WPT1: TOURISM IN ADRION; UNDERSTANDING THE NEEDS UNDER A SUSTAINABILITY SPECTRUM

DELIVERABLE 1.3.1 THE SUSTOURISMO AREAS NEEDS AND CHALLENGES & THE TOURIST NEEDS	**FINAL 20/05/2021 (OPENED FOR ADDINING PED'S INPUT – 20/09/2021)**
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Introduction

The rich, natural and cultural heritage of the **Adriatic and Ionian region** makes it one of the most attractive tourism destinations in the world. Situated at the crossroads between the Mediterranean, Eastern Europe and Asia, it has a strategic geographical location and an enormous potential for growth in the transport system. On the other hand, the region faces various challenges. Noticeable socio-economic differences can be recognized across the area. While some regions enjoy low unemployment; others have jobless rates of over 30 %. Gross domestic product per capita between the different countries also varies significantly and there are substantial differences in road, rail and maritime infrastructure, resulting in uneven connectivity. In terms of economic potential, the tourism sector is not optimally managed or exploited, and could benefit from better coordination (European Commission, 2014)[1].

The Interreg V-B Adriatic-Ionian programme, better known as **ADRION**, is a European transnational programme promoting cooperation and solidarity between eight Partner States – Albania, Bosnia and Herzegovina, Croatia, Greece, Italy, Montenegro, Serbia and Slovenia. Its main goal is to act as a policy driver and governance innovator, fostering European integration among Partner States, taking advantage of their rich natural, cultural and human resources, as well as enhancing economic, social and territorial cohesion (Interreg ADRION, 2021)[2].

SUSTOURISMO is a project funded by ADRION 2014-2020 2nd call in the Priority Axis 2 Sustainable Region, covering the specific objective SO 2.1 Promote the sustainable valorisation and preservation of natural and cultural heritage as growth assets in the Adriatic-Ionian area. It aims to upgrade the environment and highlight the natural and cultural heritage elements in ten areas (Thessaloniki GR, Igoumenitsa GR, Preveza GR, Emilia-Romagna IT, Friuli Venezia Giulia IT, Ljubljana SL, Zadar HR, Tivat ME, Berat AL, Belgrade RS) through the reduction of environmental pollutants caused by the increasing use of private vehicles by tourists. The reduction is expected to be achieved through increasing the modal share of active transportation (walking, cycling), public transport and lower-carbon mobility concepts (car sharing, electromobility). In this context, attractive touristic packages are being developed to meet the tourists' mobility requirements. Moreover, the SUSTOURISMO application for smartphones is being designed and tested. Ten partners (research agencies, universities, municipalities and other organizations in the region) are joining their forces to examine and evaluate the efficiency of innovative combined tourism-mobility services.

In the framework of the **Activity T1.3**, entitled "Common tourism identity in ADRION; needs and challenges", surveys have been conducted at the study areas in order to understand and further analyse the visitors. The surveys identified their mobility needs at the touristic places and their susceptibility to environmentally-friendly behaviour. They also offer results on market segmentation (age, gender and other social

[1] European Commission. 2014. For a Prosperous and Integrated Adriatic and Ionian Region. Available at: https://www.adriatic-ionian.eu/wp-content/uploads/2018/04/For-a-prosperous-and-integrated-Adriatic-and-Ionian-region.pdf

[2] Interreg ADRION. 2021. ADRION Programme. Available at: https://www.adrioninterreg.eu/index.php/about-program/

characteristics of visitors). Additionally, data have been collected for each local pilot case that will be used for further improvements on the tourist packages.

The report is structured as follows. At first each case participating in the SUSTOURISMO project is shortly presented describing main characteristics regarding the economy, transport and touristic sector. Following, results from the analysis of the transnational part of the surveys are presented as well as a summary of main findings from the local parts of the surveys. Finally, threats and opportunities as well as strengths and weaknesses in the tourism sustainability mobility nexus are further exploited through a SWOT analysis.

1. The SUSTOURISMO Case Studies: Economical, transport and touristic profile

SUSTOURISMO includes ten project partners from nine destinations in ADRION region (see Table 1). For each of these destinations a brief presentation follows, highlighting main characteristics composing their economical, transport and touristic profile.

Table 1: SUSTOURISMO project partners and cases

Project partner	Case
Hellenic Institute of Transport - Centre for Research and Technology Hellas (lead partner)	Thessaloniki, Greece
The Regional Union of Municipalities of Epirus	Eipirus Region (Igoumenitsa & Preveza), Greece
Institute for Transport and Logistic Foundation	Emilia-Romagna Region, Italy
Central European Initiative	Friuli Venezia Giulia Region, Italy
Institute of Traffic and transport Ljubljana	Ljubljana, Slovenia
Regional Development Agency of the Ljubljana Urban Region	
City of Zadar	Zadar, Croatia
Municipality of Tivat	Tivat, Montenegro
Regional Council of Berat	Berat, Albania
University of Belgrade	Belgrade, Serbia

1.1 The case of Thessaloniki

The Region of Central Macedonia is one of the thirteen administrative regions of Greece and the second largest in the country, located in the central northern Greece. It is the gate of Greece to Europe, connected with networks of transportation, communication and energy of international importance. The city of Thessaloniki is the region's capital and the second largest city in Greece numbering approximately 1 million residents within the metropolitan area. Thessaloniki is not only a strong political, economic and industrial centre, but also an attractive tourist destination and a transport hub. Built near the sea, at the back of Thermaikos Gulf, it is well known for its rich historical and cultural heritage, gastronomy, film festivals and other events.

Traditionally, the city of Thessaloniki was characterized by a dynamic character and high extroversion. Its multicultural background, the second largest port in Greece, the Thessaloniki International Fair, proximity to Balkans and the strong link to academia were crucial reasons supporting this profile. However, intense deindustrialisation started in 1990s and continued strongly during the last decade. The economic crisis that hit Greece after 2008, led to a reduction of the per capita domestic product of Thessaloniki by 35 % and high unemployment rate (around 30 % or even more among young people). The 'brain drain' has become a phenomenon with great dimensions, while traditional local markets and local micro-entrepreneurship have shrunk dramatically.

With the support of local actions and initiatives the negative GDP trend has slowed down and reversed in 2017; in 2018, the unemployment rate fell to 20.7 %. Basic infrastructure projects completion (roads, airport modernization, metro system operation etc.) and higher private investments along with innovation boost can be the way out of the crisis. Information and communication technology, digitalization and innovation are on the crux of cities and regions' agendas while support of tourism sector also seems a top priority. As in most other countries and cities, Thessaloniki's economy was heavily hit by the COVID-19 pandemic and the related restrictions.

Thessaloniki offers a wide spectrum of provisions for tourists; the city invites visitors with a combination of archaeological sites, including 15 UNESCO monuments, nice beaches nearby and a vivid nightlife. Around the city there are many markets and shopping places, numerous cafes and traditional taverns. Gastronomy is one of the main pillars of the city's tourist offer.

The city is located at the crossroad of the two most important national road axis, providing entrance to Eastern Europe and the Balkans. Thessaloniki is also the Greek rail gateway to Balkans. The train to Sofia operates daily, while the itinerary Thessaloniki – Skopje – Belgrade operates during high tourist season. The city boasts the second largest port of Greece. While it is s not yet recording high passenger flows, cruise tourism has started rising. Thessaloniki international airport is the third-largest airport in the country after Athens and Heraklion. It is located 13 km southeast of the city. Apart from Thessaloniki it also serves the popular tourist destination of Chalkidiki and the surrounding cities of Central Macedonia.

Figure 1: The location of Region of Central Macedonia and Thessaloniki on a national road axis

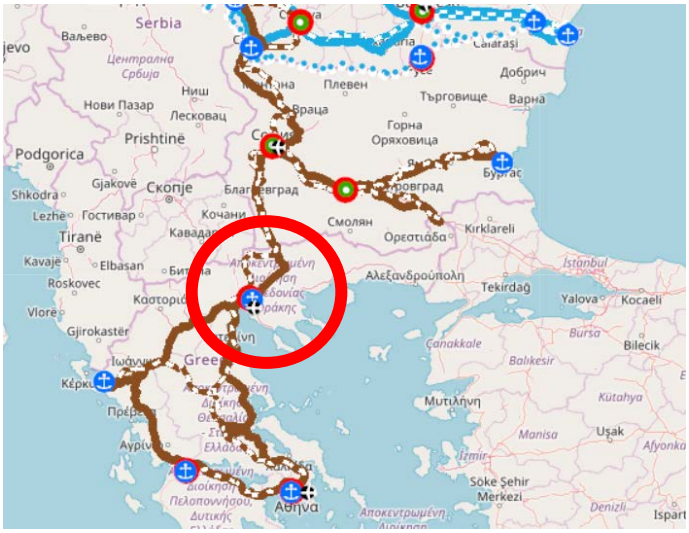
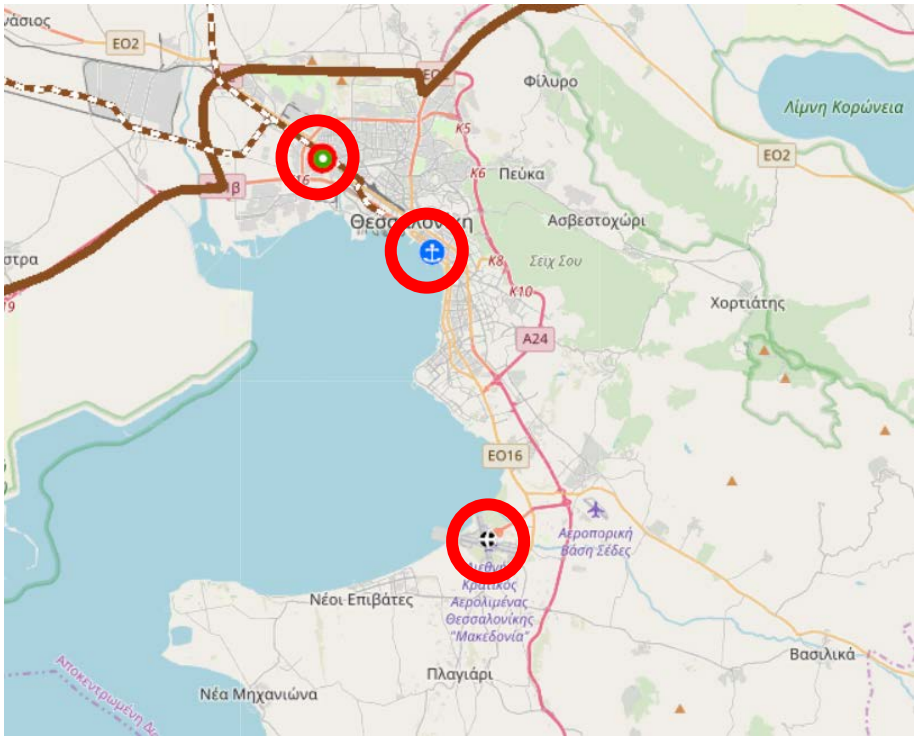


Figure 2: Thessaloniki transport nodes

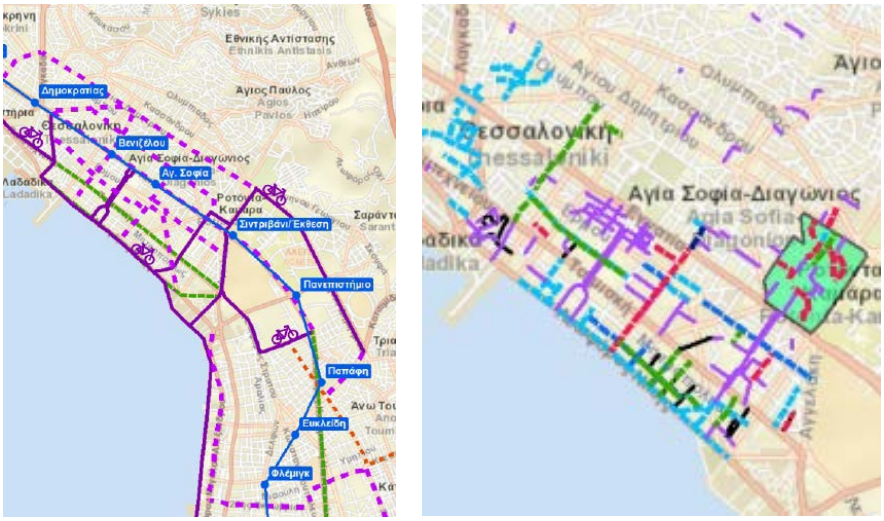


The city is served by a dense public bus network offering a good level of connectivity among urban locations. The metropolitan railway that is estimated to start operating in 2023 is expected to highly upgrade public transport connectivity. Taxi services are also available taking approximately 3 % of the modal mobility share.

Figure 3: Thessaloniki public bus network

Development of soft mobility has been highly encouraged by the local authorities in the recent years. An extensive cycling and walking paths nexus has been created in the city also connecting the outside of Central Business District areas.

Figure 4: Bicycle (left) and walking (right) paths of Thessaloniki, dashed lines present future plans



From May until October, traditional ferryboats connect the port of Thessaloniki and the White Tower with the Blue Flag awarded beaches of Peraia and the Neoi Epivates. Lastly, in recent years shared bikes and e-scooter companies have started offering services to Thessaloniki's citizens and tourists. Stations can be found at many points around the city.

Figure 5: Urban Sea Transport in Thessaloniki

1.2 The case of Epirus Region

The case of Igoumenitsa

Pilot Description

In the framework of the SUSTOURISMO project, the sRegional Union of Municipalities of Epirus / PED EPIRUS is responsible for the pilot case of Igoumenitsa, (Igoumenitsa is a city in the Region of Epirus in Greece).

