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better regional policies

Tuscany Regional Survey

presented by

Toscana Promozione Turistica - Tuscany Tourist Board

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THE SOCIO-ECONOMIC PICTURE OF THE REGION

There are about 3,745,000 **residents in Tuscany**, whose average age is 46.7 years and more than half of whom are female. More than ¼ of the population resides in the province area of Florence, while other areas with significant population density are Pisa (11%) and Lucca (11%). Demographic projections estimate more than 4 million residents by 2030.

There are more than 396,000 resident foreigners (10.6%) and the difference in age with respect to Italians is significant: on average about 33 years compared with 47 years for Tuscans. Among the 174 nationalities present, the Romanian (21%) and Albanian (17.8%) communities are the most numerous, followed by the Chinese (11%) and Moroccan (7%) communities.

Although there has been a slowdown in migratory flows in recent years, mainly due to a reduction in the supply of labour, the region remains one of the most popular destinations in Italy.

The population of Tuscany, like that of Italy and Europe is experiencing gradual ageing and the elderly now represent ¼ of the total. As for life expectancy, Tuscany is one of the European regions with the longest life expectancy: on average 85.5 years for females and 81 for males. The effects of these changes are a progressive increase in the social and economic burden of so-called unproductive or inactive classes (0-14s and over 64s) on the potentially active population.

The **productive structure of the region is evenly based on agriculture, industry and tourism**. It is based on small and medium-sized enterprises and investment largely from capital of local origin, although in recent years foreign investment has increased due to both Tuscany's widespread appeal, and targeted strategies and measures implemented by the Region. The northern area is certainly richer, more industrialised and populated, with an income contribution and a network of connections and services (roads, financial, trade, etc.) comparable to those of northern Italy. Southern Tuscany is distinguished by agriculture in the process of modernisation and rather weak industry, almost always distributed in single-crop areas.

The economic development model, with a prevalence of small and medium-sized enterprises and with few large-scale industrial centres, has enabled a good pace of growth and dissemination of private and collective wealth (**Tuscany's GDP per capita is almost 20 points higher than the EU25 average**) in the context of high social, territorial and environmental balance, positively characterising the quality of life in Tuscany. This prosperity is due in part to:

- a traditional system, even if it is experiencing major changes, of industrial and artisan 'Made in Italy' districts that are developing along the entire Arno valley;
- a high-tech industrial core centred on a few significant entrepreneurial presences and on international-level scientific and technological research;
- a broad and varied tertiary system, strongly rooted in the landscape and environmental resources of the region (tourism, cultural goods), mainly intended for end demand;
- a quality food production area based on elements of Tuscan tradition (natural environment, production culture, etc.) but also on engagement with elements of innovation from different cultures and technologies from outside the region.

Despite the continuing crisis of recent years, Tuscany has suffered from job cuts less than other areas of Italy. In 2015, **job market conditions** improved, although economic growth was below expectations. In 2016, 1,565 million people were employed, a slight rise due to the sectoral structure of the regional economy. In general, the crisis has had a strong impact on areas mainly geared towards manufacturing and in Tuscany, those employed in the sector only amounted to 20% of the total, compared with 28% in Veneto, 27% in Emilia Romagna and 26% in Lombardy. Also, in Tuscany, ⅔ of employees work in the retail, tourism and service sectors.

In 2016, GDP was +0.9%, confirming the expansion phase that has characterised the region for more than three years and that continues to ensure better performance compared to the national average. In addition to increased domestic demand, an expansion of exports continued with a further consolidated trade surplus compared to 2015. Relations with other Italian regions also contributed to growth: interregional exchanges brought an estimated contribution of about 0.2 GDP percentage points.

The outlook for 2017 estimates GDP of +1.0% and settling at +0.9% in 2018. Also, the unemployment rate will continue to fall (below 9.0%), until reaching 8.5% in 2018. The slight improvement in job market conditions should be reflected in household purchasing power, which, according to forecasts, will increase by +0.8%. This is a very slight recovery, but it should lead to increased consumption by Tuscans, which will then confirm the GDP forecasts.

Map of Tuscany and its location in Italy

REGIONAL TOURIST ORGANISATION

The tourist system comprises about 15,000 accommodation establishments, 900,000 bathing establishments, 1000 authorised guides, 500 environmental tourist guides, 18,000 catering establishments and bars, 250 information offices, 1000 travel agencies, transport companies and amusement parks, etc.

