



2020-1-UK01-KA227-YOU-094543

Desk Research Report - Italy

Document Title	Desk Research Report - Italy	
Project Activities	Desk Research Report - Italy	
Authors		
E-mail address		
Organization	M.O.R.E. Association	
Country	Italy	
Approval Status	Draft	Final X
Number of Pages		
Keyword list		
Method of Distribution	Email <input type="checkbox"/>	Internet X
Dissemination Level	Confidential X	Public <input type="checkbox"/>
Language Version	English	

KA2 - Cooperation for innovation and the exchange of good practices Partnerships for creativity



The European Commission's support for the production of this publication does not constitute an endorsement of the contents, which reflect the views only of the authors, and the Commission cannot be held responsible for any use which may be made of the information contained therein



Table of Contents

1.	Introduction	3
1.1	Project objectives	3
1.2	Project Target group	4
2.	National Report	5
2.1	The objectives of the Report	5
2.1.1	The methodology	5
2.2	The results	6
2.2.1	Conclusion	24
3.	References	26



1. Introduction

On the grounds of Heritage Tourism acting as a fundamental part of cultural heritage and sustainable tourism making up almost 40% of tourism revenues globally, a wide list of digital initiatives have been taken during the last few years. In particular, advanced technologies (such as 360o photo, Augmented Reality, 3D scanning, etc.) in conjunction with hybrid skills (i.e. technical and non-technical) of businesses' digital transformation have been providing endless possibilities in the field of cultural tourism towards enriching tourists experiences based on cultural heritage. Indeed, there are several examples revealing that heritage tourism is increasingly moving towards a new digital era. However, the COVID-19 crisis has a massive impact on the tourism-related cultural sector, having shone a light both on the challenges endured by people working in the sector and on how cultural life is weakened by the global lockdown (Compendium of Cultural Policies & Trends, 2020). In fact, the pandemic crisis jeopardizes the most crucial parts of cultural tourism (UNESCO, 2020). With almost 13% of museums being under the threat of never re-opening, more than 80% of UNESCO World Heritage properties being locked and most people working on tourism-related jobs being currently unemployed, the need to move towards digitization becomes even more urgent. To that end, new skills are being required among the professional profiles of culture and tourism. It is thus rational for young people seeking job opportunities in the heritage tourism sector to be more equipped with digital competences to form a more resilient tourism workforce (UNWTO, 2020).

1.1. Project Objectives

The project aims at empowering young people in promoting Heritage Tourism resources through the development of their own skills in Digital Design for the digital transformation of heritage tourism. Moving towards a totally new era in cultural tourism that integrates the concept of digital heritage tourism into cultural life, young job seekers should be equipped with competences that allow them to differentiate themselves among a close and yet competitive industry. After the project completion,

participants will be able to put their creativity into action being in position to map out digital content that promotes local culture and manage the tones of resources that cultural life offers (museum exhibits, local products, places to visit, local food, etc.) in an intuitive manner.

Recent research has shown that the tourism sector has been turning into digitalised solutions towards the establishment of Smart Tourism. The objective is to lead creativity and innovation in tourism, while contributing to new destination configurations (Dredge, et. Al., 2018). In fact, the Digital Heritage Tourist definition has recently appeared under the scope of tourists visiting a place (museum, location, etc.) virtually instead of physically, having the entire tourist experience in a digital manner.

However, after COVID-19 outbreak, global tourism is brought to a standstill, with millions of people looking for cultural experiences from their homes and with professionals being rather unprepared for the lockdown and with their hands tied in the context of a travel-less world. On the other hand, youth play a significant role in all action plans to limit the impact of the crisis, while they are among the most vulnerable groups being the main victims of the aftereffect of the pandemic (Rojo, 2020). Therefore, with youth unemployment being increased by 0.8% within the first month of the crisis (March-April 2020) and with Heritage Tourism being at stake and turning to digital solutions to survive, there is an urgent to equip young people with digital competences in order to overcome unemployment and support heritage sustainable development.

1.2 Project target group

The main target groups of this project are:

- Young adults that already have working experience in heritage tourism or are interested in promoting heritage tourism
- Young adults that are interested in improving their digital competences
- Youth workers
- Youth training organizations

- Tourism organizations
- Organisations related to the creative/cultural industry
- NGOs or other organizations/authorities taking initiatives towards sustainable development
- Digital designers/Digital design/e-Learning companies
- Policy makers

2. National Report

National Reports are the official documents by which countries report information and research data useful to the development and delivery of a project. Used collectively, National Reports can draw the picture of the overall context of the project.

2.1 The objectives of the Report

The main objective of the reporting phase of the project is to cumulate research data and useful information about the partners' countries, in order to draw the picture of the overall context of the project. This phase can help making clear the general objectives of the project and what are the needs, trends, and issues to be considered during the whole project development.

In this case, the aspects to be considered during the research phase, that will then be used as research questions for the national report writing, are: the unemployment statistics in the partners countries in the tourism sector; the number of people who have actually conducted tourism and cultural heritage studies in the country; data of employed people in the tourism and cultural heritage sector; what study programmes the country offers in the tourism sector; what issues concern this field nowadays and the people involved in it; how the Covid context has affected the tourism sector and the people involved.

