

SMART Europe
Final In-Depth Assessment Report

Avila (Spain)

Summary

The main challenges according to the host region's own evaluation that the Province of Avila needs to face with, are the creation of an attractive touristic destination, related to tourism in rural areas and the lack of synergies amongst the different actors.

Based on the data provided to the peer team preliminary as well as during the peer review, in Avila, tourism is the main sector that provides job opportunities and creates employment in the area. In these terms, during the peer review, the peer team's most important job was to understand the system as well as to provide recommendations that can serve as catalyst for innovation in this traditional sector.

The main findings of the peer team, presented at the final workshop of the peer review, as well as further elaborated in the current report are the followings:

- create a strategy based on consultation and participation of the fullest possible range of stakeholders
- based on continuous analyse of the market's needs, ensure that the workforce have the necessary skills – especially in terms of language knowledge
- connect the touristic offer of the city and the rural areas for further exploitation of the possibilities and for ensuring that tourists spend more time in the area
- look for international cooperation opportunities to ensure the dynamic development of the sector and the mainstreaming of international good practices

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Section 0: Introduction

(a) Short introduction to the SMART Europe Project

SMART Europe is based on the concept that smart and targeted regional policies and interventions can be designed to boost the employment directly in the regional innovation-based sectors.

With this aim, a consortium of 13 partners, representing 11 EU regions, will exchange policies and instruments for identifying and supporting the main regional economic actors that can generate job opportunities in the innovation based sectors of their economy.

SMART Europe will support decision makers to improve their strategies with the aim of incorporating the creation of employment as an additional key feature of their activities.

(b) Short introduction to the Peer Review methodology

SMART Europe Peer Review Methodology helps the regions to improve their policies in boosting employment in the sector of their “innovation anchor”.

The SMART Europe Peer Review Methodology is an adaptation of the peer review methodology of the Assembly of European Regions (AER), developed directly to use it during the SMART Europe project, when assessing different regions’ innovation anchors. The methodology standardises the relevant aspects that need to be measured, in order to enable experts with different background, to assess the regional situation in an objective way. By this, they will be able to give appropriate recommendations on the field of innovation-based job creation in the host region. The other important advantage of peer reviews is the selection of experts, who are practitioners in the field of the assessment, which means that the recommendations given by them after the review will be practical and realistic.

Section 1: Overview

(a) Short description of the Host Region, general overview, economic profile.

The Province of Avila occupies an area of 8,048 km² and is the one located farthest south of the nine provinces that compose the Autonomous Community of Castilla y León, it is integrated by 248 municipalities with a total population of 171,000 inhabitants.

Its capital Avila has been a World Heritage since 1985, it has 60,000 inhabitants and is situated 1,131 metres above sea level.

Located in the central part of Spain, it has a good road network linking Avila with the other provinces in Castilla y León, as well as with Madrid by motorway. The closest

airport is Madrid-Barajas, 125 km, there is a good connection by train with the capital although the high speed line has not arrived yet. In the province there are no navigable rivers and therefore tourist fluvial transport is nonexistent.

Its areas are very different from one another: the northern area, which is the area of La Moraña, forms part of the Castilian plateau; the central area, which begins in the outskirts of the city of Avila and extends to Gredos, is the mountainous area par excellence, the core of the whole Central System and the southern area, which is the area of the Tiétar Valley, sheltered by the Gredos Mountain Range. Here the climate gets milder, the landscape changes and so do the layout of the villages and the character of the people.

The Province of Avila has a wide network of rural tourism establishments, leading the national ranking as concerns the number of this type of establishments, with over 800 of them. There is also a good infrastructure of hotels and catering.

History, nature, cultural and artistic heritage, the wide offer of rural as well as sports and adventure tourism, gastronomy, are the main tourist resources in the province.

(b) Description of Peer Review focus (why it was chosen, specific questions and expected outputs of the Host Region)

The focus of the peer review of Avila County was creating an attractive touristic destination and using it in order to boost local economy and create new jobs. The host region was expecting suggestions regarding possibilities to innovate in the tourism sector, as well as internationalise it (currently most of the tourists are having Spanish nationality, coming from the Madrid area).

Section 2: Regional Strategy

(a) Key Findings

The Peer Review team found that the **focus of Innovation in relation to the Tourism industry was of clear** relevance to both the city and the county as a whole. However, due to the significant economic shocks felt across the EU and in particular Spain in recent years, all **existing strategies had become obsolete** due to extremely **different economic conditions** facing the area and the opportunity to align local strategy with EU strategies was now being taken up. This makes the **timing of this peer review incredibly timely** with regards to strategy and we hope that the recommendations will be useful in developing the new regional and county strategies.

There have been **considerable efforts by the city and county council** to develop a range of tools as part of the strategy for tourism in the area, including branding, tourism products and some evidence of consultation with some local stakeholders. Avila has taken the opportunity to link tourism strategy to the forthcoming anniversary of Santa Theresa, one of the region's biggest strategic and best known assets, and has done so at great speed and with considerable success in a very short time and in difficult economic conditions.

The **main findings** we identified relate to the next stages of strategy development and relate predominantly to **wider consultation of all stakeholders, more emphasis on data, targets and monitoring**, encompassing the wider range of **EU programmes** that align neatly with the 2020 strategy for the area and continuing to **internationalise** the work in the area to maximise the effectiveness of the next stages to be implemented in Avila.

(b) Recommendations

- 1. Ensure that the strategy is based on consultation and participation of the fullest range of stakeholders (public, private and user target groups)**

It was understood by the peer team that the **current strategy is now obsolete** and that economic conditions due to the economic crisis meant that existing targets were unreachable due to the significant turmoil happening in Spain and Avila in recent years. However, we understood that the **new European programme period 2014-2020 was to be the new basis for the next strategic document** relating to tourism and that it was currently **being produced**. This represents a huge **opportunity** to identify the needs of the area based on the current and projected economic climate both in Spain and across Europe and indeed the world.

However, for the current period, although there was some evidence of “round table” meetings with some businesses, we saw **little evidence of co-operation** with wider stakeholders, both in relation to co-ordination with other public sector agencies responsible for the delivery of regional and national economic and tourism strategies, including employment targets, the wider private sector (including *all* businesses in the area), or end user groups, ie. tourists or potential tourists and other groups.

The peer team would recommend **full co-ordination** with the above types of stakeholders to jointly establish a **shared vision for tourism** in the area which is understood by all. This could include the creation of support networks for all businesses (eg. see Tameside Business Family – Mini Europe Good Practice).

In relation to tourism in Gredos it was clear that the **focus is on rural tourism** and that there was a need to **develop the links** with the potentially large markets related to bird watchers in the UK, Denmark and Norway and astronomers from across Europe and the world. We recommend that user groups in these markets and to understand fully their needs in the development of the strategy. The offer can then be directly marketed to them, for them, instead of a general marketing campaign aimed at everyone. Examples of bird watching clubs and networks can be found here:

Danish Bird Watching Association www.dof.dk

Birding pals Norway: www.birdingpal.org/Norway.htm

British Birdwatching Clubs: www.birdwatch.co.uk

2. Make the fullest use in the strategy of all European programmes (accessible by the county as well as NGOs and businesses)

The opportunity to fully assess both the tourism and business support strategies in the area against the incoming range of **EU programmes is perfectly aligned** with the **development of the new tourism strategy** for the city and the county. Whilst programmes supporting purely tourism will be limited, there will be a vast range of other programmes that can be used to support the development of businesses and the skills of individuals. For example, the range of activities falling within the new **ERASMUS+** programme will be of benefit to all age ranges and will include opportunities for schools, vocational training, youth work, sporting activities as well as the traditional ERASMUS university placements usually associated with the existing programme. It is recommended that the County Council uses the opportunities that will be available from all the new programmes and assesses how each of the new programmes might be aligned with the tourism and employment strategies for the area.