The region's connections and accessibility are ensured by different modes of transport. Pisa's Galilei Airport handles national, international and intercontinental flights. Florence Airport (Amerigo Vespucci) also handles a significant volume of traffic, to which are added other smaller airports, Grosseto (Corrado Baccarini) and the Island of Elba (Marina di Campo), which supplement services especially in high season.

The main arterial roads pass through the region from north to south by the A1 motorway, along the coastline by the A12 and the Variante Aurelia road, in turn connected to the inner region by the A11.

The railway line which crosses the whole of Tuscany from north to south is the A/V line on the Milan-Rome line. Another connection with high volumes of traffic and services is on the Tyrrhenian line that runs perpendicular to the coastal area, connecting Turin-Genoa-Rome.

For maritime links, Livorno port is one of the largest, and is also a major Italian and Mediterranean port both for passengers and goods traffic. Other ports provide ferry services with the archipelago and other islands. Ferries for the islands of Giglio and Giannutri depart from Santo Stefano Port; from Piombino there are links to the Island of Elba, Corsica and Sardinia, while from Livorno there are links to Corsica, Sardinia and Sicily, Capraia and Gorgona. There are plenty of tourist ports and landing places along the region's coastline and that of the archipelago.

All major cities have developed their own local urban and suburban transport system. Moreover, many areas are creating urban and tourist cycle paths.

Every year, there are over 44 million overnight stays in the region, to which must be added about 40 million in other forms of 'secondary' accommodation, that produce wealth equivalent to 6.5% of regional GDP and generate employment equivalent to 10% of the labour force.

Given this situation, since the end of 2010 until now substantial **changes to the organisation and promotion of tourism system have been made**. In detail:

- Abolition of the Provincial Tourist Agencies and allocation of tourism promotion tasks to the Regional Tuscany Tourism Promotion Agency;
- Introduction of the tourist tax with which tourist municipalities can finance various activities after establishing Tourist Destination Observers (TDOs);
- Revision of the Consolidated Tourism Act (Law 86/2016) that designs a new system of governance and allocation of administrative and tourist information and reception functions.

Different local situations have already redefined new local governance and coordination of tourist information and reception services with a shared and unitary path, which does not only involve those involved in tourism, but in many cases has led to defining agreements between Municipalities of the same local tourist territory.

The new rules adopted, which will be supplemented by an implementing regulation, besides aiming to redesign **the new regional governance of the sector**, are intended to encourage the local organisation to be structured in order to meet different requirements:

- define a local image capable of integrating tourism with culture-trade-agriculture-craft-industry;
- promote the coordination and integration of efforts between the various departments of the local authorities and other bodies with specific competences;
- define tourist and reception and information services;
- define projects to promote local resources and regional and themed tourist products;
- coordinate local communication (local firms - entities) with regional communication.

Therefore, overcoming the logic of "tourist destination or product" in favour of a supply system capable of combining the tourism product with the entire territory and its identifying elements, by means of forms of partnership between all local actors, in order to achieve competitive and sustainable growth.

All municipal administrations, organised in tourist areas, should define and implement new territorial marketing strategies within the scope of the promotional policies established by the Region of Tuscany. On the other hand, the task of promoting tourism has been fully returned to the region, which uses Tuscany Tourism Promotion for this purpose, the regional agency for promoting tourism, with the establishment of a control room presided over by the Regional Councillor for Tourism, which comprises representatives of the Municipalities and of the Metropolitan city, Chambers of Commerce and Trade Associations, Trade Unions and Agrotourism Associations.

The new organisation is geared towards boosting Tuscany's tourism image: a unique brand encompassing all initiatives to promote individual regions to ensure greater efficiency and effectiveness for public promotional policies in support of the tourism sector.