2.1.1 Methodology

In order to be able to compile this report, M.O.R.E. used previous research carried out in the digital field which were the starting point for further insights using the Google search. The Italian government has recently introduced new measures to facilitate both digital and tourism, which is why the news found does not yet give a broad description of the digital and tourist landscape of our country. However, the selected material, in our opinion, is valid enough to give a picture of the Italian situation.

2.2 The Results

1. *What are the main areas that tourism-related training programmes/curricula that your country focus on?*

Many young people choose to train in tourism from a very young age. In the 2016/17 school year, (according to data from the MIUR, Ministry of Education, University and Research), although the general enrollments of the Technical Institutes have dropped, the number of enrollments for the Tourism address is growing. Among the young people who enroll in a professional institute, it is the "Services" sector that collects the highest number of enrollments (10.5%). In Italy, tourism training starts from high school with two different training offers:

- Technical Institute for tourism which issues the technical education diploma;
- Professional Institute for Food, Wine and Hotel Hospitality, which issues the professional education diploma.

All the Regions of Italy have a high school for food and wine. In the case of tourism, the "reformed" Professional Institute has three branches within it:

- Food and Wine;
- Hall and sales services;
- Tourist reception.

In addition to the five-year courses, professional guidance provides for the possibility of undertaking other courses, three-year (which issue the qualification of Professional Operator) and four-year (which issue the professional diploma of Technician). These offers can be activated by individual schools in agreement with the Regions.

After high school, the university offer in the tourism sector includes specific degree courses, such as tourism sciences, or other courses in different disciplinary fields (for example economics or languages) with tourism content. The training offer consists of a first level degree (called three-year) and a second level (called master or specialist). The three-year degree awards the academic title of Doctor. Subsequently, it is

possible to access the second level degree courses, which last two years and issue the academic title of Dottore Magistrale.

At the end of the degree courses it is possible to attend university masters, first or second level, which can be accessed based on the qualification obtained. A three-year degree allows access to a first level master's degree, a master's degree allows access to both master levels. The masters have a duration of one year. The academic qualification awarded is that of a first or second level University Master.

Examples of post graduate courses:

Management of Tourism and Cultural Activities, Languages of Tourism and Intercultural Communication, Masters in Tourism and Territory.

Most active bodies:

- ACT - Creative Tourism Academy: the CTS Academy, thanks to the experience gained in activities related to tourism and the environment, offers Masters and Specialization Courses for the training of young people interested in entering the world of tourism as managers, tourism programmers, employees in the marketing or distribution of tourist services, tourist assistants and tour leaders, employees in congress tourism and the hotel sector, and again, journalists and reporters on tourism and environmental issues.
- UET - European University School for Tourism, based in Rome, Milan and Palermo, offers courses and masters in Food & Beverage Management, Management of Hotel and Accommodation Facilities, Management of Tourist Destinations, Tourism & Hotel Web Marketing.
- The Business School of Sole 24 ORE (Italian newspaper of major reference for economy, industry and markets) offers the Master in Management of the hotel industry, in Management of catering and Management of tourism companies.
- The Study Center of the Italian Touring Club offers conferences and in-depth courses on tourism and culture.

In general, the academic training offer in Italy remains wide with about 64 types of courses proposed in the 2013-2014 academic year, including three-year degree courses, master's and first and second level masters (Cliclavoro data).

Interest in Higher Technical Institutes is also growing (see below).

2. Are there any training programmes that promote digital upskilling in the Tourism sector in your country? If so, please describe (title, provider, objectives, focus areas).

The Higher Technical Institutes are the first Italian experience of professionalizing tertiary training offer for cultural goods and activities/tourism according to a system consolidated for some years also in other European countries.

Born in 2010 to train senior technicians in strategic areas for economic development and competitiveness in Italy, they are high technology schools closely linked to the production system that prepare specialized middle managers who can help Government and exploit the potential of Enterprise 4.0 in the companies.

There are nr. 110 ITS on the territory related to 6 technological areas considered "strategic" for the economic development and competitiveness of the country (D.P.C.M. 25 January 2008):

- Energy efficiency
- Sustainable mobility
- New technologies of life
- New technologies for made in Italy (Business services, Agro-food system, Home system, Mechanical system, Fashion system)
- Information and communication technologies
- **Innovative technologies for cultural heritage and activities – Tourism**

The ITS allow to acquire a Higher Technical Diploma with the certification of the competences corresponding to the V level of the European Qualification Framework.

To facilitate circulation at national and European level, the qualification is accompanied by the EUROPASS diploma supplement.

In addition, the Government has launched the PST - Strategic Plan of Tourism 2017-2022 (MIBACT - Ministry for Heritage, Cultural Activities and Tourism) with which it redesigns the planning in the field of tourism economics, putting it back at the center of national policies and making it operational at the strategic address aimed at creating a homogeneous vision in terms of tourism and culture. The Plan acts on fundamental levels such as technological and organizational innovation, the **enhancement of skills**, the quality of services.

These aspects are integrated with the need for a sustainable and lasting use of the environmental and cultural heritage. Among the various objectives of the PST:

- promote innovation, digitization, creativity;
- adapt infrastructures to improve accessibility and inter-modality;
- increase the quantity and quality of employment.

Objectives that the Government aims to achieve through the development of new skills and professionalism according to the new needs of demand. The dissemination of innovative training methodologies is envisaged both in the segment of professional institutes and in higher university and post-university training dedicated to operators.