Given that there is some **inability to take responsibility for certain activities in the city and the county**, due to the allocation of competencies between agencies, identifying which programmes can be useful and the kinds of groups that can make use of these funds will help remove the restraints placed on the local authorities. The **identification and promotion** of the appropriate funds to the wider stakeholders such as **schools,**

charities and other NGOs and empowering them to take the lead on their own applications directly to the different managing agents of each of the new programmes. This can be done gradually through a capacity building programme for the third sector to enable them to take their own funding decisions based on this wider knowledge of the availability of different funds. The key message is to make use of all programmes that can have an **impact on the business environment** and encourage the development of the **skills required by the tourism sector**, including funds for all stakeholders that can promote entrepreneurship, language training and other support required to develop the tourism industry. It is not necessary to have a specific programme for tourism, the main aim is to provide the industry and the potential staff within it with the skills required. Given the wide range of opportunities available, attention should be focused on **matching the aims, objectives and targets of the tourism and employment strategies** with the range of opportunities from the new EU programmes which can assist in meeting these targets. Small projects involving people can make a big difference to the culture of an area, the skills and the outlook of individuals.

In Manchester, there are private companies existing, that are working with councils and the third sector to align EU funds with the organisation's strategy or business plan and to bring life to European programmes that has relevance for the strategic needs of an area and the organisations themselves.

3. Create linkages between tourism and employment strategies with measurable targets

As there are **currently no strategies to assess** and with limited knowledge of how the various strategies at national, regional and county level interact, it is difficult to see where the current linkages are between the tourism strategy for Avila and the employment strategy overall. However, this presents an **opportunity to ensure that the employment needs of individuals both in and out of work, and for the tourism** (and wider) sector as a whole are addresses in the forthcoming 2014-20 Tourism Strategy.

We recommend that targets are set for the local and county tourism strategy based on the **strategic aims of the higher level economic development strategies** as well as national or regional tourism strategies.

In Manchester there is the Greater Manchester Strategy (the economic development strategy for the sub region):

Prosperity for all: The Greater Manchester Strategy

http://www.agma.gov.uk/cms_media/files/final_gms_august_20091.pdf?static=1

Below that there is a Greater Manchester (GM) Tourism Strategy with strategic aims for tourism and relationships to the higher level strategies in GM and nationally.

A Tourism Strategy for Greater Manchester 2008-2013

http://www.visitengland.org/Images/Tourism%20Strategy%20-%20Manchester_tcm30-33262.pdf

Finally there is an action plan, which sets out how the strategic aims will be met, with targets for growth and is updated each year. Key to this strategy is the collection of data to analyse success:

Greater Manchester Destination Management Plan: The visitor economy action plan 2012-13

http://www.visitengland.org/Images/Destination%20Management%20Plan%20V3_tcm30-33261.pdf

Structuring plans in this way will help to connect the strategy with outputs and outcomes.

4. Strategy should reflect on the whole county (Avila and rural areas)

When developing strategies it may be useful to reflect the whole of the county in the strategy and have two distinct action plans to deliver the strategy in Gredos and Avila city.

5. In order to reach sustainable tourism, planning and monitoring is essential (collect data and use to check future opportunities)

In relation to sustainable tourism and to ensure that effective and appropriate targets are set and measurable we recommend that, again, the **full range of stakeholders are involved in this process**.

It became clear during the peer review that many businesses are not engaging with the number of opportunities on offer. For example, the rural house online booking system to provide rural houses with an online reservation is significantly under used. We recommend that **monitoring of all businesses** to ask them why they do not use certain services is undertaken. Specific questions can be asked in an annual business survey sent to all businesses, however such surveys should ask all businesses *not only those currently engaged with the process*.

See Greater Manchester Business Survey

http://neweconomymanchester.com/stories/1771-greater_manchester_business_survey

It is possible that monitoring in this way **could also lead to other solutions**, for example, if it is not possible for the County and City Council to meet every rural house owner individually, where other public sector organisations might come into contact with the rural house owners from national or regional/provincial government (eg. those responsible for fire safety, health and safety, tax etc.) consider asking them to take a short proforma to collect basic information. Alternatively try requesting the most basic information from the rural houses on paper with a postage pre paid envelope or by telephone to complete for them, as the goal is to increase the number of nights rural houses are let and therefore inclusion on the online system will be critical for them.

The County has clearly made excellent progress in **developing its brand and tourism offer**. However, regarding analysis of **the demographics of the potential tourist** to both the city and the county as a whole, it **was not clear** that there was any knowledge of the potential markets for tourism for the area, including data on age, nationality, types of thematic tourist, and the size of these specific groups in terms of potential numbers of tourist who fall into these target markets (eg. birders, astronomers, religious tourism etc). It is recommended that **more data collection and analysis** to give a fuller understanding the types of tourists and their needs, as well as an understanding of the potential untapped markets across Europe and the world is carried out and then the product marketed to them directly as groups of tourist, not to all in the same way. We anticipate from anecdotal evidence that the age range of potential tourist to Avila the city is higher than average, however we have no data to justify this. The key to understanding and developing the Avila tourism product will be to **understand the demographics, tastes and needs of the potential customer**.

6. Other suggestions:

Mobility

Much work has been done to make Avila accessible by all. This represents a huge opportunity for attracting elder tourists, not only those with physical disabilities. Consider a mobility scooter rental facility or guided tours for older people with mobility type vehicles, not only wheelchairs (eg. similar to Segway tours but not so fast!)
<http://www.shopmobilitymanchester.org.uk/>

Strategic Importance of Santa Teresa

We understand that Santa Teresa wrote about, amongst other things, in relation to prayer, strong foundations, basic patterns or structures and outward practical expressions. This could also apply to building a strong and successful business. At the same time we see a lack of businesses taking up the advice they are being given, or not understanding why they need advice. There may be a way to connect the businesses to understanding the need to build strong foundations for their businesses, and the Council may have a role to play in giving outward practical expressions in terms of showcasing good practice amongst businesses where adaptations for mobility for example, or where they have considered a marketing strategy themselves for example. If the teachings of Santa Teresa can make a connection to people in the local area regarding what needs to be done to build strong businesses, perhaps this approach could be explored as a potential tool for engaging local people and businesses, especially in the rural areas.

Avila Autentica

It is recommended that the brand should seek to expand its brand and products, by mail order across Europe (most customers are from outside Spain), building on the excellent range and quality of food and tying into the recent food scandals in the wider food industry of Europe and the realisation of the general public that not all food is what it appears to be (this is particularly true in the UK). There is currently huge potential for

growth in the authentic, local and quality food industry. Consider also the development of co-operatives to enable larger scale production to reach outside markets. Consider also links to Spanish restaurants in other EU countries, eg. Manchester city centre has at least 6 Spanish restaurants.

Please also check the Norwegian good practice “Rorosmat” – which is Norway’s first regional food brand, since 2011 having producer members and operating with 4 employees. Since 2012 there is a patent on the Rorosmat brand and the sells are still increasing. The ambitious goals are having 5 more employees, increasing the production by 2% each year and become the number one brand of Norway on local food.

Tourism Offer

Linked to Avila Autentica, consider cookery classes as part of the Avila Autentica experience. Whilst it was stated that most people know how to cook the local dishes, it was also noted that most of the customers online are from outside of Spain. Building in cookery taster courses for tourists coming to Avila would increase the tourism offer and expand the market for authentic food.

Food Diversity and Innovation

Considering innovation in the food and hospitality sector, and given the range of great local products, there is a significant lack of vegetarian options in most restaurants, with most restaurants offering the same vegetarian option. Given the anticipated growth in tourism from outside of Spain the needs of vegetarians might be considered more. Whilst we understand that this is usual for Spain, and indeed Portugal as a whole (the current largest number of tourists), if Avila is to focus on innovation in the Tourism sector, which is driven to a large extent by gastronomy, it could be beneficial for the city to innovate in this area to cater for the needs of international guests. This could be done by inviting restaurants and chefs to compete in the new annual cookery competition in Avila by submitting a signature vegetarian dish made with vegetarian Avila Autentica products in the competition to increase the diversity of the food offer and raise standards and the diversity of dishes. This might assist in creative a modern feel in the area and satisfy a growing European demand for vegetarian food eg. estimates of % of total populations who are vegetarian in France 2%, Germany 9%, Italy 10%, Netherlands 5%, Sweden 3%, UK 3% (although in addition, 23% of total UK population are “meat reducers” and 10 % meat avoiders), Switzerland 5%.