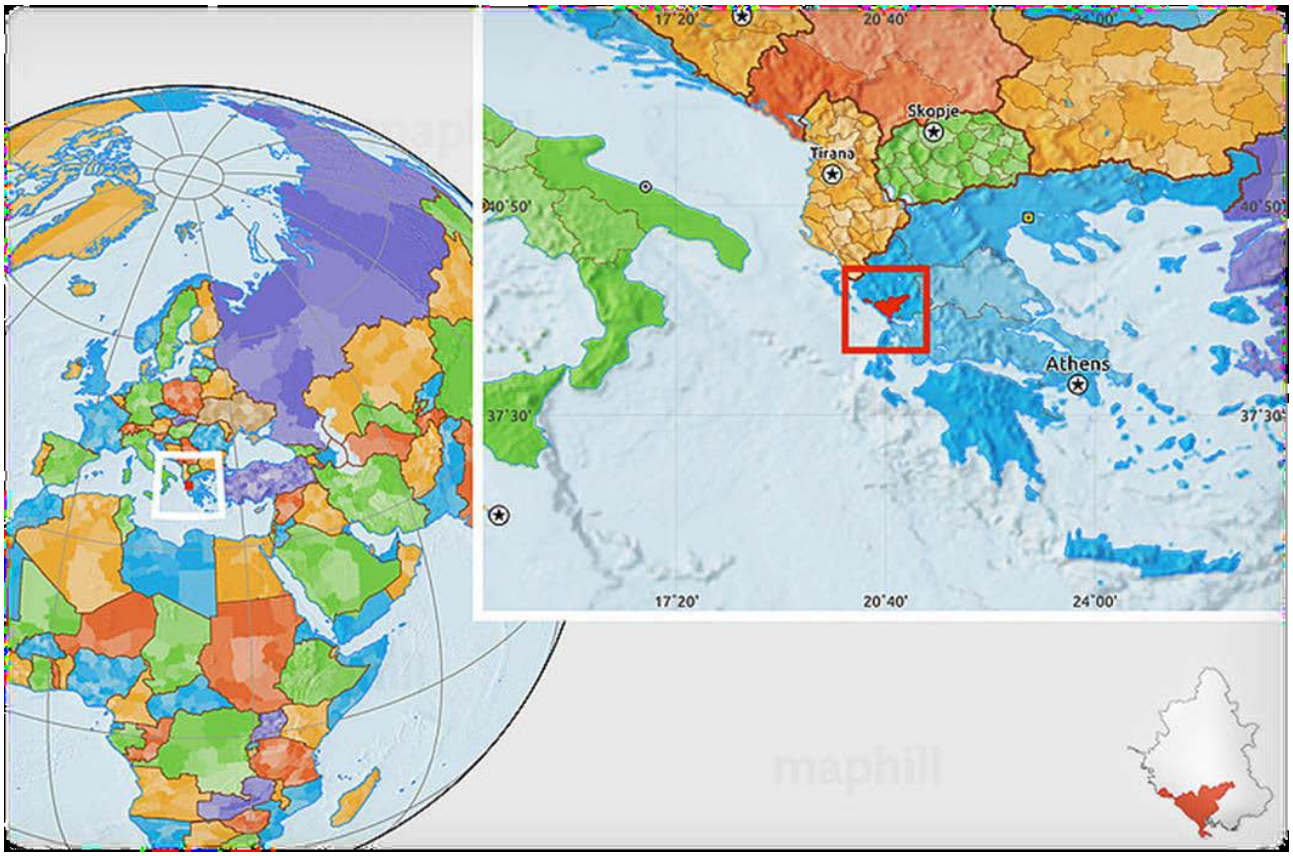


Figure 6: The pilot area of Igoumenitsa

Igoumenitsas's pilot (testing) includes the following:

Design, development, and provision of two touristic packages:

- The first SUSTOURISMO touristic package for Igoumenitsa includes a guided walking trip along city's main monuments and points of interest while experiencing local gastronomy treasures.
- The second SUSTOURISMO touristic package for Igoumenitsa offers the opportunity for experiencing the city by bicycle while being connected to beaches nearby and experiencing local gastronomy treasures.
- Promotion & Exploitation of the SUSTOURISMO app (a combination of an information provision and crowdsourcing initiative; information to tourists and ideas/tourist data collection functionalities in a gamification approach where tourists will be rewarded for provision of tourism related data that will help on better tourism planning)

Region / destination description

Epirus is located in the northwestern part of the country. It is bathed by the Ionian Sea on the west, it borders Macedonia and Thessaly to the east and, to the south, it extends to the Amvrakikos gulf and the prefecture Aitoloakarnania.

It consists of the Regional Unit of Arta, Thesprotia, Ioannina & Preveza. The headquarters of the Region is in Ioannina.

The city of Igoumenitsa (where the pilot of SUSTOURISMO takes place) is located in the northwestern part of the country. It is bathed on the west by the Ionian Sea and it borders Macedonia and Thessaly on the east.

Igoumenitsa is in the northwestern part of the prefecture of Thesprotia, in the northern Epirus. It is bathed by the beaches of the Ionian and it is the most important port of communication between Greece and Western Europe

From the area there is also the possibility for excursions to the neighboring prefectures and for cruises to the opposite Ionian Islands.

Local economy description

The economy of the Region of Epirus relies mainly on the primary sector and to a lesser extent on other economic activities, mainly trade and the provision of services. The strongly agricultural character of the Region directly affects any form of activity of the inhabitants. However, the economic life of the place is particularly affected by the development of the agricultural economy and any other economic activity has similar positive or negative effects from the increase or decrease of agricultural income.

The economy of the region is based mainly on agricultural production. In the lowlands of the Kalamas and Acheron estuaries, thanks to drainage works, large swampy areas have been transformed into highly productive irrigated arable land. As a result, citrus fruits, rice, corn, and kiwis are now grown.

The main growth of the city was also helped by two main factors. The construction of the new port, which is the first in traffic port of western Greece and the second in passenger traffic after Piraeus, and the construction of the Egnatia Highway, the road that mainly connects Igoumenitsa to Ioannina, but also to Thessaloniki and Alexandroupolis. These factors have helped the area to increase tourist traffic and to upgrade financially.

Regional /destination transport network with maps (main roads, other public transport)

The port of Igoumenitsa is a connection channel not only between Greece and the rest of Europe, but also between Europe and the Balkans, the Black Sea and the Middle East.

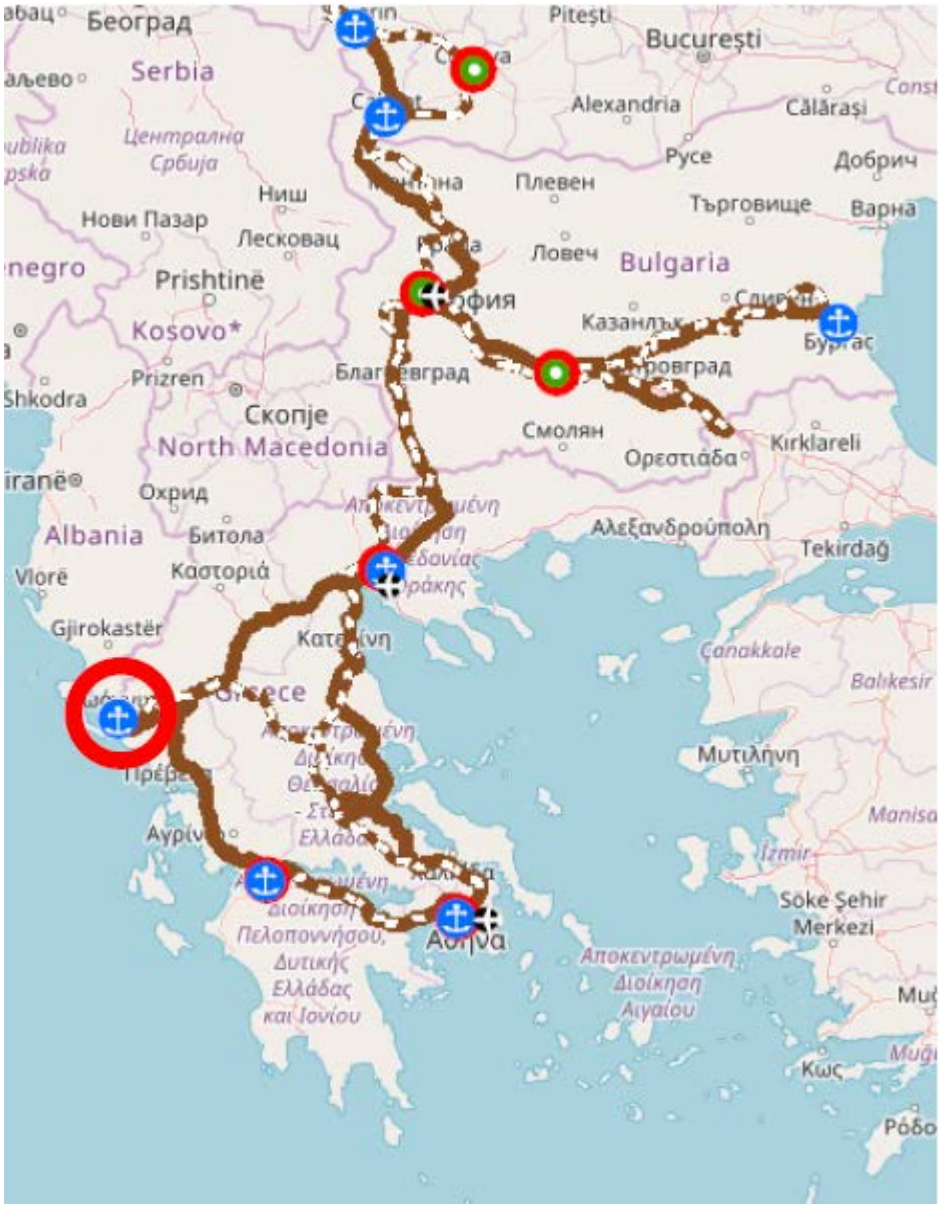


Figure 7: The location of Region of Epirus at the TEN-T

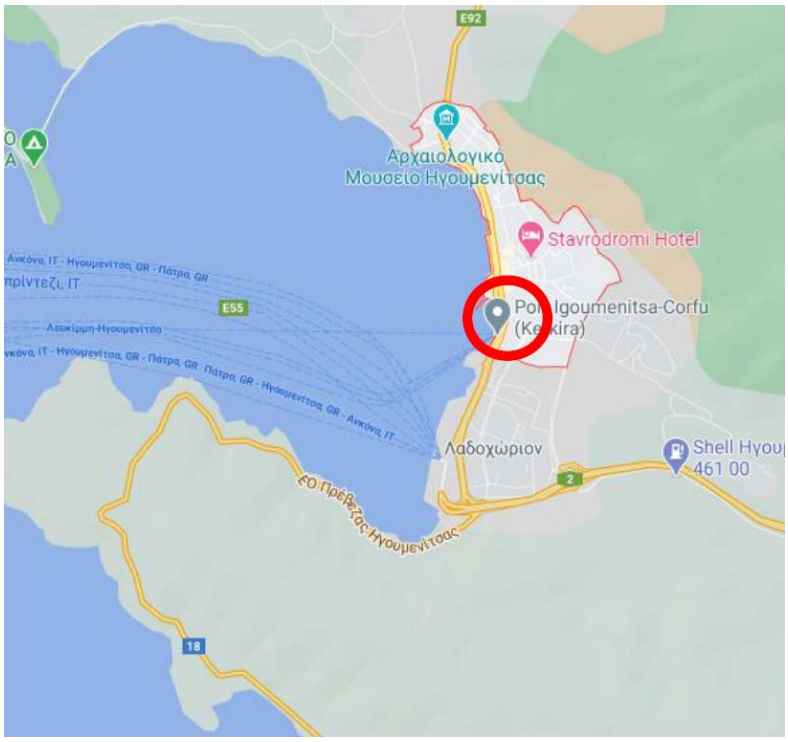


Figure 8: The location of Igoumenitsa Port

The only public transport mode currently is bus, however the hard economic situation Greece faced the last decade (economic crisis) has left its effects on the public transport services (reduced services, reduced quality of services and frequencies). The last years, active and sustainable mobility has been supported from local authorities; As a result, the Municipality of Igoumenitsa has a bike share system in the framework of the European SUMPORT program.

Overview of the tourism sector (main destinations / sites, type of tourism, impacts, etc.)

Igoumenitsa offers a wide spectrum of provisions for tourists; archaeological sites, museums, beaches nearby and vivid nightlife. In the city there are markets and shopping places, cafes and traditional taverns.

The site of the Municipality of Igoumenitsa (https://igoumenitsa.gr/el/home/gia-ton-episkepti) concentrates the main points of interest and services/experiences offered in Igoumenitsa. Main points of interest in Igoumenitsa are the Archaeological Museum, the castle of Igoumenitsa, the Lygia Tower and also the beach of Drepano.

The case of Preveza

Pilot description

In the framework of the SUSTOURISMO project, The Regional Union of Municipalities of Epirus / PED EPIRUS is responsible for the pilot case of Preveza, (Preveza is a city in the Region of Epirus in Greece).

