned money is reinvested in the preservation of architectural heritage.

The Strategic Plan identifies four broad visions to position Šibenik as an example of smart, sustainable city and a year-round destination with rich natural landscapes and cultural heritage. The first vision involves the interpretation of the rich historical heritage in new ways e.g. through projects of expanded reality and new thematic events. The second vision sees the city as a way to enjoy the Mediterranean lifestyle. The third vision sees Šibenik and its hinterland as an inspiration for environmentally sustainable development with natural areas such as the National Park Krka and the Sokolarski Raptor Centre. The last vision adopts a broader view where Šibenik is the starting point for trips in the surrounding areas.

The Strategic Plan also defines and elaborates the tourist policies that need to be implemented in the upcoming 5 or 6 years in order to achieve the desired goals and vision. The city plan encompasses projects that have already begun in the city concerning tourism development. These are policies that resulted from workshops and through research conducted among the main stakeholders in town. Croatia joined the European Union in 2013 and has access to a variety of funding opportunity for tourism from the

European Social Fund, the European Agriculture and Rural Development Fund, Life+, Horizon 2020 and COSME.

The tourism policies currently in place are grouped into four areas with a summary of the projects designed for their implementation.

- **Managing Tourism Development**
 - Education in Tourism, to organize specialized educational programs for tourist operators;
 - technical assistance to enterprises and investors; development and monitoring of competitiveness and quality indicators; mobilization of creative potential, which refers to the offer of various content that allows visitors to interact through various workshops. Šibenik recorded an increase in activities in the field of creative industries and innovative, contemporary events
- **Tourist Infrastructure**
 - Several projects aim to address the issue of traffic and public transport in Šibenik. In particular UrbEco, launched in 2015, will establish intermodal bus and boat public transport that will be based on innovative and ecological solutions; a second project involves the development of pedestrian and bicycle stations and routes; management plans to increase the accessibility of beaches; realization of a museum of sponges: the tradition of sponge shop on the island of Krapanj is 300 years old and is one of the most important elements intangible heritage of Šibenik
- **Tourist Entrepreneurship**
 - House of the Mediterranean, to create a multifunctional center to host exhibitions, workshops, lectures through the year; reconstruction and revitalization of the Fortress of St. Ivan as a center for the education of children and young people; programs to investigate the innovative enterprise projects in tourism to develop criteria for the evaluation of entrepreneurial projects and create an independent project evaluation body; programs to design an organic annual agenda for cultural events and a marketing plan to increase attractiveness of forms of creative expressions currently undervalued such as the local organs school or to increase availability of events such as the medieval festival

- Promotion and Sales
 - Destination management policies to offer unique themed packages for tourists staying in Šibenik and the region; a program designed to make the city more recognizable in international markets through promotional materials and activities.

Available documentation on culture and tourism

- Regional Master Plan for Tourism; Strategic Plan for Development of Innovative Tourism in Šibenik
- Unesco Heritage Site Management Plan for “Venetian Works of Defence between 16th and 17th Centuries: *Stato da Terra - Western Stato da Mar*”.

5. SWOT matrices

This paragraph stands as the first step toward the construction of the SWOT matrices for the Recolor project.

5.1 Cividale del Friuli

SWOT 1, published in the Regional Tourism Plan of Friuli-Venezia Giulia

Strengths	The increasing trend in arrivals, stable average stay for the cultural product, high foreign components in tourist flows, competitive prices, richness and variety of food and wine, the unique and distinctive (albeit little valued) cultural resources, geographical location (albeit currently representing a weakness), discrete territorial accessibility from abroad, presence of a large number of financing lines.
Weaknesses	Unstable overnight stays, polarization of flows on Udine, declining average length of stay (seaside), strong and short-timed seasonality (bathing), lack of winter seasonality (little developed winter mountain product), excessive and worrying dependence on mono-market (Austro-German), presence of numerous markets with reduced profitability, concentration of beds and facilities in the province of Udine and the reduced offer on the other provinces, incidence of rented accommodation, scarce valorization of holiday cottages and B&Bs , dependence on single-product (bathing), non-themed and low-level hotel offer, scarce exploitation of cultural and sporting products (despite their potential), a territorial accessibility