Role of women

It was said many times that women play a key role in the local economy, not least in rural houses. However, there were no signs of any activity addressing the needs of women in relation to entrepreneurship. It is recommended that Avila considers learning from existing good practice for example in the UK and Sweden to develop Women’s Enterprise Networks. The first, Women in Business and in particular Elaine Oweb, was involved in developing initial stages of women’s enterprise support in Patras, Greece as part of the Mini Europe project.

See: <http://nwe.org.uk/>; www.womeninbusiness.co.uk
www.q-niz.se

Section 3: Education and Human Resources

(a) Key Findings

Throughout our exploration of the **Avila tourism product**, we discovered key strengths in relation to the **propensity for innovative development in education and human resources** within the sector. Most significant was the general **agreement** that tourism is fundamental to the enrichment and growth of Avila as an economic region within Spain and the wider global economy.

Tourism in Spain represents 11% GDP, of which domestic tourism expenditure is 6% and inbound international tourism is just below, representing 5% GDP (Mintel, 2012). It is cited as being the 4th most popular destination for international inbound tourists, with a total spending power of US\$52.5 billion (equating to 12.9% of total international inbound tourist expenditure); and interestingly, it **employs approximately 2 million workers**, 250,000 of whom work in the hotel sector (Mintel, 2012). This suggests nearly 1.25 million people work other diverse sectors of the tourism industry. It also suggests that employment opportunities may well lay outside the hotel sector itself, but that they do rely on the accommodation product for a significant proportion of its custom.

Our experience as peer reviewers and as “tourists” was significantly impacted by an apparent lack of preparedness to embrace a much needed international consumer base. Employees in the service **did not always seem to be confident in communicating in English or other foreign languages**. The issue of language barriers is crucially important in the hospitality sector, as it may generate negative emotional responses from the customers, and this hinders customers from maximising their tourist experience and them spending their disposable income in the local economy. International tourists will be greatly affected by the fact that the majority of tourism service-providers tend to speak only Spanish or they speak very basic English. It was noted that there was very **poor tourist information material and signposting in English** in Avila, which may be a great disadvantage if the province aims to compete on the international tourism market. Language as a communication tool influences many different aspects of the service encounter. The lack of relevant communication skills and misunderstandings present difficulties in obtaining required tourist information (eg. about sights, restaurants, leisure activities, etc.) and can very easily lead to stress, embarrassment and anxiety for both parties. Furthermore, it may encourage tourists to exit the experience all too early.

The tourism sector in general is characterized by a relatively low level of education (a large volume of unskilled or semi-skilled labour force) compared with other sectors of the economy, although in the recent years there has been a considerable improvement in the level of formal tourism education. We heard that **unskilled workers are competing on the labour market with those having the necessary education** eg. in terms of jobs at hotels and restaurants. Attracting and retaining skilled labour force may still cause difficulties for tourism development. In Spain there are certain types of jobs in tourism

(e.g. hotel receptionist, hotel animators), where – as opposed to other countries – **there are no official requirements** regarding qualifications or formal training. This could be a hindering factor, since if there are national qualifications for the sub-sectors of the tourism industry, as well as clearly set standards of competence, then the employers are prompted to **invest in training** or to **select properly qualified staff**, which may trigger an **increase in the quality of service**.

In the tourism sector, small and medium-sized enterprises typically do not have the time and capacity to take advantage of the educational opportunities, while large companies appear to organise their own training according to their own particular needs. The peer-review team was informed that considerable emphasis is placed by the Avila County Council on **skills development and training** when trying to address the actual needs of **SMEs** in the region.

However, this appears to be largely **related to the city of Avila**. In the Province of Avila **rural area**, **good practice examples** were evident, where local **businesses have taken charge** of the maintenance of skill development for their businesses. This was demonstrated when the peer team visited the Hotel El Milano Real, a family-run small business that undertakes the training of their employees, and also organises study tours for staff and themselves as owner-mangers.

Avila does have **excellent educational resources to build upon**, including formal educational institutions, e.g. University of Salamanca, School of Education and Tourism, as well as the informal example of the successful and inspirational practitioners eg. the owners of El Milano Real. However, there appear to be **few good examples of networking for learning purposes**, these exist on a limited scale, and so this suggests strong coordination is needed to increase the synergic effects of the educational opportunities.

At present tourism in Avila County is based on **domestic tourism**, the vast majority of the tourists coming from Madrid and the neighbouring mainland areas of Spain. However, in the future tourism planners and local tourism businesses aim to attract **international tourists** to a greater extent, targeting a wide range of countries and nationalities, eg. France, Britain, Portugal, Germany or even Brazil, Japan and China. At the moment Avila County as a destination is still lesser-known on the international markets, but there are already distinctive and high-standard tourism products that have the potential to be successful internationally, e.g. the city of Avila as an accessible and World Heritage City, gastro tourism or “dark skies” in Gredos. The initiatives and efforts to open up for the international markets are notable, however we felt that the **international market segments have not been clearly determined for the future**, and the marketing activities are not harmonized accordingly.

Competing on the **international tourism market** is a great challenge, which requires – among others – **continuous product development, joint marketing actions** as well as **international expertise**. Local decision-makers, entrepreneurs and employees with international experience are needed to enhance tourism development in this respect.

(b) Recommendations

1. Focus on improving the language skills of the tourism providers

To increase inbound international tourism to the Province of Avila it will be essential that tourism providers and associated stakeholders significantly increase their skills in English language and in the native languages of their target markets (e.g. French, German, Russian, etc.); this includes both verbal and written skills, but moreover, their skills of listening and fully understanding in order to be capable to effectively respond to questions, queries and general statements of intent.

University & tourism graduate language skills - Within the **University of Salamanca**, “*the School of Education and Tourism*” has the capacity to employ the most efficient and current **language teaching methodologies**, and provide professional help in elaborating language syllabuses and curriculum guidelines, as well as in designing teaching and learning materials that best suit the communicative needs of the local population, the service-providers and the tourists. It is important to **strengthen all language teaching throughout the education system**, however, special emphasis must be laid on teaching English and possibly other foreign languages for the future tourism professionals to ensure that they will be able to compete on the global market. In addition to formal educational institutions, **adult education institutions, private enterprises** (such as language schools), **libraries and civil organisations can have a vital role** to play in language teaching targeting the adult population.

There are a number of ways and a number of levels on which tourism industry stakeholders can **access support for developing English language skills**, and these vary in terms of the demands on a person’s time and also their financial resources. More advanced routes to developing English across the region, of course will involve institutional support, be that the University, the Tourist board and/or the County Council. Detailed below are specific examples where help could be sourced outside of university:

Possible good practice examples:

Access for all – within Spain – Perhaps one of the most easily accessible tools for all is the Richard Vaughan Teaching English TV series, as viewed whilst in Madrid. This has an excellent reputation and is open to all who choose to tune in every day.

Businesses, professionals, students & children – This Spanish based project also offers a unique intensive English Language short course residential programme to develop and refine English language skills for all interested parties. It involves Anglo volunteers to come and stay in a retreat and talk with Spaniards in English all day and night (about anything)... “No Castillian permissible”. This activity is known as “Vaughan Town” and the venues are based in the province in Gredos and very near-by (Extremadura). Activities: 1-

2-1 chats; role play; presentation skills; telephone role play; Agony Aunt problem solving issues; drama and acting.