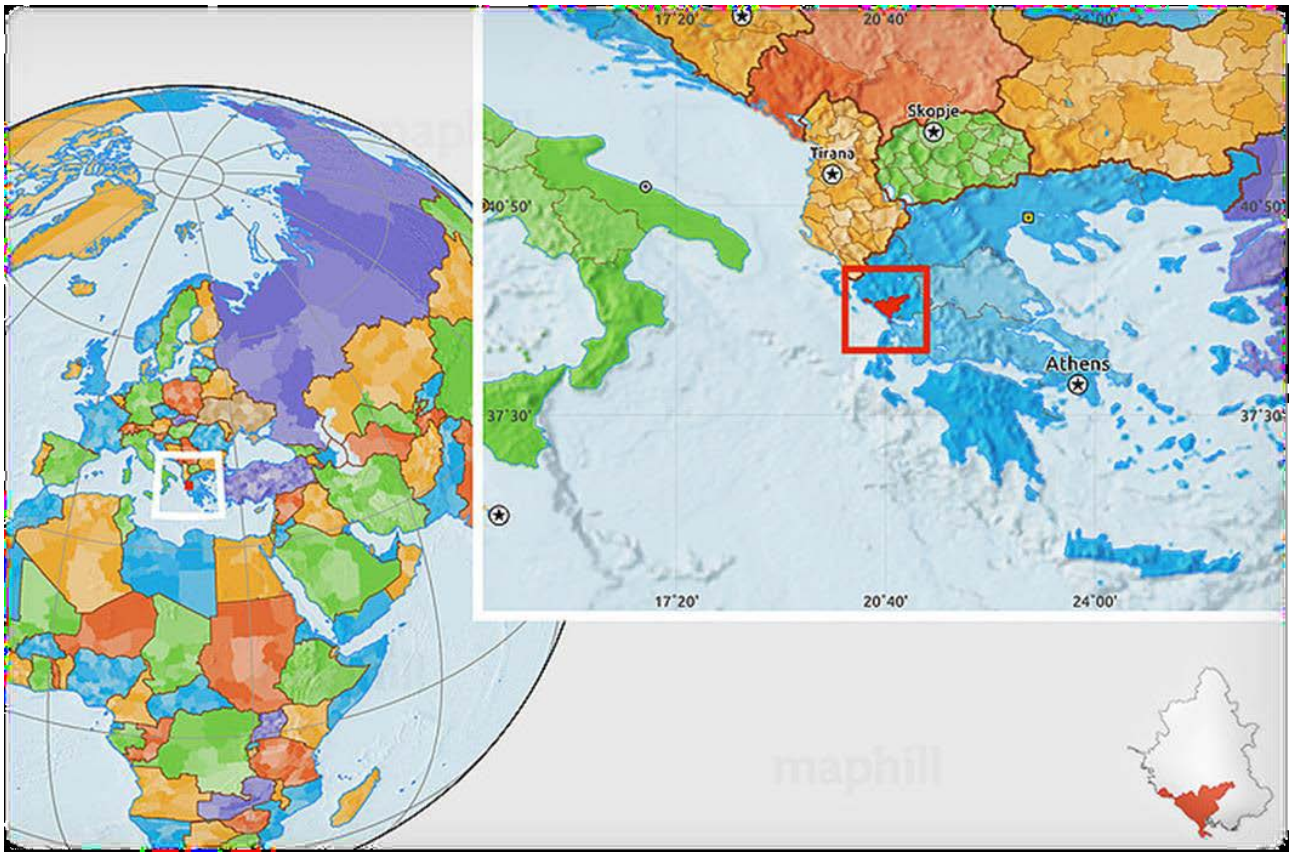


Figure 9: The pilot area of Preveza

Preveza's pilot (testing) includes the following:

Design, development, and provision of two touristic packages:

- The first SUSTOURISMO touristic package for Preveza includes a guided walking trip along city's main monuments and points of interest while experiencing local gastronomy treasures.
- The second SUSTOURISMO touristic package for Preveza offers the opportunity for experiencing the city by bicycle while being connected to beaches nearby and experiencing local gastronomy treasures.
- Promotion & Exploitation of the SUSTOURISMO app (a combination of an information provision and crowdsourcing initiative; information to tourists and ideas/tourist data collection functionalities in a gamification approach where tourists will be rewarded for provision of tourism related data that will help on better tourism planning).

Region / destination description

Epirus is located in the northwestern part of the country. It is bathed by the Ionian Sea on the west, it borders Macedonia and Thessaly to the east and, on the south, it extends to the Amvrakikos gulf and the prefecture Aitoloakarnania.

It consists of the Regional Unit of Arta, Thesprotia, Ioannina & Preveza. The headquarters of the Region is in Ioannina.

The city of Preveza (where the pilot of SUSTOURISMO takes place) is located in northwestern mainland Greece, to the south of Epirus and at the entrance of the Amvrakikos Gulf. It is bathed by the beaches of the Ionian and the Amvrakikos Gulf and is an important port for the Region of Epirus. It has been connected since 2002 with Aktio of Aitoloakarnania, with the high-tech Submarine Tunnel of Preveza - Aktio.

The Municipality of Preveza occupies an area of 66.8 sq. Km, while the population amounts to 31,733 inhabitants, and it is an administrative center of the Region.

Local economy description

The economy of the Region of Epirus relies mainly on the primary sector and to a lesser extent on other economic activities, mainly trade and the provision of services. The strongly agricultural character of the Region directly affects any form of activity of the inhabitants. However, the economic life of the place is particularly affected by the development of the agricultural economy and any other economic activity has similar positive or negative effects from the increase or decrease of agricultural income.

The economy of Preveza is based mainly on agriculture (citrus, cereals, grapes, oil and vegetables) and livestock (sheep and goats). Significant income of the prefecture comes from the exploitation of forests, while the mineral wealth is of little importance. The industry is substandard and limited to the processing of agricultural products.

The Municipality now owns one third of the Regional Unit of Preveza and one half of its population (31.733 inhabitants) and is both an administrative and productive center. The urban center is a center of communication and trade and has a population of 20.000 people. The remaining 85% of the area of the Municipality concentrates the rest of the population, which is engaged in primary production.

Regional /destination transport network with maps (main roads, other public transport)

Regarding city's position in the transport networks, Preveza is located outside the main transport axis of Western Greece. However, it is connected, through the secondary national network, to Ioannina and Igoumenitsa.

Also, the underwater road crossing Aktio- Preveza ensures the fastest connection of Aitoloakarnania and Southern Greece with the coastal zone of the prefectures of Preveza, Thesprotia and the port of Igoumenitsa.

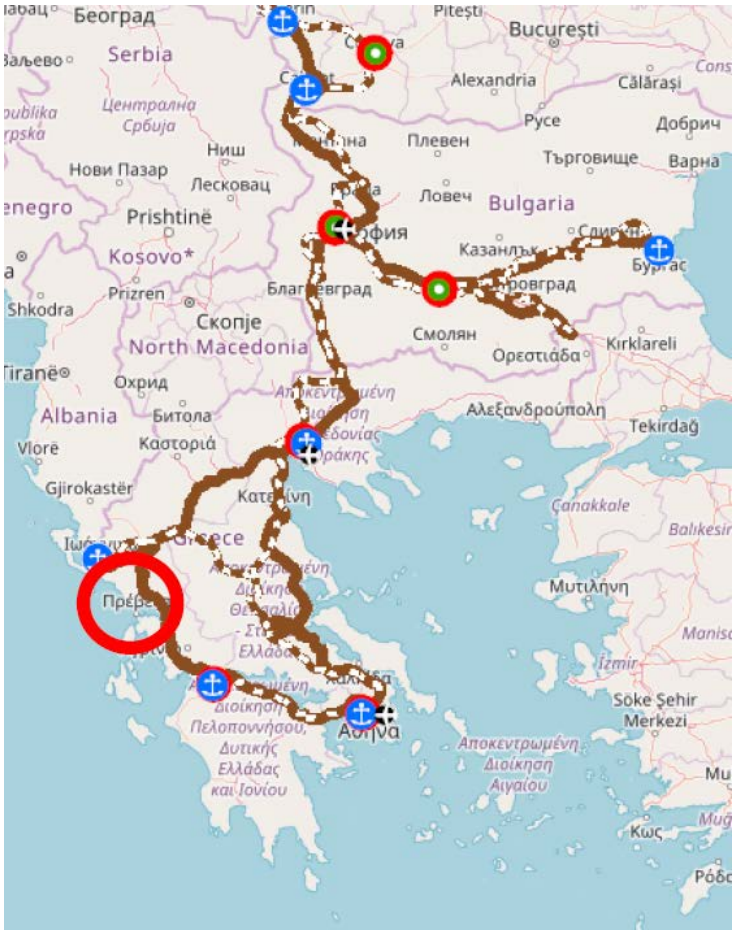


Figure 10: The location of Regin of Epirus at the TEN-T

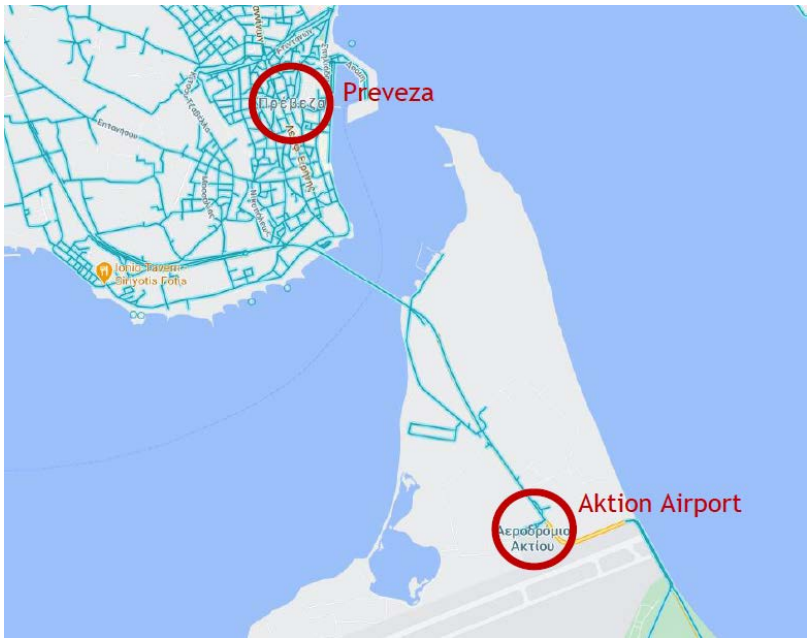


Figure 11: The location of Aktion Airport

The port of Preveza has a commercial character. It has a favorable position in the geographical area of Greece, as it is a transport gateway for product exports to Europe. It also serves the needs of the area in many sectors, such as energy (oil, gas) etc.

During the summer months, the port of Preveza presents increased traffic on yachts under Greek and foreign flags which moor inside the port that serves as a marina.

Aktion Airport (PVK) is an international airport serving the wider area. In recent years, the airport, despite the economic crisis, is growing, with passenger traffic constantly increasing and with more and more airlines using it as a final or intermediate destination of their routes.

The only public transport mode currently is bus, however the hard economic situation Greece faced the last decade (economic crisis) has left its effects on the public transport services (reduced services, reduced quality of services and frequencies). The last years sustainable mobility has been supported much from local authorities; in fact the Sustainable Urban Mobility Plan of the Municipality of Preveza is in progress, for more sustainable and safer transport.

Overview of the tourism sector (main destinations / sites, type of tourism, impacts, etc.)

Preveza offers a wide spectrum of provisions for tourists; archaeological sites, museums, castles, churches and monasteries, beaches nearby and vivid nightlife. In the city there are many markets and shopping places, numerous of cafes and traditional taverns (gastronomy is one of city's main experiences). Preveza is known for the protected wetland of the Amvrakikos gulf, Ancient Nikopolis, the historic center with Venetian influences (the Venetian Clock), narrow alleys and picturesque taverns. Its rich natural beauties and mild climate conditions are the ideal for fast-paced tourist development.

The site of the Municipality of Preveza (http://discoverpreveza.gr) concentrates the main points of interest and services/experiences offered in Preveza. Main points of interest in Preveza are the archeological site and Museum of Nicopolis,, the Pantocrator Castle but also the main market of the city, with the traditional restaurants and local shops.

1.3 The case of Emilia-Romagna Region

The Emilia-Romagna Region is the sixth-largest region in Italy. It covers 7.4 % of the national territory and has about 4.4 million inhabitants. The region links northern and southern Italy and connects the Mediterranean with the Northern Europe. It is situated in central-northern Italy, in the heart of the country's most industrialised area. The region is divided into eight provinces: Bologna, Ferrara, Modena, Parma, Reggio Emilia, Piacenza, Rimini, Ravenna and Forlì-Cesena. The last three provinces are part of the historical subregion called Romagna on which the SUSTOURISMO project focuses. This is an area with a high touristic vacation, related in particular to summer holidays on the Riviera Romagnola coastal areas.

Emilia-Romagna is one of Italy's leading regions in terms of per capita income and for many years it has been classified as one of the richest regions in Europe. It ranks amongst the top regions in Italy regarding the quality of life. Small and medium-sized enterprises are the driving force of the region's economy. The dynamic nature of the production sector has resulted in high employment levels; indeed, employed inhabitants amount to over 68 %, considerably higher than the Italian average. In 2018, unemployment rate was 5.9 %, which was below the national and European average.

Manufacturing plays the leading role of the regional economy. The most relevant industries are linked to mechanical engineering and automotive sector. They include sport cars and motorcycles, agricultural machines, shipbuilding, industrial automation and robotics, food processing and packaging, wood processing, ceramics, precision farming, medical equipment and others. Tourism and entertainment industries are very important in the coastal area, while cultural and gastronomic tourism has been increasing in the last years. Sectors that are still not sufficiently developed and competitive are Information and Communication Technology and creative industries. The service sector in general is characterised by low productivity.

Emilia-Romagna is a top European tourism destination, welcoming more than 11.5 million visitors annually and generating 50 million overnight stays. Its unique attractions provide visitors with different touristic experiences and packages. Emilia-Romagna can host large groups and accommodate large-scale events, thanks to more than 1.1 million beds across 4,300 hotels. The Romagna area is one of the most important touristic areas in Italy, especially Rimini, Ravenna, Forlì-Cesena, and Bologna. Consistent tourist flows generate problems related to traffic jams, both on the highway and local roads, as a large part of trips are conducted with private cars.

Emilia-Romagna has a well-structured transport system of numbering 574 km of motorways, 1053 km of railways while airports are located in Bologna, Forlì, Parma and Rimini. The main motorway crosses the region from north-west (Piacenza) to the south-east (Adriatic coast), connecting the main cities of Parma, Reggio Emilia, Modena, Bologna, and from here further to Ravenna, Rimini and the Adriatic coast. An efficient train service connects all the most important regional cities.

Figure 12: Emilia-Romagna Region main transport infrastructure

Figure 13: Emilia-Romagna main rail network

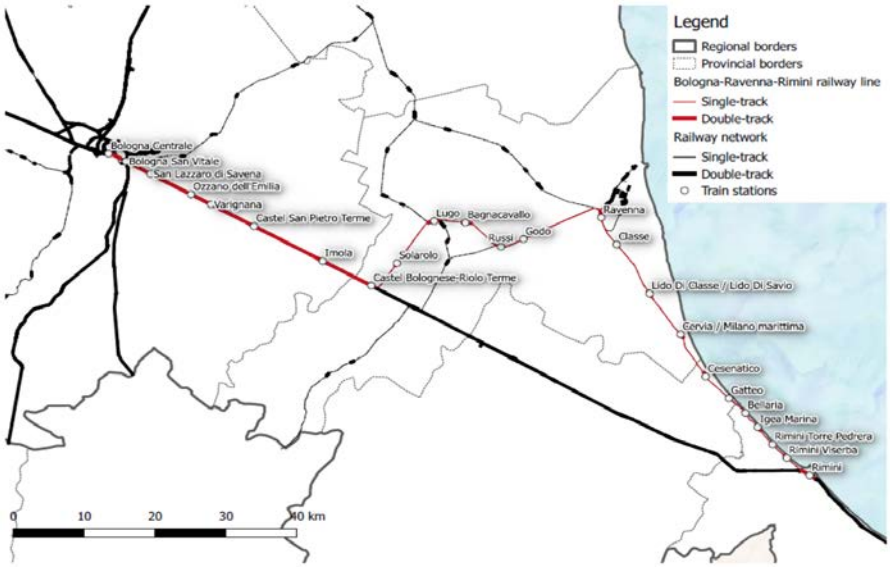


Figure 14: Romagna main touristic cities and rail connections

1.4 The case of Friuli Venezia Giulia Region

Friuli Venezia Giulia Region enjoys a strategic position between the north of Italy, the Mediterranean and Central and Eastern Europe. It is bordered in the east by the Isonzo river, in the west by the Tagliamento river, in the north by the mountains and in the south by the sea. A large part of the territory is located on the border with Austria, with which it shares the mountainous ranges, and with Slovenia, with which it shares the river Isonzo and the Julian Prealps Park.