Other Government Actions:

Strategy for Technological Innovation and Digitization of the Country (Ministry for Technological Innovation and Digitization). It lists 20 actions "to transform the country" by 2025 including:

Cross-Tech hub Italia Project

The project involves the creation, development and growth, through public-private partnerships, in coordination with the other competent Ministries, of cross-industry technological hubs in compliance with the excellence of the territories in which the centers are located and starting from the excellences that already exist in the our country.

The main technologies of reference will be artificial intelligence, cybersecurity, 5g while the sectors will be autonomous and sustainable mobility and robotics as well as the made in Italy sectors (manufacturing sector, **tourism**, food, fashion, design, social, digital humanities).

Region Puglia – Province of Trani – Training course “Destination Management 4.0”

The project aims to train “Specialists” in tourism and in digital communication and promotion for cultural and experiential tourism. It aims to enhance skills in digitization and digital creativity applied to culture and cultural heritage, thus responding to the growing demand for new specializations of the cultural and creative industry. In fact, as it is still largely unanswered today, the gaps still existing in the current training and education systems will thus be filled and, at the same time, will affect the development of the economic and entrepreneurial potential of culture and cultural heritage in a network and destination logic.

3. *What are the main problems of the tourism sector in your country? (If any)*

According to the AGI / Censis dossier (one of the most well-known Italian news agencies) dedicated to the sector in the framework of *Italy under stress. Diary of the transition 2020/2021*, “tourism has experienced a new, unexpected, but above all devastating setback”.

But even before the pandemic, the major problems linked to tourism in Italy and never resolved are related to logistics, the port and airport system and rail links. Factors that contribute to placing Italy in seventh place in the world tourism competitiveness indicator.

After the Covid shock, we suffered 219 million fewer guests in accommodation establishments in the first eleven months of 2020, equal to -52.2% (Istat - National Institute of Statistics). According to data from Assoturismo (Italian Federation of Tourism), arrivals decrease by 61.8% and presences by 55%.



The effect on consumption are heavy, which lose 50 billion euros. The consequences on employment are very serious, despite the blocking of layoffs: -265 thousand employed in the second quarter of 2020 alone. At a European level, Italy risks being one of the most affected countries: it is in fact the one with the highest number of accommodation establishments (more than 30% of the total of the whole Union), the second country for foreign presences and among the first four for presences in hospitality establishments.



4. *Do young people in the tourism sector face any challenges or obstacles when looking for a job?*

Youth unemployment and, more generally, the working conditions of young people are one of the main collective concerns in Italy. The emergence of the problem is long standing and in recent years, even if the activity rate of young people has halved in half a century - due to the growth of upper secondary and tertiary education - the unemployment rate of 15-24 year olds has grown and is steadily around 35%.

Following the pandemic, the employed in the world of tourism have returned to the levels of 2011 having dropped in 2020 compared to 2019 by about 350 thousand units, from 1.3 million to 953 thousand. After all, the restrictions on travel as a measure to counter the pandemic contagion, have in fact made it impossible to do tourism or travel to participate in fairs and events. In essence, one in four tourism employees lost their jobs in 2020. The worst decline concerned those with fixed-term or seasonal contracts: among these, one in three lost their job. The crisis has hit women (183,000 fewer employed than in 2019), young people and foreigners the most: in fact, the latter two categories have seen a reduction in employment by 30% and days worked by 40%. This was stated by the Labor Market Observatory on Tourism 2020 drawn up by Federalberghi (Federation of Italian hotel and Tourism associations) and Fipe (Italian Federation of Public Exercises) with the Ebnt (Bilateral National Tourism Organization).

The average age of workers in the tourism sector is 37. In particular, in hospitality it is equal to 41 years, in public establishments it is 36, in intermediation it is equal to 41 years, in thermal baths it is 46 and in amusement parks it is 35. Following the pandemic, young people were the most affected both as regards the loss in terms of employees and days worked (respectively minus 37.0% and 42.9% for under 20s and -28.1% and -39.2% for young people between 20 and 30 years)

Before the crisis, tourism was the leading sector of youth employment: young people represented 63 percent of the employed, 602,000 employees under 40 and 342,000 under 30.

5. *What has been the response of the tourism sector in your country to the Covid-19 travel restrictions?*

After the declaration of the "state of emergency", the Italian Government adopted a series of decree-laws containing extraordinary measures aimed at limiting the spread of COVID19 and mitigating its effects on the markets. These actions have introduced numerous temporary and extraordinary interventions to support families, workers and businesses belonging to all economic sectors, including tourism.

- Tourism fund aimed at supporting the tourism sector through market operations, with a budget of 50 million euros for 2020
- Fund for the promotion of tourism in Italy, with an endowment of 20 million euros for 2020, in order to favor the recovery of tourist flows and the promotion of the various sectors of Italian tourism
- Fund to support travel agencies, tour operators, tour guides and tour leaders, accommodation facilities and passenger transport companies with open buses in urban and suburban areas damaged by the containment measures of COVID-19, with an endowment € 675 million for 2020 and € 100 million for 2021
- Two funds for emergencies in the entertainment and cinema and audiovisual sectors. The Funds, established at the MIBAC, were endowed with a total of 325.4 million euros for the year 2020 and 90 million for 2021
- Fund for emergencies of businesses and cultural institutions, at MIBAC, intended to support bookstores, the entire publishing chain, as well as museums and other cultural institutes and places, with an endowment that was equal, in the year 2020, for a total of 631.5 million euros
- Fund intended to compensate for losses resulting from the cancellation, postponement and downsizing of trade fairs and conferences due to the COVID-19 pandemic. The Fund, established at the Ministry of Tourism, is endowed with 100 million for the year 2021.