“Good practice” for improving the language skills of the host population in Hungary – A good example of a large-scale endeavour to increase language proficiency of the population in Hungary is the ongoing project “Your knowledge is your future - Developing IT and foreign language skills” funded by the European Union; the European Social Fund. Recognizing that language skills are essential for success in the labour market a nationwide educational project was initiated by the Hungarian government in 2012. Among others, the project aims at supporting the language learning of the Hungarian population with special emphasis on the inclusion of the disadvantaged social groups in the programme, for example inhabitants from disadvantaged rural regions, people above 45 years of age, mothers on maternity leave and the unemployed. There are English and other language courses (mainly German, Italian, French and Spanish) at A1, A2, B1 and B2 levels (using the terms of the Common European Framework of Reference for Languages) offered to the adult population. As a result of the European funding the participants have to pay only 2-5% of the costs of their education, and about 300 euro per capita is allocated for this purpose.

A local initiative to improve the language skills of the host population in **Hajdúszoboszló** is also worth noting. Hajdúszoboszló is a renowned spa town in Eastern Hungary, welcoming a significant number of international tourists mainly from Germany, Poland, Slovakia, Romania and in the latter years from Russia and the Ukraine. The “Hajdúszoboszló Hosts’ Association” (Hajdúszoboszlói Vendéglátók Egyesülete) is a non-governmental organization founded in 1992, whose members are the local hotels, pensions, restaurants, retailers and other service-providers. Its primary aim is to increase the standard of their services, and thus the competitiveness of tourism in Hajdúszoboszló, which also entails improving the language skills of the host population. During the low seasons the association organized language courses e.g. Polish and Russian for the representatives of the members, as they realized that speaking and understanding the native language of their target market gives them a competitive advantage.

Links:

Spanish Participants link

<http://www.grupovaughan.com/cursos-ingles/vaughan-town-pueblo-angloparlante>

Anglo Volunteers Link:

<http://volunteers.grupovaughan.com/philosophy>

Gredos Avila: Vaughan Town

<http://volunteers.grupovaughan.com/towns/gredos>

“Your knowledge is your future”: www.tudasodajovod.hu (in Hungarian)

„Hajdúszoboszló Hosts’ Association”: www.hajduszoboszlo.hu (in Hungarian)

2. Promote lifelong learning

The concept of *lifelong learning* refers to education through life that is open to all ages, via a range of learning opportunities, including formal, non-formal education and informal learning. Learning may take place for personal, social or employment-related purposes. Notably, the process of learning is considerably important for improving our individual and collective performance at work. It is widely accepted that over time, will re-view their careers and return for some form of re-education or the learning of new skills. Proactively encouraging these educational opportunities could put Avila tourism related employees at a great advantage in an increasingly global, highly skilled and knowledge-driven economy.

Tourism customer service training

It is advisable to pay attention to the many groupings that can influence the future success of the Avila tourism. However, it is suggested that resources are specifically focused on **educating “front-line employees”**. These are customer facing, and whose foreign language communication skills and personal attitude to the guests significantly influence the international tourist experience. Suggestions to advance the service experience:

Cultural awareness training – Within the service experienced, it was clear in some instances that misunderstandings could arise from cultural and language differences and this negatively interfered with that the relationships between host and tourist, thus possibly impacting on future customer loyalty. Therefore, the training at this level of tourism employee becomes essential particularly regarding cross-cultural awareness and inter-cultural sensitivity, but also in guest service recovery and to customer complaints handling. Increased confidence in these skills can only help increase guest satisfaction and loyalty and help to retain existing custom for future return visits. The suggestion about is related to the fact that Avila is going to step out to the international markets (including the emerging markets, like China, Russia, Brasil, etc.), which means a growing number of tourists from very different cultural backgrounds. Learning English or any other language for talking to the tourists is simply not enough for effective communication. It is important to be aware of the cultural differences, the different expectations concerning communication (body language, welcoming, handling complaints, etc.) and a wide range of things (expected accommodation, meals, timing, behaviour, etc.) Of course, goodwill and paying attention to the individual tourists help a lot, but education may help to raise awareness about cultural differences in order to satisfy tourists' needs.

Technical training – Updating Job skills – providing job specific short courses, for example for tour-guides or chefs, as well as associated vocational training in customer service, may significantly contribute to a higher, more consistent, and more sustainable level of guest service. In addition, there also needs to be support for newly emerging job-profiles

including IT/Social media marketing specialists, event managers (and associated assistants), outdoor-sport activity and adventure tourism workers. The knock-on effect to other sectors of improved customer service by the tourism industry could be very extensive and vice versa. And so it is also suggested that other customer service training take place for other not-so-obvious tourism experience influencers, including taxis and other general transpiration (including to-and-from Avila); leisure and luxury retailers; general retailers; supermarkets, etc.

International experience – For those enterprises and entrepreneurs who engage in overseas visits, new business opportunities and unexpected cross-border business alliances are often created, purely because of their physical presence being in these foreign localities and the possibilities of having one-to-one meetings with various foreign stakeholders.

Exploit good practice examples! There are excellent examples to draw on who work on all the above areas. The case study presented to us in Gredos, Avila, by the rural house and restaurant “El Milano” is an exemplar. They have taken all of the above challenges by training in-house and have been rewarded with a thriving rural business through their investment in their people. It would be wise for the County Council to utilise the buy-in the expertise of the proprietors and staff of El Milano as an official training and knowledge exchange providers. By kite marking this business as the benchmark, the Council could set is as the desired sector standard for staff-development to be achieved by all who wish to apply for subsidy and funding for future projects.

Business & Community life-long learning

Micro and small business development

In addition to improving the skills and awareness of individual staff, it has been suggested that tourism enterprises, most notably SMEs should be supported by delivering educational opportunities to them. They tend to have limited capacity to update professional development and staff training, therefore providing managerial updating on issues, such as environmental management and sustainability, technology, and technology based-marketing may contribute to more efficient business operations and a more consistent tourist experience. Instruments that can be utilized: pop-up training courses and workshops, written and e-advisory manuals/good practice guides; Community of Practice groupings etc.

The tourism learning area approach could be an adaptable model in the Province of Avila, as there are already clear signs of the cooperation among the tourism stakeholders in the field of education. The concept of the “learning area” means that instead of receiving training from an educational institution, stakeholders of a destination are encouraged to form a network and work together to share and exchange skills, knowledge and experience. In this way enterprises, public authorities, training institutions and local communities are both “learners” and “teachers” at the same time, and the content of learning can be flexibly modified according to the stakeholders’ needs. The tourism learning area may be a geographical or a thematic area depending on the circumstances.

Local community

Furthermore, it is highly important to include the **local communities** in the learning processes in order to progress towards sustainability. Local community involvement is seen as essential, as community empowerment is a key in the sustainable development of a tourist destination. Local participation in planning and decision-making is vital to facilitate the acceptance of change by host communities that have arisen from innovative tourism development. The pro-active supply of such training and development, financed by subsidy at **government level**, could facilitate businesses (especially micro and small businesses) meeting the needs and requirements that future tourists will likely demand. For example, in Hungary the above mentioned project "Your knowledge is your future - Developing IT and foreign language skills" is partially funded by the European Union, and it offers not only foreign language courses but also IT courses for the adult population. There are other initiatives providing non-formal learning experiences for a wide audience. An example for a non-profit organization is *TED*, which organises international conferences and events, where various disciplines and experts give speeches and share their knowledge. The talks are released online through the TED's website (www.ted.com) and they are freely available worldwide. The TEDx programme stimulates dialogue also at a local level, for example in Debrecen, Hungary, independent TEDx events are organised discussing up-to-date and important issues, for example sustainability, global marketing and technological innovation, etc.

Finally, it must be emphasized that **governments – at the local, county or national level** – should play a facilitation and coordination role in the learning process, as they are in the position to initiate and implement educational and research programmes and to establish stakeholder networks. On the other hand, governmental agencies themselves may gain benefit from learning about a wide range of issues regarding tourism development.