Within the region, the SUSTOURISMO project focuses on a specific area that has been selected on the basis of its tourism potential, but also considering the availability of services and infrastructures for sustainable mobility, that will be connected and promoted through the pilot action. The area of interest is represented by a triangle connecting the urban centres of Aquileia, Grado and Trieste, thus touching upon:

- the Friulian coast, one of the most important tourist resources of the region, with Grado among the primary destinations for seaside tourism;
- the immense archaeological site of Aquileia, with its Patriarchal Basilica, an artistic and historical treasure included in Italy's register of UNESCO World Heritage Sites;
- the natural and cultural landscapes of the Friulian plain;
- the city of Trieste, beloved urban tourism destination, easily visited on foot or by bike, also thanks to the new bike-sharing service, created at the beginning of 2020. This service allows cyclists to

cover the entire gulf of Trieste, from Miramare Castle and Barcola to the west, to Campo Marzio to the east. In Trieste visitors can also benefit from an easy connection to naturalistic areas along the coast or in the inland, with particular focus on Duino and the Karst.

Until the 1980s, Friuli Venezia Giulia was one of the least developed regions in northern Italy. The economy was mainly agricultural, basing on a variety of crops related to the different environmental conditions of the territory. Thanks to both political and monetary factors that favoured the opening to international markets, the region's economy experienced an impressive growth during the 1990s.

Progressively scaled down because of the increasing role of industry, the agriculture of Friuli Venezia Giulia is currently characterised by the combined importance of traditional cultivations, (such as wheat, corn and potatoes) and of new specialized and innovative cultivations, often recognized with the DOP or IGP certification (such as its renowned red and white wines, cheeses and some fruit and vegetables specialties). The economic contribution of the primary sector is also guaranteed by mussel-farming, particularly relevant in the Gulf of Trieste, and fishing, which offers quality fish on the national markets.

The industrial sector includes some internationally renowned manufacturing excellences, mainly operating in the production of furniture (Livenza), household appliances (Monfalcone and Pordenone) and textiles (Udine) or in the agribusiness sector (San Daniele del Friuli hams, Birra Castello). In the area of Trieste shipyards as well as steel and mechanical plants play an important role.

The tertiary sector is especially related to cultural, nature, seaside and “food and wine” tourism. Thanks to its position at the crossroads between East and West and between Central Europe and the Mediterranean, the region attracts millions of international tourists every year. It 2019, the region recorded over 1.4 million arrivals and almost 5.2 million overnight stays by foreign tourists, with an average length of stay, 3.7 days. Austria and Germany were by far the most relevant origin countries. Domestic tourism recorded somewhat lower numbers, with 1.3 million arrivals, 3.9 million overnight stays and an average length of stay, 3.1 days.

During the summer, visitors are directed especially to the coastal area of Lignano Sabbiadoro and Grado, while in winter the preferred destinations are the Alps and Prealps. The historical and artistic cities (Aquileia, Trieste, Palmanova), the authenticity of the places (Isonzo, Laguna di Grado), the itineraries and the walking routes on the symbolic places of World War I are also primary attractions.

Trieste, Grado and Aquleia present the area selected for the development of the pilot action. In 2019, Trieste recorded almost 273,000 arrivals and 650,000 overnight stays, with an average length of stay of 2.4 days. The prevailing offer is connected to urban and cultural tourism and to the city’s central European and multicultural profile. It is however interesting to mention that in 2020 the two major cruise companies have chosen the port of Trieste as home-port for their post-Covid season, suggesting a possible tourist development in this direction in the next few years, also in connection with the critical issues related to the access of large ships to Venice.

In 2019, Grado and Aquileia (together with Gorizia, included in the same statistical survey area) attracted slightly more than 340,000 arrivals and 1.4 million overnight stays. The average length of stay (4.2 days) is positively influenced by Grado's characterization as a seaside destination.

Among the most relevant trends somehow connected with the development of a sustainable tourism offer, it is important to mention:

- the increase in agro-tourism businesses, providing both catering and accommodation;
- the role of natural, historical and artistic heritage and territorial "authenticity" as strong tourism attractions;
- the consolidation of cycling flows over medium and long distances: bikers come mainly from Central Europe and Eastern Europe, but some locations, such as the ascent of Mount Zoncolan, attract cycling travellers from all over the world.

Friuli Venezia Giulia Region is crossed over by two fundamental road networks – Corridor 1, which runs along a north-south route (which at the local scale involves Tarvisio - Adriatic Sea - Trieste) and Corridor 3 (which at the local scale involves Trieste - Monfalcone - Palmanova - Latisana). The regional communications system includes four highways (A4 Torino-Trieste, A23 Udine-Carnia-Tarvisio, A27 Mestre-Vittorio Veneto-Pian di Vedoia, A28 Portogruaro-Pordenone) and a dense and articulated network of state roads, which ensures adequate road connections. The railway lines cross the territory with numerous local stops and fast connections providing access to other regions. The port system includes the important hub of Trieste, the ports of Monfalcone, Grado and Duino-Aurisina and the river port of Nogaro. The transport system is completed by the Trieste Airport.

The sub-regional area of Aquileia, Grado and Trieste, selected for the pilot action, can count on a relevant offer of sustainable mobility services and infrastructures, including: numerous cycling paths and routes; bike-sharing service in Trieste; motorboat service connecting Lignano to Marano Lagunare, which is accessible to cyclists; and some examples of public transport that provide bike transportation.

A relevant resource is also represented by the Udine-Villach railway, which on weekends and holidays extends to Trieste, including stops in Palmanova, Cervignano - Aquileia - Grado, Trieste Airport, Monfalcone and Trieste Centrale. Besides connecting important tourist attractions (Grado, Trieste) and UNESCO sites (Palmanova, Aquileia), this railway line strengthens the accessibility of the cycle path system (in particular Alpe Adria Route: Palmanova - Grado and Adria Bike Route: Trieste - Monfalcone - Grado).

Figure 15: The system of transport networks in Friuli Venezia Giulia

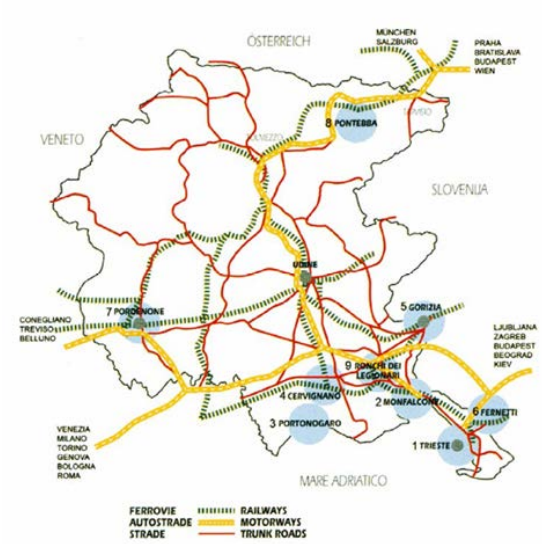
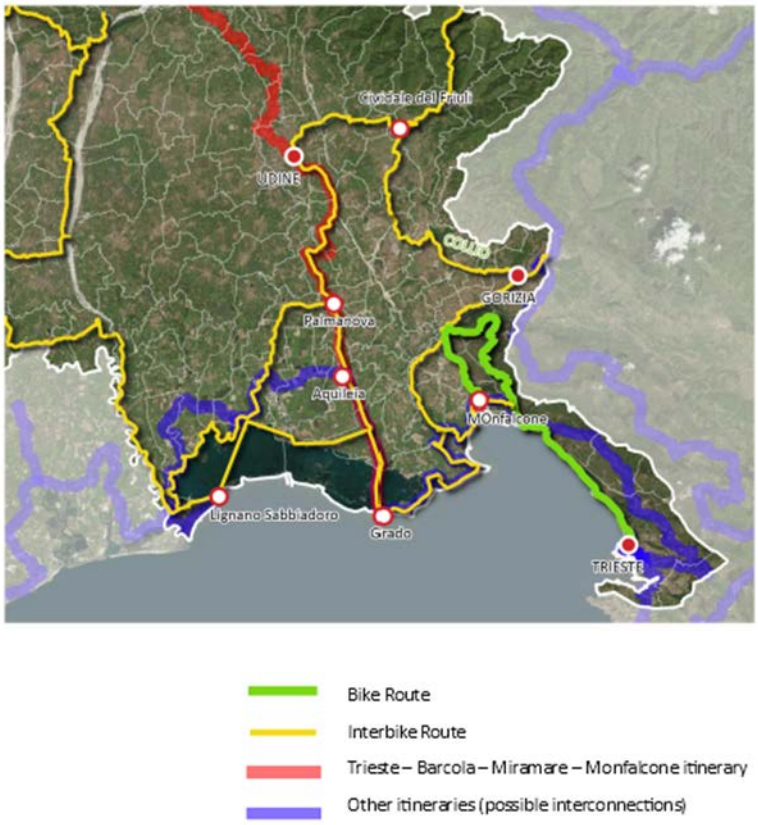


Figure 16: The railway network system in Friuli Venezia Giulia

Figure 17: Main bike itineraries in the pilot action area



1.5 The case of Ljubljana

Ljubljana is one of the smallest European capitals with a population of just under 300.000 people. It is the political, economic, administrative, scientific and cultural centre of the country. In terms of education, Ljubljana stands out mainly on account of the concentration of post-secondary schools, faculties and institutes. As numerous commuters travel to the capital for work, the city faces traffic-related burdens that negatively affect the environment and life quality.

As the largest city in Slovenia, Ljubljana is an important driver of regional economic growth and innovation. When compared to other Slovenian regions, it has significantly higher employment rate and GDP per capita, a smaller share of the industrial sector, but better developed market and public services. More than a quarter of Slovenia's active working population lives in the wider Ljubljana urban region. Most of the people are employed in the wholesale and retail trade activity, processing activities, public services, professional, scientific and technical activities, and education. The occupational composition of the active working population indicates a distinct concentration of people pursuing a creative profession.

In recent years, Ljubljana has been experiencing a tourist boom. Between 2010 and 2019, tourist arrivals more than doubled (from 430,000 to 1,128,000), as did the number of overnight stays (from 842,000 to 2,228,000). Visitors perceive the city as a beautiful, boutique destination that offers a range of authentic experiences. Ljubljana boasts 542 m^2 of public green spaces per resident and it was titled the European Green

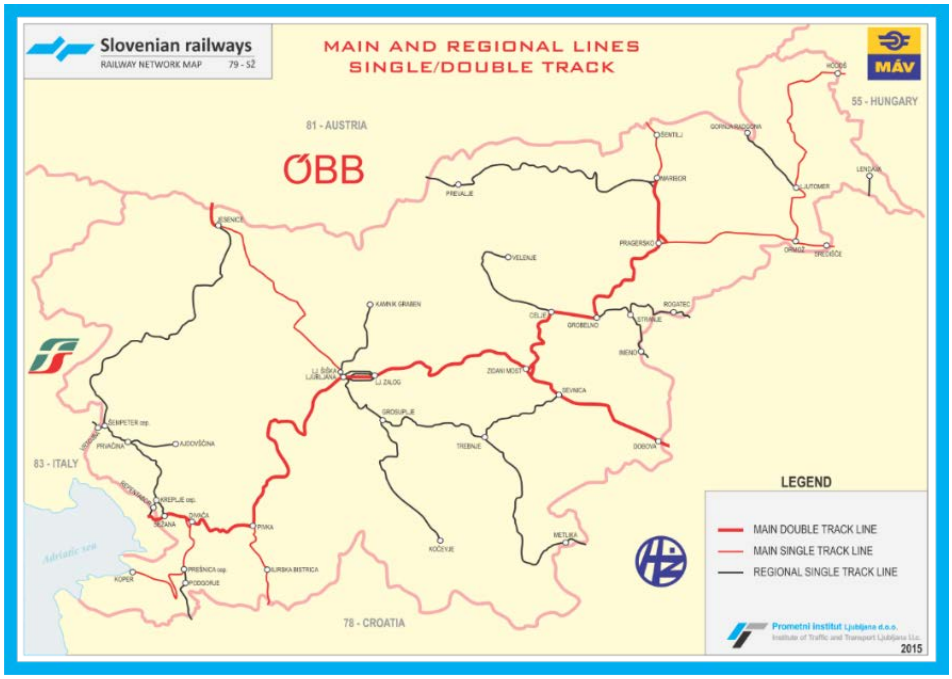
Capital in 2016. It owes its unique character to the heritage of various historical periods and the vision of the famous architect Jože Plečnik.

Among the most visited tourist sights are the historic old town with Ljubljanica river, Ljubljana Castle, Dragon Bridge, Central Market, Tivoli park and various cathedrals, museums and galleries. In the recent decade, Ljubljana has also positioned itself as an exciting culinary destination. Moreover, the proximity of well-preserved natural areas makes Ljubljana an ideal choice for urban tourists who also enjoy the outdoors.

Ljubljana and its region are situated at the crossroads of major European transport routes. The city's favourable location gives companies fast access to Europe and serves as an entry point to the Balkan markets. The capital is located at the intersection of two corridors of the core trans-European transport network: i.e., the Baltic-Adriatic and the Mediterranean corridors. The multi-modal core network corridors contribute significantly to European cohesion and the strengthening of the internal market. The motorway density in Slovenia is higher than EU-28 average.