Examples of "local" initiatives by tourism sector entities for the revitalization of tourism to combat travel restrictions:

- Federagit (Federation of Italian Tourist Guides) of Florence in collaboration with the Municipality and Confesercenti (trade association representing Italian businesses in the trade): "Unusual Florence? Better with the guide!" and proposes to replace the "classic" guided tours with thematic itineraries to discover curiosities and anecdotes, accompanied by professional guides. Obviously in small groups and in full compliance with anti-Covid regulations. The appointments, free of charge, are dedicated to esotericism, trekking, literature and much more.
- Mister White Travel Agency of Naples: Together with the Municipality it has developed a series of unpublished regional tours, aimed at promoting authentic and unique experiences closely linked to the Campania region. This is how the tours of Pompeii were born with excursions to Vesuvius, visits to the milking of cows in Paestum and the vein linked to cinema. The "Naples and cinema, a century-long journey" itinerary in fact refers to the great films set in the area, such as "Neruda's Postman" in Procida and the films of Totò and Sofia Loren.
- "Smart Working Holiday", an initiative launched by Cortina Marketing to make teleworking enjoyable too. Not only thanks to the suggestive view of the snow-covered landscape of Cortina d'Ampezzo, but also to the possibility of carrying out activities in nature at the end of the working day or taking a lunch break in local mountain huts and farmhouses.

Furthermore, during the lockdown, some cultural organisations acted to create innovative content and communication opportunities in order to retain, approach, and not alienate their actual and potential audiences and this had a positive effect on their willingness/capability to use fundraising tools and channels, including digital ones.

Italian Organizations Analysed

- Science Museum, Trento

- Gallerie Estensi, Modena
- GAM, Turin
- MAMBO, Bologna
- Teatro Carlo Felice, Genoa
- Genus Bononiae, Bologna
- The Bagatti Valsecchi Museum, Milan
- MUDEC, Milan
- Donnaregina Contemporary Art Museum, Naples
- Museo Madre, Naples

The activities realized are:

- Increased use of social media, workshops promoted by GAM's Education Department, contests and columns;
- Creation of "The Director's Walks" format and "Do-it-yourself Egyptian" video tutorials for children and increasing the number of videos in the series "Snapshots from the collection": from one per month to four videos published in March;
- Continued promotion and communication of planned exhibitions (without attempted sale of tickets or products);
- Little Mart at home;
- Virtual gallery tours, quizzes and trivia in Instagram stories;
- Publication of videos with a famous YouTuber from Bologna;
- Campaigns on social media, "Il blog delle meraviglie" blog on the Gallerie Estensi website and a column in Gazzetta di Modena newspaper, development of an app for the Ducal Palace.

6. *What has been the response of the tourism sector in your country to the Covid-19 unemployment?*

Although the current tourist context is very delicate, Italian tourism has always shown a great aptitude for resilience. The crises of recent years (11 September, SARS in the East, international terrorist attacks, the global financial crisis of 2008) are all examples of how dramatic situations have affected the behavior and habits of tourists, but have also highlighted how the market tourism has always managed to recover and continue to grow over time.

The Covid-19 crisis, therefore, has also led to the emergence of new needs and new trends by tourists. Consequently, the Italian tourism sector is moving in further directions.

- Safety in the use of the tourist experience
- Proximity market
- Experiential tourism
- Downsizing of tourism linked to events
- Downsizing of congress and exhibition tourism

Obviously these considerations affect the problem of unemployment in the sector itself. The assessment of new needs and tools is clearly also giving rise to the possibility for new professional figures and / or to strengthen existing ones.

Therefore, the sector is adapting to the new priorities and needs to be satisfied, such as the search for safety, hygiene, social distance, etc ... These concepts are influencing the brand development, the way in which the tourism product is built for the destination and the investment in human resources with new skills to heal unemployment.

First of all, the spaces, the use of the product and the ways of relating with the guest were reorganized. Museums, exhibitions, access to monuments have been rethought and organized in a functional way to meet new needs, especially thanks to the use of new technologies (think of the Virtual Tour offered by the most important Italian museums). It was also essential to rethink the ways in which people request information from the tourist office of the destination and in this context the digital

experience was certainly privileged, with appropriate information on the destination website, development of dedicated apps, chatbots and all that that smart technologies can offer to shorten the distance between guest and destination while maintaining high standards in safety.

The process is still ongoing but the premises are comforting.

On the political side, moreover, the Government measures to support unemployment due to Covid-19 crisis:

- Compensation for seasonal workers in tourism and spas
- Indemnity for fixed-term workers in tourism and spas
- Entertainment workers' allowance
- Contribution relief

7. *What is the level of digital knowledge in your country among young people (18-29)? Which digital tools do they use the most and for what purposes?*

The DESI index (Digital Economy and Society Index), which measures the progress of EU member states on their path towards a digital economy and society, highlighted Italy's backwardness in digitization. In addition to this study, an Eurostat survey also confirmed the Italian shortcomings.