	that is not optimal for Italians, limited training, extremely low accessibility of product clubs, lack of public-private collaboration, adoption of different tourist strategies by the various bodies and subjects operating in the territory in an uncoordinated manner, the short-term vision adopted by the governance in marketing strategies and the reduced attention to ROI, reduced average dynamism and professionalism of regional entrepreneurship.
Opportunities	The opportunities for the Region derive from the wealth of resources and services. The Region has its "core" elements but must structure them adequately. The exploitation of European funds represents an opportunity for the Region, if used strategically and with a long-term vision. The opening towards different markets with greater quotas is a further positive challenge to be faced, together with a greater offer theme, also receptive, easily structured and potentially highly profitable.
Threats	The main threats to the development of the competitiveness of tourism in Friuli Venezia Giulia are represented by the endogenous vision, not very dynamic and flexible of the regional tourism system, from the reluctance to collaborate and from a deep-rooted individualistic culture. A further threat is represented by territorial accessibility, if governance will not have the capacity to intervene. The reduction of public funds for the sector can threaten regional competitiveness when private individuals will not be able to intervene independently or contribute to marketing activities at the regional level.

SWOT 2, published in Landscape Regional Plan of Friuli-Venezia Giulia, annexed section for the Unesco Site of Cividale del Friuli

Strengths	<p>Naturalistic values</p> <ul style="list-style-type: none"> - Presence of the Natisone River which creates a very suggestive landscape, with a strong visual impact suggested by the northernmost of the two gorges of the river (banks of the River protected under the DM 01/07/1955) (Geosite FVG) - Permanence of a green area in the
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	<p>Convitto Nazionale Paolo Diacono (area of the convent of Santa Chiara) inserted in an area subject to landscape restrictions</p> <ul style="list-style-type: none"> - SIC IT 3320025 Magredi di Firmano (southern peripheral area) <p>Historical-cultural anthropic values</p> <ul style="list-style-type: none"> - Great testimonial value of the complexes included in the perimeter of the core areas of the UNESCO site, which represent a center of great historical and artistic value in the Italian and European Early Middle Ages and are strong points of identity for the community of Cividale, as well as tourist attractions - The historic center, still clearly legible from the original layout and substantially preserved compositional elements, represents a unique historical, architectural and cultural heritage - The medieval layout is clearly legible in its substantially preserved compositional elements and preserves important pieces of the building circuit and residential architecture (e.g. Borgo Brossana) - High permanence of buried archaeological remains, referable to the structure of the Roman city and its suburb and to the successive stratifications, of which the most connoting is represented by the permanence of the Longobard age - Presence of important museum sites such as the National Archaeological Museum and the Museo Cristiano del Duomo located within prestigious architectural structures - Territorial strips with a predominantly rural matrix (e.g. Via Castello) remain in the peri-urban zone
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	<ul style="list-style-type: none"> - In the programming of the landscape there are still forms and signs derived from the territorial organization of the Roman age (e.g. road axes). <p>Panoramic and perceptive values</p> <ul style="list-style-type: none"> - High is the perceptive value of the monuments included in the core areas of the UNESCO site - Cividale qualifies as a privileged area of perception of the urban and architectural layout of a historic center - The existing visual quality points along the Devil's Bridge and from the Belvedere show their strategic importance for the enjoyment of the panorama towards the historic center, in this sector characterized by the core areas of the UNESCO site, as well as offering the key to understanding the choice ancient settlement - High perceptive value of Borgo Brossana (medieval residential architecture, defensive circuit, religious buildings) - Presence of other panoramic points along the course of the Natisone (e.g. Borgo Brossana)
Weaknesses	<p>Natural criticalities</p> <ul style="list-style-type: none"> - Obvious signs of degradation of the Emilian stream <p>Anthropic problems</p> <ul style="list-style-type: none"> - Widespread urbanization in the peri-urban area that compromises the unity of landscape reading with the historic center - Progressive densification of modern residential areas in the peri-urban area, also with complexes of strong visual clutter - Presence of a business center and a commercial area in the northern peri-urban

