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A sustainable strategy of redistribution of the tourist flows in Basilicata region, in south Italy. Coastal tourism as a development factor for the natural parks

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ABSTRACT

Basilicata region, in south Italy, is delimited by the Ionian and the Tyrrhenian seas and includes territories morphologically different with four protected areas, two regional and two national. This lack of homogeneity of the territory reflects on the tourism dynamics of the region. Coastal territories are more profitable in terms of flows, while in the inland territories, except Matera, the weight of tourism is still too low. In the protected areas, except the Regional Park of Murgia Materana, flows are marginal and tourism cannot activate a significant local development process. Given this framework, the Fondazione Mattei conducted a study aiming at the determination of strategic guidelines for the planning of a local development based on the integration between market forces and forms of social control. This planning aims at the redistribution and deseasonalization of coastal flows through the integration between coastal and rural tourism in the inland. To evaluate the integrated tourism product potentiality, Eni Enrico Mattei foundation analyzed some national case studies and conducted a survey on the consumer of the Ionian Coast. Analysis measured the tourism competitiveness of the protected areas in Basilicata by the use of Dwyer and Kim's model combined with Balanced Scorecard method. The more appealing products for the coastal demand and more competitive products in the market of green destinations have been identified by BCG matrix. The analysis outlined the necessity of a strategy of integration of the four protected areas in order to increase their market share and several tourism segments should be enhanced to increase the potential of the nature-based tourism product of Basilicata.

Keywords: Redistribution of the tourist flows; Tourism competitiveness; Sea and inland tourism integration; Natural parks

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INTRODUCTION

One of the defining features of tourism is its seasonal nature. In the space of a year, periods of high tourist flows concentrated in certain areas alternate with times of slump and an almost total lack of demand. This phenomenon impacts on the economic sustainability of the sector, which, in many cases, is not profitable for the whole year, and this also creates serious impacts in the social and environmental sphere.

Periods of few visits are followed by times when the destination is subject to tourist flows that significantly impact on the quality of life of the residents and the environment that has to sustain this burden. The flows of tourists to Basilicata, a region situated in the south of Italy are also highly sensitive to the seasons.

Indeed, while the Basilicata continues to stand out in Italy for the decidedly high rates of room night in tourism due to the increasing renown of its main centres of attraction, primarily Matera, the seasonal effect overall on tourism, measured as the proportion of visitors in July and August against the total, still remains very high when compared to the national average (51% against 39%).

However, in recent years, the seasonality has been mitigated, due to more marked flows of cultural, wine and food and environmental tourism. Seaside tourism has also been less seasonal, especially on the Ionian Coast, where the increase in tourists in June and September 2015 far exceeded those of July and August, a phenomenon restricted, however, to the summer period only. Indeed, busy periods still alternate with seasons when demand is very low, during which many facilities are closed and small coastal centres are deserted.

In contrast with this area, packed with tourists in the summer with good positioning in terms of visibility and demand, both domestic and foreign, there is the mountainous hinterland, still in an exploratory phase of tourism with potential for greater value. (Statistical Data of the Tourist Agency of Basilicata, 2015).

The redistribution of the tourist flows over time and space is, therefore, the most important challenge facing a region that, from a position of weakness, is now building a brand and its reputation. So The goal of this work is to indicate a possibly solution to overcome the seasonal situation of the tourism in the Basilicata region, in particular we will indicate a way to move coastal tourism to internal areas characterized by the presence of natural areas.

To reach this purpose, first, through the data, we illustrate the will of coastal tourists to visit natural areas, then we will show the characteristics of those natural areas to locate their main resources. Therefore we will use the Growth–share matrix (Boston Consulting Group matrix) in order to identify the natural areas tourist products capable of intercepting the tourist request..

The dynamics of tourism in Basilicata and opportunities for the sustainable redistribution of the flows through the main centers of attraction

In 2015, tourism in Basilicata, the land of the Lucani people, displayed significant growth in terms of arrivals and stays, with a double-digit increase in the former (+ 16.5%) and 10% in the latter. The reason for this growth lies principally on the tourist arrivals linked to the city of Matera, much of this interest is due to the designation of Matera as Capital of Culture.

In absolute numbers, an increase was recorded of around 205,000 visits, which led to an overall amount of overnight stays of more than 2.3 million. The increase in arrivals was even more marked and reached almost 675,000 units, a new all-time high and the sign of the growing, widespread appeal of the region on the tourist markets.

The greater growth of guests compared to overnight stays can be ascribed to the development of less "stationary" types of tourism, such as those to cultural destinations, which involve shorter stays. From this point of view, it is no coincidence that almost 2/3 of the arrivals registered regionally are concentrated in the city of Matera, which acted as the driving force.

