Abruzzo, Italy 2019
George Washington University School of Business
in collaboration with
University of D’Annunzio
Agenda

- Introduction
  - About Us
  - Location Setting
- Methodology
- Project Vision
- Situational Analysis
- Product Development
- Marketing
- Governance
- Conclusion
- Acknowledgements
- Closing Remarks
About Us

• 14 GWU Graduate Students
• 3 Ud’A First and Second Level Degree Students
• Masters of Business and Tourism Administration - Sustainable Tourism Development
• Skills in finance, product development, marketing, business development, and more.
Abruzzo

- 3 National Parks
- 2 Towns
- 1 Protected Marine Park
Methodology

Areas of Focus
- Product Development
- Marketing
- Governance

Methods
- 24 Site Visits
- Desk Research
- 67 Interviews
- 7 Focus Groups
Abruzzo is the global standard for ecotourism and natural heritage by collaborating with stakeholders to integrate sustainable products and opportunities throughout the year.
Situational Analysis - PESTLE

**Political**
- Changes in tourism government structure in 2016
- Frequent strategic shifts

**Economic**
- Abruzzo growth rate - 1.6%, unemployment - 11.9%
- Small and medium enterprises dominate the landscape

**Social**
- Aging population in park villages
- Disconnect between stakeholders between public & private sector

**Technology**
- Innovative technology in tourism
- Developed tech sector

**Legal**
- 1991 - protected areas established by Law 394
- Regional Strategic Tourism Plan

**Environmental**
- Greenest region in Europe
- Threat of earthquakes, landslides and avalanches
Il turismo in Abruzzo

Fonte: Regione Abruzzo (2018)

Mercato nazionale: 86%
Mercato internazionale: 14%

Aprile, maggio, settembre e ottobre (mercato internazionale)
Agosto (mercato nazionale)

80% estate e 20% inverno e primavera

Escursionista da 1 giorno
Mezza età per i parchi
Gioventù per la spiaggia
Le opportunità

I turisti dagli Stati Uniti

fonte: ENIT, Regione Abruzzo e US National Travel and Trade Office

↑ 8%

crescita media dei visitatori americani (2016-2018)

$ 592 US$ vs. turisti tedeschi - 328 US$ (2017)

122.7 %

variazione di spesa del turista americano tra 2016 e il 2017

56%

dei turisti americani utilizza un'agenzia di viaggio
## Situational Analysis - SWOT

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Weaknesses</th>
</tr>
</thead>
<tbody>
<tr>
<td>● Diverse tourism products and extensive park facilities</td>
<td>● Ineffective communication and partnerships</td>
</tr>
<tr>
<td>● Leadership engaged and interested in park management</td>
<td>● Lack of long-term continuity and vision</td>
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<tr>
<td>● Geography/accessibility to other regions</td>
<td>● Seasonality</td>
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</table>

<table>
<thead>
<tr>
<th>Opportunities</th>
<th>Threats</th>
</tr>
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<tbody>
<tr>
<td>● Natural beauty with four true seasons</td>
<td>● Communication/language skills</td>
</tr>
<tr>
<td>● Unified strategic planning</td>
<td>● Population decline and generational gaps in villages within national parks</td>
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<tr>
<td>● Collaboration among all four parks</td>
<td>● Competition</td>
</tr>
<tr>
<td>● Sustainable tourism programs - IUCN’s DestiMED initiative &amp; European Charter for Sustainable Tourism certification</td>
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Product Development
Regione Abruzzo’s Department of Tourism

Outbound Operators (Bring tourists from outside to the region)

Destination Management Companies (Product Development)

Inbound Tour Operators (package and sell products)

Product Management Company (Marketing and Distribution - DMS)

Suppliers (run products - i.e. agritourism restaurant)

Park Management (Product Development)
Opportunities

Product Design

Challenge:
Disconnect between product and expectations of demand.