	<p>area, which represent elements of strong intrusion</p> <ul style="list-style-type: none"> - Need to organically define a global project to enhance the historic center - Need to consistently apply a formal uniformity for existing illustrative apparatuses intended for the use of monuments <p>Perceptive criticisms</p> <ul style="list-style-type: none"> - The viability of the main road, even if regulated, compromises the enjoyment of the historic center and its historical-architectural value - The existing valuation criteria do not make the perception and the enjoyment of the complex events that characterize the historic center intended as founding elements of the diachronic path of the city - the total lack of tools addressed to the knowledge of the features of the paleo-landscape in the peri-urban area undermines the recovery of the identity of the places
<p>Opportunities</p>	<p>Attraction elements</p> <ul style="list-style-type: none"> - Recognition of the universal value that makes the place unique or of exceptional world value "The Longobards in Italy. The places of power (568-774 AD) (IT 1318) - The monuments and the archaeological area of the Patriarchal Palace under the National Archaeological Museum testify to the dynamics of anthropic occupation in the early Middle Ages: the spaces of the center of Lombard power can be visited and used - High interpenetration of the historical and cultural values of the historic center with the natural and environmental values

	<p>offered by the Natisone River</p> <ul style="list-style-type: none"> - Possibility of tourist enjoyment of the history of the development of the city and its territory, including the Lombard necropolis, thanks to the presence of the recently renovated National Archaeological Museum - Possibility of tourist use of the Cathedral of Santa Maria Assunta thanks to the Christian Museum and treasure of the Cathedral, which houses monuments of international fame (eg altar of Ratchis, Callisto baptistery) - Arrangement and development in progress of the Monastery of Santa Maria in Valle, including the Lombard Temple
Threats	<p>Elements of risk</p> <ul style="list-style-type: none"> - Interventions in the subsoil in the historic center and in the peri-urban area can cause damage to and / or cancellation of buried archaeological remains - Further alteration of historical building systems under the pressure of peri-urban construction

5.2 Montefeltro

SWOT 1, published in the Regional Plan for Tourism Promotion, Marche Region – SWOT for tourist demand

Strengths	<p>Good percentage of foreigners using the bicycle once at the destination; High percentage of tourists who play sports; good percentage for shopping activities, excursions and visits to castles / holy places; High percentage of tourists who buy food and wine products and clothing, a decent level of purchase of theater shows and concerts</p>
Weaknesses	<p>Strong dependence on the national market</p>

	(83%, Italy 68% average); Low impact of cultural resources on the tourist's choice of vacation destination; Low percentage of tourists visiting museums, exhibitions and archaeological sites; Low percentage of tourists who buy handicrafts and services related to spa treatments
Opportunities	Coordination activities in the field of live entertainment and strategic use of cinema); Opportunity of the power of word of mouth on the tourist's choice of vacation destination; Opportunity for the development of the web channel aimed at booking, especially by foreigners; Strategic use of social media (Marche Social media team); Good percentage of foreigners traveling by camper van: opportunity to visit the entire region in tour mode; Presence of a potential "desire of Marche" from the USA that has not yet translated into corresponding tourist flows (proven by access to the website)
Threats	Negative trend of the tourism market related to the average stay, not only because of the economic crisis, but because of behavior of purchase of tourists more oriented to the "short break"; Presence of competitors such as Spain, Croatia, Turkey

SWOT 2, published in the Regional Plan for Tourism Promotion, Marche Region – SWOT for tourist offer

Strengths	Evaluation, by tourists, above the national average with respect to cleaning of places, environment, traffic, tourist information, catering costs; Wide and uniform distribution throughout the region of basic cultural resources (museums / permanent
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	<p>exhibitions / events); Wide range of sports activities in the parks / nature reserves (mountain and non-mountain areas), in the hills and on the coast; DOC and DOCG wine production spread in almost all the regional territory; Cultural offer, especially live show, high level; Presence of industrial districts as a vehicle of Marche manufacturing excellence; Presence of spas distributed over the regional territory and high quality of the relative hotel structures, in line with the characteristics of the relative target; Improvement of the international reputation of the Marche destination in the last three years; Good impact of natural resources on the tourist's choice of vacation destination; In the major non-coastal centers (30,000 inhabitants), good seasonal adjustment capacity for demand</p>
Weaknesses	<p>Evaluation by tourists, lower than the national average compared to courtesy and hospitality, quality of the restaurant, cost of accommodation; Low percentage of international tour operators selling the Marche product</p>
Opportunities	<p>Improvement of rail and motorway connections (3-lane motorway): in particular with regard to the Lombard market this can lead to a reduction in seasonality and an increase in short breaks from the richest area of the country; Possibility of orienting demand through agreements with low-cost flight companies for the activation of direct lines to medium-range target markets; Opportunity deriving from the growth of thermal tourism oriented not to care, but to wellness services; Use opportunities and</p>