Matera attained a 15% share of the total overnight stays in the region and 32% of the total number of guests. Significant performances have also been seen in areas of seaside tourism. In Metepontino, the Ionian coast of Basilicata, in particular, visits exceeded 1,200,000 units for the first time, with an increase of 4%, the highest in recent years. The growth in its power of attraction is confirmed by the data on arrivals, which increased by 13%.

Tourism in the hinterland, by contrast, displays a stationary trend, especially the protected areas of Basilicata, with the exception of the parks of Murgia Materana and Pollino where, despite the fact overnight stays received a boost of 19.5%, this growth only concerned the municipality of Viggianello, which, in a year, almost tripled the number of visits, while other tourist businesses slowed down significantly, and it is here that the greatest slowdown in enhancing the accommodation provision is seen with average rates of use lower than 12%.

These areas currently play a secondary role in the regional tourism dynamics. It therefore seems clear that, from the point of view of sustainable development, a strategy is required to create balanced growth in all the local tourist areas. In this light, the positive balance of last season in Metapontino, and the extraordinary exploitation of the visits to Matera, could certainly give impetus to accelerating the development process, especially in the inland areas.

The nature parks, although they cover 25% of the territory, have seen less than impressive numbers remain static (with the exception of the Murgia Materana park), a consequence of the Basilicata's lack of competitiveness in terms of nature tourism, are certainly among the first destinations that require intervention.

The issue of enhancing the region's natural resources is fundamental, not only because of the effect they have on the territory's geography and because they are capable of activating development processes that simultaneously embrace the economy and respect for the environment, but also because of the positive dynamics that generally characterise the sector, from which Basilicata could benefit in order to increase its market appeal. The number of visits to national and regional protected areas and other areas subject to constraints exceeded 102 million and the forecasts for the future are even better: 58% of national and European tour operators expect an increase in demand. (12th Ecotur Report On Nature Tourism, 2014).

Tourism in Basilicata's protected areas: characteristics and limits

The system of Basilicata's protected areas, made up of 2 national parks (National Park of Pollino and the National Park of Appennino Lucano Val D'Agri Lagonegrese) and 2 regional parks (Gallipoli Cognato e Piccole Dolomite Lucane Park and Murge Materane Park), cover 23% of the region.

Overall, they attract 41% of the arrivals registered in Basilicata but these are brief visits, as shown by the data on the average stay of 1.8 nights compared to 3.7 nights regionally.

Murgia Park, which encompasses the city of Matera, draws 60% of all tourist visits to protected areas. These are significant numbers for the area, in continuous growth in recent years driven by the Matera's visibility as a European Capital of Culture. Parco dell'Appennino Lucano, which welcomes 23% of the total arrivals, is the second natural area in terms of arrivals.

The marked presence of business flows connected to mining and other extractive activities in the Val d'Agri and the dynamics of this phenomenon, creating a fluctuating demand for workers, have produced an oscillating trajectory in the tourist flows. Then there is the Parco Nazionale del Pollino[1], which registered 15% of the total arrivals.

Associated with significant demand for nature tourism, Pollino is the only protected area that, in the last five years, has displayed marked periods of decreases in the flows, with the exception of 2015. Finally, the Parco Regionale del Gallipoli Cognato commands an even more marginal share, since it sees only 2% of the arrivals; the emphasis in the Park is so firmly on hiking that it influences the performance of the accommodation sector, which, notwithstanding the attractive power of the locations, struggles to increase the provision of beds.

In general, the flows of the protected areas in recent years have remained decidedly seasonal with a low rate of stays. An analysis of the status quo reveals the strong and weak points of the individual destinations.

[1] It is made clear that Parco Nazionale del Pollino is an interregional park but the analysis refers only to the Lucania side.

The Murgia Materana park, as already emphasised, has witnessed significant growth in recent years due, above all, to the visibility Matera has gained. While, on one hand, the attractive power of the Sassi (The Sassi and the Park of the Rupestrian Churches of Matera, registered as Unesco site in the 1993, is the most outstanding, intact example of a troglodyte settlement in the Mediterranean region, perfectly adapted to its terrain and ecosystem. The first inhabited zone dates from the Palaeolithic, while later settlements illustrate a number of significant stages in human history.Matera is in the southern region of Basilicata[2]) gives the park good visibility in the guides and on the web, bringing an increasingly large catchment area, on the other there is the danger of basking in reflected glory.

