

NAPLES: LIFE WITHOUT TOURISM

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How covid-19 opens sustainable perspectives to tourism

LD.net Webinar Series

In partnership with RSA, ELARD and AEIDL

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**New local development:
Opportunities and challenges in a post-Covid world**



SUMMARY

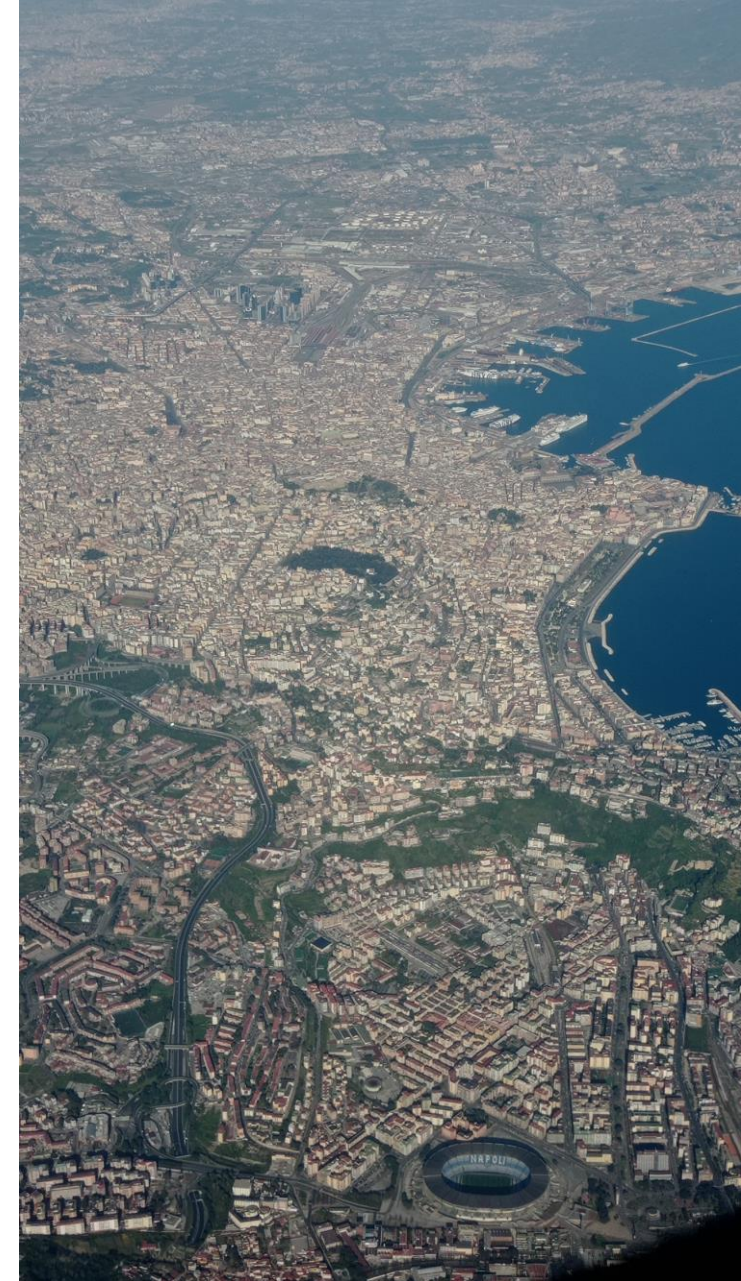
1. Introduction
2. Investigation method
3. Before Covid-19
4. During Covid-19
5. How local perception changed
6. Regional Perspective
7. Afterwards?



1. INTRODUCTION

Why Naples?

- The capital of Campania Region, celebrated by poets and musicians, was interested by a massive growth as world touristic destination
- The Metropolitan city has an overall population of **3,017,658** (31-12-2020)
- Naples Municipality accounts for **940,940** inhabitants (31-12-2020)
- The old city centre is listed in the **UNESCO WHS since 1995**
- Compared to other Italian historic cities, **Naples was greatly undeveloped** in term of touristic offer, until beginning 2000s.
- Thanks to a constant sustained growth in the 2011-2019 period, tourism is now one of the **greatest economic resources** of the city
- Positive touristic trend, without an holistic strategy, stimulated **many medium-small private undertakings** in the touristic, cultural and leisure facilities and services
- The **local economy adapted** itself to the touristic market, and private business mainly addressed to it



1. INTRODUCTION

The current drastic reduction of tourism is a possibility to investigate how the local system reacted, by formulating the following questions:

- Was the previous touristic growth a positive factor and sustainable for the city?
- What did it happen when covid-19 stopped this growth?
- How the city re-organised activities?
- Has it been an opportunity to re-define future tourism city strategies or even the regional ones?
- Did covid-19 impacted on the citizen perception of potential alternatives to tourism?