	<p>enhancement of historical theaters as resources for congress tourism; Business tourism development opportunities aimed at business travelers (presence of a widespread business and entrepreneurial fabric); Opportunity to take advantage of the development of cycle tourism and trekking itineraries by groups of private subjects; Increased attention to quality by receptive and restorative operators thanks to quality certification processes; Opportunities for co-marketing actions with large companies of "Made in Marche"; Development opportunities in "rich and growing" markets (USA, Russia, China)</p>
Threats	<p>Competition from neighboring Italian regions, in particular with regard to products that in the Marche do not have particular factors of differentiation and competitiveness (Terme) or come to complete maturity (Sea); Risk of reduction in maintenance services, urban decor, public transport, cultural and sporting due to budget reductions by public bodies</p>

SWOT 3, published in the Local Development Plan of GAL Montelfeltro - SWOT for tourism

Strengths	<p>Presence of a rich environmental, historical and cultural heritage; Presence of quality craftsmanship; Richness of typical and traditional products; Trend in constant growth in the number and quality of accommodation facilities related to rural-slow tourism; Territory and landscape still intact in the marginal areas; High quality historical centers; Quality socio-economic context; Good average stay of tourists, especially foreigners</p>
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Weaknesses	<p>Reduced number of first-level resources able to attract flows independently; Seasonality of tourist flows; Difficult territorial accessibility; Strong seasonal concentration of local events; Reduced number of tourist services; Poor experience of the offer; Reduced level of offer thematization; Limited professionalization of sector operators; Limited international tourist quotas; Poor communication and promotion and not in line with the rural-slow product; Reduced promo-commercial value; Poor online presence</p>
Opportunities	<p>Availability of municipalities to collaborate; Administration availability to a shared strategic planning; Presence of rural villages undergoing restructuring; Connection between catering and local production; Ability to create positive externalities in other productive sectors; Development of innovative production sectors capable of spreading new businesses throughout the territory; Presence of a tourist consortium with more than 100 operators</p>
Threats	<p>Concentration of tourist flows on the most attractive destinations, such as Urbino; Standardization of the offer with few proposals; Possible emergence of duality between historical centers and hamlets in the location of infrastructures and services; Possible internal conflicts and difficulties in collaborating</p>

5.3 Campobasso

SWOT 1, published in the Strategic Tourism Plan for Eastern Molise

Strengths	Good quality of life; Good level of conservation of the material and immaterial cultural heritage and, more generally, of the villages; Social resilience; Food and wine excellence; Variety of the offer (sea, hill, rural villages); Slight increase in arrivals and overnight stays over the years
Weaknesses	Poorly developed accommodation system both in qualitative and quantitative terms; Inadequate tourist information and reception system; Poor organization of tourist signage; Difficult accessibility; Poor organization of the use of cultural and natural assets; Insufficient organization of public transport; High seasonality of tourism demand; Lack of a survey and analysis system for the hotel and non-hotel accommodation sector; Lack of a coordinated image of the destination; Scarce formal relationships with specific tourist markets as well as intermediation operators; Lack of effective governance; Insufficient presence on the Internet and on Social Media; Low level of private investments in the tourism sector and related sectors; Low vivacity in the creation of new tourism businesses; Limited presence of services related to leisure and tourism
Opportunities	Investment plan and consequent increase in the routes served at Pescara airport; Investment plan for the modernization of