Passenger trains connect all parts of Slovenia. The Slovenian Railways network is linked to all major European cities with InterCity and EuroCity trains. The entire railway network consists of 128 stations and 135 railway halts, which together accounts for 263 stop facilities. Major railway connections in Slovenia intersect in Ljubljana.

Figure 18: Railways in Slovenia

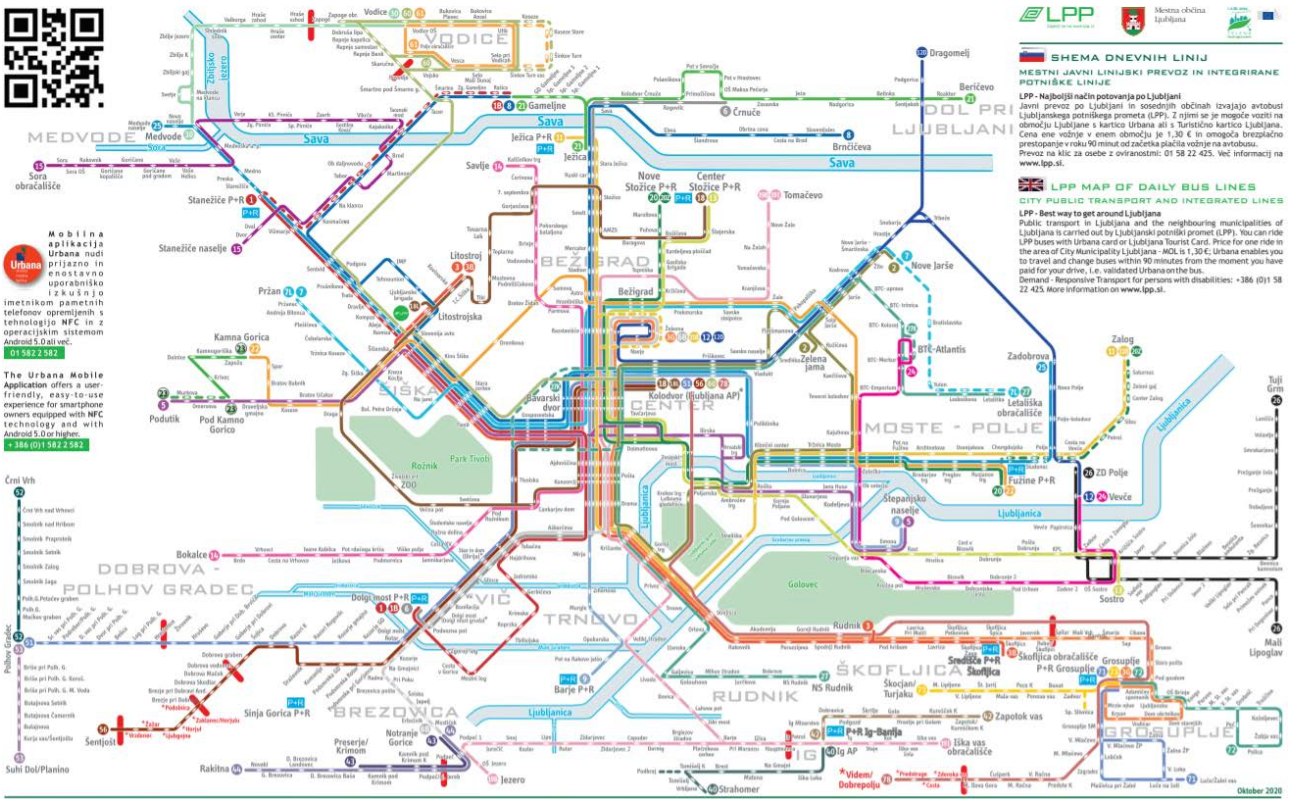


Within Ljubljana, public transport is offered by a dense network of bus lines. In the city centre that is closed for motorised traffic, free transport with electric vehicles Kavalirs is offered to residents and visitors. There is a plan to expand the public transport network to the Ljubljanica river. In the coming years, the first

passenger boat line will be established. Furthermore, Ljubljana is well-known as a cyclist-friendly city. The city has about 300 km of maintained biking routes.

Ljubljana Jože Pučnik Airport is located 25 km from the Slovenian capital. It is the main Slovenian airport for passengers and cargo. Regular and charter flights carry passengers to important European destinations. The airport is in a process of continuous transformation, becoming an important regional distribution and logistics centre.

Figure 19: Public bus lines in Ljubljana



1.6 The case of Zadar

Zadar County covers an area of just over 7,000 km^2 and is located in the central part of the Croatian Adriatic coast. It is mostly spread in Southern Croatia (Dalmatia), and with its smaller part also in Mountain Croatia. The coast is very indented with a total of 200 islands, of which Dugi otok is the largest. 70 % of Zadar County belongs to the continental area, while the rest is occupied by the coastal area and islands. Zadar County has a total of 1,300 km of coastline. According to the 2011 Census, Zadar County had a population of 170,000. The administrative centre of Zadar County is the city of Zadar, the fifth largest city in Croatia.

General economic trends in Zadar County over the past decade have been characterized by economic growth until the occurrence of the economic crisis in 2008. The period from 2009 to 2013 was marked by negative economic trends. In 2013, the GDP of Zadar County amounted to EUR 1.402 million, which represents 3.22% of the total GDP of Croatia, and 10 % of the GDP of Adriatic Croatia.

The economy of Zadar County is based on trade, manufacturing, maritime transport, construction fisheries and agriculture, crafts and tourism. The manufacturing industry is the most important segment of the industry sector. It is characterized by traditional production, with underdeveloped sectors with higher value-added products.

The review of the economic situation in Zadar County also shows the extreme importance of small and medium-sized enterprises, which are the driver of economic growth. Access to finance is a major constraint for the development of micro and small enterprises, while most of them face the problem of the availability of professional staff. The main problems faced by artisans are the seasonality of business, given that a large proportion of artisans rely on tourism, catering and related service activities, and grey economy, which creates unfair competition.

Since 2008, the tourism sector has been recording a constant growth in number of tourist arrivals and overnight stays, as well as the number of employees and revenue growth. The monthly dynamics of tourist traffic indicate seasonality of Zadar County tourism with a visible visitation peak in July and August and the concentration of visitors along the coast. The primary motive of visitors are the sun, sea and beaches. The quality of the sea is, in more than 98 % of the places where it was measured, rated excellent.

In addition to the sea, lakes are also a great tourist attraction. These are Vrana Lake, Lake Mir in the Telašćica Nature Park and the wetland lakes Veliko, Malo and Kolansko blato, all protected areas. The entire area of the Velebit mountain is also rich in water sources and streams, and the river Zrmanja with its canyons is already recognized as a place for outdoor sports, adventure, “robinson”, excursion and rural tourism. Protected natural areas present great potential for off-season tourism development.

Zadar County is rich in cultural and historical heritage and archaeological sites and monuments. Some of the most famous monuments are the church of St. Donat, Forum, Cathedral of St. Anastasia in Zadar, and the Church of St. Cross in Nin, better known as the smallest cathedral in the world. Remains from ancient times, early Christianity and the early Middle Ages can all be found here. Folklore, traditional architecture and crafts, viticulture, gastronomy, legends and stories represent opportunities for further development of tourist activities during low season.

Zadar County occupies a very important place in Croatia due to its geo-traffic position. Determined by its central natural position, it has a great importance and role in connecting the north and south of the country, both in road and rail transport. Traffic connections are characterized by state roads and the highway A1 (Zagreb - Split – Dubrovnik), Zadar Airport, ferry connections with Ancona in Italy, and the railway line that connects, via Knin, Zadar-Šibenik-Split with central Croatia.

The most important road routes of the Zadar County Road network are: Zagreb-Lika-Zadar-Split, Rijeka-Zadar-Split and Zadar-Benkovac-Knin. The A1 Zagreb-Split-Dubrovnik motorway enables optimal connection of Zadar County and inclusion in European traffic corridors. State roads are paved, arranged and equipped, but there is a need to build and arrange bicycle paths in the protection zone of roads. Some sections of county and local roads are unpaved.

On the Zadar-Knin railway line, passenger traffic is still suspended until further notice. For the further development of railway traffic, the reconstruction of this section of the railway is a necessity, as well as its electrification.

Figure 20: Road infrastructure of Zadar County

1.7 The case of Tivat

Tivat is located in the central part of the Bay of Kotor, on the southwestern slopes of the Vrmac hill. At the opposite the Bay of Tivat is located with the beautiful archipelago Krtoli and Luštica peninsula on the west. Along the coast of Tivat there are small harbours, bays and numerous beaches. The municipality covers an area of 46 km^2, of which about 5 km^2 overlooks the open sea.

Tivat is one of the smallest but also the most developed Montenegrin municipalities. It is a combination of new and old; customs and traditions of the local population and the cosmopolitan spirit of people from all over the world. According to the last census of 2011, Tivat numbers 14,000 inhabitants. The majority is concentrated in the city centre and the coast, so the spatial distribution of the population is unfavourable, as there is great pressure on the narrow coastal zone, while the spaces in the hinterland are empty. This represents one of the most critical challenges for future sustainable economic and tourism development in Tivat.

Tivat is a modern Mediterranean city oriented towards the development of tourism and complementary industries. On the national level it records highest average salary and one of the lowest unemployment rates.

Local economy is based on the micro and small enterprises sector, which account for 99 % of the total economic entities.

The area includes a large yacht marina with a luxury resort and all the associated facilities, Porto Montenegro. This resort is crucial for the positioning of Tivat as a prestigious destination. Luštica Bay, another large investment project, is shaping the Tivat part of the Luštica peninsula, where a town is being built on the once deserted part of the coast. Besides these two huge investment projects, Tivat is also focused on environmental issues. In this context, Tivatska Solila, natural reservation for many endangered plants and animals, should be especially emphasized.

About 5 % of foreign tourists in Montenegro stay in Tivat shaping the 7 % of all overnights at national level. Tivat is a city of culture and its rich cultural life makes an integral part of the tourist offer, which significantly affects the extension of the season and non-board consumption. The municipality is adorned with numerous hotels of the highest category, as well as restaurants and cafes. An impulsive increase in the number of tourists has transformed the urban structure of the city, mobility, and economic activities, as well as the daily life of citizens of Tivat. There are also over 40 active sports clubs and abundant sports facilities, which enable development of sports tourism. Luštica Bay plays a key role in the development of golf tourism.

Tivat is well-connected with its closer and wider environment and with European countries by air, road, and sea. In the last 10 years, Tivat airport passenger volume doubled. However, even though Tivat meets the prerequisites for a good connectivity, the quality and extension of these connections are not satisfactory today. Maritime traffic is still under development, the main road axis (Adriatic Highway) is not of high quality (highway flow is insufficient), and for now air traffic is limited to day time, because the airport equipment needed for night traffic is still not completed. According to the latest information, the tender for the preparation of Tivat Airport regarding night landing has been completed and the project is expected to be completed by the end of 2021.

Tivat does not have direct maritime lines with Italy, however the port in Bar, which is 65 km away, provides regular transport to Bari. Tivat waterfront offers boaters the opportunity to moor smaller boats and yachts, while marina Kalimanj offers 330 berths to accommodate boats and other vessels. On the other side, Porto Montenegro Marina, is considered to be one of the best marinas in the Mediterranean. Furthermore, Luštica Bay marina is set to become a pinnacle of flawless design and first-class facilities.

Public passenger transport of Tivat includes buses, taxis, and sporadically also maritime transportation. Public bus lines are connected to the Adriatic Highway. The project of managing and regulating traffic flows in Tivat also regulates freight traffic, whereby it is prescribed that trucks can move only on the Adriatic Highway, and trucks can enter the city zone only with special permission. Nonetheless, traffic jams occurring during the summer season are threatening the brand of the city as a prestigious tourist destination. The intensive use of road infrastructure also causes environmental problems.

There are bicycle paths along the central city streets, while in the surrounding area, bicycle traffic takes place on the road. The exception are the roads built in the recent period where the bike paths were built separately from the road.

Figure 21: Transport infrastructure of Tivat

1.8 The case of Berat

Berat is located in south-central Albania, 120 km south of the capital, Tirana. It lies on the right bank of the river Osum and is surrounded by mountains and hills including Tomorr in the east, which was declared a national park. The city has a population of around 100,000 inhabitants with an area of 380 km^2. The old town was inscribed in the World Heritage List of UNESCO in 2008 as a rare example of an architectural character typical of the Ottoman period. Berat is also one of two designated ancient museum cities in Albania.

The economic situation in Berat, measured by Gross Domestic Product per capita is in line with the national average. The local economy is built upon three pillars that ensure sustainability and growth: tourism & services, industry & trade, and agriculture. The structure of enterprises shows dominance of the commerce sector (39 %), hotels & restaurants and clothing (both at 14 %), construction (11 %), and food-processing and other processing industries (both at 9 %).

Industry development is focused on light, food and agricultural industries. Textile production companies are playing an increasing role, not only employment-wise, but also by exporting high quality produced textiles to international markets. Berat is well known for olives and figs, wines, fruits and vegetables. The most important animal products are meat and milk.

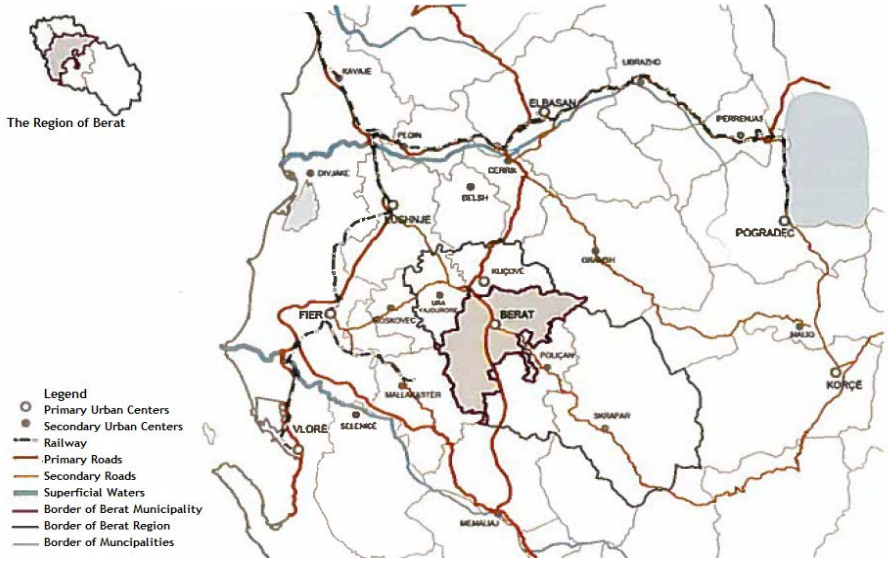
A key pillar of the economic development is the tourism sector. Built on the banks of the Osumi River over 2,400 years ago and home to an ancient castle that towers over the city, Berat is among the main tourist destinations in Albania, unique city for its overlapping houses. The region of Berat is home to 486 cultural heritage monuments which has had an extraordinary impact on the cultural tourism flow. The historic centre of Berat comprises of three areas – the Castle, Mangalem and Gorica quarters. Besides cultural tourism, Berat's tourism offer is focused on adventure tourism (hiking, biking, rafting, paragliding in the Osumi canyons) as well as gastronomy and agro-tourism.

