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Istria Tourist Board (www.istra.hr)



SECTION

1.1 ISTRA AS A TOURISM DESTINATION - SHORT OVERVIEW

As the leading light of a fresh approach to tourism in Croatia, Istria is a picturesque destination comprising of a 3,600 sq. km heart-shaped peninsula in the north of the country.

The Istrian peninsula is located at the head of the Adriatic between the Gulf of Trieste and the Kvarner Gulf. It is shared by three countries: Croatia, Slovenia and Italy. The largest part of the peninsula belongs to the Republic of Croatia. Most of the Croatian part of the peninsula belongs to the Istrian County. The name is derived from the Histri tribes, who are credited as being the builders of the hill fort settlements (castellieri). The Romans described the Histri as a fierce tribe of pirates, protected by the difficult navigation of their rocky coasts.

Indeed, Istria's coast has traditionally been the focus of tourist activity with its historic towns such as Vrsar, Pula, Porec and Rovinj and the resorts of Umag and Novigrad. The Istrian interior is characterised by medieval hilltop villages set amongst rolling country and forests - a countryside that lost almost 90% of its population who exited during the four years of civil war from 1991-95. This is a countryside of legends - giants and štrigas, a mischievous band of witches.

Today, Istria is the most important holiday destination in Croatia. At the heart of its success lies a multi-cultural appreciation and a unique model for destination development founded upon deeply-rooted stakeholder involvement, exceptional levels of innovation and collaboration based upon synergistic enhancements across all sectors - tourism, food and drink, infrastructure development, unique village hotels and farmhouse restaurants, konobas and an intense focus upon the quality of local products and services in order to deliver guests with unique, unforgettable, Istrian experiences charged with positive and warm emotions.







SECTION TWO

2.1 DESTINATION TOURISM STRATEGY

In order to define the destination tourism strategy of the region of Istria, the history of the area and the reasons that made creating a strategic development plan a prerequisite should be considered.

Following the civil war (from 1991-1995), which left the destination devoid of tourists and experiences, the region of Istria was presented with the opportunity to rethink and reposition itself on the world market.

The goals were very simple;

- To prolong the tourism season.
- To make Istria visible on the world tourism map.
- To development gastronomy.
- To create a healthy synergy and corporation with all stakeholders, especially between the hotel industry and the agricultural industry and all by maintaining a sustainable tourism philosophy.

The main goal was to make the region a recognised destination for the production of quality products that would place the region on the world map of foodie destinations. The focus was oriented more on the development of quality rather than quantity but also securing the right distribution of those products.

The biggest advantage that Istria had was the possibility to create a Master Plan with all stakeholders involved in the decisions-making process. This Master Plan included the regional government, hotel companies, the camping sector, maritime services, small run boutique hotels, villa and homeowners, private accommodation owners, farm holidays, the local tourism offices, service providers and local producers.

Key projects were established in order to secure the re-population of the hinterlands and to secure the development of the area.





Istria has since become the epitome of a successful transformation in Croatian tourism, driven by an enlightened Istrian Tourist Board. The Istrian approach closely follows the themes of the national strategy with the key protagonists realising that high standards and memorable visitor experiences hold the keys to competitive advantage. The momentum leading to the rapid transformation of the tourism industry is the result of three main factors:

- **1.** Highly focused leadership in the public and private sectors.
- **2.** Innovation and creativity in the delivery of tourist experiences.
- **3.** The realisation that a collaborative approach involving the community is essential.

Overall, the picturesque and diverse region of Istria attracts visitors by the coast as well as tourism in the hinterlands. The coast is predominantly oriented towards mass tourism and the main tourism season, whereas the hinterlands focuses on agriculture and the production of local products, which directly influenced the development of the region as an ideal off-season tourism destination.

Roman Amphitheatre, Pula (www.culturetourist.com)





2.2 SPECIFIC FOOD TOURISM STRATEGY

From the outset, Istria's tourism plans identified a value not a volume approach. Every product created in Istria is imagined in terms of what it would look like of its quality when benchmarked against its competitors.

This is best evidenced in the comprehensive story of positioning the local gastronomy product and experiences. It would be impossible to deliver a credible, quality, tourist gourmet experience unless there was an investment in creating unprecedented levels of quality in the production of the autochthonous products and contemporary design in their presentation, promotion and marketing.