2. INVESTIGATION METHODS

Desk

- General data on the pre-existent touristic market in Naples
- Analysis of existing city plans for tourism
- Analysis of general statistic data during covid-19 on tourism
- Analysis of the main global platforms for touristic services (booking, Airbnb, Hotels)
- Analysis of regional strategies for next 2021-2027 EU funding period

Interviews

- Local experts on touristic destinations management
- Local public officials (Municipality, Metropolitan city, and Region)
- Guides and other touristic services
- Foundations managing touristic sites
- Unioncamere Campania

3. BEFORE COVID-19

- Italian positive trend, with a constant growth in touristic presences since 2004.
- Result of different dynamics due to factors related to:
 - Economic crises
 - Natural disasters
 - Terrorist attacks
 - Structural changes of the sector
- In particular, relevant changes:
 - New forms of accommodation in the tourism market
 - Online Travel Agent phenomenon
 - Diffusion and marketing through social media;
 - Spread of the sharing economy.



3. BEFORE COVID-19

Also Naples benefitted from Italian positive trends.

Additional factors supported the sector sustained growth:

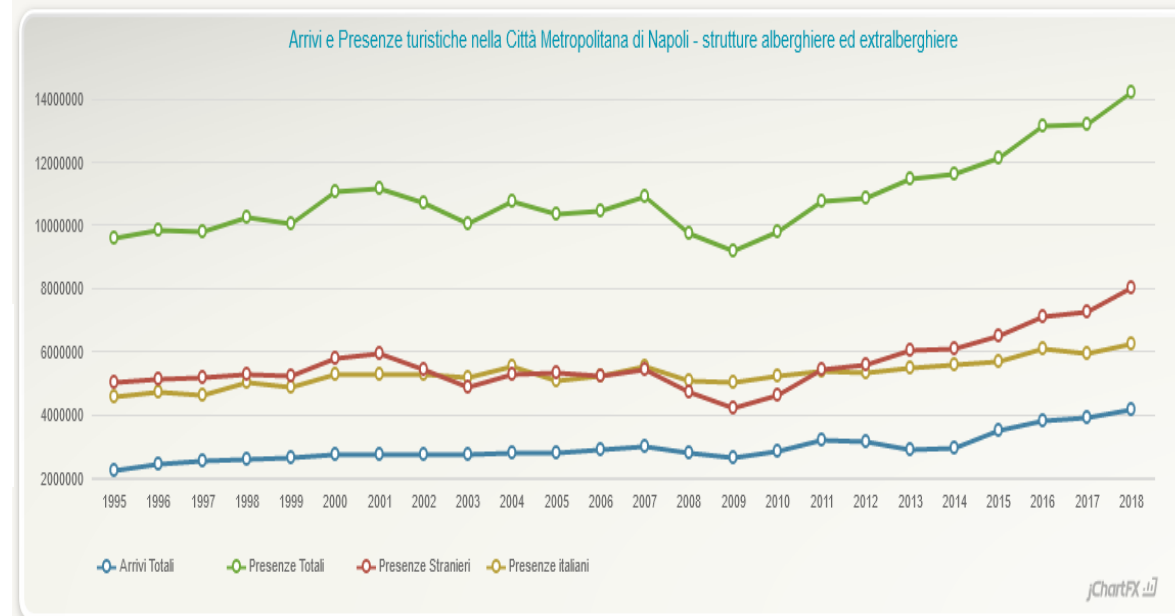
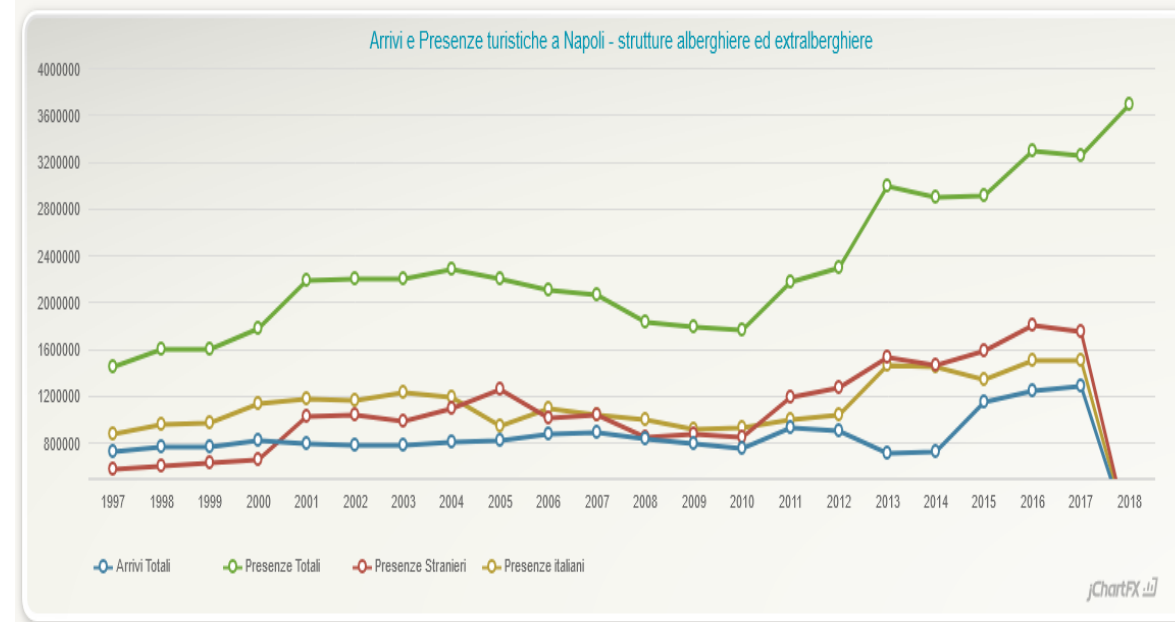
- Stereotypes of extremely dangerous and polluted city replaced by the environmental, cultural, and social richness
- Improved availability of low-cost touristic accommodations, restaurants, and touristic services
- More efficient airport, with low cost flights
- A better management of the Cultural Heritage resources (e.g., Museums, Archaeological excavations, and underground sites)