The analysis of the demand, in fact, reveals segmentation entirely to the advantage of cultural tourism and discovering the territory, to the point that these two segments overall attract 70% of visitors to the destination. Enjoyment of the environmental resources was cited by 20% of the sample as the reason for visiting..

Strong points	Weak points	Opportunities	Threats
UNESCO site	Signage and trails	Matera 2019	Basking in the reflected glory of Matera
Important cultural heritage	Secondary attraction of flora and fauna	Diversification of provision (not only cultural)	No independent provision
Good visibility in guides and on the web		Diversification of the tourist catchment areas	
Good bed provision		Internationalisation	
Quality of the tourist services			

Swot analysis: Parco della Murgia Materana
Source: Tourism in the Parks. Analysis of the competitive potential of protected areas: the case of Basilicata, Feem, 2015

The Parco dell'Appennino Lucano is the most recent regional area to be designated protected and, as such, still has poor visibility.

This is due to lack of action on the brand, which has untapped tourist potential; the lack of connections and signs and the very limited recreational provision are real constraints on its development. The mining and extraction activities in the park and the business flows that derive from them could, if managed properly, present an opportunity to promote the territory,

[2] http://whc.unesco.org/en/list/670

increase clients and convert the business flows to nature and leisure tourism[3].

The encouraging figures of the increase in beds are tempered by a fluctuation in the flows, mostly linked to the requirements of the oil industry. However, the opportunity offered by the awarding of the European Charter for Sustainable Tourism is a real chance to promote tourism in the territory and the greater recognition and attraction of its values. Setting aside the business flows, the main demand is for nature (39% of clients) and tourism directed at the wine and food resources (22%). Less interest is found in the cultural heritage, sports and the discovery of the territory. (Tourism in the Parks. Analysis of the competitive potential of protected areas: the case of Basilicata, Feem, 2015).

Strong points	Weak points	Opportunities	Threats
Variety of the natural, wine and food and cultural resources	Poor visibility in guides and websites	The newest park in Italy	Extraction activities
Variety of traditional events	Local and seasonal tourism. Static nature of the flows.	Business tourism	Poorly structured tourist provision
	Limits on collective mobility	Increase in accommodation facilities	
	Poor recreational provision;	European Charter for Sustainable Tourism	
	Lack of signage and trails		

Swot analysis: Parco dell'Appennino Lucano
Source – Tourism in the Parks. Analysis of the competitive potential of protected areas: the case of Basilicata, Feem, 2015

Parco del Pollino is one of the first protected areas established in Italy where the emphasis is on nature and the provision of tourist activities. Although it has a recognisable brand and good visibility in guide -books and on the web, it has seen a reduction in the tourist flows in recent years and, according to the local operators, it seems to be sliding into a phase of stagnation in which tourism is given only marginal consideration as a resource and opportunity for the territory. The demand is marked by tourism driven mainly by the enjoyment of the natural resources (57% of the sample) and sports (16%) and only marginally interested in the other resources.

[3] Chiarullo L. et al., Il turismo business legato al settore estrattivo: opportunità e minacce per un'area interna della Basilicata, in Becheri E., Maggiore G., 19th Report on Italian tourism, Mercury 2013.

Strong Points	Weak Points	Opportunities	Threats
Good visibility on tourist guides and websites	Decreasing flows	European Charter for Sustainable Tourism	Tourism as secondary resource
Arbereshe culture	Seasonal tourism and tours	New attraction: the flight of the eagle	
Strong emphasis on nature	Lack of signage and trails	Recognition for natural resources	
Rich provision of sports tourism/activities	Difficulty in collective mobility		
	Lack of events		

Swot analysis: Parco del Pollino
Source – Tourism in the Parks. Analysis of the competitive potential of protected areas: the case of Basilicata, Feem, 2015

Finally, the Parco di Gallipoli Cognato is a protected area covering a limited area and attracts marginal flows within the regional tourist economy, nevertheless aiming at future growth as the visibility and attractive force of Castelmezzano and Volo dell'Angelo increase. The risk, however, is that the nature provision continues to be a secondary product compared to tourism dedicated exclusively to visiting villages and sports activities, predominately hiking. Current demand is mainly from the nature and sports segments, which were the main reasons for visiting for 72% of tourists. Around a quarter are interested in the enjoyment of the cultural heritage (13%), wine and food (8%) and tradition (7%).