The study quantified digital skills thanks to a composite indicator, based on selected activities carried out by individuals on the Internet in four specific areas: information, communication, problem solving, software.

First of all, the ability to identify, locate, retrieve, archive, organize and analyze digital information is assessed, underlining its relevance and purpose.

Secondly, the survey tries to quantify the skills of communicating in digital environments, sharing resources through online tools, connecting with others and collaborating through digital tools, interact and participate in communities and networks, develop intercultural awareness.

In addition, Eurostat has assessed the competence in identifying digital needs and resources, making informed decisions on which are the most appropriate

digital tools based on the purpose or need. It is therefore a question of problem solving skills linked to the creative use of technology.

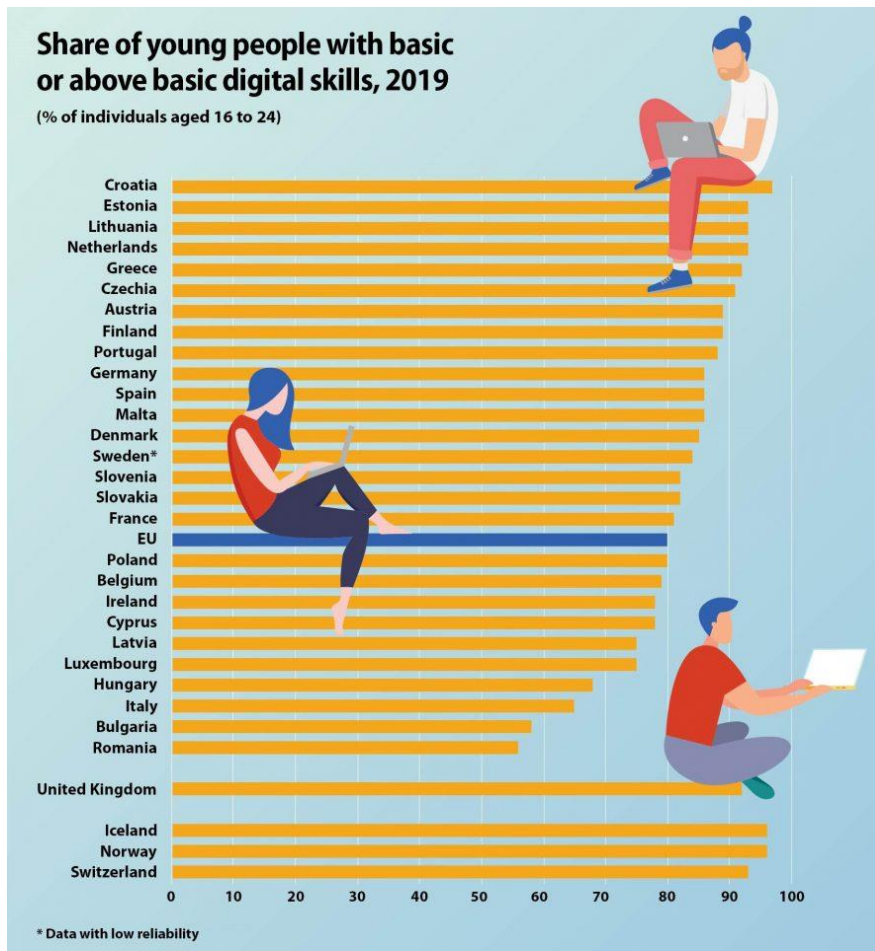
Finally, the survey measured software skills, generically defined as the ability to create and edit new digital content (from word processing to images and videos). This includes the skills to integrate and rework previous knowledge and content and to produce creative expressions, multimedia outputs and programming. The competence of individuals in dealing with and enforcing intellectual property rights and licenses is also assessed.

THE RESULTS

In the general framework, Italy is fourth from bottom with a percentage of 65%. In detail, according to the breakdown of the DESI index:

- Connectivity: Italy ranks 17th on average with EU values;
- Human capital: Italy ranks 28th and last place. Only 42% of individuals between 16 and 74 have basic digital skills (vs 58% EU average);
- Use of the internet: Italy ranks 26th. 17% of individuals residing in Italy have never used the internet;
- Integration of digital technology: Italy ranks 22nd. Only 10% of SMEs sell online (well below the European average of 18%) and only 8% of turnover comes from digital sales;
- Digital public services: Italy ranks 19th, below the European average, despite the good performance in the offer of digital services and open data (Open Data) only 32% of Italian users online it uses e-government services (compared to the EU average of 67%).

Specifically, young people aged 16 to 29 would have a satisfactory level of computer skills, as well as those under 15. The problem is especially evident in the over 29s: a third of them would have no understanding of technological systems (OECD average: 17%).



ec.europa.eu/eurostat

According to the latest interesting research by the Cultural Institute of Social Sciences Niccolò Rezzara of Vicenza (Italian study center) in 2015, digital tools are now within everyone’s reach: 93% currently use the internet and 81.5% actively enter relationships offered by social networks. 92.4% own a smartphone and 91.9% a computer, while less than half also own a tablet.

In detail concerning young people, it is clear that many of them are in continuous connection. 88% claim to use the internet every day and more than 50% use social networks for over 2 or 3 hours.