As a result, tourism development had to commence with a programme of support for those producing the local wines (Malvasia and Teran), olive oils, vegetables and those harvesting the forest for truffles and mushrooms as well as the seas and rivers for fish.

Today, the Istrian gourmet product includes internationally award-winning wines and wine tourism, extra-virgin olive oil tourism, prosciutto tourism, agro-tourism and truffle tourism together with a while programme of year round activities and events packaged with appropriate accommodation (farmhouses, village hotels).

This collective tourism drive has ensured that Istrian hoteliers, small scale producers, chefs and truffle hunters all feature in the key world tourism guidebooks and magazines.

INVESTMENT AND DEVELOPMENT OF FOOD TOURISM EXPERIENCES

There are numerous examples of significant investment and development of the food tourism experience, both public and private. The following outlines the most important projects that have contributed to developing Istria into a gourmet destination.

GOURMET SECTOR

The biggest challenge regarding this sector was to reactivate depopulated areas in the hinterland and develop, certify and promote Istria as a gourmet destination. Examples included in the case study illustrate projects and initiatives undertaken over the past 15 years to achieve these goals.

Even though the region had a tradition of making olive oil and wine for over 2,000 years, the quality of the products were not at the highest level and hence visibility on a world gourmet market was insignificant.

The quality of the products and the presentation of the same needed to be upgraded and this was done through several steps which included:

- a) Benchmarking to similar destinations.
- b) Holding specific seminars.
- c) Securing loans from the regional government.
- d) The creation of specific events related to that product.
- e) Specific targeted marketing activities.

In the case of loans, the regional government signed an agreement with the local banks for loans to upgrade the quality of production. Whether it was in the agricultural industry or the tourism sector, the government agreed to cover up to 2% of the interest rates leaving the remaining interest rate balance for businesses amounting to a maximum of 5%.



BRAND PROPOSITION - KEY MESSAGING

The goal of the Tourist Board is to brand Istria as a sustainable tourism destination that is open all year round, making it ideal for discovering cultural, adventure and foodie experiences. A stronger focus has been placed on Istria becoming a well-known gourmet destination.

FOOD CLUSTERS IN THE DESTINATION

Since the development of the gourmet project, Istria as a whole has become a foodie destination and is no longer subdivided into clusters. Some areas have specific products that are not available in the entire region - for example the central north cluster (known as Central Istria) is renowned for truffles. The north west (Umag - Novigrad - Buje cluster) is known as a region for the flat fish called Svoja. The south cluster (Pula, Medulin, Fazana) is famous for blue fish and crab fish - a specific breed that migrate from Italy to the tip of the Istrian peninsula to reproduce while the western cluster (Rovini and Porec) is noted for its fresh oyster farms on the Lim channel.

The key to success of the region from a commercial point of view is the emphasis on quality and the marketing activities. The main reason why Istria has been able

to prolong its tourism season is essentially because of the food sector which has proven to be the main motivation for tourists to travel to the destination in the off-season. Gourmet tours are organised by tour operators and tourist agencies as well as hotel companies during the entire year.

FOOD COLLABORATION, NETWORKING AND VALUE-ADDED EXPERIENCES

It is clear that there is a very strong collaboration between all stakeholders in the region. Hotel companies have increased the use of local products in their restaurants in order to support local producers. Events are ideal for engaging local producers that in turn attract foreign visitors. The strategy for hotel companies in the off-season has evolved not to just promote the hotel itself but the entire destination, with hotel companies creating packages oriented around the season of specific products.

Several hotels and tourist agencies have developed packages solely to promote a certain product. For example, the white truffle season which starts in October and ends in January has witnessed a sizeable number of foreign tourists booking accommodation specifically for that event. This can also relate to other events which not only attract foreigners but also Croatians from Zagreb and other areas in Croatia.





2.3 ROLE OF FOOD IN THE VISITOR EXPERIENCE

The mentality of the restaurants changed from offering the guest what they thought the tourist visitor may be accustomed to. to offering seasonal local dishes from local producers. Olive oil and local wines can be found on every table. More and more specialised shops have adjusted to selling quality products - so an ideal souvenir would be a bottle of olive oil for example or some conserved truffles. As mentioned previously, it is largely thanks to the food industry that Istria has been able to prolong the tourism season.