Strong points	Weak points	Opportunities	Threats
Proximity to the provincial capital	Limited area	Flight of the angel	Overshadowed by Flight of the Angel and Castelmezzano
Rich natural heritage	Poor visibility in guides and on the web	Castelmezzano, the most beautiful town in Italy	Lack of capacity
Increase in beds	Difficulty in collective mobility	Integration of offer	Only suitable for sports tourism
Flight of the angel	Tourism chiefly involves touring		

Swot analysis: Parco Gallipoli Cognato
Source – Tourism in the Parks. Analysis of the competitive potential of protected areas: the case of Basilicata, Feem, 2015

The design of the research: Objectives

Given the foregoing. The aim of this study is to identify a strategy for development of protected areas trying to shift the flow of tourists in coastal areas to inland areas in order to solve the problem of the seasonal nature of tourism and simultaneously foster the growth of inland areas not yet characterized by sufficient tourist arrivals.

At the same time the work intends to act on the competitiveness of the protected areas, positioning them better on the market of nature destinations, taking account of key factors presented by the hinterland.

Integration between the coast and the hinterland, in recent years, has been a recurring theme in the European tourism policies. They are moving in this direction and, as part of the development plans for the Mediterranean area and, in particular, the Adriatic-Ionic region, at risk of gradual marginalisation, they identify the land-sea connectivity as a precious opportunity.

Among these policies, there are the projects Odyssea Fim[4] (the Odyssea parteners are Corsica region, Liguria region, Sardinia and Tuscany region) and Adristorical Lands which are examples of excellence in the field of cross-border cooperation and shared integration between coast and hinterland. The first, which is being developed as part of the Italian-French "Maritime" Programme, is aimed at enhancing the lands around the tourist ports and the creation of tourist itineraries as a unique way to enable rural areas to benefit from substantial sports tourism.

A similar project is Adristorical Lands, which is based on the idea of the port as a "gateway" to the territory, that is, a favoured route from the coast to the hinterland. In this light, the itineraries designed to incentivise the interactions between coast and rural areas are a valid instrument for promoting multicentre development that respects the environment.

METHODOLOGY

In order to assess the level of interest of tourists in the coastal strip and their willingness to visit the hinterland, as well as the features the integration product must have to convince them to explore the hinterland, a territorial marketing analysis was undertaken using the instrument of the "choice experiment", which enables the level of satisfaction in certain existing kinds of tourism to be evaluated and new products to be created to meet the trends in demand by discovering preferences and needs.The analysis was carried out through the submission of a questionnaire to tourists on the Ionian coast. The interview questionnaires took place during the summer (August-September).

The reference population from which the sample was extracted includes tourists on holiday in Basilicata, intercepted in countries that fall in the Ionian Coast (Metaponto, Nova Siri, Pisticci, Policoro and Scanzano Ionico); fild with a significant flow of tourists from where inland areas are called to draw. Specifically was adopted a non-probability sampling, interviewing randomly tourists.

The number of surveys collected was 165 questionnaires. The questionnaire was divided into two sections, the first section aimed to identify the kind of the holiday that visitors were enjoying at the time of the interview, the methods of selecting the destination and the means of transport they use most. Moreover, the habitual tourist conduct of the interviewees was surveyed and, specifically, the type of holiday they usually take and the attitude to travelling during the low season.

The purpose of the second section was to sound out the degree of interest in visiting the hinterland, the motivations for travelling, travel times, what kind of tourist products they would choose and the what kind of tourist services they would like to test.

The results of the survey produced good feedback on a structured tourist product that presents a range of good quality services. Half the sample stated that the journey should last "between 50 minutes and a maximum of an hour", while 40% would be willing to travel for a maximum of 2 hours. Among the tourist products offered, chosen based on the features of the hinterland, more than half those interviewed chose the nature and cultural products.

At this point, due to the indications from the survey and taking account of the match between

[4] http://www.odyssea-fim.eu/

the requirements expressed by tourists in terms of type of provision and travel times (see graphic below) and what is available in the protected areas, a tourist analysis was carried out on the parks. In particular surveys were aimed at measuring the tourist competitiveness using the Dwyer and Kim model associated to the Balanced Scorecard method in particular with the purpose of identifying factors for the enhancement of natural areas in the market of nature destinations.

The results of the two analyses were entered in a BCG (Boston Consulting Group) matrix, a tool that enables the strategic assessment of tourist products with greatest potential for growth in relation to the trends in demand and the provision of key factors, which determined the most competitive tourist products for coastal demand and on the market for green destinations

The concept of competitiveness and its measurement is emerging as a necessity for the in-depth consideration of the main objectives of policies of tourism development and planning.

Among the evaluation models, one of the most commonly used is that of Dwyer and Kim (2003), which define competitiveness as "the ability of a destination to deliver goods and services that perform better than other destinations on those aspects of the tourism experience considering as being important by tourists" (Dwyer, Kim 2003).