Berat is an inland location with good connectivity to other municipalities in the region as well as other main regions of Albania. There are 812 km of roads in the municipality, approximately 30 % are asphalted. The most common type of road category are scenery / landscape roads, especially in the hills surrounding the city. This infrastructure holds potential for further touristic development. No railways exist in the region of Berat. The railway system in Albania is old and rarely used.

Public transportation in the city of Berat accounts for approximately 30 active buses which run through the entire city every 9-15 minutes, stopping at 23 stations, each with approximately 500-1000 meters distance from one another. According to a census of 2013, approximately 62 % of the working force of Berat either walk or bike to work, 20 % use public transportation, and the remaining 18 % use private vehicles, a number that is assumed to have slightly increased in the recent years.

The Municipality of Berat has recently increased its attention and resources towards green transportation modes such as cycling. Currently, only the centre of city has a dedicated bike line that is about 2 km long, while the objective is to extend it throughout the entire city.

Figure 22: Road network in the Region of Berat



1.9 The case of Belgrade

Belgrade is the capital city of the Republic of Serbia with over 1.6 million inhabitants. As such, it is the capital of Serbian culture, education and science. Belgrade has theatres, cinemas, museums, concert halls and other cultural facilities. Most institutions in the field of science and art of national importance are located here. Belgrade is also the hub of nightlife, shopping, restaurants, concerts, festivals, and other similar events.

In the city, there are number of parks that complement urban environment and offer green oases. One of the main characteristics of Belgrade is that it is located at the confluence of the Sava and Danube rivers, which is a huge wealth and a perspective for the development of the city. Walking or cycling along the rivers is popular among residents and visitors. In the immediate vicinity of the city centre is the river lake "Ada Ciganlija", one of the favourite sports and recreational places in Belgrade.

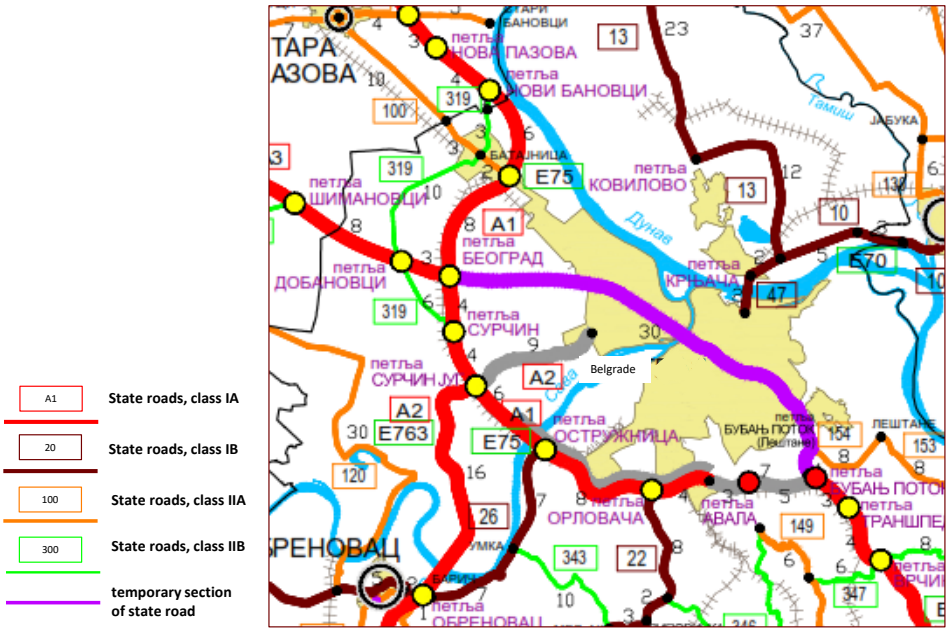
The Belgrade region bases its economic territory on connecting the manufacturing and scientific sectors, wholesale, and creative entrepreneurship. Belgrade is the main driver of the economy for Serbia. In 2019, GDP of Belgrade region presented almost 42 % of total GDP of Serbia.

Tourism in Belgrade is a branch on the rise, and the number of visits to the capital of Serbia is increasing year by year. In 2019, over 1.2 million tourists arrived to the capital and an 8.5 % increase was recorded in arrivals comparing to 2018. The structure of foreign tourists' overnights shows that approximately 54 % of all tourists staying in Serbia, have visited the city of Belgrade.

As a touristic destination, Belgrade offers a variety of attractions – from cultural and artistic content to the famous nightlife and culinary offer. The most popular sites of Belgrade include the city centre, more precisely Knez Mihajlova Street, Kalemegdan Fortress, Temple of Saint Sava, bohemian quarter Skadarlija, Nikola Tesla Museum and others. Fans of recreational tourism like to visit the above-mentioned Ada Ciganlija. The riverbanks of Sava offer many sports activities such as cycling, roller skating, water skiing, bungee jumping, football, basketball, volleyball, tennis, golf, mini golf, yoga etc. In addition, there are a number of restaurants and cafes here that tourists can enjoy.

Belgrade is a significant road and railway hub with an international airport and a developed river transport. Within the region, there are a total of 5,748 km of roads, of which 190 km are of the first class, 452 of the second class and 5,106 km of municipal class. The most important is the state road A1, the highway running from the state border with Hungary, through Novi Sad, Belgrade, Nis, Vranje to the state border with Macedonia. The part of the highway that passes through Belgrade itself is marked in purple below.

Figure 23: State roads in the area of Belgrade



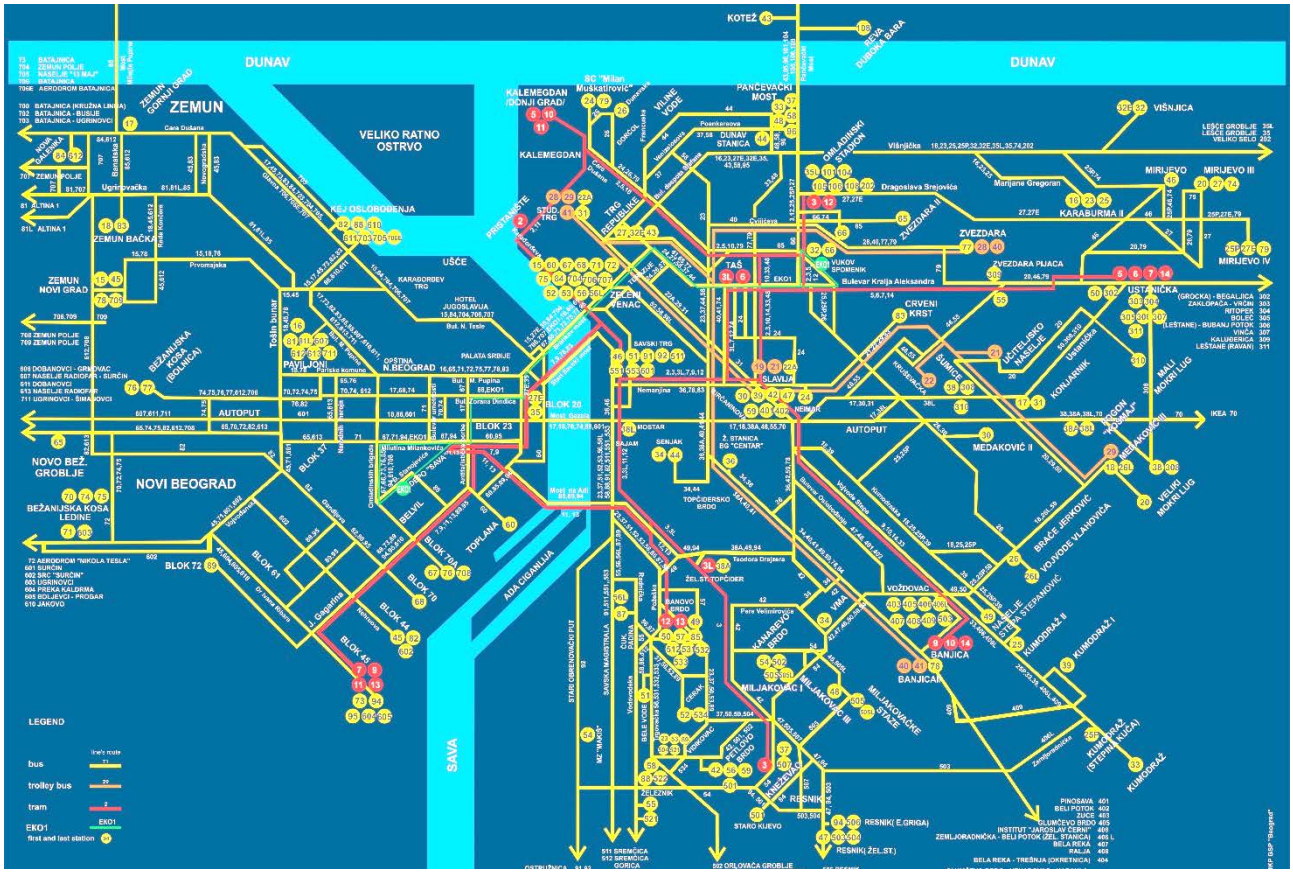
Railway traffic in Belgrade is integrated into the urban public passenger transport. It includes the following lines: Batajnica - Ovča, Lazarevca - Resnik - Ovča, Mladenovac - Belgrade (centre) - Ovča. Intercity and international railway traffic depart from larger railway stations in Belgrade.

Figure 24: Railway network in the Belgrade region

In addition to trains, the public transport network consists of bus, trolleybus and tram lines. According to data from 2018, there are 85 bus lines, seven trolleybus lines, and 12 tram lines. The length of the bus transport network is 1,313 km, trolleybus network 56 km, and tram network 132 km. There are over 2,500 public transport stops.

Nikola Tesla Airport is the largest airport in Serbia, located 18 km west of Belgrade and connected to the city by highway. It is an important transportation hub in this region. In 2019, about 2,800,000 passengers used the airport, 10 % more than in the previous year. In addition to renting cars and taxis, the city itself can be reached from the airport by using public buses.

Figure 25: Network of urban public transport lines in Belgrade



2. Survey results - transnational part

The general aim of the transnational part of the survey was to capture tourists on the spot (mainly foreign, but also domestic visitors) and better understand their transportation needs. The survey aimed to identify tourists' mobility needs during their stay at the pilot cities, tourists' mobility needs regarding their trips within the ADRION, and tourists' environmental behaviour.

The transnational part of the survey is composed by two parts and 33 questions (ANNEX A). Part A includes questions regarding socio-economic characteristics of visitors (questions 2 – 10), while questions describing the tourists' trips are included in part B (questions 11 – 33). The analysis of results is structured in the same order of questions, whereas project partner results are depicted according to the alphabetical order rather than order of the application form.

Due to Covid-19 pandemic and related travel restrictions, several project partners encountered problems with finding and surveying a sufficient number of foreign visitors, which resulted in different survey context than initially planned (see Methodology). Besides the overall share of foreign visitors surveyed being smaller, some project partners were forced to employ alternative methods of surveying (online, by phone).

When analysing results of the transnational part of the survey at the level of pilot cities, foreign and domestic visitors were therefore not divided, since the ratio between these two groups varied greatly between different project partners. A comparison between foreign and domestic visitors (in total from all collected questionnaires) is made at the level of ADRION region. When presenting results of the transnational part of the survey, figures at ADRION level are depicted before figures at case level under a few questions in order to save space in this document and avoid half empty pages.

2.1 Methodology

Target groups of data collection were domestic and foreign visitors of SUSTOURISMO pilot cities. Time frame, methods of collecting data, and number or surveyed visitors (especially foreign visitors) have been affected by the Covid-19 pandemic and all related travel restrictions. They vary from one destination to another as depicted in Table 2 and Table 3.

Table 2: Methods used for survey conduction

Project partner	Survey time frame	Methods of collecting data	Survey locations
Thessaloniki	September 1 – 16, 2020	CAPI face to face surveying with tablet computers	Airport, main train and bus stations, cross-border station between Greece and Bulgaria at Promahonas, main tourist attractions, museums etc.
Emilia-Romagna Region	September 2020	Face to face	Rimini, Romagna riviera

Friuli Venezia Giulia Region	October – November 2020	By email and phone (recent visitors of Triste Grado and Aquileia)[3]	/
Ljubljana	September 22 – October 22, 2020	CAPI face to face surveying with tablet computers and CAWI online surveying (to complete the quota of domestic visitors)	Railway and bus stations, city centre, touristic sights, shopping malls
Zadar	October – December 2020	Face to face and online	City centre, airport, bus station, ferry port, tourist information centre
Tivat	November 2020 – January 2021	Face to face (75 %) and online (25 %)	City centre, Porto Montenegro, Solila, Luštica Bay
Berat	September – December 2020	Face to face and online	Museums, hotels, tourist information points
Belgrade	October – November 2020	Face to face	City centre, hotels, airport

Table 3: Number of visitors surveyed by project partner

Project partner	Domestic visitors surveyed	Foreign visitors surveyed	Total visitors surveyed
Thessaloniki	102	199	301
Emilia-Romagna Region	192	25	217
Friuli Venezia Giulia Region	251	0	251
Ljubljana	226	420	646
Zadar	208	90	298
Tivat	118	156	277
Berat	90	210	300
Belgrade	140	193	333

For statistical data analysis IBM® SPSS® software was used. The collected data sets from different destinations were grouped in to one data set. Since data format varied between obtained data sets from different destinations, the values were recoded to a common format. Values were then labelled, and scales of measure and missing values were defined.