Opportunity:
Guidelines around strategic, sustainable product design in order to reach specific target markets
- Sustainability standards
- Quality assurance
- Scaleable
- Market Segment

Infrastructure

Challenge:
Limited mobility, transportation and interpretation (signage and language) for international tourists (EU Market)

Opportunity:
Develop infrastructure for international tourists - transportation, signage, and bilingual guides

Linkages

Challenge:
Limited connection between inbound and outbound operators (US Market)

Opportunity:
Create linkages between inbound and outbound operators to retain revenue in the park communities and increase international tourism
### Action Plan

#### Private Sector

1. Assess needs of specific target markets and cater product delivery to match
2. Prioritize sustainability criteria from the European Charter for Sustainable Tourism
3. Collaborate with other sustainable operators to connect with international markets

#### Park Management

1. Develop signage with Italian and English
2. Create incentives for multilingual language training for operators
3. Create mobility services and infrastructure to connect parks and existing drop points

#### Destination Management Company

1. Improve product delivery training
2. Develop product quality assurance systems
3. Assess readiness of suppliers to engage with new target markets
4. Determine sustainable outbound operators
5. Bring outbound operators to experience unique Abruzzo

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**Table:**

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<th>Private Sector</th>
<th>Park Management</th>
<th>Destination Management Company</th>
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<td>1.</td>
<td>Assess needs of specific target markets and cater product delivery to match</td>
<td>Develop signage with Italian and English</td>
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<td>2.</td>
<td>Prioritize sustainability criteria from the European Charter for Sustainable Tourism</td>
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<tr>
<td>3.</td>
<td>Collaborate with other sustainable operators to connect with international markets</td>
<td>Create mobility services and infrastructure to connect parks and existing drop points</td>
<td>Assess readiness of suppliers to engage with new target markets</td>
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<td></td>
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<td></td>
<td>Determine sustainable outbound operators</td>
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<td></td>
<td></td>
<td></td>
<td>Bring outbound operators to experience unique Abruzzo</td>
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</table>
Marketing
Marketing Environment

- Regione Abruzzo Department of Tourism (DMO)
- Product Management Company (Marketing and Distribution - DMS)
- Destination Management Companies (Product Development)
- Entrepreneurs
- Suppliers
- Parks
<table>
<thead>
<tr>
<th>Leadership</th>
<th>Seasonality</th>
<th>Online Presence</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Challenge:</strong> Perception of ineffective leadership</td>
<td><strong>Challenge:</strong> Ineffective strategic tourism plan that addresses seasonality</td>
<td><strong>Challenge:</strong> Lack of implemented destination management system</td>
</tr>
<tr>
<td><strong>Opportunity:</strong> Foster strategic leadership</td>
<td><strong>Opportunity:</strong> Implement a strategic plan to mitigate seasonality issues</td>
<td><strong>Opportunity:</strong> Implement a platform in conjunction with latest technologies</td>
</tr>
<tr>
<td><strong>Actions:</strong> Follow through on leadership commitments, maintain transparency about strategic plans</td>
<td><strong>Actions:</strong> Identify target markets and customize products</td>
<td><strong>Actions:</strong> Tailor to target markets, integrate with online platforms and optimize for mobile</td>
</tr>
<tr>
<td>Challenge: Collaboration of marketing efforts with independent suppliers while maintaining responsible tourism</td>
<td>Challenge: Limited marketing and offering of year-round products</td>
<td>Challenge: Limited sustainable message across online promotional channels to attract responsible tourist</td>
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</tr>
<tr>
<td>Opportunity: Increase revenue to independent sustainable suppliers</td>
<td>Opportunity: Manage products to reduce seasonality and foster economic sustainability</td>
<td>Opportunity: Execute green marketing campaigns</td>
</tr>
<tr>
<td>Actions: Require tourism suppliers to be working on CETS certification to work with the park</td>
<td>Actions: Market to target segments via various channels during non-peak times</td>
<td>Action: Implement social media tactics that start a “green” conversation</td>
</tr>
<tr>
<td>Collaboration</td>
<td>Seasonality</td>
<td>Online Presence</td>
</tr>
<tr>
<td>-------------------------------------</td>
<td>--------------------------------------</td>
<td>-------------------------------------------</td>
</tr>
<tr>
<td>Challenge: Lack of cooperation</td>
<td>Challenge: Lack of efforts to reduce</td>
<td>Challenge: Limited reach and messaging</td>
</tr>
<tr>
<td>between independent suppliers to</td>
<td>seasonality</td>
<td>due to size and resources</td>
</tr>
<tr>
<td>bring in the responsible tourists</td>
<td>Opportunity: Implement efforts to</td>
<td></td>
</tr>
<tr>
<td>Opportunity: Increase sustainable</td>
<td>reduce seasonality impacts</td>
<td></td>
</tr>
<tr>
<td>tourism benefiting community and</td>
<td>Action: Offer rebooking discount</td>
<td>Opportunity: Leverage resources and</td>
</tr>
<tr>
<td>suppliers</td>
<td>and others incentives during non-</td>
<td>partnerships</td>
</tr>
<tr>
<td>Actions: Form a cooperative,</td>
<td>peak times</td>
<td>Action: Create a website, develop a</td>
</tr>
<tr>
<td>collaborate on promotional efforts</td>
<td></td>
<td>strong social media presence, partner</td>
</tr>
<tr>
<td></td>
<td></td>
<td>with larger entities for sponsorships</td>
</tr>
</tbody>
</table>
Governance
Proposed Tourism Governance System