This is the summary of the new system of regional governance for the sector

Tourism functions

Region	Municipalities	Municipalities Capital Metropolitan city	Municipalities in associated form
Planning and policies for the sustainable development of tourism	Accommodation establishments	Travel agencies	
Homogeneity of the tourist offer	Exercising professional activities	Classification of accommodation establishments	
Promotion activities	Hospitality and information relating to the local tourist offer	Setting up and holding of a 'pro-loco' (local promotional) list lisorganisations) register	Super-local hospitality and tourist information
Coordination of hospitality and information activities of local entities and organisation of regional services	Hospitality and information relating to the super-local tourist offer (exercised in associated form) within local areas defined with regional law	Collection and compilation of statistical data	
Implementation of projects through Tuscany Tourist Promotion and Tuscany System Foundation		Super-local hospitality and information until activation of associative forms by municipalities	
Professional education and training			

The regional tourist promotion system

TUSCANY TOURIST PROMOTION

TUSCANY SYSTEM FOUNDATION

Local Tourist Areas

Homogeneous tourism product

Tourism control room

- Associated information and tourist welcome services management
- Knowledge and planning area
- Information and welcome area
- Organisation, coordination and promotion of tourist products area

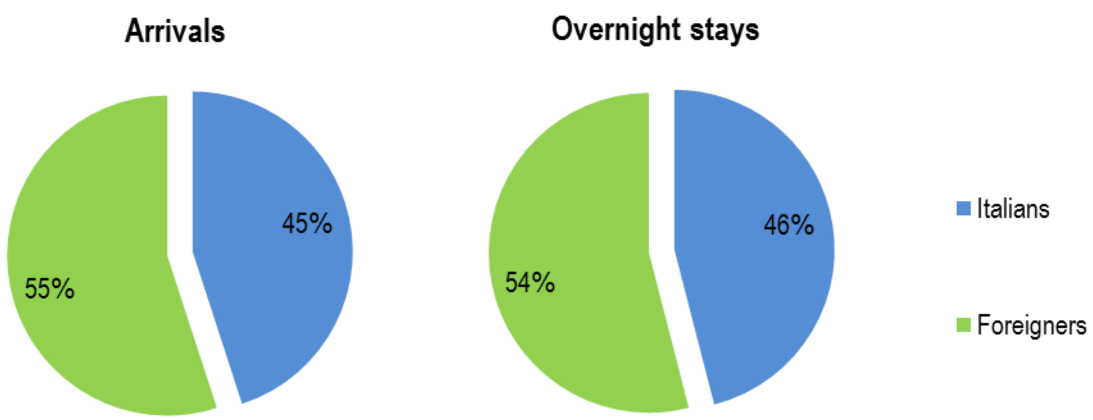
- Connection and coordination between Municipal Administrations to create a quality tourist offer
- Agreements between Municipal Administrations
- Minimum standards for creating the homogeneous tourism product

THE TOURISM MARKET

On average, every year **the number of overnight stays in official establishments exceeds 44.5 million**. Also, considering the trend of demand for unofficial accommodation, many observers estimate about 90 million overnight stays in total. For the regional economy, the sector certainly represents an important buffer from the ongoing employment crisis.

Tourist flows to Tuscany are divided equally between Italians and foreigners, even if foreigners slightly outnumbers Italians: 55% of arrivals and 54% of those present in total.

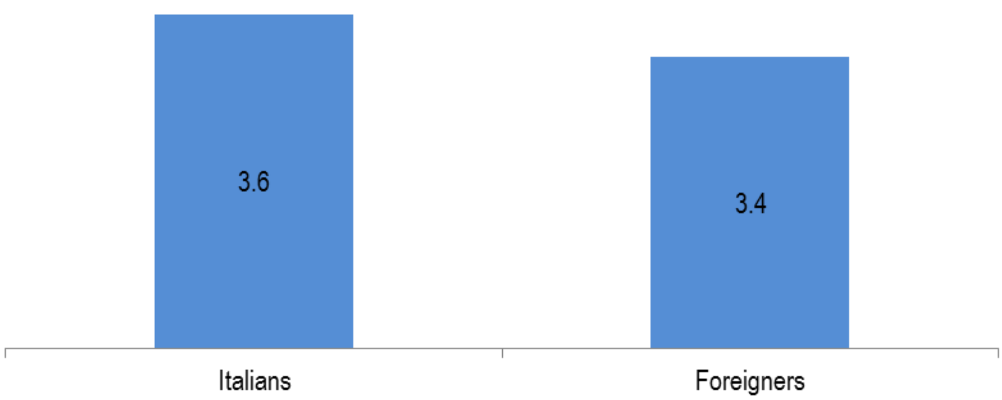
Tourist flows: the nationality



65% of those present who are foreign are of European origin and the main nationalities are German, Dutch, French and British. As for non-European visitors, the most representative markets are those of the United States, China, Brazil, Canada and Australia. For domestic flows, most are represented by Tuscans, followed by tourists coming from Lombardy, Lazio and Piedmont.