The age of people who participated in the survey was defined according to the year of birth. Based on their age, respondents were divided into different age groups. Respondents were also grouped based on their

[3] It must be noted that answers are expected to differ when surveying tourists traveling in 2020 (during a global pandemic, mostly domestic visitors) and tourists who visited the pilot cities in previous years, as their profiles and needs are quite distinct.

number of visits in the specific destination, number of nights spent in the destination and number of people traveling together.

Responses were labelled as domestic or foreign. The label was determined by the destination in which the survey was conducted and the nationality of a particular respondent.

Once uniform data base was created, 2 specific, separate data bases were prepared. One was created for ADRION region where respondents that visited the destination more than 30 times or stayed at the destination for more than 14 days were excluded, since they were considered not as regular tourists but more as temporary residents whose mobility habits and needs are different from regular tourists. By eliminating respondents who stayed in a destination longer than 14 days, the report enables a clearer picture of the regular tourists' needs.

The other data base was created for particular destinations where respondents that visited the destination more than 14 days were excluded due to the same reason stated above. Respondents who visited the destination more than 30 times were not excluded from this data base, because some destination samples were already small.

For analysis of respondents' satisfaction with specific transport modes, crosstabs function in SPSS was used. This function is used to create contingency tables, which describe the interaction between two categorical variables.

Survey results were evaluated according all the special circumstances occurred by the COVID-19 pandemic. It is currently not anticipated that tourism sector will return to normality before 2023 or even later. Thus, it is possibly necessary to conduct the surveys again during 2023, in order to address the survey objectives under normal conditions.

2.2 Results

Q1: Would you like to participate in our survey?

The purpose of this question was to obtain data on the number of people who did not wish to participate in the survey. It has no substantive significance.

Q2: Gender

Surveys were most evenly distributed between genders in Berat, Ljubljana and Thessaloniki. In Belgrade, and Emilia-Romagna Region, male respondents were predominant, while in Friuli Venezia Giulia Region, Tivat and Zadar a large majority of respondents were female. At ADRION level, slightly more females were surveyed among domestic and foreign visitors.

Figure 26: Gender distribution per case (in %)

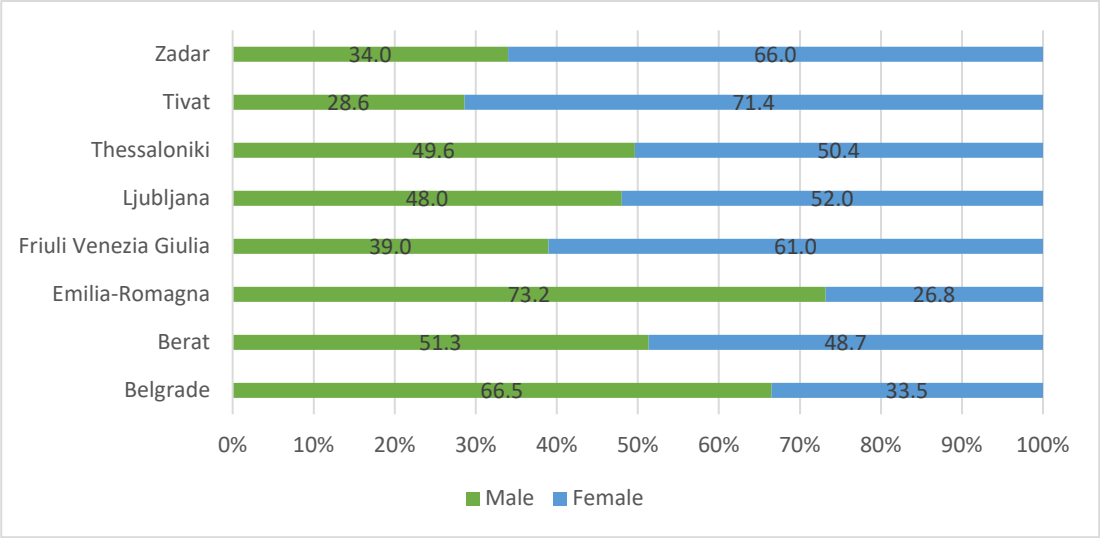
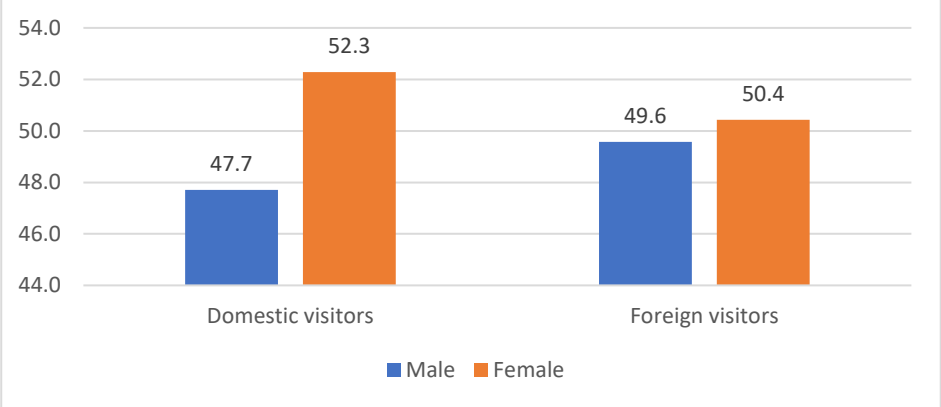


Figure 27: Gender distribution at ADRION level (in %)



Q3: Age

In question 3, respondents stated year of birth. Results were grouped into five age groups: 18-24 years, 25-34 years, 35-54 years, 55-64 years and over 65 years. In all destinations except for Ljubljana, as well as at ADRION level, the age group of 35-54 years was the most represented. For Ljubljana case the younger age category of 25-34 was the most represented.

Figure 28: Age distribution per case (in %)

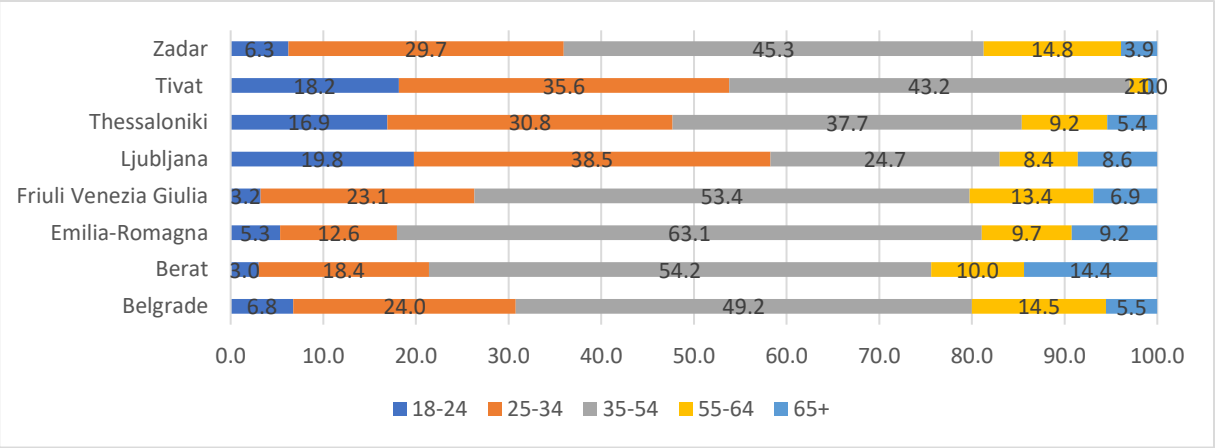
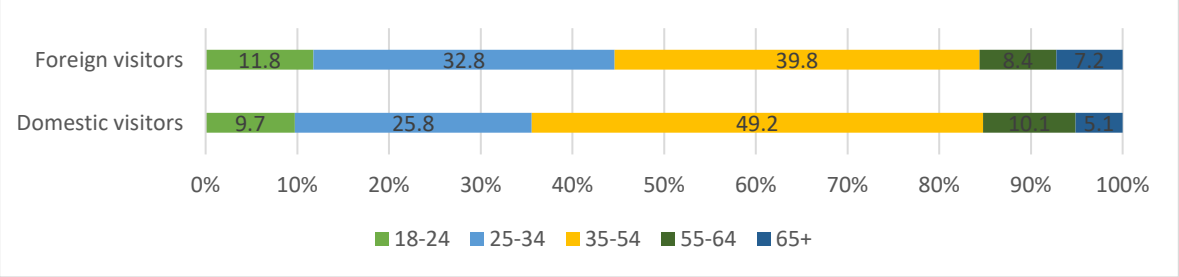


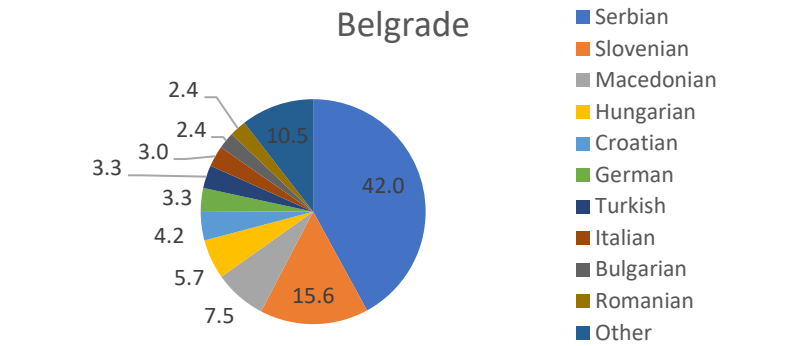
Figure 29: Age distribution at ADRION level (in %)

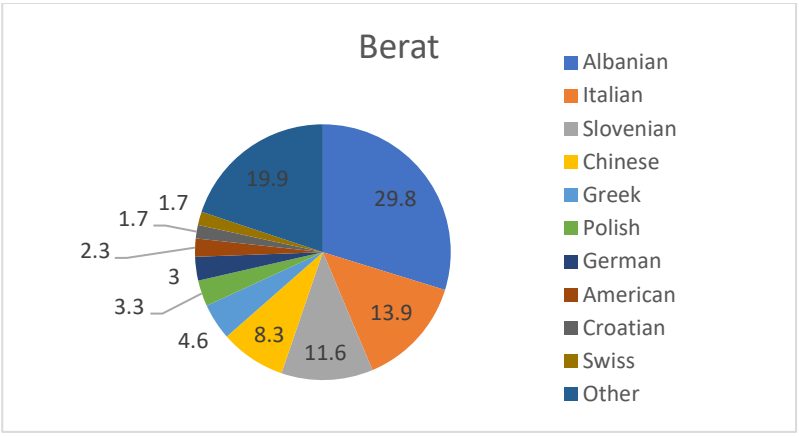


Q4: Nationality

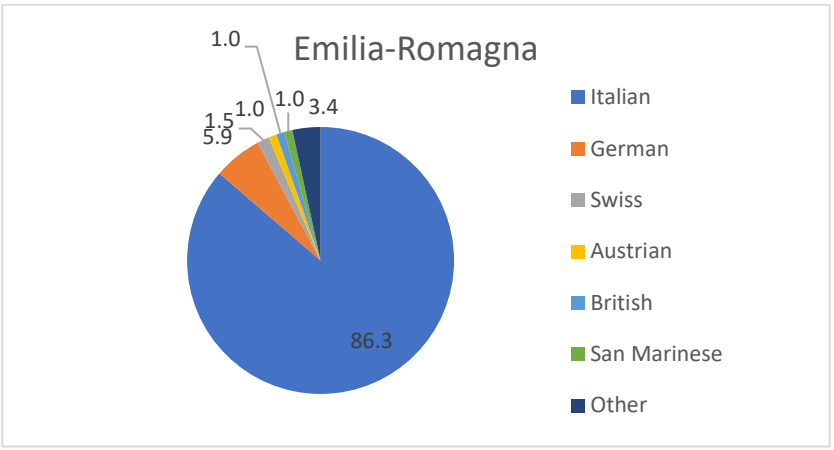
Respondents were asked about their nationality. Results are depicted separately for each case. Besides the nationality distribution of foreign visitors, the below graphs also illustrate the ratio between domestic and foreign visitors surveyed in specific destinations. In Friuli Venezia Giulia Region, all respondents were domestic visitors (Italians). In addition, ratio between domestic and foreign visitors is shown at ADRION level. The last graph illustrates the composition of foreign visitors of the ADRION region by nationality. The largest share is represented by Germans (22.4 %), followed by Italians (9.4 %), Slovenians (8.5 %) and Serbians (7.3 %). Results from Thessaloniki, Emilia-Romagna Region, Ljubljana, Zadar, Tivat and Belgrade are additionally interpreted by project partners below. Central European Initiative – Executive Secretariat (Friuli Venezia Giulia Region) and University of Belgrade are responsible for adding interpretation since input was not delivered on time.