The model is made up of 4 categories of factors:1) resources, 2) destination management 3) influential factors, such as localisation and safety 4) the characteristics of the demand.

One of the most recent adaptations, the analysis perspective of which is shared, considers, in addition to traditional competitive factors, the Web and ICT, seen as facilitators of the development of the demand and the processes of co-creation and sharing of the process of acquisition, consumption and post-consumption of the tourist services (Pilotti, 2013). Given the foregoing, a theoretical model was proposed in the study with 4 categories of factors contemplated - supply, demand, web and ICT, the destination's image – and a set of 63 indicators (see graphic below) selected on the basis of the availability, reliability and immediacy in collection. Finally, the integration was carried out of the model updated with the Balance Scorecard method (Kaplan, Norton, 1994), which takes on remarkable importance in the planning of a destination (Butler,1980), since it enables the swift identification of the success factors and major problems on which to build a strategy of relaunch and redefinition of the tourist structure.

Set of Indicators Tourist Provision			
Tourist resources by segment	*Accommodation provision by category*	*Economic sustainability of the accommodation provision*	*Marketing*
NATURE TOURISM SUPPLY/DEMAND ratio	% QUALITY HOTELS	LOCAL PERSONNEL EMPLOYMENT%	APPEARANCE IN CATALOGUES TOURIST OFFER SAMPLE
CULTURAL TOURISM ratio	% P.L. IN MOST REQUESTED NON-HOTEL ACCOMMODATION	% USE OF LOCAL ARTICLES	
WINE AND FOOD TOURISM ratio	INCREASE IN BEDS IN FIVE YEARS	% USE OF FOODSTUFFS KM0	
DISCOVERY TOURISM ratio	INCREASE IN QUALITY HOTELS	% SALES OF TYPICAL PRODUCTS	
SPORTS TOURISM ratio	INCREASE OF NON-HOTELACCOMMODATION ON REQUEST		

Set of Indicators Tourist Demand			
Size of demand	Segmentation of demand	Quality of demand	Customer satisfaction
INCREASE IN ARRIVALS IN FIVE YEARS	NATURE TOURISM DEMAND-SUPPLY ratio	PUBLIC AWARENESS OF A PARK	OPINION OF ACCESSIBILITY AND SIGNS
INCREASE IN VISITS IN FIVE YEAR	CULTURAL TOURISM ratio	MAIN MOTIVATION FOR VISITING PARK	OPINION ON THE VARIETY OF THE TOURISM PROVISION
INCREASE IN AVERAGE STAY	WINE AND FOOD TOURISM ratio	LACK OF TOURING OUTSIDE THE PARK	OPINION ON ENVIRONMENTAL ENJOYMENT SERVICES
SEASONALITY	DISCOVERY TOURISM ratio		OPINION ON WINE AND FOOD QUALITY
EXTENT OF TOURING	SPORTS TOURISM ratio		OPINION ON ENJOYMENT OF CULTURAL ASSETS
INTERNATIONALITY INDEX			OPINION ON QUALITY OF ENTERTAINMENT
INCREASE IN INTERNATIONALITY INDEX			OPINION ON THE PROFESSIONALISM OF THE OPERATORS
			OPINION OF THE EASE OF FINDING INFORMATION
			OPINION ON QUALITY/PRICE RATIO

Set of Web and Ict Indicators	
Destination's online visibility	Accommodation facilities' online visibility
WEB POSITIONING OF THE DESTINATION	WEB PRESENCE STRUCTURE
	OPTION TO BOOK ONLINE
	PRESENCE ON BOOKING
	OPINION ON BOOKING
	PRESENCE ON TRIPADVISOR
	OPINION ON TRIPADVISOR
	PRESENCE ON TRIVAGO
	OPINION ON TRIVAGO
	PRESENCE ON PARK'S WEBSITE

Set of Indicators Destination's Image		
online photos	Tripadvisor	tourist guides
DMO vs UGC RATIO NATURE PHOTO	NUMBER OF COMMENTS ON TRIPADVISOR	APPEARANCE IN NATIONAL/INTERNATIONAL GUIDES
CULTURE PHOTO RATIO	OPINION ON TRIPADVISOR	DETAILED INFORMATION
FREE TIME PHOTO RATIO		RATIO OF NATURE OFFER VS PARK OFFER IN GUIDES
WAY OF LIFE PHOTO RATIO		RATIO OF CULTURAL OFFER VS PARK OFFER IN GUIDES
TRADITIONS PHOTO RATIO		RATIO OF NATURE OFFER VS PARK OFFER IN GUIDES
FOOD AND WINE PHOTO RATIO		RATIO OF FOOD AND WINE OFFER VS PARK OFFER IN GUIDES
		RATIO OF SPORTS OFFER VS PARK OFFER IN GUIDES