Internet is mainly used for downloading messages, music and photos; social networks to meet people, share messages. The contents of the messages are

94.3% information. The free judgments on people and sentimental relationships are placed behind them, with a few statistical points less. 29.5% use intimate texts or images online.

66% of their judgment on the social situation is limited to acquiring the new way of communicating differently than adults. Only one in five mentions the presence of a new way of relating and one in four of the new possibilities of play and pastime. 75% of young people condemn scams and stalking and, with a few percentage points less, the masking of identity and anonymity. Only about half grasp the inconsistencies of the ostentatious use of tools in public places.

8. *Please look for examples (practices, projects, tools, etc.) implemented in your country that promote digital solutions for the safeguarding of Heritage Tourism.*

There are many examples spread throughout the Italian territory.

- "Travels in ancient Rome", is now a fixed appointment of the Roman summer: visitors to the Forum of Augustus and the Forum of Caesar, armed with a special receiver with headphones, watch magnificent videos and videomapping reconstructions, projected directly on the surfaces of the sites, which show the places as they appeared at the time, witnessing a representation that - as reported by the same visitors in various online reviews - manages to combine emotion, wealth of information and great historical and scientific rigor.

- The "Ara as it was" project saw the combination of different technologies within the Ara Pacis exhibition space, offering a unique Augmented Reality and Virtual Reality experience. Through special viewers for Augmented Reality and the camera of the devices inserted in them, virtual elements and real elements blend directly into the visual field of visitors who find themselves immersed in a 360 ° environment, where they can admire the Ara Pacis in its original colors and witness scenes from the life of imperial Rome thanks to the combination of live film shooting, 3D reconstructions and computer graphics. The particular technology used carried out a real-time 3D tracking of the three-dimensional elements of the bas-reliefs and sculptures, allowing the anchoring of virtual

objects to real objects, contributing to the effectiveness, immersion and sense of magic of the entire experience.

- "Circo Maximo Experience": also in this case, the combination of technologies for augmented (AR) and virtual (VR) reality allows to visit the site in all its historical phases thanks to a cutting-edge experience that uses interactive technologies to date never used in an outdoor area of such large dimensions. Again, visitors are able to explore the site from specific vantage points.

The initiatives were promoted by Roma Capitale, Department of Cultural Growth - Capitoline Superintendence for Cultural Heritage, organized by Zètema Progetto Cultura (instrumental company wholly owned by Roma Capitale which operates in the Culture sector) and entrusted through calls for tenders to several private companies that have taken care of the realization.

- The path of immersive experiences and virtual reality was followed by the Museum of Science and Technology in Milan with Toti Submarine VR Experience, a free app for virtual reality that since 2015 allows the user to explore firsthand "Enrico Toti S-506", the first submarine to be built in Italy after the Second World War. The project is part of the activities of the Italian Videogame Program which aims to promote the potential of the videogame medium for the enhancement of the territory and tourism.

The videogame, in the specific form of the applied game for the enhancement of the artistic and archaeological heritage, is, in fact, a growing sector and increasingly in sight by the institutions to the point of finding space in the "Operational guidelines for the preparation of the Cultural Strategic Development Plan" of the DG Museums of the MiBact.

- Along this line, the Archaeological Museum of Taranto presented the video game "Past for Future", created by the collective of artists TuoMuseo in collaboration with the Ministry of Cultural Heritage and Activities. "Past For Future" is a 2D horizontally scrolling narrative game that explores human

feelings through a long investigative journey in the city of Taranto and in the treasures of the National Archaeological Museum of Taranto.

- The path of videogame experiences as a means of communication, promotion of the territory and involvement of the public follows the success of the National Archaeological Museum of Naples which, with the title "Father and Son" has, in fact, inaugurated a genre. The side-scrolling 2D narrative game alternates the exploration of human feelings such as love, dreams, fear, through a journey through the streets of Naples, different time periods and, of course, the spaces of the museum, which becomes a real location of the game. Some areas of the game, in fact, can only be unlocked by physically going to the Museum. After its success, a new chapter of the game is currently under development.

- Conservation and restoration: the 3ReaD project

The "3ReaD" project, born from the collaboration between two private companies and two Roman universities and financed by the Lazio Region, has the objective of using digital technology to assess the state of conservation of the cultural, architectural and historical-artistic heritage, applying - in an integrated and synergistic way - comparative, diagnostic and forecasting analyzes for the management of emergencies and for planned conservation activities. The project aims to create an innovative digital platform consisting of a set of modules and tools, complete, integrated with each other with AR / VR / MR technologies, for the survey, the generation of 3D objects, their editing and analysis, in order to assess the state of conservation of the architectural, archaeological and historical-artistic cultural heritage.

Many other examples/projects arise from a private sector:

- Bravo Innovation Hub.

Is an innovative incubator funded by the Pon Imprese e Competitività 2014-2020, which is part of the Action Plan for the dissemination of entrepreneurship and innovation promoted by the Ministry of Economic Development and housed in

the historic Palazzo Guerrieri in Brindisi, which gathers start-ups and the micro-enterprises of the tourist and cultural supply chains of Basilicata, Calabria, Campania, Puglia and Sicily.