Trend (2013-2018):

- Arrivals – annual average growth: **9%**
- Presences - annual average growth: **5%**
- Average days for tourist (2018): **3.4**

74/100

Score del Destination Reputation Index per Napoli



3. BEFORE COVID-19

- Local market growth is fragmented without a proper marketing strategy
- In 2017 Naples municipality developed a Plan for a **Strategic Marketing for Tourism Development in Naples 2020**.
- Apparently participated, the strategy was based on **unlimited growth, without considering sustainability**.
- According the plan, a **good management** (governance) and definition and adaptation to the new **demand for tourism** (urban tourism or city break) guarantee the city touristic success
- Leading the process is a not well defined **Destination Management Organisation**, which will never see the light.
- Small private sector, third sector, and all **spontaneous actors are completely forgotten**

un orchestratore
che sviluppa e implementa la strategia operativa in
accordo con attori pubblici e privati.

un promotore della destinazione Napoli.

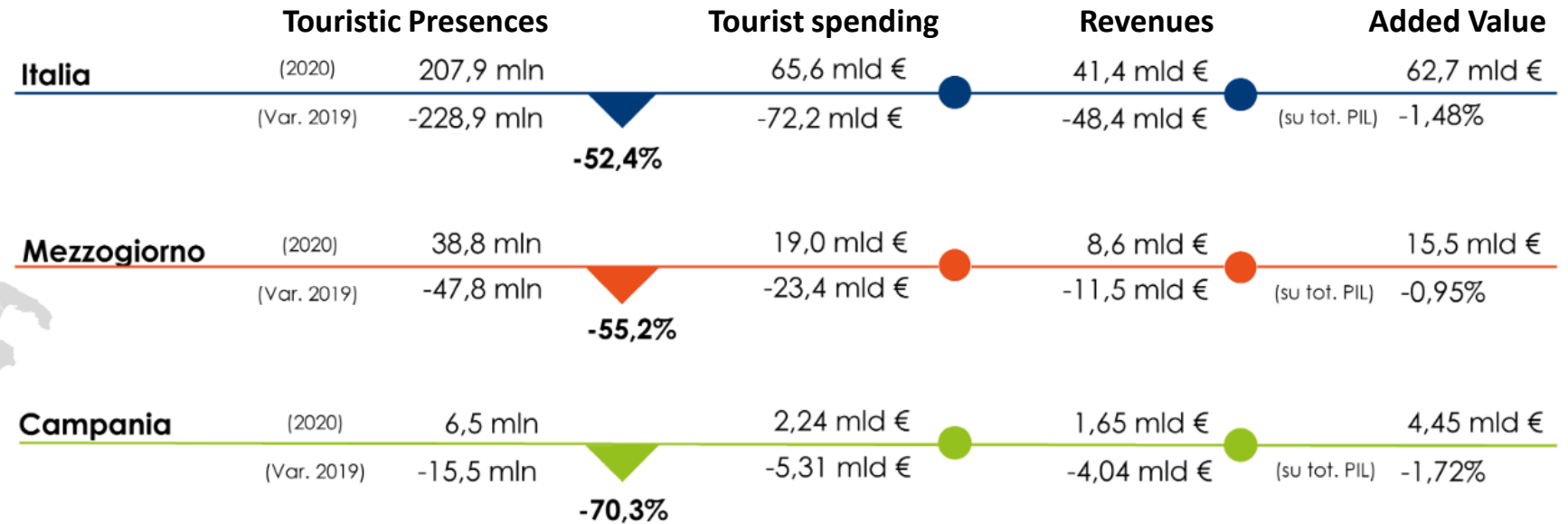
1. DMO - Destination Management Organization
2. Strategia marketing e promozione social media team
3. Portale turistico
4. Programma Decoro urbano
5. Programma Sicurezza
6. Riorganizzazione informazione ed accoglienza turistica
7. Turismo congressuale
8. Creazione nuovi servizi e prodotti turistici
9. Sensibilizzazione e formazione
10. Programma Crociere

creazione di un
soggetto coordinatore
della gestione operativa della destinazione,
dell'accoglienza e delle azioni di promozione e marketing