Source: Tourism in the Parks. Analysis of the competitive potential of protected areas: the case of Basilicata, Feem, 2015

The results: Sea tourists preferences for an integrated product

The interviews with seaside tourist produced reassuring data regarding the actual application of the integration strategy. Specifically, while 51% (on the total ammount of 165 respondents) state they are on holiday in Ionian Coast tourist locations for the first time, 49% are regular visitors and, for this reason, represent a much more easily intercepted catchment area that can be directed to the hinterland.

The main means of reaching the destination is the car, which is an important advantage for the immediate application of the integrated product in the light of the deficiencies encountered regarding public transport. Another favourable factor from the perspective of the seasonal balancing of the flows is the attitude to out-of-season visits: 55% of tourist stated they took other trips in addition to summer holidays, both in spring and winter. While the main reason for current holidays is seaside activity, more than half those asked said the natural and cultural resources were factors that might persuade them to visit the hinterland.

The remaining 45% might be interested in a wellness, sports or wine and food product. For 50% of respondents, the journey to reach the interior locations should last from fifty minutes to a maximum of an hour, while 40% would be willing to travel for a maximum of two hours. Among the services requested was an efficient public transport system, improvements of which must be made. Accommodation facilities in typical villages, food and wine provision in line with local traditions and good, widespread signage and trails were also requested.

The competitiveness of Lucania's parks

As mentioned, the integration of the Dwyer and Kim model with the Balance Scorecard method enables the assessment of the tourism performances of the four Lucano parks and, at the same time, the identification of strongpoints and major problems.

Specifically, the survey showed that all the parks have intermediate levels of competitiveness displaying positive trends in various factors, while not lacking areas for improvement. Murgia Park currently has a higher degree of competitiveness compared to the other natural areas of Basilicata. It stands out for its diversified nature, sports and discovery provision, even more than currently requested; for its competitive accommodation system, given the existence of a sizeable number of beds in quality hotels and the most popular non-hotel accommodation among nature tourists (12th Ecotur Report On Nature Tourism, 2014).

Its positioning on the agency circuit, the level of sustainability of the facilities and the opinion of the tourists about the current services are good. The demand situation is also favourable, considering that the flows have increased significantly, the seasonal nature and influence of hiking are limited and flows of foreigners are increasing.

Finally, awareness of the Park among visitors, the degree of digitalisation of the accommodation facilities and the online profile and reputation are all high. However, the competitiveness of the image in the national and international guides is average and often there is only a brief mention of the Park as part of a more detailed description of Matera. The aspects currently seen as uncompetitive are: the provision of the food and wine and cultural resources is lower than demand, the average stay is less than two night, the number of visitors whose main reason is to visit the protected area and the online users whose searches target the Park.

Then in terms of competitiveness there is the Parco del Gallipoli Cognato, which promotes a full package of resources for nature, cultural and discovery products in excess of demand and has seen a substantial increase in beds, especially in the most popular non-hotel accommodation facilities, with a high opinion of the services and a good level of digitalisation among the facilities.

The number of arrivals is also growing. The degree of competitiveness in the following factors is average: available beds in the most popular non-hotel accommodation facilities, seasonality and awareness of the protected area. Critical points are: the provision of too few resources to meet the demand in the sports and food and wine segments, the lack of beds in quality hotels, the low sustainability index of the facilities in terms of the indirect and allied economy, the lack of agency circuits, the high level of hiking, the five-year decrease in visits and average stays, a limited rate of internationality that has not grown over the years, a low percentage of visitors who come for the protected areas and users who look for and leave reviews of the Park, in addition to a derisory presence in national and international guides.

Then there is the Parco del Pollino, whose strongpoints are the diversified provision, in excess of demand, in the nature and discovery segments, the increase in beds in the most popular non-hotel accommodation facilities, high visibility in the catalogues of national and international tour operators, the widespread awareness of the Park among visitors and the positive opinion of the services delivered. The number of searches for the destination on the web and the number of reviews on TripAdvisor are also high.

An analysis of the data on the seasonal nature of the flows produces average values due to hiking and the main reason for the stay. This is also due to the level of digitalisation of the hospital system and the coverage in Italian and foreign guides. However, there are gaps that need to be covered, including the limited provision compared to demand for discovery, wine and food and sports products, the five-year decrease in beds, the lack of beds in quality hotels and a still low level of sustainability of the facilities with regard to the allied economy.