- Pomerium - SATELLITES, DRONES AND 5G TO PROTECT THE HISTORIC CENTRE OF ROME

Pomerium by e-GEOS - a company formed by Telespazio (80%) and the Italian Space Agency (20%)- is one of the winning projects in the European Space Agency's "5G for l'Art" call for tenders relating to the use of technology on behalf of the cultural heritage and the environment.

Pomerium envisages the creation of an advanced monitoring system using integrated methodologies and technologies, including a "Digital Twin" approach, to study and monitor certain areas of the historic centre of Rome within the area encircled by the Aurelian Walls. Areas identified in particular are the Palatine Hill and the Colosseum, the Pyramid of Cestius and Porta San Paolo, the urban course of the Tiber, the Aventine Hill, and the Porto Fluviale.

In view of the potential expressed so far, however, the digital transformation in the museum and cultural heritage sector is still proceeding at a slow pace, juggling the now historic "patchy" initiatives, pilot projects and best practices that barely manage to get out outside the logic of experimentation.

According to the latest Istat report "Italy of Museums", in 2019 only 10% of museum structures engaged in the digitization of their catalog and less than 45% use interactive technologies and digital tools.

9. *What kinds of thematic tourism are present in your country?*

We highlight some trends to understand how tourism is changing and which employment prospects can open up the new challenges of the future.

Environmental, sustainable and responsible tourism

The growing mobilization of large masses of people for tourism can have social and environmental consequences in the most delicate territories and habitats. One answer to the problem is called sustainable tourism, and it is based on elements such as the long-term tolerance of flows from an ecological point of view; economic and social equity; greater interaction between the tourism industry, local communities and travelers; the responsibility of travelers in contacting the local population and paying attention to the management of resources and waste. Sustainability thus becomes a great creative opportunity to regenerate and qualify the tourism offer and for the development of new professional figures. Highly specialized figures able to hold together communication skills, ability to read the territory and knowledge related to the carrying capacity of the environment and the communities concerned, for the adoption of new models outside the logic of exploitation and consumption models traditional.

On this topic we point out the Italian Association of Responsible Tourism.

Experiential tourism

It is a type of tourism that responds to emotional needs, linked to a narration of the territory based on the specific interests of the recipients (architecture, photography, music, food and wine, etc.). It was created as a response to counter the pricing policies of large groups and is based on the theming and personalization of tourist routes to offer the customer a unique experience to share with people sharing the same passion.

Cultural tourism

It is a great challenge that concerns us very closely. In fact, culture as well as tourism is one of the strategic assets for the economic growth of our country. This is why Civita (large entrepreneurial reality specialized in the enhancement of cultural heritage) presented the Report *The-art-of-producing-Art* which, if on the one hand underlines how Italy is losing competitive positions at an international level, on the other it detects a trend favored by the digital revolution, which has made for new groups of users (the

"creative tourist") both the consumption of traditional cultural activities (from performing arts to museum visits) and those activities linked to the culture of a territory (from fashion to design, from crafts to the taste industry) or to the communication and audiovisual industry (for example film tourism). This trend is potentially capable of supporting the economy of areas of the country that are not part of the current tourist attractions.

In this context, the works of the TDLAB (Laboratory for Digital Tourism), an initiative of the Ministry of Cultural Heritage and Activities and Tourism, which had the task of implementing a digital strategy for tourism, were inserted. The TDLAB, established with D.M. of 3 April 2014, concluded its work and delivered the Strategic Plan for the digitization of Italian tourism to the Minister. It envisages three areas of intervention - interoperability and big data, digital development and promotion and marketing - divided into 30 concrete actions intended to be implemented by the new ENIT.

With the Culture and Tourism Decree (Law Decree 31 May 2014, n.83), the MiBACT introduced important innovations for the relaunch of tourism. Among the measures adopted: tax credit for the digitization and restructuring of tourism businesses; the definition of "zero bureaucracy" tourist districts, simplifications for new businesses and tax concessions for start-ups created by under 40s. The adoption of an extraordinary plan for cultural tourism mobility, the creation of national circuits of excellence and a review of the classifications of hotel structures to adapt them to European and international ones.

10. *What kinds of thematic tourism could be developed in your country?*

Proximity tourism is one of those forms that is becoming more and more popular, it is the type of tourism that aims at the (re) discovery of the nearest places, those that are located a few kilometers from home, and that perhaps because of this is why we never thought of looking through the eyes of a visitor.

Those who practice Undertourism, on the other hand, choose little-frequented destinations, that is, they think about travel, choosing national, if not regional, little-known and uncrowded destinations, even this type of tourism enhances local realities.

More and more people are choosing sustainable tourism that promotes knowledge and enhancement of local cultures and traditions, while respecting the environment and the life systems of the countries, territories and populations that inhabit them.

Another new trend in tourism is Neverending tourism, a service capable of extending the tourist experience before and after the trip, offering online content such as "virtual" visits to museums and cities, sports activities set in destinations but virtually practicable. o cooking courses linked to the territories visited.

But also work can also be seen as a tourist activity, Business Travel is a tourism in half that can be done in those places where, thanks to an excellent internet connection, customers can "cure" themselves of stress through moments of relaxation. , even during the working week. In 2020 alone, 39% of Italian hotels had remote workers as guests, who preferred to carry out their activities in places other than their home. An economic form to travel is "last second" travel, although there are not many tour operators offering this service, online you can still find agencies specialized in Last Second that sell travel packages for departures within two days at most with costs very content.