The average length of stay is 3.6 nights for Italians and 3.4 nights for foreigners. The monthly distribution of visitors in Tuscany is less accentuated with respect to the typical seasonality of Italian locations. In general, the months in which there are significant inflows of tourists range from April to October.

The average length of stay



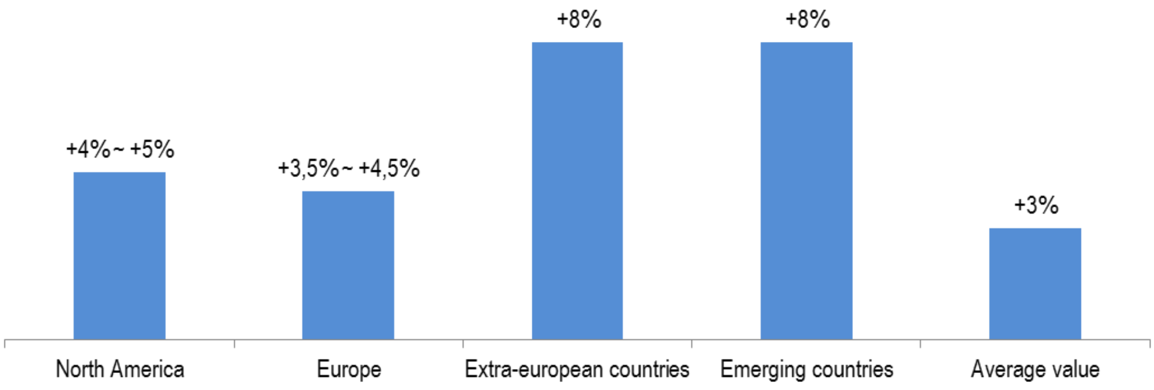
Foreigners (in particular non-European tourists) prefer top-of-the-range hotels, especially in the cities of art and in minor more established art centres. Italians, on the other hand, prefer to stay in mid-range hotels or facilities such as holiday residences, villages and campsites. However, it should be stressed that both Italian and foreign tourists also choose farm holidays or rural houses.

More than a third of the total overnight stays is concentrated in cities of art, another 40% approximately is concentrated on coastal resorts and the remaining 20% is distributed in a vast area of rolling hills, some of which are veritable icons of Tuscany.

The region represents one of the most popular tourist destinations in Europe and in the world, which also managed to maintain its market share in the years of 'crisis'. With respect to the main competitor destinations (Lazio, Veneto and Emilia Romagna in particular) it has managed to maintain its positioning with a good pace of growth over the last fifteen years.

Also, a further +3% increase in tourist visits is forecast for 2017, in line with 2016. Growth driven by cultured travellers in search of slow experiences and who wish to discover tourist areas that are off the beaten track. The estimated growth in North American tourists is +4/5% and for the flows from Europe forecasts are +3.5/4.5%. A good performance is also expected for those coming from other countries outside of Europe and emerging countries (+8%), and in particular those from the Far East.

The forecast for 2017



In addition to the general market picture, another element of the region's competitiveness is the strong heterogeneity that the system has internally, both in terms of supply and demand. **Tuscany is a region that in the face of underlying cultural homogeneity has a variety of natural and human environments and a wealth of cultural and scenic attractions,** which provide many potential reasons to visit**.** Which is why we talk about a plurality of sub-regional tourist systems and products, enclosed in a single regional "Tuscany" brand, that the development strategy is based on to maximise economic growth and prosperity for residents.

Florence and the main cities of art in the region

Tourism in the cities of art is an important segment of the market that accounts for more than 15 million overnight stays, about 10 million in the city of Florence and in the neighbouring municipalities. This concentration of demand corresponds to an equally considerable concentration of supply in terms of cultural heritage. Around 31% of the museum surface area in the whole of Tuscany and 30% of the region dedicated to museums and archaeology is concentrated in the Florentine area. A large part of the cultural entertainment supply in the region is also concentrated in Florence, but there is no lack of events and opportunities in other cities and art centres, in particular for internal areas of experiential tourism.