4. DURING COVID-19



Source: ISTAT

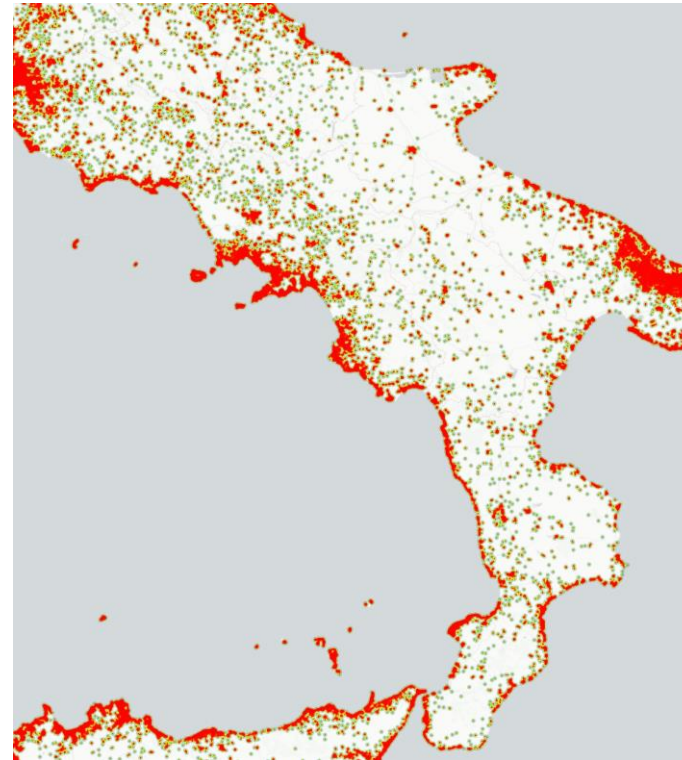


Fonte: elaborazione SRM

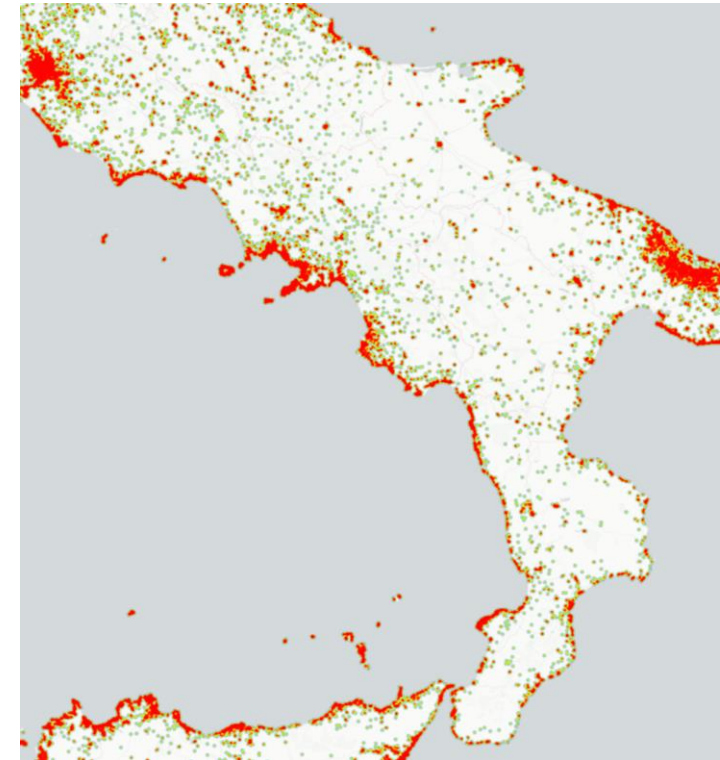
4. DURING COVID-19

AirBnB case

- Economic costs Airbnb imposes likely outweigh the benefits
- Costs to renters and local jurisdictions likely exceed the benefits to travelers and property owners.
- Airbnb expansion is the reduced supply of housing as properties shift from serving local residents to serving Airbnb travelers,
- During Covid, in Naples the initial 6.858 ads reduced of about 50%, and properties moved back to supply local or temporary residents, lowering rental prices