- Regione Abruzzo Department of Tourism (DMO)
- Product Management Company (Marketing and Distribution - DMS)
- Destination Management Companies (Product Development)
- Parks
- Municipalities
- Private DMCs
- Tourism Associations and Cooperatives (Private)
- Tourism Operators
- Tourism Suppliers
<table>
<thead>
<tr>
<th>Opportunity:</th>
<th>Challenge:</th>
<th>Challenge:</th>
<th>Challenge:</th>
</tr>
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<tbody>
<tr>
<td>Supporting the new regional destination management organization structure</td>
<td>Some governmental bodies lack long-term continuity for tourism plans and initiatives</td>
<td>Destination management companies are generally ineffective and disconnected from the tourism businesses</td>
<td>Incomplete certification by park management and tourism businesses</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Tourism businesses are eager to collaborate with each other with DMCs as their liaison</td>
<td>Complete all stages of the CETS certification to enhance collaboration</td>
</tr>
</tbody>
</table>
Action Plan

1. Parks to consider fully completing ecotourism certification stages
2. Engage park stakeholders to ensure inclusiveness in sustainable tourism initiatives
3. Create a grant program for small and medium enterprises’ sustainable initiatives utilizing national parks and EU funds

DMO Best Practices

1. DMO engages stakeholders through the DMCs in sustainable planning, implementation, marketing, product development, and monitoring
2. DMCs provide business support services and sustainable product development guidance to tourism businesses
3. Work with ENIT to communicate from the national level, the values and interests of Abruzzo for the international markets

DMC as Liaison and Resource

1. Embrace all tourism businesses in the area for one year trial
2. Educational programs in stakeholder education for business development and sustainable tourism management
3. Manage community and business events to encourage networking and collaboration towards sustainability

Park Management Framework

1. Parks to consider fully completing ecotourism certification stages
2. Engage park stakeholders to ensure inclusiveness in sustainable tourism initiatives
3. Create a grant program for small and medium enterprises’ sustainable initiatives utilizing national parks and EU funds
The creation of a holistic strategy centered around marketing, product development and governance structure will aide in unifying Abruzzo and encourage opportunities for future generations to experience the traditions, cultures, and nature...not only Italians, but all the world’s citizens.
Acknowledgements

Special thanks to:

- D’Annunzio University
- IUCN
- The Region of Abruzzo
- National Parks of D’Abruzzo, Majella, Gran Sasso e Monti Della Laga, and Torre del Cerrano
- Legambiente
- Warm and welcoming communities of Alfadena, Anversa degli Abruzzi, Assergi, Atri, Bosso, Capestrano, Capitignano, Caramanico, Campotosto, Chieti, Palena, Penna Piedimonte, Pescara, Pescasseroli, Pineto, Sangro Aventino, Silvi, Sulmona, and Valle Di Tiribumi, and stakeholders who traveled to these communities to meet with us.
Grazie mille!
Discussion

How do you feel after hearing all of this?
Did we miss anything in our assessment?
What would help incentivize people to come together?
   Do you have any other questions?