There are also critical factors for demand, such as the decrease in arrivals, the visits and average stays over the five years, a low internationality index that has not seen any increase in years and a low level of digitalisation among the accommodation facilities.

Finally, in the case of the Parco Nazionale dell'Appennino Lucano, supply exceeds demand for nature, cultural, food and wine and sport products. The positives are: an increase in beds over five years for the most popular non-hotel accommodation facilities, the sustainability of the accommodation facilities and awareness of the protected area among visitors.

Average values are found regarding the increases in arrivals and visits, the seasonal nature and hiking, the degree of digitalisation of the facilities and the volume of the online searches for the destination. The opinions on the services range from good to satisfactory. Factors requiring action are: the limited sports provision, the decrease in beds, the lack of availability of beds in quality hotels, the decreases in the average stay, a low rate of internationality, the absence of tour operator catalogues, the limited digitalisation of the facilities and a weak image reflected in little coverage in the guides, a derisory number of reviews on the web and a low percentage of tourists who consider the Park their main reason for visiting.

The strategic positioning of the nature product

After analysing the competitiveness, the study now aims to identify the right strategies to improve the positioning of Basilicata natural areas into the market taking into account the analyses conducted on the domestic tourist situation, the preferences of coastal tourists, the competitive structure of the market.

Currently, the Lucano parks do not display very positive performances in the market of Italian protected areas, only the Parco del Pollino is in a more promising position. According to Ecotur (12th Ecotur Report On Nature Tourism, 2014), the Parco nazionale del Pollino lies in sixth place among the ten most requested of Italian tour operators and is the first and only protected area in southern Italy.

Finally, a local chamber of commerce survey on the awareness of tourists regarding Italian parks showed that only Pollino was recognised in the catchment areas of demand. It emerged from the surveys conducted that only 33% of tourists were interested in nature and that a visit to the protected area was the main reason for staying for 25%.

The rates of increase in the arrivals and visits, with the exception of the Parco della Murgia due to the presence of Matera, were negative and require repositioning. The marginal presence of the Parks in the main tourist information and agency channels (web and guides) is an additional sign.

The Boston Consulting Group matrix was used in order to identify the tourist products with the greatest potential for development compared to the demand, taking account of the competitive context. The Matrix is based on two dimensions: the relative market share which is the destination's share of the market compared to its main competitor, and the sector's rate of growth. On the basis of these two dimensions, the matrix is subdivided into four quadrants, in which the products are classified as competitive, less competitive, attractive or less attractive.

During the analysis, BCG matrix was used to evaluate which secondary products in relation to the main product, that is, nature, on which it is intended to focus, could contribute to the strategic positioning of the destinations with regard to a main rival, identified as the Parco Nazionale d'Abruzzo, which is the most popular among nature tourists (according to the 12th Ecotur report).

An initial examination of the number of arrivals and the turnover of the protected Lucano areas compared to the competition made clear the need to consider the Lucano parks in the analyses not as individual units but as a tourist-territorial aggregation, since the competitor has a substantial numerical advantage over the individual destinations. This initial result is, of itself, a strategic indication: the integration of the parks could be a real opportunity to break into the markets with numerous advantages for the domestic competitiveness of the destinations.

Aggregating the data, it is clear that the integration would have the positive effect of establishing an almost complete correspondence between the provision offered and the tourism demand for nature, cultural, wine and food and territorial discovery products; it would additionally guarantee a variety of accommodation able to respond to market demand, with a beneficial influence on the seasonality and internationality of the flows. Moreover, a more varied provision could reduce the phenomenon of touring outside the protected areas and persuade tourists to extend their stays in the destinations.

Aggregation could, finally, ensure easier access to the channels of promotion-advertising and improve the visibility both on the web and in the guides. The results of the matrix confirm that the wine and food product, also demanded by coastal tourists, demonstrates the highest potential. It displays both a high growth rate and a high market share.

The Lucano parks are very competitive in this product as demonstrated by the fact that they have 7 geographically-branded products. Wine and food is the most profitable product both with regard to the potential demand and that of the coast.