- AirBnB developed Airbnb.org, a non profit designed to facilitate the provision of temporary accommodation to people in emergency situations.
- Current trend in Naples is a longer term renting through AirBnB to temporary residents



AirBnB, 2019



AirBnB, 2020

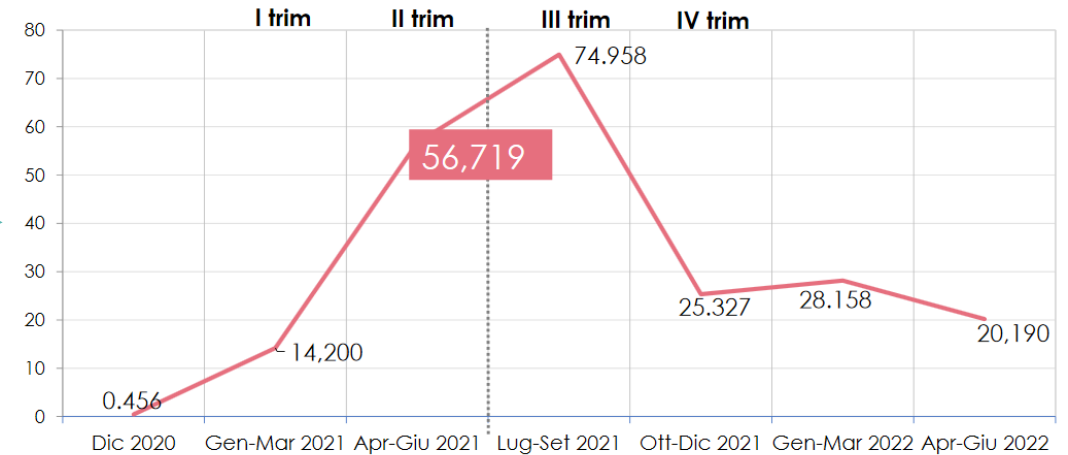
4. DURING COVID-19

The tourism sector developed forecast analysis based on vaccination development

According the forecasts, the 2021 “must” be the year of the recovery.