	<p>the railway network (Adriatic high-speed road; Termoli-Campobasso ridge); National and regional broadband investment plan; National Law on Tourist Districts; Pact for Molise (an extensive investment program for employment relaunch and development that among other things has an important budget for tourism); Recognition of the Lower Molise as a non-complex crisis area; Wellness tourism (travel for wellness: wellness trips are not mere journeys, but true ecstatic / aesthetic experiences in search of new destinations where it is possible to regenerate the mind and body); Natural tourism (travel in a sustainable way: different forms including cycle-tourism, trekking, religious paths, etc.); Sports tourism (sporting initiatives and events); Returning tourism (Molise in the world who preserve or want to rediscover their origins); Food and wine tourism; "Molise does not exist" (from a negative element to a positive communication factor)</p>
Threats	<p>Increasing competition from new entrants destinations; Competitive strengthening of "direct competitors" destinations; Investments in non-renewable energies (drilling for fuel research) and renewables (e.g. uncontrolled proliferation of eolithic shovels; slowing of the Molise economy and industry crisis (e.g. possible closure of the Molise sugar factory); immigration and depopulation; building heritage in disuse, legislative confusion and consequent difficulties in territorial and tourist governance</p>

SWOT 2, published in the Strategic Plan of the Urban Area of Campobasso

Strengths	Increasing demographic trend; Presence of the University; Low school dropout rate; Low industrial environmental impact; Development margins for tourism, agriculture and crafts; Presence of tourist, environmental and cultural attractors; Presence of typical food and wine; Low evidence of crime and good social climate; Persistence of traditional values such as: solidarity, creativity and hospitality; Function of regional administrative center
Weaknesses	Poor entrepreneurial culture; Low corporate propensity for innovation, internationalization and joining into business networks; Low propensity of companies to invest in ICT and research; Poor infrastructural endowment; Poor capacity of public bodies to build network; Poor propensity of the PA to innovate; Limited offer and use of online public services; Insufficient connections; Presence of degraded areas and underused public facilities; Poor exploitation of cultural and environmental heritage; Inconsistent tourist flows; Subjected area and natural risks; Lack of innovative energy saving solutions and smart energy distribution networks; Lack of integrated transport services; Youth emigration, particularly of graduates; Growth of population groups at risk of poverty and social exclusion; Poor presence of social enterprises whose number does not guarantee the satisfaction of the needs of the territory; First signs of perception of urban insecurity.
Opportunities	European, national and regional incentives

	for the tourism, agriculture and innovation sectors; Incentives for the creation of business networks, innovation and entrepreneurship; Young ICT literate generations; Existence of measures aimed at protecting the environment and increasing awareness of the need to protect it.
Threats	Increased emigration of young people and qualified subjects; Continuation of the international economic crisis; Possible loss of status as regional capital.

5.4 Labin

From the Plan for Sustainable Tourism of the City of Labin

Strengths	Good geographic position (close to the emissive market and the Adriatic Sea); extraordinary wealth and specificity of natural, protected resources - exceptional resource potential; favorable climate conditions; indented coastline; proximity of variety of offers in other destinations in Istria; further possibility of tourism development - the unsaturation and presence of insufficiently valorized sites; tourism as a significant economic activity of the town of Labin; significant investments in town planning, high share of permanent beds in commercial types of accommodation (hotels) in the total number of beds in the destination (more than 36%); favorable structure of hotel capacity; safe destination.
Weaknesses	High share of capacity in non-commercial accommodation (households or private accommodation) out of the total number of beds in the destination - more than 47%; low capacity utilization in households; low

	<p>quality of accommodation services in households; inadequate education of service providers in households; spatial limitation of the supply development in households (e.g. the possibility of building a swimming pool or compartmental content due to the limited number of plots in Rabac); disparity in the occupancy rates of different types of accommodation capacities (households vs. hotels); inadequate preparation of commercial accommodation facilities for seasonal extensions outside the main summer months (a large number of hotels have no heating); receptive nature of existing tourist agencies; low integration of cultural heritage into tourism product; unexploited selective forms of tourism; food and beverage supply in the quality and value for money segment is below the standard of competition; lack of autochthonous offerings; low quality content offerings in the destination; static marketing system; obsolete website; insufficient investment in marketing destination activities; inadequate use of promotional mix; perception of less quality summer destination; lack of common spirit amongst local population; inadequate micro-infrastructure (parking areas); poor traffic signalling from main access hubs; insufficient potential for eco-tourism development in potentially challenging locations.</p>
<p>Opportunities</p>	<p>Eco-tourism/ cultural tourism/ active vacation/ health and wellness tourism; <i>eco-friendly</i> concept and <i>flagship</i> as the destination image bearer; development of new tourist products towards the target groups paying attention to the 6E concept in development of modern tourism (Entertainment, Excitement, Environment,</p>