2.4 FOOD AS A DIFFERENTIATOR

The following summary from across the entire food industry in the region provides examples of the development of food-based products from the initial development phase to marketing activities.

FARM HOLIDAYS

As many farmers who lived in the hinterlands experienced difficulties in getting their vegetables and local products into fruit and vegetable markets in larger cities along the coast, the regional government began subsidising local farmers to be able to sell their produce directly on their own farms.

The concept appeared straight-forward but yet challenging as the mentality of the producers had to change and adapt to the demand of similar products in other markets. Capacity was limited to 50 people during a day (which prevented the farms from becoming too commercial, limiting them to one bus per day).

From all the products sold on the farm, a minimum of 50% had to emanate directly from that farm. The remaining 50% was divided into two criteria – a minimum of 40% of the goods had to be produced in that specific micro-location. For example, if a farm did not produce their own cheese, but their neighbour did, a farmer was able to sign a contract with their neighbour and sell their produces directly on the farm. This resulted in 90% of the products offered being from the locality, thus securing home-made produces of high quality for the consumer. The remaining 10% would pertain to salt, pepper, rice and mineral water.

It must be also noted that if a farm did not produce its own wine or beer or soft drinks, they were not allowed to sell these products on their farm.

This project has become a huge success and also provides a guarantee to the consumer that all that is purchased is local (not regional but micro-regional). Such farms have become very popular especially at weekends for the local population, illustrated by the need to make a reservation in advance due to the high demand.

RESTAURANTS AND TAVERNS

One of the first projects in the region was to enable restaurant owners to move away from the main tourist season and upgrade their quality and services in order to be open during the entire year.

Apart from subsidising specific loans, the regional government's biggest tool was promotion, through which they decided to only endorse the best restaurants in the region that followed five very simple criteria based on a points system marked out of 100.

Ambience: the atmosphere of the restaurants and taverns should be homely, using local wood and stone to create a pleasant atmosphere. (This principle eliminated all plastic tables and chairs which were commonly used during the peak tourism season and pertained to almost 95% of all restaurant owners).

Service: an educated, well-mannered and well-informed staff was considered crucial. This led to opening the first sommelier club in Istria whose primary objective was to provide professional staff to local restaurant and tayern owners.

Wines: it was important that the restaurant has a wine list of world, regional and local wines. Again, with a sommelier as a presenter, the restaurant or tavern would receive more points.

Local Products: the biggest task with this criterion was to move from the mentality and philosophy of "give the guests what THEY want" to "let me show you what WE have today". Prior to this, most of the restaurants catered to already existing guests and regularly offered them dishes that were not local.



The region of Istria is blessed with local seasonal products – ranging from vegetables, mushrooms, wild asparagus, truffles (the only region in the world to have truffles all year round – four different types), a variety of fish (over 350 different species), meats and so on. Under the new benchmarking system, restaurants were urged to have seasonal menus and use domestic products from local farms and producers.

Working Months: this stated that the restaurant owners would need to work for the majority of the year, with only a few months rest. Again, this criteria eliminated almost 90% of existing restaurants during that time, since most were open only during the main tourism season.

Due to the government's assistance and the increase in standards and local seasonal produce, restaurants no longer depended on just the summer season, but were able to work throughout the entire year and actually create a larger income since the consumer was no longer only summer visitors but tourists who visited the region solely for gourmet purposes.

Two interesting developments emerged from this initiative as firstly, Istria has become a foodie destination attracting food lovers from the entire globe and mostly off-season in order to enjoy local products. In addition, the trend has completely altered from restaurants that only worked during the summer season, to restaurants that operate for the rest of the year and actually close their doors during the summer season since it is no longer the clientele they target.

The overall results of this project have been outstanding as innovative cuisine combined with local products have branded the destination as the best foodie destination in Croatia and the best hidden gourmet treasure in Europe. Certified restaurants recommended through Jeunes Restaurateurs D'Europe, Michelin and Gault&Millau are becoming much more common.

WINES

As in any region, the local wines play an important role in branding a destination. The same process was applied in Istria regarding benchmarking, education and financial help to assist in securing the right technology and know-how in order to make wines of very high quality.