Start to look to new models, with concern about different demands or increased need for green solutions

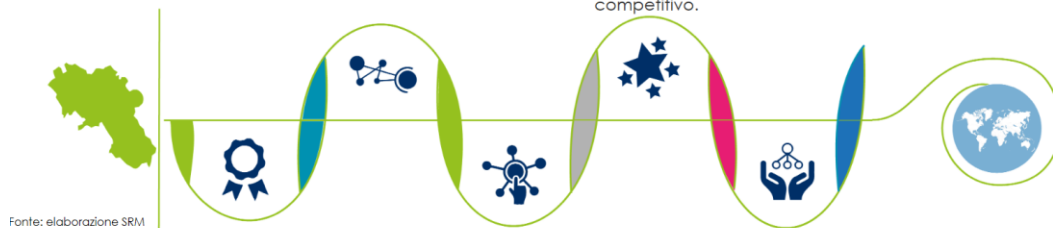
Totale dosi di vaccino disponibili per periodo (mln)



Fonte: elaborazione SRM su dati Ministero della Salute

Verso un turismo continentale: si riducono i viaggi a lungo raggio favorendo un turismo internazionale «di prossimità».

Attenzione alla qualità della sanità: la presenza di strutture sanitarie nella destinazione efficienti, diventa un fattore competitivo.



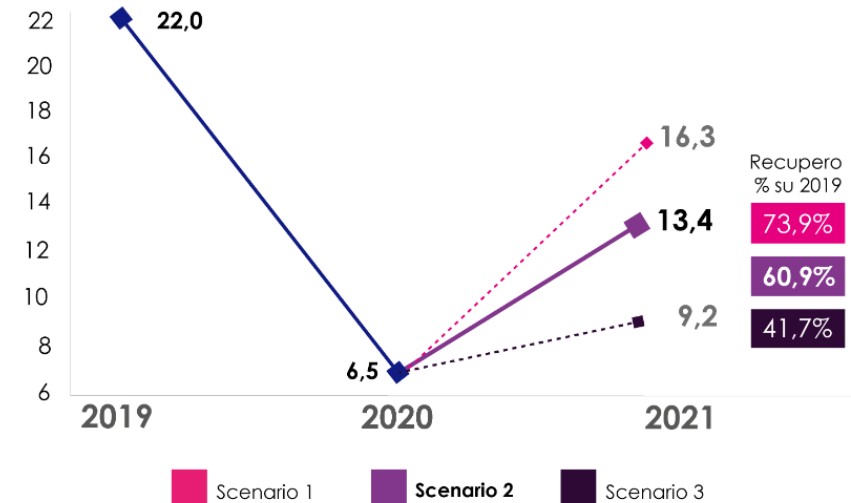
Fonte: elaborazione SRM

Sostenibilità e Ambiente: maggiore attenzione alla salubrità degli spazi ed a stili di vita sani. Ampio spazio alla green economy.

Tecnologia e digitalizzazione: diventa un elemento chiave nella competizione globale e di stimolo all'offerta turistica complessiva.

Diversificazione produttiva e commerciale: assume un ruolo centrale la possibilità di ampliare l'offerta di prodotti e servizi turistici per il successo delle iniziative imprenditoriali.

Presenze turistiche totali (mln)



5. HOW LOCAL PERCEPTION CHANGED

The operators' view

- Financial support from the State
- Certainty about the recovery timing
- Fight to illegality, and need for interaction
- Reconsidering the strategic importance of the sector from the public

The Public management (Region) view

- “Campania operators, particularly damaged by the pandemic emergency, will be involved in the **new governance models** and will participate with a full sense of responsibility in the initiatives to be taken to guarantee them tangible benefits on the restart for a high quality experiential tourism”

The expert view

- The pandemics gives the possibility to completely re-think the model for developing a tourism more aware of the resources scarcity
- A new governance model, more participated, and effective
- In cities like Naples, the future demand will ask for better health systems to support tourism



5. HOW LOCAL PERCEPTION CHANGED

The social perception

- Foundation and cooperatives developed several initiatives for promoting heritage and cultural sites, without targeting potential tourism in the short time
- Common initiative was the crowdfunding
- Few privates make online promotion by organising webinars and virtual tours
- Explanation is they miss digital skills for developing platforms attractive at international level

Heritage institutions' perception

- Maintain high the interest by organizing exhibitions and webinars
- Reopening is something that will bring back to the old behaviours
- All of them claim for the digital transition
- The biggest museums (such as the MANN and Capodimonte) miss a real digital tour or at least guided virtual tours or VR tours. Also a complete digital catalog is absent.