	<p>Education, Exploration); exceptional possibility of extending the season; offer development driven by the development of the offer in the immediate vicinity (revitalization and awakening of the village near the town of Labin); revitalization of the old town core and market positioning of Labin; favourable projections of tourism growth in Croatia by 2020; new tourism demand trends - trips related to special interests and activities; meeting needs, expectations and habits of new tourists; the development of IT and its importance in tourism; the greater popularity of auto-destination and shorter trips; low-budget flights and better connections between Istria and the emissive countries; enrichment of catering offerings (quality restaurants), culinary and gastro-scene development; raising the quality of existing accommodation capacities (significant investments in improving hotel quality Maslinica and Valamar); encouraging ecological agriculture and organic family farms development; raise the level of environmental awareness (differentiation of the service providers in the category: sleep, eat, see&do); Action plan for energy sustainable development of Labin; waste management system; preparation of hotel facilities for cyclotourism; encouraging social entrepreneurship in tourism; development of destination management companies and destination management; deregulation of the legal and regulatory framework; increased interest in investment after joining the EU; potential for tourism development in the direction of sustainable development - encouragement of renewable energy sources and ecological principles of</p>
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	<p>destination management; investment in informing and educating people directly and indirectly employed in tourism; greater focus on e-marketing; possibility of using EU funds and other incentive programs; valorising cultural (tangible and intangible) heritage, especially mining traditions; partnerships (public-private, with close destinations and destinations having similar resource bases and cultural heritage); establishment of stronger control mechanisms over the architectural characteristics of future construction investments respecting the architectural principles of sustainable construction; exceptional economic effects and multiplier effects of tourism; outstanding support from local authorities in tourism destination development.</p>
<p>Threats</p>	<p>World's tourist market situation (and the recovery of our most important broadcasting markets); promotional campaigns of retention of guests in their countries of residence; increase of destination with specific offer (profiling tourist destinations according to interest groups); strong industry in the surroundings (can also be considered as a challenge for destination development), loss of Istrian identity; loss of cultural identity; Law on tourist and other construction land unvalued in the conversion and privatisation process; law on agricultural land; disregard of urban plans; new law on tourism services and the Law on Catering (under preparation); new Law on Tourism Communities (under preparation); "mass" approach in providing tourist services; price undercutting or overestimation; tax policy.</p>

5.5 Zadar

From the Strategic Plan for City Development

<p>Strengths</p>	<p>Zadar is a recognized tourist destination; the city has a long tourist tradition; there are already organized tourist capacities in the city (labour force and tourist infrastructure); good traffic connectivity and position; good air transport and the existence of low cost cargo lines; good climate, preserved beaches, natural and cultural heritage; geographical position (relative to national parks and distance from all other important attractions); Zadar archipelago is an outstanding tourist potential; offering top quality value added products, especially gastro-ecological and autochthonous products; rich and substantial tourist offer during the season.</p>
<p>Weaknesses</p>	<p>Insufficient quality (needed) staff in tourism; lack of quality (luxury) accommodation facilities; short tourist season; Zadar is recognized as exclusively summer (seasonal) destination; lack of quality content in pre-season and post-season; no adequate space for manifestations throughout whole year (for larger concerts, congresses); tourist activity in Zadar region is centralized mainly in Zadar; there is no a long-term tourist plan (vision) for the city centre – Peninsula; insufficient use of existing capacities due to poor coordination of tourist stakeholders, public and private tourist sector; poor association in creation of a tourist offer; poor use of existing local brands and attractions (e.g. maraschino, Greetings to the sun, etc. which are not sufficiently financially valued);</p>