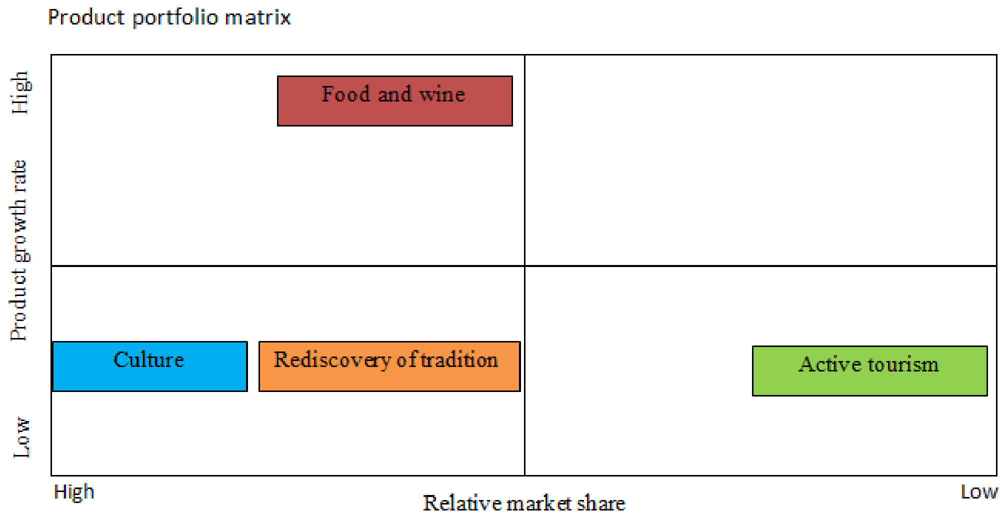
It is important to underline, in this regard, that the wine and food demand currently exceeds supply in three out of four parks, that is, Murgia

Materana, Pollino and Gallipoli Cognato parks, notwithstanding the fact there is a significant wealth of resources.

The cultural and discovery products, on the other hand, display a low growth rate and a high market share: while cultural reasons are not the major driving force of tourism within the parks, they do command a large slice of the market. What's more, it's the second most popular option for coastal tourists.

Considering the vast wealth of cultural resources in the rural areas and the uniqueness of the Parco della Murgia Materana with its stone churches and the city of the Sassi, which gained international renown in 2019 through Matera, the product is certainly strategic, mature and able to generate certain income for low investments.

Among the four parks, those that should focus most on cultural products to fill the gap between supply and demand are Parco della Murgia, for which it is necessary to enhance the connection between the natural resources and the cultural wealth of Matera, the driving force for the regional flows, and Pollino.



A different approach is required for the sports product, which is marked by a low development rate and a low market share: this is a product that generates limited profits and tends to be eliminated or is retained in order to complete the range. In reality, taking account of the fact that demand for sports tourism currently exceeds supply in three of the four parks (Pollino, Gallipoli Cognato and Appennino Lucano), which are developing hiking itineraries connecting the three protected areas and that, through the formula of major attractions like the Flight of the Angel in Gallipoli Cognato and the Flight of the Eagle in Pollino, the parks can play the card of experiential sports tourism, the recommendation is to keep it in the portfolio to complete the range, with the revival and restructuring of the existing facilities from the perspective of bringing together resources and enhancing the provision without major investment.

CONCLUSIONS

One of the main problems of the tourism sector is its seasonality. The tourism of Basilicata, and in particular the tourism of the Ionian coast, is characterized by high seasonality of flows, mainly concentrated in the summer months of July and August.

This area, characterized by substantial arrivals, by good ranking in terms of visibility and demand both domestic and foreign, contrasts with the inland territory and protected natural areas that are still in an exploratory phase with an high potential yet to be put in value for the tourism industry. These assumptions enable us to forecast an integrated development of the coastal and natural areas.

A "product mix" that would allow spreading the flows of the Ionian Coast, at the same time to build a tourism product in line with the demands of the post modern market, more and more interested in an offer that integrates service quality, typical offer and uniqueness of the experience. An integration implemented by diversifying and balancing the tourism of the coastal strip and the use of hinterland with its natural and cultural heritage.

A tourism that takes its cue from the new holiday motivations, linked to the discovery of two territories geographically close but with an antithetical tourist offer, whose integration could produce positive effects in terms of tourism development.

The analysis of questionnaires administered to tourists in Basilicata characterized by a motivation linked to the sea has shown that there is a willingness to discover the hinterland, not far from the coast, characterized by the presence of natural parks with its relative resources such as natural tourism resources, cultural and anthropological ones. Finally, we tried to understand what are the tourist products with greater development potential that protected natural areas should build on considering the key factors of the territory and the tourism demand.

For this purpose it is chosen to use the Boston Consulting Group matrix that has the purpose of providing a representation of the structure of a destination in order to allow management to adopt the most effective strategies for a fair allocation of resources. The matrix is able to identify the most competitive products on which the destination should point to.

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