Spa towns

Chianciano Terme and Montecatini Terme are the two main locations, that collectively have approximately 2.5 million overnight stays, whose tourist development, which started between the end of the nineteenth century and the first few decades of the twentieth century, is linked to the traditional spa model of mineral water treatments. However, there are now several places mostly located in hilly settings, that host spa sources around which accommodation facilities have been built, some of which have internal spas and which offer stays in which the spa bath is only one component of a wider tourism product of wellness, fitness and food and wine tourism. They are now configured as experiential proposals in hilly settings.

Hilly areas

The internal hilly area, that from a tourism point of view constitutes the ‘Tuscan countryside’, is very extensive and diverse from both a socio-economic and settlement point of view. It includes both areas of urbanised countryside, accessible and open, with productive settlements, mainly the manufacturing type and characterised by a strong opening up to international trade, and rural, relatively isolated and sparsely populated areas that have experienced depopulation and a weakening of the productive fabric over time. Both, to different extents and in different ways, have been affected by the tourist development that has been ongoing for many decades (like Chianti and Val d'Elsa) or in other cases by more recent times (as in the case of some areas south of Siena and Pisa, the countryside around Lucca, Val di Chiana and Grosseto). Almost all these areas have experienced a higher development of accommodation supply and demand than the regional average, characterised by a specific type of accommodation (agrotourism) that has been a success in terms of international tourism demand.

Mountain Tourist Systems

Mountain systems are a less developed part of the regional territory from the point of view of tourism. This concerns eight areas (Lunigiana and Garfagnana, Pistoia Mountains, Alto Mugello, Prato Mountains, Casentino, Val Tiberina and Mount Amiata) totalling approximately 1 million visitors a year. If we exclude the skiable area of the Pistoia Mountains, the other areas are apparently less equipped with traditional attraction elements, but have a strong landscape and environmental value. The regions concerned have suffered from depopulation and a weakening of the productive fabric in recent decades, but have kept a wealth of natural capital and a widespread artistic heritage, albeit less known, intact.

Bathing systems

Coastal destinations account for most tourist visits in the region, about 40% of official visits and certainly an even higher share of unofficial visits in houses. It is a system defined by seasonal tourism and by most visitors being Italians and Tuscans (64%). The foreign component mainly comprises tourists from western European countries, and especially from central Europe.

TOURISM SUPPORT ACTIONS

The objectives set in the context of the strategic planning of the sector, and the positioning choices that Tuscany will have to have in the context of national and international tourist markets, talk about developing the sector, which cannot be achieved solely through marketing and promotion, essential instruments to conquer or maintain markets, but the challenge of competitiveness involves the need to go back to the product and the relationship between the product and the region.

The objective is to keep the destination of 'Tuscany' at the top of must-see location lists in the world, and especially to use all the regional potential to increase flows and consequently increase the weight of the tourism in the regional economy.

The priorities established by the programme are:

- a new governance model;
- new strategies for promoting products/regions/markets.

Operationally, however, the strategy will have to:

- promote the integration of new tourist products and local areas;
- increase the diversification of products in the various tourist areas;
- encourage the integration of services, local coordination and relations between institutions and companies.

Those intended to guide the process of growth and development of a destination (public and private actors) must work together to strengthen the attractiveness of the destination, improving the 'product' and strengthening internal and external communication processes.

Reconstructing the identity of places therefore becomes a strategic tool for managing the development of a destination in an integrated way, to maintain its competitive advantage and, on the other hand, managing to communicate the region's value proposition to markets. Of course, at the centre of the tourist development of Tuscany is a long-lasting sustainability model, shared and participated in, with the aim of producing widespread economic and social wellbeing.

The immediate objective is to create value through knowledge and the exchange of information. Shared knowledge of the values, resources, structure and dynamics of the market must be aimed at creating a local identity, from which to identify development guidelines and strategies to promote local areas. All this is achievable by:

- increasing tools to analyse tourism demand and supply;
- involving all actors involved in developing the destination;
- introducing planning tools to support competitive and sustainable growth;

The cross-cutting objective of the strategy is specially structured to support the growth of professional skills and knowledge, not only of those who operate in the sector of tourist production, but also of those who indirectly contribute to creating the area products.