These trends are, in fact, at the center of some initiatives for the revival of tourism.

Roots Tourism

We are facing a form of tourism that more than others has to do almost exclusively with tourists. In fact, it allows him to know and discover something that belongs to him, that is part of his history and his culture which is the memory of his roots. This form of tourism is also called genealogical tourism, as it mainly refers to the descendants of emigrants who return to visit and experience the places of their ancestors during their holidays. a form of tourism in its own right but an integral part of cultural tourism. Root tourism for Italy is of interest potentially a basin estimated at between 60 and 80 million descendants of Italian emigrants in the world.

Naturism

More and more people go on vacation every year, leaving costumes and clothes at home. In the last ten years there has been a slight but steady increase, essentially those who undress do so because they love being free and reject labels. The average age is not that high. The new young people practice independent naturism. The boys make a pragmatic choice without ideological involvement.

There are 123 thousand people who practice naturism in Italy, 368 thousand are those interested. Data in hand ([source: Jfc 2017](#)), we are talking about 70 million nudists in the world and 20 million in Europe alone.

5 thousand, on the other hand, are members of naturist associations in our country. 54 million euros is the turnover of naturist tourism in Italy. There are 50 places where naturism can be practiced in Italy. There are still few structures in Italy that allow men and women to be free, to practice nudism and this data suggests new ideas for an increase in naturist tourism in Italy with a consequent demand for workforce for the management of the structures. beaches and the digital circulation of information.

2.2.1 Conclusions

From what reported above and from the analysis of the data in the various studies mentioned, it is clear that in the Italian territory digital culture has not yet given great

evidence, showing a marked gap between the so-called "millennials" and the mature generation. Although information and technological tools are easily accessible today, the older generations have matured a deeper aptitude for their use, certainly because they were protagonists of a pioneering era of technological innovations which, in a context where the media had a less aggressive impact, they were able to involve more and give emotion. Today technology is easy, fast, close at hand, almost obvious and in any case imagined just as a tool dedicated to cyber communication. This is the reason why young people generally use it for social media (Facebook, Instagram, TikTok, etc.), paying little attention to the other possibilities it allows. The situation changes for those young people who have followed a course of study where technology today becomes an indispensable tool, especially if we are talking about Digital Design, Computer Science, Engineering.

As for the tourism sector, several structures were heavily affected by all the restrictions related to the covid, even if business trips remained constant as they were authorized by the government. The pre-covid experience of digitizing works of art and museums has ensured that these good practices incentivized other museums to create virtual tour itineraries available via the web. The lack of certainty of the end of the covid emergency continues to stimulate the production of such experiences with compelling proposals for web visitors.

Certainly the recent openings have given relief to both tourists and structures, as demonstrated by the fact that the entire hospitality sector reports significant increases in bookings. We have also mentioned naturism as Italy has given a significant tourist offer in recent years that continues to evolve thanks also to the spread of dedicated beaches that the various municipal administrations assign. Surely the strong restrictions inside the houses have generated a very strong attraction towards places surrounded by nature, both mountains and sea.

3. References

MIUR, Ministero dell'Istruzione, dell'Università e della Ricerca
<http://ustat.miur.it/opendata/>

Cliclavoro - Portal of the labor market of the Ministry of Labor and Social Policies.
<https://www.cliclavoro.gov.it/Pagine/default.aspx>

MIBACT - Ministero per i Beni, le Attività Culturali e Turismo
<https://storico.beniculturali.it/mibac/export/MiBAC/index.html#&panel1-1>

MITD Ministero Innovazione Tecnologica e Transizione Digitale
<https://innovazione.gov.it>

Puglia Region <https://regione.puglia.it>

AGI / Censis dossier, Italia sotto sforzo. Diario della transizione 2020/2021.
<https://www.agi.it/economia/news/2021-02-27/conseguenze-covid-turismo-italiano-11572892/>

Istat - Istituto Nazionale di Statistica <https://www.istat.it>

Assoturismo <http://www.assoturismo.it>

Federalberghi- Fipe - Ebnt, Osservatorio sul mercato del lavoro nel settore turismo. XII rapporto (2020).

Federagit Federazione Italiana Guide Turistiche, Accompagnatori ed Interpreti
<http://www.federagit.it/presentazione.html>

Professional Master's students in "Tourism Promotion and Management of Cultural Heritage" of the University of Bologna in collaboration with Marianna Martinoni, THE DIGITAL RESPONSE OF CULTURE TO THE COVID-19 EMERGENCY (2020)

Digital Economy and Society Index <https://digital-strategy.ec.europa.eu/en/policies/desi>

Eurostat <https://ec.europa.eu/eurostat/web/digital-economy-and-society/data/database>

Istituto Culturale di Scienze Sociali Niccolò Rezzara, Cambiati dalla rete. Ricerca Sociologica (2015)

Associazione Italiana Turismo Responsabile <http://www.aitr.org>

Associazione Civita, Report L'arte di produrre Arte. Competitività e Innovazione nella Cultura e nel Turismo (2017)

Jfc - Tourism Consulting, Territorial Marketing, Tourism Research <https://www.jfc.it>



The European Commission's support for the production of this publication does not constitute an endorsement of the contents, which reflect the views only of the authors, and the Commission cannot be held responsible for any use which may be made of the information contained therein