Links:

Tourism learning area:

http://ec.europa.eu/enterprise/sectors/tourism/files/studies/learning_areas/handbook_learning_areas_en.pdf

TED: www.ted.com

3. Developing international mindsets & educational collaborative partnerships

Professors & students spending professional time working and studying across national borders (and seas) can provide an intensive international learning experience for those open minded individuals and organisations, which incomparably advance the knowledge and skills of the participants. International experience can be gained by creating and maintaining educational collaborative partnerships to study and/or work abroad, as these can help to overcome negative stereotypes and bring a fuller understanding and authenticity of the new culture being explored. Moreover, these new partnerships can

link in with bigger international networks (including virtual) and be exploited to facilitate longer-term business practice sharing and knowledge exchange.

Inbound and outbound student/tutor exchange – The opportunities for developing a more international mindset are many for students and tutors, most notably in study/teaching exchanges, and for Avila, this would be especially useful in English speaking countries. There are well-established programmes in Europe that provide a good starting point and existing programmes include: Erasmus, Leonardo, Grundtvig for example – and in the future ERASMUS+ programme new opportunities will be available. In other parts of the world eg. in the USA (and China), such partnerships are usually developed on an institutional agreement between universities, and the mobility visas are facilitated by mobility organisations, such as IST Plus (www.istplus.com). The University of Salamanca already has relations like this with France and should develop them with English speaking nations which would further help to disseminate the good reputation of Avila as a tourism destination internationally. International mindsets and the dissemination of new ideas in tourism could equally be strengthened by attracting more fluent English speaking students from abroad for study exchange and to study full-time in Avila itself. The inbound exchanges could be a more fruitful and cost efficient way to achieve this cross-fertilization if the university targeted the English or American markets (alongside the Chinese) for the recruitment of students.

Recruiting English speaking students – Educational tourism has seen a significant growth in recent years and Avila is well placed to take advantage of this situation. Inbound English speaking students would not only impact the university, it is likely to impact positively the local economy, both financially and also in developing English skills in local commercial businesses too.

Degrees taught in English – Additionally universities should consider introducing undergraduate or postgraduate programmes which could also be open for Spanish and international students alike. This would be commensurate with most other European Universities offering Tourism and Tourism related degree programmes.

4. Employer engagement in university curricular development and delivery

In order to meet the true managerial needs of industry, the university could actively **engage with key employers to assist and in curricular development within the Tourism degree programme**. Employers should be taught to search for collaboration and benchmarking possibilities not only local on local level, in and around Avila (best practice/kitemarked - <http://en.wikipedia.org/wiki/Kitemark>) but also from national organisations based in Madrid and also international companies. This practice is commonplace in the UK, USA, the Netherlands, Germany and many more European countries and helps to bridge the abyss between education and industry. Such collaboration helps considerably in facilitating the development of a tourism-event destination with employees that meet the demanding and changing needs and requirements of an internationally mobile and very discerning consumer.

Employer engagement practices range from being in an advisory capacity at module level, to being a full panel member of a degree validation committee. Other practices in delivery include: guest lecturing on specialist subject; master-class speaker; workshop facilitator; assessor on business projects; placement/internship provider/mock-interviewer; case study writer; host of practical facilities. Tourism management degrees could involve employers in other ways, in particular in helping research: eg. employers could offer themselves as case studies to have data collected from and later be analysed. One particularly effective method works hand-in-hand with industry “Group consultancy project”, whereby an assigned group of students aim to find practical solutions, based on empirical research, to solve real business problems. More recently, entrepreneurship is being embedded into the degree curricular and this helps incubate new business ideas and new business leaders of the future. We would recommend that the Tourism degree at University of Salamanca consider some of these interventions.

All these employer-based interventions may be provided free-of-charge as part of the employer’s “social responsibility” or they can be provided purely as business service, paid at an hourly rate. Not only do the students benefit in their studies, they also benefit in their careers from having a much clearer idea of what industry requires for. Further, it also aids staff development in professional up-dating, and it profiles the university’s professional reputation more widely in the community and worldwide.

Possible further good practice example – already in the Catalogue – is the cooperation established between the **University of Debrecen and the IT Service Hungary company**: the two organisation have various common activities in order to ensure that graduates are having the necessary skills required by the industry (in this special case on the field of IT).

5. Managerial orientation of degree

It was cited during the peer review, that local placement providers often found the student interns too practice-based and seemed to **lack the higher level knowledge skills and managerial competencies**. This suggests the inclusion of more managerial oriented programme, including areas such as Tourism development; sustainability; HR; Marketing, CSR, and Strategy... and Enterprise. It is believed that these more advanced skill sets might help retain local inhabitants in the industry as they see more long term and challenging career opportunities nearer to home. Moreover, it could help to develop a more innovative and long-term strategic thinking for the tourism industry in the Province of Avila.

6. Professional event industry employment sector and Event Management degree

It was notable that Avila and the province are abundant with **cultural, sporting, heritage and gastronomic events** of which it is rightly proud. However, in the tourist experience

we had little information that could be sought on these events, both inside and outside the hotel concierge. Indeed, **very little information could be found** easily within the tourist offices, regardless of the fact that most information was not available in English. It was clear there was **no formal strategic approach** to event management and it was unfortunately provided in a largely word of mouth manner. This suggested a missed opportunity and a prime area for event-tourism development and the consequential potential impact on local employment opportunities could be significant.

This also suggests therefore that the events industry sector needs to be taken very seriously and is ripe for an innovative approach to be taken towards it. The potential knock on effect on tourism and the wider employment landscape of developing a professional events sector to integrate with a new tourism strategy are very positive indeed. This will require financial resources from government and also a managerial talent to fill the evident skills gap, to this end, we suggest to the University of Salamanca to develop an addition to their portfolio of courses and **create an Event Management degree**.

Section 4: Innovative Environment

(a) Key Findings

Innovation activity dealing with development of services and business models, are **much more complex** than innovation processes to develop new industrial products (hardware). There are usually more stakeholders involved, and it is often **difficult to visualize a profit** potential high enough to attract risk capital. It is also more difficult to know the activity of potential competitors. Innovation activities in the tourism sector are mostly related to **services and business models**. Another challenge in the tourism sector is the businesses which usually are very small with restricted capacity financially and when it comes to human resources.

The **peer review to Avila** showed the group many interesting projects and activities, and handled in a correct way, the **potential seems to be large**.

It seems to be some interesting business models which include **cooperation between companies** (eg. Gregos). There are certainly also some **individuals** which are inspirational for others and are able to lift both cooperation and innovation processes.(eg. Avila Autentica, ASENORG)

We **did not see any intermediary organisations** playing an active role in Avila. In Gredos however, we met an active business association (ASENORG).

The economic **crisis** has also forced individuals to think new, and the existing, well **developed network** of rural houses is definitively a strength to build upon.

However, it seems to be a **weak coordination** and cooperation when for instance it comes to the **events sector** (eg. V. Centenary of Santa Theresa and Avila Autentica). Many companies and restaurants seem to do "business as usual". We think that more cooperation abroad could be beneficial for the region; **language** and best practice. We observed good networking in Gredos, but **no complete Clustering** among businesses in the region.

It also seems to be **insufficient business support**, both financially and in the processes of fostering innovation.

Mainly due to language problems, it seems to be **little encouragement to focus on international cooperation**. This is related both to encouragement of higher level managers to go abroad to gain experience and to encourage international students' **placements** in local businesses.

Avila seems to have a **good school of tourism** and hospitality, but it seems to the group that there is a **lack of focus on entrepreneurship in the education**. The lack of focus on entrepreneurship seems also to be the case when it comes to the local government.

It seemed for us that the existing strategies were elaborated without a broad cooperation from the whole range of stakeholders. We did not experience/missed participation from business actors in strategy development/round table discussions in the urban area.

Many processes seem to be **top down** rather than bottom up.

The scarce focus on entrepreneurship may also be the reason for the **business gardens and incubators only existing in the capital**. We did not observe clear links to EU programmes for support of innovation infrastructure, and neither did we see national financial schemes to support start-ups in the tourism sector.

The University has an important role both when it comes to student education, and as a knowledge provider, but we think there is a much larger potential for the School of hospitality and tourism.

The financial **crisis makes** it difficult to rise private capital and in particular risk capital for startups.