Among other strategic objectives also being considered is an examination of the hospitality process, divided into three basic phases of the tourist experience: before, during and after. Hospitality being understood as a distinctive sign of the Tuscan destination, goes through:

- the defining of hospitality policies for the entire regional area;
- the organisation of the tourist hospitality system in the main regional tourism gateways;
- the organisation of a regional network of information and tourist welcome services;
- the integration of the hospitality system between actors;
- the characterisation of a tourist hospitality system based on the communication, behaviour and identity values of the region.

However, with respect to 'communication', being understood as a strategic lever, the main objective defined within the scope of the programmatic plan is to identify concrete lines of action for Tuscany brand placement. Therefore, it is important to identify methods capable of boosting the region's attractiveness and competitiveness, that subsequently help to:

- communicate the 'Tuscany Lifesyle';
- close the gap between desired and chosen location;
- safeguard the quality of the brand;
- create loyalty;
- encourage integration.

Another element to support the strategic planning of the regional tourism offer is the organisation of themed content, which must not only meticulously respond to the motivations and needs of travellers but must also be capable of stimulating their collective imagination. This aspect must be accompanied by stimulus actions to actually increase the quality of the hospitality, also by planning innovation strategies.

Constructing specific original, quality content, differentiated by themes and levels of detail for the numerous tourist targets who are interested in the Tuscan region for various reasons.

Supporting and facilitating actions and processes for training, updating and retraining operators employed in the production of tourist goods and services, but at the same time supporting the development of integrations, synergistic actions or any form of associative management.

Strategic levers also include considering the digital tourist ecosystem, i.e. the set of rules and conventions, skills and professionalism, infrastructure and technological systems that enable governance of the destination to manage the digitisation and promotion of the tourist offer.

The specific objectives are to:

- digitise the tourist system and the regional tourism offer;
- strengthen the digitisation of promotion and marketing services;
- consolidate Tuscany as a smart destination.

The cross-cutting objective consists of the ongoing training and updating of all professionals (on tools, languages, etc.). A particularly important subject of targeted training will cover the implications for the regional tourism sector of the so-called fourth industrial revolution.

SWOT ANALYSIS OF THE TUSCANY DESTINATION

Tuscany is perceived as a destination due to its particular historical, artistic and cultural heritage, but also as a destination that produces excellence (wine and food), it knows how to welcome visitors and allows them to experience the Tuscan lifestyle, a lifestyle that arouses interest and curiosity.

In addition to its natural, architectural, artistic and cultural attractions (events), Tuscany is greatly appreciated for reasons such as its cuisine, street food, shopping, sporting activities, spas, etc. and descriptions of holiday experiences often include terms as *charming, remarkable and evocative*.

The Tuscan destination that emerges the most is Florence, often included at the top of the rankings of the most beautiful cities in the world and in Europe. The Uffizi museum and the Ponte Vecchio also appear at the top of international rankings, but there are also plenty of mentions of Siena and its hills, Piazza dei Miracoli in Pisa, traditional shops and workshops, cinematographic locations, atmospheric accommodation facilities such as castles, historic residences, inns and farmhouses, etc., both from the point of view of architecture and furnishings and for the quality of the services offered.

To sum up, a varied set of proposals which contribute to improving the positioning of Tuscany on tourist markets, compared to other competitor destinations.

Nevertheless, within the scope of the changes that have taken place in recent years, both in regional development models and in demand consumption patterns, some issues have emerged that are obviously typical of complex systems structured in this way. Specifically:

- *Accessibility*. Tuscany has high flows of mobility of people and goods particularly unbalanced toward road transport, and not aimed towards using the railway network: this is one of the most critical aspects in terms of accessibility, even if we are now seeing a growing development of alternative modes of transport such as maritime and aviation.
- *Environment and region*. If, on the one hand, the region is characterised by having lots of trees, the significant presence of protected areas and very high-quality coastal waters for bathing, on the other hand, many towns face hydrogeological and flood risks. Another potentially very critical point is waste, also because of the intense tourist flows: data on per capita production is considerably higher than the national average and second only to Emilia Romagna, also high is the amount of waste that is separated.
- *Tourism, trade and cultural heritage.* Tourism is an important driver of development and the cultural offer is a powerful attractor on which regional identity is based. However, all this requires high costs, growing both in absolute and proportional value, for the protection, promotion and management of the cultural heritage.
- *Rural and mountain areas.* The rural and mountain areas in the region are generally characterised by a set of structural, geomorphological and economic factors: low population density and dispersed inhabited centres, the high incidence of elderly populations, high public spending per capita with insufficient resources, difficulties managing public services and transport. These are areas with a high scenic and environmental value, involved in tourist and agrotourism activities, but insufficient to create resources to address the critical points.