	<p>inadequate structure of accommodation capacities (hotels, apartments...); there is no idea, strategy, concept for management of exceptional tourist resources and attractions; there is no marketing and strategy for manifestations (there numerous manifestations, in some areas too many, which are not harmonized and not targeted...); insufficiently developed excursion tourism (we offer mostly Kornati and Telašćica); insufficient - inadequately stimulated tourist agencies in forming tourist programs that would fit the targeted tourist policy of the city; green areas are not adequately (in tourist terms) adapted to offer.</p>
<p>Opportunities</p>	<p>Better connectivity of tourism with other sectors; good opportunities for extending the tourist season; specialization of school programs for tourism needs; specialization of tourism offer in the form of cultural tourism; City of Zadar UNESCO city; new school programs (chef, waiter and other staff in tourism); strengthening nautical tourism (activities for nautical tourism); organization and valorisation of the Zadar coast; development of marinas in the centre of the city (when ships are moved to Gaženica port); orientation towards young people as a target group that is relatively easy to attract.</p>
<p>Threats</p>	<p>Without better management there is a threat to become a city museum, “the city of stone”; the decline in tourist demand due to the economic situation or for some other reasons; global trends that lead to loss of identity of smaller cities.</p>

From the Strategic Plan for Tourism Development of the City of Zadar

<p>Strengths</p>	<p>Favourable geographical position; transit centre - good traffic connections (air and road); vicinity of national parks and parks of nature; pleasant climate; sea destination; a powerful product of sun and sea; Mediterranean style / spirit of living; rich gastronomic offer (Mediterranean diet); the culture and tradition of the city; rich cultural content; the richness of cultural and entertainment events in the season; new tourist attractions (Sea organ, Greetings to the Sun); legend of the beauty of the sunset; different age structures of tourists who consider the destination appealing; loyal guests; reasonable prices; quality educational opportunities for tourism staff; hospitality of the local population; good infrastructure (utilities, electricity, internet); Gaženica port; liberation of traffic in the city centre; cleanliness of the city; waste separation projects; safe destination.</p>
<p>Weaknesses</p>	<p>Lack of content in pre-season and post-season; unsatisfactory structure of accommodation capacity (in private accommodation), questionable criteria for categorization of objects; dumping prices due to too much bidding; poor infrastructure base (connection to sewerage, network, road network, traffic in idle, cycling paths, etc.); poor beach infrastructure, access roads and signalization; infrastructure unsuitable for people with special needs and disabilities; poor railroad connection; infrequent ferry lines with Italy; lack of communication between institutions; poor coordination of</p>

	<p>cultural programs and content (organization of several events on the same day, at the same time); bad guest information system; too static understanding of culture; insufficient use of new technologies; incomplete, heterogeneous and inadequate offer of contents; inadequate utilization of individual locations; transit destination (short stay of guests); seasonality; problems with finding quality staff; uneducated staff in private accommodation; poor knowledge of foreign languages in public services (police, public transport); lack of good marketing campaigns and city branding; lack of autochthonous content and indigenous cuisine; too many fast food restaurants; crowd; poor condition of the certain locations in Zadar (e.g. Puntamika-Borik); lack of entertainment activities; lack of parking space and lack of public garages; lack of service parking for boats; lack of parking spots for tourist buses; poor public transport organization; insufficient investment in environmental protection; lack of garbage disposal cans at certain locations in town; unresolved property and legal issues; loss of life in the old city centre (Peninsula); uncontrolled development; nonexistence of operational plan.</p>
<p>Opportunities</p>	<p>Development of Dalmatia or the whole of Croatia as one destination; extending the season by developing new content; improving the structure of accommodation capacities; changing the structure of private apartments in small family hotels; existence of regional and national tourism development strategy; better cooperation between the city of Zadar and the region in creating a unique product; improving the city's catering offer (especially</p>