6. REGIONAL PERSPECTIVE

Is this need to recover tourism introduced in the Campania Region Strategy for EU Regional Funds 2021-2027?

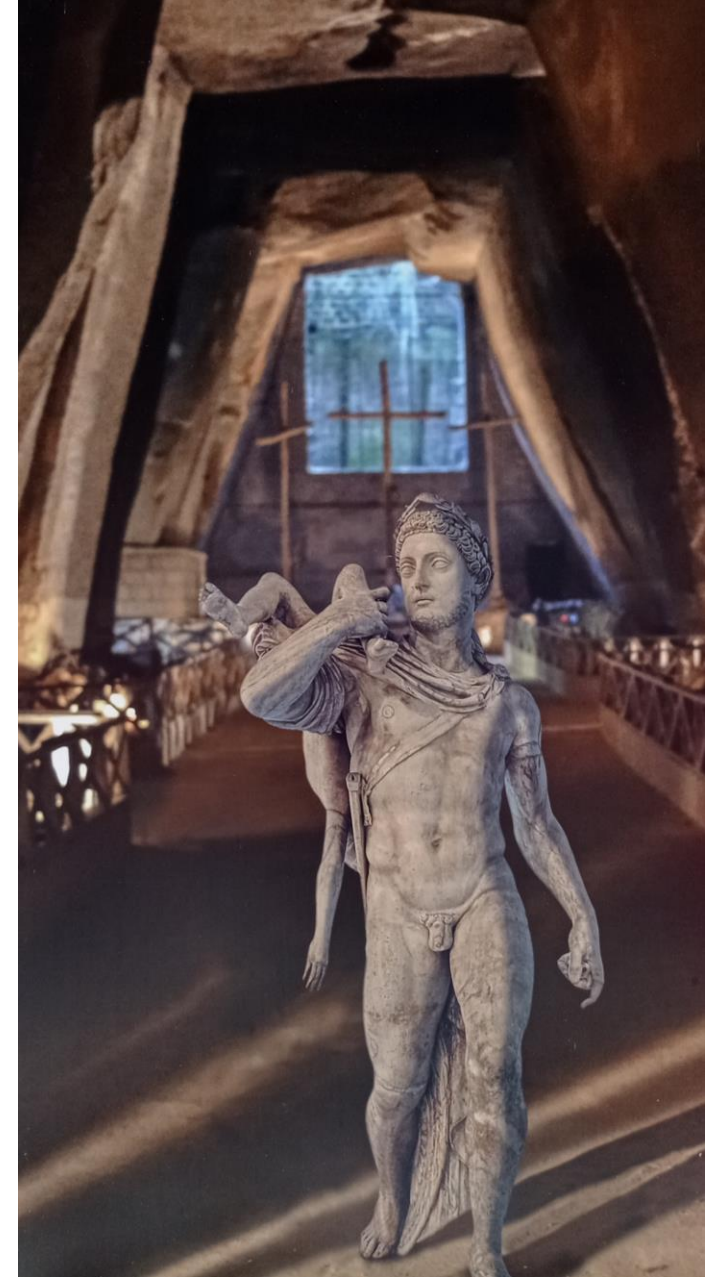
- The overall strategy is based on the five objectives of policies dictated by the European Commission in the regulations for 2021-27
- However, three transversal development drivers, in light of the effects of the pandemics, have assumed a more permeating and characterizing role: culture, health and legality
- The document introduces Culture as the factor of regional identity, of knowledge and productive sphere of valorisation of tourism: a driving force for innovation, sustainable growth, employment and training.



6. REGIONAL PERSPECTIVE

Actions aim at:

- **developing local economy**, by also strengthening the digital skills
- **protecting, promoting, and enhancing the heritage**, with restoration interventions to preserve the identity of the community
- **developing the areas of cultural and creative production**
- **promoting the area as a tourist-cultural destination of excellence** to be developed
- Obviously, the strategy aims at making Campania one of the most oriented regions towards the **green transition**
 - attention must be paid to the **infrastructures necessary to guarantee sustainable mobility**, both in highly populated areas and in tourist areas



7. AFTERWARDS?

Is the pandemics an opportunity for cleaning mistakes and promoting a sustainable tourism?