Besides the references cited above, the main strengths/weaknesses and opportunities/risks of the tourist destination of Tuscany are as follows:

STRENGTHS	WEAKNESSES
- Variety of the scenic heritage	- Congestion of flows in the most attractive areas
- Cultural heritage which exerts a strong power of attraction and represents a special regional identity element	- Seasonal peaks in some areas (e.g. coast)
- Unesco Heritage	- Increase in unofficial accommodation
- Tuscan way of life	- Limited interest in professional and managerial updating
- Variety of the tourist offer	- Non-renewal of the product in some areas
- Tuscany brand known internationally	- Insufficient totally free WiFi coverage
- Destination perceived as safe	- Poor local public transport in some areas
- Increase in the share of demand satisfied by Tuscan airports, also due to the low-cost international segment	- Infrastructure dimensioning of road transport below the national average
- Strengthening of the public mobility system within the metropolitan area of Florence	- Demand for mobility of people and goods favouring road transport
- Presence of a complex regulatory framework full of implementing measures: community regulations	- Lack of sensitivity and knowledge of the environmental implications of economic and social activities. Need to push for the implementation of technical and governance regulations provided for by legislation
- Protected areas cover 1/10 of the regional territory. Strong expansion of organic farming	- Pollution levels at the limit, especially due to the intense pressure on transport, in particular in metropolitan and coastal areas
- Widespread presence of large and small cultural institutions in the regional territory	- A substantial reduction in resources allocated to the cultural sector by financial laws
- Quality agricultural, artisan and manufacturing productions	- Prices too high compared to other regions, both of companies and local services
- Excellent food and drink products	
- Widespread presence of shops, markets, festivals, fairs.	
- Presence of innovative enterprises	

OPPORTUNITIES	THREATS
- The implementation of infrastructure measures to optimise transport services by rail and by road	- Loss of a brand identity
- Development of niche tourist products (e.g. luxury, wedding, cyclotourism, etc.)	- Risks related to excessive use of both cultural assets and historic centres
- The development of environmentally-friendly economic activities such as rural and environmental tourism	- Loss or damage to habitats and species of interest or at risk of extinction
- Recognition of the right to knowledge, training, culture and to meet the cultural needs of citizens	- For immovable cultural assets: hydrogeological risk, seismic risk, risks related to conditions of localised and static vulnerability
- The importance of the role of cultural assets in the development and use of new technologies: diagnostics for restoration; databases relating to cultural heritage	- Presence of diseconomies in the management of the cultural assets sector
- Digitalisation of content	- National public resources to promote cultural assets are constantly being cut
- Widespread presence of micro-enterprises to the advantage of typical productions and employment	
- Promotion of the experiential element in the consumption of environmental and cultural factors	

“REGION’S POLICY STRENGTHS AND DEVELOPMENT PRIORITIES IN RELATION TO THE SIX BEST PRACTISES POLICY THEMES”