	<p>on Peninsula); improving infrastructure support; improving the attraction base (views of existing and creation of new ones); development of indigenous products; establishing a coordination body; mutual networking of institutions and joint launch projects; development of tourist information system; focused production of cultural products intended for tourism; inclusion of Zadar saints and feasts in a tourist offer; giving added value to products through eco-certificates; launching the investment cycle - opening Zadar to investors; use of EU funds; involving the local population in tourism development; educating the local population; construction of public garages at the entrance to the city and transportation of guests to the city via electric trains; construction of bicycle trails and introduction of electric bicycles; improvement of quality and computerization of public transport; attracting new air carriers; using new technologies; branding the city as a destination of experience with the use of music; using "stories" for tourist purposes; expanding tourist markets; expansion of tourist offer of Zadar islands; various opportunities for improving the offer of cultural tourism - creating new cultural tourism products, in particular using new technologies; use of existing sacral heritage for the development of religious tourism; development of MICE tourism, especially congress tourism; sport tourism that includes preparation, tournaments, organization of events, etc.; improving supply and quality in nautical tourism; gastronomic tourism; designing and promoting offers for visitors arriving with cruise ships; improving the offer of excursions; manifestation tourism.</p>
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<p>Threats</p>	<p>New trends in tourism (shorter stay time - 3-5 days, no return to the destination); reducing tourism demand for the Mediterranean; seasonality; political turmoil at the state and local level; inadequate support of relevant institution for improvement tourism; uncoordinated legal regulations at the national level; lack of financial resources for investments; high taxes, sojourn taxes (tourist tax) and inconsistency in tax policy, unresolved question of authority, responsibility, finance, deadlines and measurement of tourism results and outcomes; lack of criteria for creating and supporting tourism offer; economic pressure on cultural institutions; underdeveloped railway traffic in the Republic of Croatia; high tolls on motorways; strong development of distant tourist markets; growth of other Mediterranean destinations; emigration of the population due to unemployment; insufficient encouragement in branding Croatia; weather dependent tourism; exposure to elemental disasters (rain, strong wind); devastating space for the needs of mass tourism; losing destination authenticity; increasing tourism related crime, especially use of drugs, alcohol and prostitution; the world economic crisis; natural disasters; possible war conflicts and political instability; refugee crisis; an outbreak of epidemics; ecological disasters.</p>
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5.6 Šibenik

Published in the Strategic Plan for Development of Innovative Tourism of the City of Šibenik

The SWOT analysis is divided into four areas: space and economy, tourist attractions, tourist superstructure and destination management

- Space and economy: assessment of the status of a destination that affects or is affected by the development of tourism
- Tourist attractions: an assessment of the status of existing tourism resources and attractions from the aspect of their "touristic destination"
- Tourism superstructure: a review of the tourist offer development
- Destination management: a rating of factors that determine the capability of managing a destination from the aspect of tourism development.

SWOT 1 – SPACE AND ECONOMY

Strengths	Traffic availability; natural environment (national parks); the archipelago; protected nature; islands and beaches; tourism is one of the key economic activities.
Weaknesses	Architectural devastation of particular areas; Insufficient linkage between tourism and other economic activities; poor traffic connections (islands, beaches, national parks); the island's low population density.
Opportunities	EU funds; employment; possibility of producing healthy food.
Threats	The continuation of the economic crisis; the absorption capacity of EU funds; investment policy; continued construction that does not follow architectural heritage.

SWOT 2 – TOURIST ATTRACTIONS

Strengths	Rich cultural heritage; familiarity with the cathedral; sacral heritage; the preserved core of the city; numerous established manifestations; picturesque landscape; traditional products.
Weaknesses	Low levels of “touristification”;

	dislocation of attractions.
Opportunities	Market segmentation / "niche" growth; linking attractions to innovative tourist products.
Threats	Availability of tourist fund; competition growth.

SWOT 3 – TOURISM SUPERSTRUCTURE

Strengths	Marines; Amadria Park hotels, D- Resort Šibenik, Hotel Bellevue, Heritage Life Palace hotel, King Krešimir Hotel - a diverse and rich accommodation offer.
Weaknesses	Lack of quality and diverse accommodation in the city; poor quality of catering facilities and nightlife; low capacity utilization; level of linkage in marketing; mid-management quality, seasonality.
Opportunities	Stronger connectivity / cooperation between hotel companies and destinations; market segmentation; construction of new quality accommodation facilities (investments); trends; EU funds.
Threats	Insufficient investment in the quality and variety of accommodation offers; destination product support.

SWOT 4 – DESTINATION MANAGEMENT

Strengths	The positive relationship of the city towards the development of tourism; organization of numerous manifestations; good educational structure.
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Weaknesses	Poor public transport quality; parking; poor stakeholder cooperation; insufficient positioning of the city; nonparticipation of the local community.
Opportunities	Professional management (destination management organization); strengthening promotional activities; creating a strong brand; stimulating the DMC's (destination management companies).
Threats	Poor coordination of stakeholders; lack of education.