Due to the crises companies **hesitate to hire students**, hence the students have to leave the region (and the country).

Need for more cooperation in the different sectors and between the triple helix partners, including actors from surrounding tourism destinations.

We found some initiatives for **tourism products and packages** (eg. wine tasting, micro-brewery etc.), but we believe the potential to be larger.

There are different tourism **experiences** in the region, both in the city and in rural areas, but we did not see any packages combining these.

We think the **potential in the region is much wider** than limited to religious and historical. We don't think Santa Theresa is the only option for innovation.

We had many excellent **gastronomical** experiences, but this alone will not be enough to attract tourists.

(b) Recommendations

1. Collaboration

Encourage and foster **collaboration** between the different stakeholders, among the different levels (national, regional, local), among business actors in specific geographical locations, as well as companies in the wide range of tourism.

Include business environment in roundtable discussions for innovation

2. Foster cluster development

After Prof. Michael Porter wrote "The Competitive Advantage of Nations" in 1990, cluster development has been a focus in many countries. Cluster development linked to regions got even more focus and regional attention after his publication "Innovation: Location Matters" in 2001. Many scientists have taken these thoughts further and suggested adaptations to their national and regional innovation systems, thus both nations outside (e.g. Norway) and inside the EU has focused on cluster development. We recommend that the Province of Avila should look into the EU programs for cluster development and see what could be beneficial for their own region.

Establish a common understanding of goals, target groups, strategies and action plans.

Combine the offers of the city and the rural areas

There must be budgets (private and governmental), to support the processes and concrete actions.

3. Entrepreneurship

Focus more on **entrepreneurship**, in education as well as in the overall strategies.

Establish proper incubators and other innovation infrastructure (e.g. intermediaries) suitable for tourism industry.

There is a need for financing schemes, for start-ups and small projects to ease initial innovations in small companies.

4. Learning from best and new practices

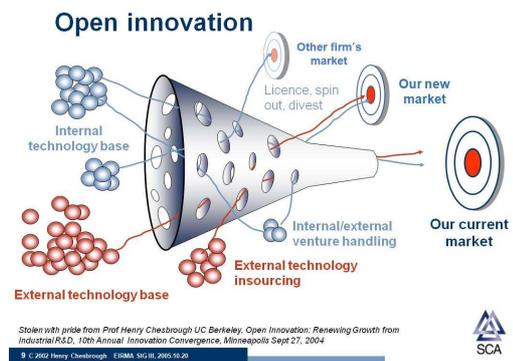
Encourage higher level managers to go abroad to gain experience

Encourage (international) student placements in local businesses

Good practice/best practice vs. new practice: copying the old solutions. We have observed many good practices existing in the county, use investigate them, modify them if needed and use them.

5. Open innovation

Open innovation (Henry Chesbrough) is a paradigm that assumes that firms can and should use external ideas as well as internal ideas, and internal and external paths to market, as the firms look to advance their technology. The boundaries between a firm and its environment have become more permeable; innovations can easily transfer inward and outward. Companies can not rely on their own development (R&D), and should rather share ideas and knowledge with other companies and R&D institutions. This was seen in Gredos, but it seems to be a lack of involvement of R&D institutions (The university in Avila).



6. Incremental innovation

Incremental innovation is a series of small improvements to an existing product or product line that usually helps maintain or improve its competitive position over time. Many of the "products" seen during the peer review can be regarded as incremental innovations, and companies should be aware of it and take more advantage of this.

Make environment for encouraging continuous development of tourism products & packages (eg. learn to make a traditional Spanish sweet, experiences – good practice: „wine tasting at 4Postes, ...)

7. Financing possibilities from EU

In the new Research, Development and Innovation program in EU, the “Horizon 2020” program, there is a much stronger focus on SMEs. Companies can get a lump sum to do their initial innovation (50.000 Euro), and if the idea is good they can get further financing of the project.

Section 5: Partnership

(a) Key Findings

Concerning the issues related to partnerships, the review disclosed that the region of Avila has:

A developed network of organisations targeted on supporting the tourism sector

During the peer review week, we met a whole range of organisations, associations, institutions, private companies and businesses that **acknowledge the potential of tourism** in Avila under the current economic conditions.

Public initiatives have been set up like the Provincial Tourism Council that has strictly a political managing board, while the rest of its members: private businesses, unions, NGOs, the University, local municipalities, etc. play an advisory role. Being a recent initiative, it is still unclear if it appropriately represents the significant key players in Avila’s tourism sector. In addition to this, we felt that its **top-down approach was discouraging members** from enrolling in this Council. Having said this, it did highlight the engagement of some relevant stakeholders for future common interests, creating a positive environment for cooperation.

Associations like CONFAE, the hotel and business association from Avila, the Avila business association, Nord Gredos owners association – ASENORG, are emerging with the **common goal of penetrating** the national and potentially the international tourism market.

The **University of Salamanca** has a local branch in Avila: the School for Education and Tourism with a yearly average of 100 students (1/3 are foreign students involved in the Erasmus programs). It represents a **huge opportunity for the local tourism sector** to receive trained professionals, but it is currently under-exploited for many reasons: mostly the unfavourable legal framework, lack of attractiveness and local opportunities for young graduates compared with close job markets like Madrid.

Multitude of brands bringing together stakeholders from different areas of the local tourism industry

Having a **brand** means giving a personality that **identifies your product** (name, message, sign, symbol, or design, or combination of them) and the way it relates to its key constituencies: all the involved actors.

Avila seems to have acknowledged the potential of brand promotion and established both at local and provincial level several brands, which involve actors in tourism at all levels.

“Avila Autentica” set up by the County Council is a collective brand with the enclosed logo that promotes the typical agro-products of the area, uniting local producers that cannot promote their products on the market by themselves. It is a **good example of support given by the authorities to local businesses to expand**, but also it is intended to be a label of authenticity for the quality of the local products. We heard from “Avila Autentica” that the majority of their customers buying from their **“virtual shop”** were international, and there is a way that we can exploit these connections. For example, partnerships could be established with Spanish restaurants in Manchester, who could sell Avila products. Exporting perhaps could be achieved by a joined up approach and/or product.

The **municipality of Avila has concentrated its image on the personality of Santa Teresa**, her handwriting being the logo of Avila city, as well as other associated brands like “Saborea de Avila” for the gastronomy offer of the city. The walls and the 9 gates of the town are also wrapped around the selling image of the city.

Nevertheless, sometimes it can be **confusing and counterproductive to have too many brands**. Too many logos intended to identify mainly the same tourism resources makes the key messages unclear. What does Avila want to be famous for? Given the scope of the offerings available in Avila, there is a lack of clarity and consistency in the activity and messaging.

Little flexibility in developing collaboration with potential clients such as tour operators, travel agencies, etc.

Spain is still a **major player in the world tourism market**; before the economic crisis, Spain was the best European earner for two years running for tourism activities and ranked as the fourth destination in the world.

Such a prosperous market must have attracted **major tour operators** and **travel agencies** that started activating here and developed partnerships with local business.

Avila is not a typical Spanish destination, but it has potential and a wide range of tourism resources that can turn it into a key player on the tourism market. The main

issue is the **clarity of their target market**: the tourists to which they address their offer. Is Avila looking to concentrate on mass tourism, individual tourism or both? During the peer review we heard about different statistical data, however sometimes we could not see the linkages among them, which gave us the feeling that there is no clear information about the type and origin of the visitors, the main markets interested in Avila, the new emerging BRIC countries (Brazil, Russia, India and China).

An additional key concern that arose during the week was the **lack of public transport routes into Avila as a destination**. The involvement of tour operators or at least travel agencies is necessary. In 2011, Spain was chosen as the most visited destination worldwide by a survey conducted by EACTA (European Travel Agents and Tour Operators Association). Likewise, the highest percentage of tourists that used the services of a travel agency were those tourists strictly interested in spending their holidays in Spain (24%), for more info please follow http://ec.europa.eu/public_opinion/flash/fl_334_en.pdf.