Policy theme	Strengths	Development priorities	Policy rate
THE PROMOTION OF TOURISM PRODUCTS TO ENHANCE THE VISIBILITY, IMAGE AND MARKET UPTAKE OF DESTINATIONS.	Identifying action lines capable of contributing to the definition of a new winning strategy concerning the place brand of Tuscany, with the support of country branding techniques in order to differentiate this destination and improving its position on the international tourist markets.	On the one hand we need to resort to tourist promotion platforms suitable to the specific features of each destination and product and, on the other, to improve the hospitality services as well as information provision on the various territories by communicating opportunities, themes and personalised itineraries. The integrated management of the development of each destination will not certainly be an easy task and will require initiatives aiming at the valorisation of new tourist products. The objective is to strengthen and keep the competitive advantage, beyond communicating the value of the territories offered to the market.	4
THE VALORISATION OF ATTRACTIONS THROUGH MARKETING, TERRITORIAL BRANDING AND QUALITY SCHEMES	Reorganising what is on offer by integrating the most established areas and those with a higher tourist vocation with the emerging destinations. The aim is to valorise the potential products and those models on offer that so far have been targeting market niches, a tourist demand not entirely met or even unmet.	Stimulating the development of emerging destinations by valorising territorial identity and assets. Areas still to be discovered and rich of experiences to be told. Valorising big attractions (e.g. Florence) as a starting point rather than the arrival point of tourists in Tuscany. The main risk that Tuscany brand runs is tied to the exceeding of the environmental sustainability threshold in some territories, first of all Florence. The big attractions of mass tourism can be integrated with the offer of other less known territories which are however capable of meeting the requirements of specific targets. This requires a well articulated area planning in order to be functional to the distribution of tourist flows over time, as well as to decongest	5

		the places with a high tourist impact.	
THE INNOVATION OF THE TOURISM OFFER THROUGH THE CLUSTERING OF SMES AND TOURISM PRODUCTS	The integration of services and the consolidation of the enterprises networks are necessary elements for a good performance of a destination. The Tuscany Region has always supported aggregation forms that over time have contributed to developing an entrepreneurial fabric capable of synergically acting and particularly sensitive to the themes of the innovation of proposals.	Encouraging coordination and integration of the initiatives between the various productive sectors that contribute to the tourist offer, but especially among private subjects who work locally. Identifying new strategies of valorisation of products - territories - markets. Defining and updating the integrated image of a territory by strongly linking up the references to old and new tourist products. Defining the projects of valorisation of the local themes and resources, both to improve the "product" and to strengthen the internal/external communication processes. A particular effort is expected to be made for the coordination of territorial communication with the regional one, in order to maintain a unitary vision.	4
THE INNOVATION OF THE TOURISM OFFER THROUGH SYNERGIES BETWEEN PRIVATE AND PUBLIC	Involving all the subjects responsible for the development of the destination in a renewed co-determination model. The aim is to encourage the coordination and integration of the initiatives between various private and public sectors and subjects, so that Tuscany as a destination can maintain its leadership position.	Supporting all forms of collaboration between enterprises and public actors for the development of a systemic offer at the territorial level. Placing at the centre of tourist policies a sustainable development model, a longlasting one, shared and participated, with the aim of producing and spreading economic and social wellbeing. The subjects responsible for leading the process of growth and valorisation of the destination must share their "vision" and above all must behave in a way that aims at reinforcing the attractiveness of the destination, improving the "product" and strengthening all the communicative processes.	4
THE DIVERSIFICATION OF TOURISM PRODUCTS AND SERVICES TO PROVIDE MORE CUSTOMISED PACKAGES	The offer must as far as possible meet the requirements of the tourists in terms of the experiences they wish	Differentiating the contents of communication and specifying the offer of services based on the specific needs of the target groups. The objective is not	5

	to live as well as their needs, so as to guarantee their preference of Tuscany to other destinations, and then develop their loyalty by discovering new places that will lead them to choose the region again.	only to understand the demand, but also to make it a "repeater". This is why the tourists must have the perception of not having explored all the itineraries that Tuscany can offer. Valorisation and integration of emerging destinations is essential so as the demand perceives Tuscany as a complex "mosaic of many identities". The aim is to lead the tourists to discover the many facets and experiences that the territory can offer. The success of this strategy depends on the creativity of the local professionals who work together in constructing the product or products.	
THE DEVELOPMENT OF EXPERIENTIAL TOURISM IN RELATION TO LOCAL VALUE CHAINS AND EXCELLENCE.	It is essential to convey to the tourists the particular and specific features that distinguish Tuscan territories enabling them to accomplish different experiential itineraries.	Providing the less known destinations with the suitable tools and skills so as to become an alternative choice for some types of tourists, through an adequate process of development, compared to the destinations of mass tourism. Thus responding to the need for "experience" that more and more frequently seems to be the main objective that some target groups seek in their journey. Tuscan hospitality must become a distinguishing mark of the tourist policy. Fostering a system of tourist hospitality based on communication, behaviour and values of identity of the territory which convey the typical aspects and lifestyle of Tuscany. Valorising and making all the events tied to the local aspects usable.	4