Apart from an overall focus on the production of high-quality wines in the region, an emphasis was also placed upon the typical local varieties such as the white grape Istrian Malvazija and the red grape Istrian Teran. The first verified product which received a certificate of quality IQ (Istrian Quality) was the Istrian Malvazija. The main objective was to make the Istrian Malvazija a highly-regarded world class wine. This project accelerated very quickly with several events aiding its development and reputation.

One such event was Vinistra, the most celebrated and well-known wine festivals in south east Europe which is held in the town of Porec, with over 20,000 visitors every year. The event includes gourmet shows, wine presentation, panels and an accompanying fair.

Istrian wines are now to be found in exclusive shops, hotels and restaurants around the world and have won numerous accolades. The latest list of awards received by the world renowned "The Decanter Magazine" is perhaps one of the best signs that only with quality can a wine be truly visible on the world stage. This year was an exceptionally good year as Decanter 2020's competition included 16,518 wine samples from 56 countries and Croatian wine producers were awarded 226 medals.

Decanter World Wine Awards 2020 www.decanter.com/decanter-awards:

| Platinum 97 points - 2 producers | Silver 91 points - 5 producers |
|------------------------------------|-----------------------------------|
| Gold 96 points - 1 producer | Silver 90 points - 10 producers |
| Gold 95 points - 7 producers | Bronze 89 points - 3 producers |
| Gold 94 points - 1 producer | Bronze 88 points - 9 producers |
| Silver 93 points - 3 producers | Bronze 87 points - 9 producers |
| Silver 92 points - 6 producers | Bronze 86 points - 1 producer |



TRUFFLES

There are only two countries in the world that have white truffles, one being the region of Istria. From locally prepared meals to the top restaurants that include truffles in their nouvelle innovative cuisine, Istria is considered an ideal destination to taste this gem.

One of the key ingredients to establishing Istria's reputation in this field was promoting the destination as the preeminent truffle destination in the world.

In addition to having discovered the biggest truffle in the world - as mentioned in the Guinness Book of Records - which made it easier to promote truffle hunters and restaurants, some further beneficial activities that stand out include:

- Creating a gourmet event and auction based on truffles every weekend during October to celebrate the white truffle.
- Inviting world famous chef Bruno Clement from France, also known as "the King of truffles", to visit the region and promote Istrian truffles. Clement uses more than six tonnes of truffles per year in his three restaurants and in addition to having recorded a promotional series on the Istrian truffles, he also regularly highlights the Istrian region as the origin of many of his truffles recipes on his restaurant menus.

EXTRA VIRGIN OLIVE OIL

Similar to the enhancement initiative concerning Istrian wine, the extra virgin olive oil project included education, subsidised loans by the regional government with local banks, and investments in knowhow and equipment. However, this is one project that has been able to achieve amazing standards. Every year, Italian olive oil connoisseur Marco Oreggio samples over 6,000 different olive oils from the entire world and publishes the internationally recognised 'Flos Olei' booklet with 500 of the best producers worldwide. The rating is based on a 80-100 scale.





The latest edition of the prestigious Flos Olei for 2021 included 71 producers from Istria among the top olive oil producers of quality extra virgin olive oil and most significantly confirmed Istria as the number one region for the best extra virgin olive oils worldwide for the sixth year in succession.

Awarded points of over 90, a significant number of the Istrian olive oil producers gained better results than previous years, which is proof of the constant quality upgrade and application of the newest science-technological trends in olive oil production.

It's the perfect example of how with quality produce and a relentless strive to evolve and improve, Istria has been able to establish itself as the best region for extra virgin olive oil in the world.

THE ISTRIAN OX

This is an example of an endangered endemic species that was saved to hold a special place in the food industry. The Istrian Ox, which can weigh up to two tonnes, was mostly used to plough farmers' fields. As tractors became more prevalent, the animal was slowly going extinct and something had to be done to give it a renewed purpose.

The first step was to help promote those who already had Istrian oxen on their farms, with financial aid provided by the local government to assist the creation of local farms that specialised in the caring of the precious species. Several events were then initiated in order to help promote the farmers and their farms. Prior to this project commencing, there were only 400 Oxen in the region, but following the creation of these farms, there are now more than 2,000 Oxen in Istria, illustrating the success of the initiative.