- Certainly, the sudden stop of the tourism **growth produced some effects**, such as reducing small business flourished spontaneously in the historic centre, and a repositioning of several other businesses
- However, **no public initiatives are envisaged** to create a better integration for all, and contributing in different ways to the city tourism development
- The purely **marketing approach** based on a common coordination of the main tourism stakeholders could maybe satisfy the main demand, but not the quest for sustainability
- The **Regional strategy for 2021-2027**, modified during the covid pandemics, seems the most effective if supported but a holistic plan, with a wide participation and clear incentives, pushing all different actors, empowered or not, to perform in a sustainable way.



Photos taken from the Exhibition:



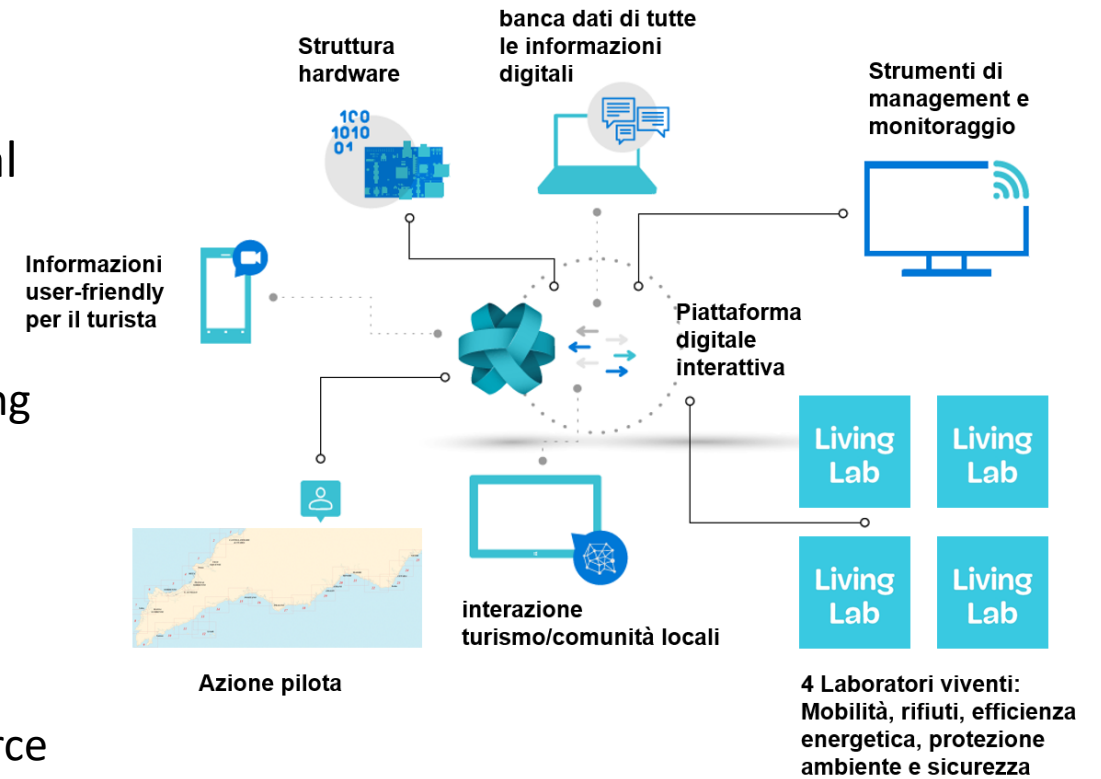
7. AFTERWARDS?

A Platform for sustainable tourism?

There is a need for an **infrastructure at the service of sustainable tourism**, consisting of a database with all digital information necessary for:

- **Enabling the tourist to choose his destination** in a sustainable way
- **supporting citizens**, institutions and businesses in choosing more sustainable and efficient behaviors and businesses
- **supporting local systems** to negotiate with the tourism industry, offering alternative models based on interaction with local communities, where all the actors can benefit while respecting the environment.
- **Making tourism a wealth for the territory**, and not a source of environmental degradation

This **Platform must be an interactive and dynamic guide** able to interpret the needs and guarantee efficient and concrete solutions



A model of public-private platform developed for Sorrento Peninsula, CNR 2018

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