We understood during the peer review week that working with these operators is discouraging because they practice high profit margins (30-35 % /tourist packages).

An encouraging example could be the case of the UK Federation of Tour Operators (FTO) that has made public its pricing and profit politics, starting from 10-12% as net margin on sales turnover, depending on the package sold (air plane tickets or accommodation or tours), for more info please follow <http://www.fto.co.uk//operators-factfile/pricing-and-profit/>.

The municipality of Avila had an agreement with an Austrian tour operator that will bring foreign tourists for three months during the celebration of the 5th centenary of Santa Teresa. The manager of El Milano Real Restaurant and Hotel from Hoyos del Espino has been working for a long time with tour operators and she seemed to be content even if she is running a small rural business.

Good examples like those mentioned above need to be fostered and implemented by other businesses in the area, working towards a mutually beneficial balance for both parties involved.

(b) Recommendations

1. Support a functional tourism network with its supply components to secure the existing and potential tourists

The most common definition of the **travel industry** speaks of a composite of organisations, both private and public, that are involved in the development, production, and marketing of products and services to serve the needs of the travelers (Gee and Makens, 1997). In this chain, we can find **direct providers, support services**

and **developmental organisations** on one hand and the supply components such as natural resources, infrastructure, hospitality, etc. on the other hand.

Direct providers that are the most visible to the tourists are well represented in Avila, as, at province level there are: 144 hotels, 939 rural houses, 520 restaurants, a multitude of retail shops, etc.

The *support services* level that provides basic services and goods but also specialised services (for example, tour organisers, travel and trade publications, and hotel management firms) need to be further developed and oriented towards the upcoming strategy in tourism.

Developmental organisations, responsible for the sustainable development of tourism have uneven roles in the local tourism industry.

At county level, the **Provincial Tourism Council** has united several stakeholders, but has a top-down approach and it has not set up its own budget. **Changing its status**, having legal **entity**, focusing on attracting **strategic funding for tourism** in the upcoming financing period would increase the attractiveness and utility of such a board.

Having said that, it need not always be necessary to run projects directly, but **to identify willing individuals, businesses or NGOs** to develop activity directly (see strategy section). Womens' Enterprise Networks may also be a useful tool for a self supporting system for female entrepreneurs, for example in rural houses. (see strategy section for more detail).

The potential of the **University School for Education and Tourism** is underutilised, especially by the private sector. A continuous **interaction** between these two important actors should be developed; the business sector should have an input in the curricula and training of the tourism specialists, and students should work in the tourism facilities (hotels, restaurants, travel agencies, and local tourism offices) as part of their practical lessons like internships. As a result, the students would have a better chance of finding a job in this sector and there is a greater chance they would remain in Avila after graduation.

Encourage interaction between university stakeholders for the purpose of research, data collection and forecasting. Utilise the students, their programme and skills for the benefit of the region.

There is also potential to set up partnerships with overseas universities, for placements and sharing best practice. It was clear that you had a lot of **overseas students** already studying in Salamanca, but how could you utilise their connections back home to raise the visibility of Avila internationally?

The **accessibility** project presented to us by Noelia Cuenca, should be fostered and **extended as a unique selling point for Avila**. This is an example of best practice, where

major players in the local tourism sector: local NGOs, the municipality, hotels, restaurants have worked together to make major tourism attractions of the city available for tourists with special needs. This project has demonstrated the willingness of stakeholders, to make improvements to increase business and the tourism sector in Avila. Is this a network that could be continued? Those businesses having made adaptations and experiencing some increase in turnover should be showcased as good practice for other businesses to follow.

The infrastructures, the natural resources, the hospitality, *as supply components* of tourism in the Province of Avila, are favourable points that can sustain the development of the tourism sector.

The focus of the county and local authorities on turning Avila into a DESTINATION that offers you cultural, gastronomic, outdoor EXPERIENCES is correct, but must concentrate on valuable brands: Avila Autentica, Yemas de Santa Teresa, Gredos Park, etc. We recommend that you **foster co-operations between local businesses** to use possible synergies of products and services. The tourism brand for Spain is “all that you are looking for”, however, for Avila to stand alone it needs a differentiating message that instantly communicates WHY someone should “visit Avila”. For example, the Pinos Cimeros adventure tree park in Gredos is a good tourist attraction, but it also could serve a corporate/business market for team building/away days and support the corporate/conferencing potential which was also evident in the area. See UK based similar business, Go Ape, which has expanded very quickly over the whole of the UK <http://goape.co.uk/events/corporate> and case studies <http://goape.co.uk/events-case-study>

2. Work with intermediaries: set up partnerships with tour operators/travel agencies

Tour operators continue to have a **major influence on consumer choice**. As mentioned earlier, a tourism market that has no relationships with tour operators and travel agencies is unlikely to attract more tourists or to increase overnight stays.

Big or small tour operators/ travel agencies are already on the Spanish tourism market, so, the challenge is to attract them to what Avila has to offer.

Presenting Avila as an alternative for the usual coastal holidays in Spain, outlining its **niche tourism offers** as complete and functional tourism packages could be the proper way.

Partnerships with other **World Heritage sites** could also hold massive benefits by creating common packages or thematic routes for example. We are aware of the existence of common initiatives, but we would like to recommend having more emphasis on cooperating with these sites.

Tourism packages that include different **destinations outside of the walls of Avila** (the circuit of the UNESCO cities from the area), different activities in the province (bird

watching, dark sky, outdoors, events) secured by the offers of hotels, restaurants or rural houses should be promoted on all available media and social channels. Creative and targeted promotion can provide a powerful tool in influencing visitors and attracting potential tour operators.

Websites, commercial guide books, leaflets should be made available and **translated into English**, providing positive messages and encouraging tourists to be active (write reviews, complaints, opinions) in their future tourism experience in Avila. It is also important that **at least some of the leaflets and maps should be offered free of charge** to the tourists, at the tourism offices.

Look for operators that promote types of tourism that are not affected by seasonality: **niche tourism** (eg. birders, astronomers), business tourism, non-family tourism, or even look for eco-tour operators.

3. Develop an “eco-friendly” local transportation system for tourists

Tourists that do not rely on the services of travel agencies and make their own travel arrangements would like to have a **reliable transportation system** on their side at destination.

Madrid can be considered as the gateway to Spain, and Avila is situated at a favourable distance from Madrid, unfortunately, the transport could be felt as connections are seemingly complicated. We would recommend to make as clear as possible to the future visitors the different ways of getting to Avila, inform them about the closeness to Madrid in tourism brochures, websites etc.

To enjoy the experiences of Avila and the county without a car, you will need a transportation system if you want to extend your stay for more than one night or to enjoy touristic experiences outside the city walls. Therefore transportation is a key. It is really important to develop new, **sustainable ways of public transport within the county** in order to allow visitors to benefit from the huge variety of programmes and heritage offered by rural areas.

The county should consider setting up **partnerships with local transport companies** to offer means of transport to different tourist locations around Avila or even to get to Avila, accessible for all type of tourists.

Try to develop **sustainable means of tourist transportation** taking into account the Kyoto Protocol, and make it official in the tourism strategy, soon to be drafted.

4. Do not underestimate the potential of partnerships set up during internationally funded projects

The availability of EU funds, international financing programs, the new upcoming financing period could solve many of the requirements of the tourism market in Avila

starting with infrastructure (eg.: connections, signposting) and even within the service sector (eg.: continuous training for tourism workers). The **Council for Tourism should attract funds** and seek out these **strategic projects** for the benefit of local stakeholders. It may not always be obvious which fund can help, it is not necessary to wait for a Tourism programme – most funds can be adapted to assist the tourism sector and the skills of people who work within it.

There are a number of comparable cities internationally, which could offer insight into how to present a clear tourism marketing message/offering. For example, York or Oxford in the UK are also historic cities, a few miles from major cities – it would be advisable to check how they are attracting and packaging tourism offers to attract overnight visitors. See www.visit-york.co.uk

In addition to this, these partnerships are also an opportunity to establish connections that later can be transformed into working partnerships, to exchange experiences and maybe to import suitable best practices.