However, the project still required giving these animals purpose and that was earmarked to be through gastronomy. The meat from the Istrian Ox was not previously eaten so the regional government employed specialists to test the quality of the meat and to find the best way to prepare it.

Research showed that meat which was directly in contact with the spine was actually poisonous, so just the slaughter of this animal had to be done in a specific way. In addition, since the meat had a very tough texture, the government hired local chefs to test the quality of the meat and to suggest ways of preparing dishes with this endemic species. Any restaurant owner or hotel that wanted to offer this meat on their menus, had to undergo a special educational course and a mandatory cooking course. Having completed the courses, the restaurants owners would receive a certificate verifying that this meat was safe to serve in their restaurant. Today this meat has a special place in Istrian gastronomy with unique dishes being prepared and local farmers manufacturing different products such as sausages, salamis, cold cuts and so on.

HOTEL AND FOOD INDUSTRY COLLABORATION

One of the outstanding collaborations between the hotel sector and the food industry is the fact that all the hotel companies in the region offer local products from local producers. Bearing in mind that hotels previously had their own suppliers at competitive rates (products imported at a much lower price than local producers may offer), hoteliers admirably realised the potential and interest in promoting Istria as a gourmet destination. Measures and actions taken by hotels to promote local produce include:

- At buffets there is a dedicated section which promotes local dishes made from local ingredients from domestic suppliers - highlighting to tourists in the destination the local cuisine while supporting local producers.
- Organising special events based around Istrian gastronomy again to further promote local products as well as entertain guests. Such events include festivals and cooking courses with chefs from the hotel and famous chefs from the region.
- Special gourmet tours organised by hotels through their own established DMC companies. Hotel owners and managers are no longer trying to just keep the guest occupied in the premises, but actually enable them to discover the region through recommendations or bookings made through the hotels themselves.



Another interesting hotel group is Maistra (part of the Adris investment group) which has invested in the reconstruction and reopening of the fish factory Cromaris – helping local fishermen secure a market as well as creating white fish farms along the Adriatic coast. Cromaris sells fresh fish as well as conserving fish in various forms, and supplies to locals as well as major hotel companies and restaurants.

All family run boutique hotels base their menus on local cuisine and help support local agriculture.

OTHER EXAMPLES

There has been a significant increase, of not so common, quality products in the region as well as innovative projects around food. Cheeses, honey, local vegetable, oysters, prosciutto and fish farms have all improved their standards and increased their quality to enable them to find their niche market. More and more products are environmentally-friendly and have been duly certified with labels of Eco products.

For example, an oyster farm in Limski Kanal which previously only catered for hotels and restaurants, now with guidance and the initiative from the regional tourism board, is also able to organise special oyster tasting tours and experiences.

TOURISM AGENCIES

Apart from Istria being an ideal destination for all kinds of experiences raging from adventure, cultural and entertainment tours, gourmet tours have resulted in confirming the destination as a sought after foodie destination. Organised gourmet tours are booked worldwide, attracting food lovers from the USA, England, Germany, Austria, Holland, France, Italy and many more.

For those neighbours who don't need an agency, Istria is not at a far distance and is considered a car destination. Hence, many food lovers, especially from Italy, Slovenia and Austria arrive to experience the local as well as high end cuisine for a short weekend.





GOURMET EVENTS

With Istria benefiting from the availability of seasonal products throughout the year, the creation of gourmet festivals appeared the next logical step to combine gastronomy, tradition, culture and entertainment in one location. Examples of gourmet events that take place in the region include:

- Istria Gourmet Festival an annual educational seminar with panels, gala dinners and cookery demonstrations from world renowned Michelin Star chefs sharing their knowledge and experiences.
- **Truffle Days** spread out over several locations, the fair is based entirely around truffles and the preparation and auction of the rare delicacy.
- Vinistra an educational event combining seminars, fairs and cookery classes based mainly around the grape of Istrian Malavazija but also including all local products in the region.
- **Open Wine Cellars** a day where all the wineries in the region open their doors so that visitors may get a hands-on experience of the wine cellars and speak with their owners. This event is entirely free of charge.
- Days of Olive Oil an event where all the best olive oil producers present their products and there are also cookery classes and presentations based around extra virgin olive oil.
- **Days of Cheese** promoting all local producers that manufacture cheese, also accompanied by seminars and cooking classes and demonstrations.
- Days of prosciutto The Istrian prosciutto is a must at every dining table. The event promotes all producers of this dried meat.
- **Wild Asparagus Days** a concept where all restaurants during the season of wild asparagus offer dishes prepared only with this wild vegetable at affordable prices.
- **Hook and Cook** a festival based around the blue fish and prepared outdoors on the coast accompanied by music and refreshments.
- **Brodet Cup** an annual competition where celebrities compete in preparing Brodet a Croatian fish stew.

All these events attract more than 10,000 visitors per day and have an impressive media reach.

It is evident that Istria has become a top foodie destination and is only going to become more popular as long as the region maintains quality levels and that the synergy between the private and public sector continues to be fruitful.

MARKETING INITIATIVES

The majority of marketing activities are those common to all tourism boards, however some activities stand out more than others.

All major events based around gastronomy have a wide-reaching marketing impact, strongly supported by the use of well-known social influencers as well as famous individuals that specialise in their own unique fields of expertise.

Share Istria: one of the main marketing campaigns invites tourism influencers from around the world to discover the destination and promote it. Under the hashtag #shareistria the region is constantly being promoted through social media throughout the year.

Festivals/Events: The majority of Istrian events attract and invite celebrities to the destination in order to promote them. Apart from locally branded events such as the Pula Film Festival, ATP tennis tournament with accompanying entertainment programme, Vinistra etc, the region also successfully bidded for famous branded events such as Iron Man which was held in Pula and the Red Bull Air Race World Championships which had over one million spectators.

Film industry: Istria has become an ideal location for filming. Whether it be tourism documentaries, reality shows or movies, the income as well as the number of viewers has had a sizeable impact on the destination. Most production companies have a minimum of 50 team members that spend an average of 30 days in the region filming at different locations. Their accommodation is mostly based on half or full board and their logistical requirements help employ locals.



Cooperation with major industries: The Istrian Tourist Board found it important to sign contracts with leading industries of interest that might help promote the region. These world leadings brands include CUBE (German bicycle manufacturer), BMW (German multinational car and motorcycle producer) and Bayern Munich (football club from Germany).

The collaboration with CUBE in particular was hugely significant as being one of the biggest producers of bikes and biking equipment in Europe and Istria having more than 2,000 km of biking paths in the region, signing such a contact proved to be ideal. CUBE in return promoted Istria as the quintessential destination for their bikes and in addition, all promotion regarding CUBE in Croatia would be exclusively done in Istria.

Similarly with BMW, since the region has outstanding scenic routes and the Istria Tourist Board wanted to enhance their corporate event hosting capabilities (congresses, team buildings and seminars), an alliance with BMW was agreed where all promotion for their cars in Croatia would be done in Istria including any business requirements needed. BMW also does a large part of its overall marketing in the region of Istria.

Finally, with almost 70% of all German tourists that travel to Istria coming from the region of Bayern, this specific market was targeted by the Istrian Tourist Board when becoming a strategic partner of FC Bayern Munich in 2018. Ten large projects were initially outlined on a thematic and timely basis to promote Istria including the use of Bayern Munich players in an Istria destination campaign. All Bayern's pre-season training camps are held in Istria while other projects included the organisation of a friendly legends football match in the 2,000 year old Amphiteatre in Pula between former players from the Croatian national team and Bayern Munich. This was covered by national television and media both in Croatia and Germany.







SECTION THREE

3.1 KEY LEARNINGS

Istria has a variety of accommodation possibilities, however, focusing their promotion on individual guests has proven to be an inspired decision and has reinforced Istria as the leading tourism destination in Croatia throughout the duration of the Covid crisis.

The top five learnings in the context of Istria's approach to how the destination and businesses adapted are:

- 1. A collaboration between the private and public sectors regarding marketing activities for already existing capacities oriented to individual travellers.
- 2. The implementation of Covid-19 regulations in accommodation capacities as well as restaurants and bars in order to give travellers an assured sense of security.
- **3.** A concerted drive within the private sector to secure sales of local foodie products through existing marketing channels.
- **4.** A collaboration within the private sector to secure "at home" cooking in existing capacities.
- **5.** The adaptation and creation of online technology in order to secure sales of local products web, apps.