Section 6: Sustainability of the jobs created by the innovative sectors

(a) Key Findings

The peer team experienced during the peer review in the Province of Avila that **stakeholders are mostly aware of the importance of sustainability** – in terms of its economic, social and environmental dimension as well.

In order to ensure the sustainability of the jobs created within **tourism**, that is considered to be the most important economic sector of the province, some crucial steps have already been made.

The peer team has seen evidence of various existing **collaborations amongst different actors** of the tourism sector (eg. setting up the Provincial Tourism Council, developing common brands), these initiatives are really important on the way of drafting a **common strategy** for the tourism sector that will lead to **long-term sustainability** of the future actions and created jobs.

The existing collaboration and possible future **common project development with world Heritage sites** might also lead to higher level of services in the tourism sector, as well as to the creation of new local jobs.

As an example please refer to the **THETRIS** Central European project (www.thetris.eu): In rural regions cultural heritage has important value in regional development, especially in culture economy, which can be the main protagonist in economic and social development. The THETRIS project's main objective is to **increase the competitiveness of rural areas** in Central Europe by the capitalization of cultural heritage, to develop long-

term strategies for the **preservation and sustainable exploitation** of churches in the partner areas, and to raise awareness of local actors for the preservation of cultural heritage. The complex development of churches have positive effects on all the community, as more tourists come to the rural areas, which **boosts economic development, create jobs, increase living standards**, and local residents will stay in their area. By involving the local community in the development process, they also understand the value of their heritage and take part actively in its preservation and protection.

The peer team also sees huge potential in the upcoming events related to the **V. Centenary of Santa Teresa**. This is a great opportunity for calling the attention of religious tourists from all over Europe (and the rest of the world) on the heritage Avila is having. What we think is important to provide continuous information via internet about upcoming events in the language of the targeted foreign visitors as well, and to engage various organisations even from abroad that are having experiences in organising journeys with religious motivation. It is also important that these events and connections should be considered as a **focal point** for a well developed long-term tourism strategy of the area.

We also understood, that the **unpredictable economical and legal environment** makes it hard to think and plan in the long-run. However we think it is essential to allow stakeholders having a clear view on the upcoming initiatives, guidelines and plans of the different organisations in order to be able to maximise the benefits for the city as well as the rural areas of the province.

The peer team is also aware of the different initiatives the province makes targeting environmental sustainability via its various projects, which is great and highly favourable. It is also important to focus on **environmental sustainability** and combine it with developing the new tourism packages, use it as a kind of **unique selling point** of the province – eg. when targeting some niche market.

(b) Recommendations

Based on the above mentioned findings the peer team would like to make the following recommendations to ensure the long-term sustainability of the jobs in the tourism sector in the Province of Avila.

1. Continuous data collection and analysis is needed – know where your assets are, and what do businesses need, what students want

During the peer review the peer team has seen many outstanding projects and initiatives, however it was also expressed that the province does not have developed yet a common strategy for tourism. As a first recommendation we would suggest to set up a system for **continuous data collection and analysis**, and develop the tourism strategy with the **wide involvement of stakeholders** – eg. the methodology used during the development of the Competitiveness Plan Gredos-Iruelas could be further extended. This

analysis should gather information not only from public bodies and statistics but also from the various actors active at the tourism industry. Involve **service providers**, ask about their needs and their experiences. And why not asking **international students** coming from the countries planned to be targeted by the strategy to contribute with their opinion? Possibly using the “DEMOLA model” of Tampere that is designed for innovative companies and students to work together – with adapting it to develop different projects in the field of tourism?

2. Provide consultation opportunities for employers, industry representatives with university and public administration

The initiative of setting up the Provincial Tourism Council is a good start – please see more at Partnership section – it would be useful to involve more deeply the representatives of the different stakeholders, eg. employer and industry representatives, universities and public administration organisations. The Council should consider to have a **more clearer and more important role in shaping tourism on provincial level** – eg. becoming a legal entity that is able to run directly for funding, searching for cooperation possibilities (even on national or international level) for its members and act as a kind of “**umbrella organisation**” to facilitate their participation. It would be also important to make clear the role of the different organizations in the shaping of tourism policies – in order to create a **transparent system** that will be functioning well on the long-run.

3. Extend tourism for all year – develop new packages

In order to ensure the sustainability of the tourism sector and its services, newly developed tourism packages should **incorporate the results of previous analysis** as well as try to focus on the identified **niche markets** – especially whenever possible with extending tourism for all year. In these terms the already identified packages introduced to the peer team in Gredos (eg. birding, dark skies, mycology, trashumanica, sport and adventure) could serve as a good basis, as well as the “accessible tourism” image of the city of Avila. With focusing on niche markets, the effects of seasonality could be better handled. A **combination of different offers** – eg. rural areas and the city or culture and adventures – could also increase the attractiveness of the newly developed packages. Please refer to the above mentioned THETRIS project in which eg. a pilot project is under development to **connect sport and cultural tourism** with using **modern technology** in order to attract tourists to rural areas, and to create local jobs.

4. Real business cooperations to be established in order to maximise the utilisation of resources

The different cooperation projects (eg. common brands) are highly welcomed, and the public institutions should continue to encourage such initiatives. In order to ensure that

these will be viable in the long-run without continuous public intervention, some emphasis should be made on **supporting businesses to develop real, win-win cooperation** actions as well that are economically, socially and environmentally sustainable.

5. Use EU programmes (eg. Horizon2020 – innovation programmes for SMEs!, Erasmus+)

The peer team sees huge opportunities in the **upcoming EU financial period**. It is really important that the public and private actors get information in time about the future **programmes**, as well as update their local, national and international **contact lists** to make partner search easier when the EU calls are out. It is also possible to think about university cooperations and exchange programmes – eg. Erasmus+ – to be able to incorporate in the various local and regional initiatives **international good practices** and as well as support **language education** of students and tourism service providers.

Section 7: Conclusions

During the peer review in Avila the peer team had the impression that as an absolutely remarkable strength of the province, **local stakeholders are aware of the importance of tourism** and they have a common understanding on the fact that it is a possible innovation anchor to build on.

We have seen many good examples of cooperation (eg. Avila Autentica, CONFAE, developing the Provincial Tourism Council...), of targeting different niche markets (eg. accessibility initiative, thematic groups appearing in the Gredos-Iruelas Competitiveness Plan...) and as well as the huge potential of tourism products to be offered to future visitors (eg. gastronomy, culture, religious traditions, various activities...).

To **sum up** our recommendations we would like to **suggest the decision makers** of the Province of Avila the followings in order to help them with developing new initiatives and policies that will lead to the **creation of new jobs** and a **better exploitation** of possibilities offered by the **tourism potential** of the area:

1. Strategy and coordination

It is essential to develop a common tourism strategy with the involvement of the widest range of stakeholders – in line with other regional, national and international strategies and trends, based on well prepared data collection and analysis.

Set up a clear focus, with clear target groups and clear message.

Ensure that in this strategy the role of the different actors is clear, and coordinate their activities in the future to be able to benefit from possible synergies.

2. Avila city and rural areas

Combine the offers of the city and the rural areas in order to make the province more attractive for future tourists – and to be able to create more local jobs.

Good practices are existing in the territory, use them in a wider range, transfer from one part to another, create “learning network” of stakeholders.

3. Internationalisation

Develop new initiatives to strengthen the foreign language knowledge of locals – especially those directly employed in the tourism sector, being on the “front line” and meeting with visitors directly.

Search for international examples, good practices – you do not need to re-invent the wheel. Exploit the opportunities offered by the various international cooperation programmes. Some of the new programmes of the 2014-2020 EU financial period are already available, check the possibilities of developing new projects that can support to reach the strategic objectives of the Province of Avila.

Support local stakeholders in participating at international cooperations.

The peer team truly believes that with better exploitation of the tourism potential and further development of the already existing great initiatives the Province of Avila will be able to create new jobs in this sector and attract more visitors to the area.