Figure 30: Nationality (in %); joined graphs

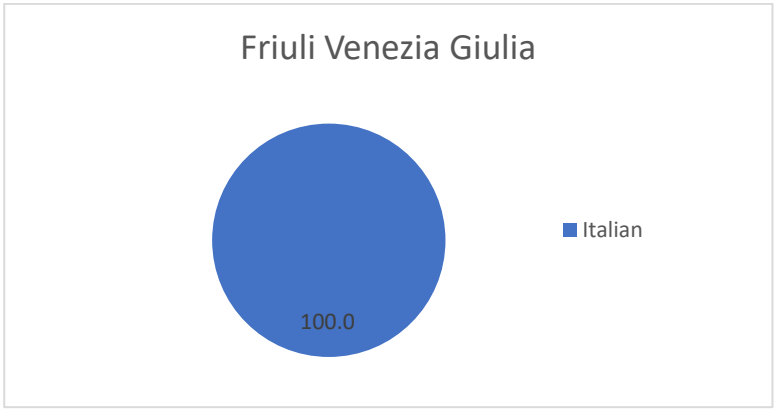


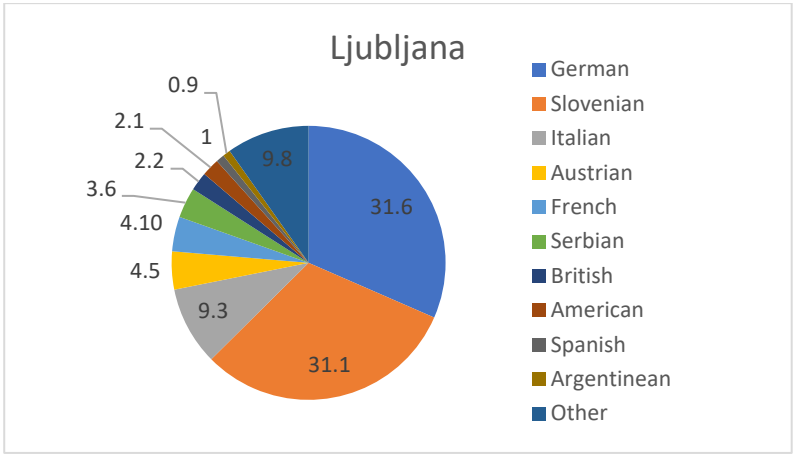


Regional Council of Berat: The structure of visitors in regard to their nationality is a good representative of the tourists that visit the region of Berat. According to our data and estimations, visitors mainly come from neighbouring countries in the Balkans, Western Europe and China. The pool of participants in the survey reflects and is aligned with already existing information; for example, a report published in 2018 by the Institute of Statistics (INSTAT) in Albania, most foreign citizens entering the country for tourism purposes are from Kosovo, North Macedonia, Greece, Montenegro and Italy.

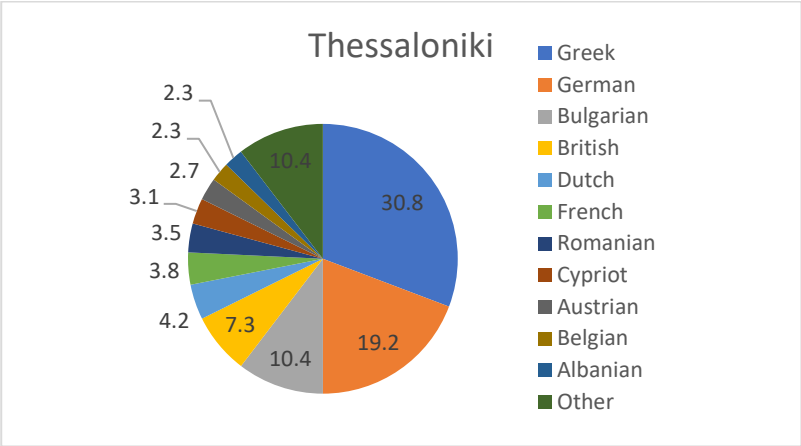


Institute for Transport and Logistic Foundation: The predominance of Italian tourists in the Rimini costal area is not representative as the surveys were conducted in a period strongly affected by the Covid-16 restrictions to foreign tourists. During the summer 2020 there were mainly Italian tourist, but in a normal touristic season the percentage of foreigners is significantly higher. For example, in the last years the presence of Russian visitors had grown, but during summer 2020 they were not allowed to visit Italy.

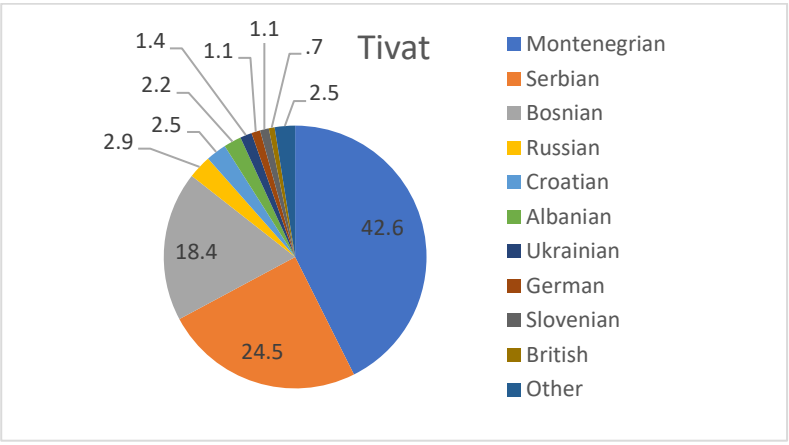




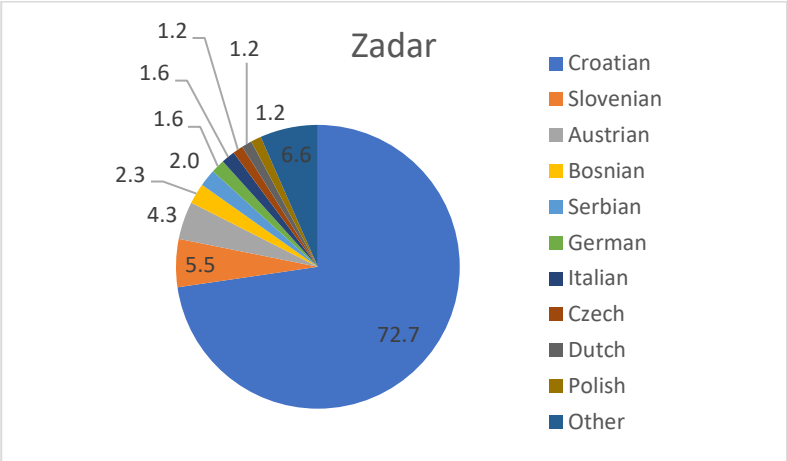
Institute of Traffic and Transport Ljubljana: In accordance with the statistical data on arrivals and overnight stays of foreigners in Slovenia in 2020, the structure of visitors from the survey matches, only the shares are distributed a little differently.



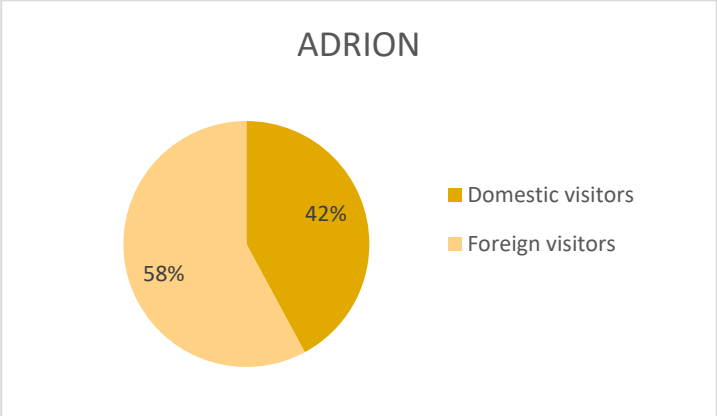
HIT CERTH: The survey was contacted in a period not favourable for the tourism sector, as the COVID-19 pandemic spread all over the world from the beginning of 2020, affected the tourism trends and created a series of problems and distortions. Hence, the actual profile of tourists in Thessaloniki city differed substantially this summer season compared to previous years. Cross-border movement restrictions have been put in place for visitors from main touristic markets of Thessaloniki, such as Serbia, Turkey, Russia and North Macedonia, leading to a significant reduction of the number of tourists from these countries compared to previous years. Moreover, restrictions imposed for many visitors from Balkan countries, (cross – border points closure, mandatory COVID-19 tests for incoming tourists, mandatory quarantine period when returning back home etc.) reduced the incoming flow from traditional road entry cross-border points, minimizing the number of visitors using their car as a transport mode. However, and taking into consideration the visitors' structure from previous years it seems that Germany is still the most important market presenting a share of 19.2 % (which is rather low comparing with the relevant share of 2018 that was 34 %) while United Kingdom follows in a rate of 7.3 % (the corresponding rate in 2018 was 10 %).

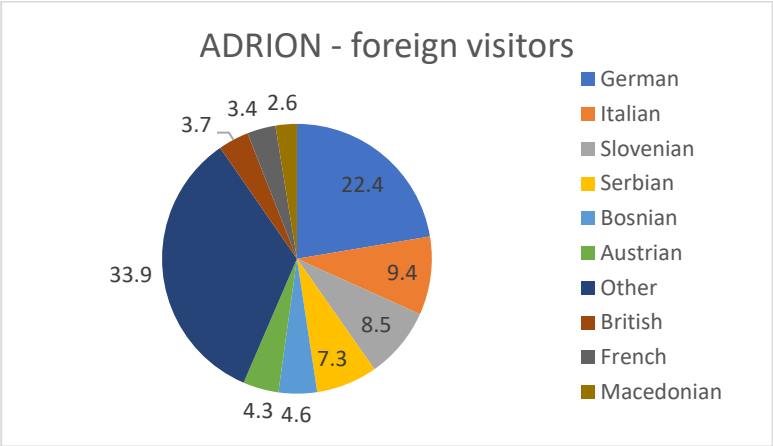


Municipality of Tivat: Structure of visitors is representative and offers representative insight into mobility and tourism status quo in Tivat in terms of general market structure, potential growth of certain markets in recent period and Covid influence (mostly negative) on certain regional/international markets (e.g. EU).



City of Zadar: According to the Croatian Bureau of Statistics, the share of tourist arrivals in Croatia by nationality in 2019 was 34 % domestic tourists and 66 % international tourists. Similar data can be found in the overnight statistics, where 33 % of total overnights in Croatia were recorded by domestic tourist and 67 % by international tourist. In the Sustourismo survey over 70 % of tourists were domestic tourist and among the most represented foreign nationalities were: Slovenian (5.5 %), Austrian (4.3 %), Bosnian (2.3 %), Serbian (2.0 %), German (1.6 %) and Italian (1.6 %). This differs a bit from data collected in 2019, according to national statistic, where the most represented nationalities in the overnights in Croatia were Germans (23.7 %), Slovenian (8.9 %), Austrian (8.4 %), Polish (7 %), Italian (6.1 %) and Czech (5.9 %). The tourist structure varies because the majority of the traditional inbound markets for Croatia were “closed” for travels, which means these markets had very high travel restrictions, especially during the end of the year when the Sustourismo survey was conducted.





Q5: City (Place of residence)

The answers regarding the place of residence varied significantly. The first five most common answers for each project partner are presented in the below table, including domestic destinations. Due to the large differentiation among answers, top answers are not depicted at ADRION level. Results from Thessaloniki, Emilia-Romagna Region, Ljubljana, Zadar, Tivat and Belgrade are additionally interpreted by project partners below. Central European Initiative – Executive Secretariat (Friuli Venezia Giulia Region) and University of Belgrade are responsible for adding interpretation since input was not delivered on time.

Table 4: Place of residence (in %); top 5

Belgrade		**Berat**		**Emilia-Romana**		**Friuli Venezia Giulia**	
Ljubljana	6.3	Amsterdam	13.2	Bologna	13.6	Torino	5.6
Podgorica	3.8	Bagneux	4.3	Milano	10.7	Udine	5.2
Banja Luka	3.3	Ballsh	3.0	Verona	6.8	Ariano	2.8
Skopje	3.0	Bejing	3.0	Bolzano	5.8	Bologna	2.8
Beč	2.0	Benevent	2.6	Modena	4.9	Roma	2.8
Other	81.6	Other	73.8	Other	58.3	Other	81.0
Ljubljana		**Thessaloniki**		**Tivat**		**Zadar**	
Munich	6.2	Sofia	9.6	Podgorica	18.4	Zagreb	34.4
Maribor	3.8	Athens	3.8	Belgrade	14.5	Split	6.3
Frankfurt	3.4	Amsterdam	3.1	Banja Luka	3.0	Slavonsk	2.7
Berlin	3.3	Berlin	3.1	Bar	2.3	Osijek	2.3
Kranj	2.9	Frankfurt	3.1	Kragujevac	2.3	Vienna	2.3
Other	80.4	Other	77.3	Other	78.0	Other	52.0

Regional Council of Berat: The cities presented in the table do not correctly reflect the data. This might be due to the fact that nowadays the phenomenon of the expatriation is quite common. The most common places of residence of tourists that have visited Berat are Tirana (Albania), Novara (Italy), Kumanova (North Macedonia), Maribor (Slovenia), Bejing (China), Ioannina (Greece) and Gjilan (Kosovo).

Institute for Transport and Logistic Foundation: In the Emilia-Romagna case, due to the Covid-19 summer 2020 restrictions, the visitors in Rimini were mainly regional tourists (Bologna and Modena) and from the northern part of Italy (cities with rapid train connections to the Rimini area).

Institute of Traffic and Transport Ljubljana: Places of residence show that majority of tourists come from countries that were highly represented in the previous question and are in line with the expectations.

HIT CERTH: For Thessaloniki case the top five places of visitors' residence are Sofia (Bulgaria), Athens (Greece), Amsterdam (Netherlands), Berlin and Frankfurt (Germany). It is obvious that visitors, both foreigners and locals, are residents either of capital cities (cases of Sofia, Athens, Amsterdam and Berlin) or of multitudinous cities (case of Frankfurt), a fact that indicates a rather satisfying transport connectivity of Thessaloniki city with these cities (satisfying road network for Sofia and Athens cases and air network for all other cases).

Municipality of Tivat: Regarding places of residence, key finding indicates that visitors are coming from capitals and larger cities from regional market, East European and West European markets, such as: Belgrade, Moscow, Banja Luka, etc. Smaller share of surveyed visitors is coming from Montenegro, also mostly from Podgorica as capital.

City of Zadar: The main places of residence for surveyed visitors were Zagreb – 33.4 %, Split – 6.3 %, Slavonski Brod – 2.7 %, Osijek – 2.3 %, Vienna – 2.3 %, Other – 52.0 %. The predominance of Croatian cities can also be explained by the larger share of domestic tourists surveyed, as opposed to foreign tourists. Vienna, as the only non-Croatian city on the list, can be related to the fact that there was a larger share of Austrian tourists (4.3 %) in the sample compared to other nationalities. The places of residence represented in this survey showed that among the domestic tourist in Zadar there were residents of the continental part of Croatia, which usually visit the Adriatic region.

Q6: Educational level

In Berat, Ljubljana, Thessaloniki, Tivat and Zadar the largest share of respondents held an undergraduate degree, while in Belgrade and Emilia-Romagna Region over a half of respondents had a vocational or technical degree. The largest share of respondents with a postgraduate degree was recorded in Friuli Venezia Giulia Region. At ADRION level, respondents with an undergraduate degree were dominant among domestic and foreign visitors.

Figure 31: Educational level per case (in %)

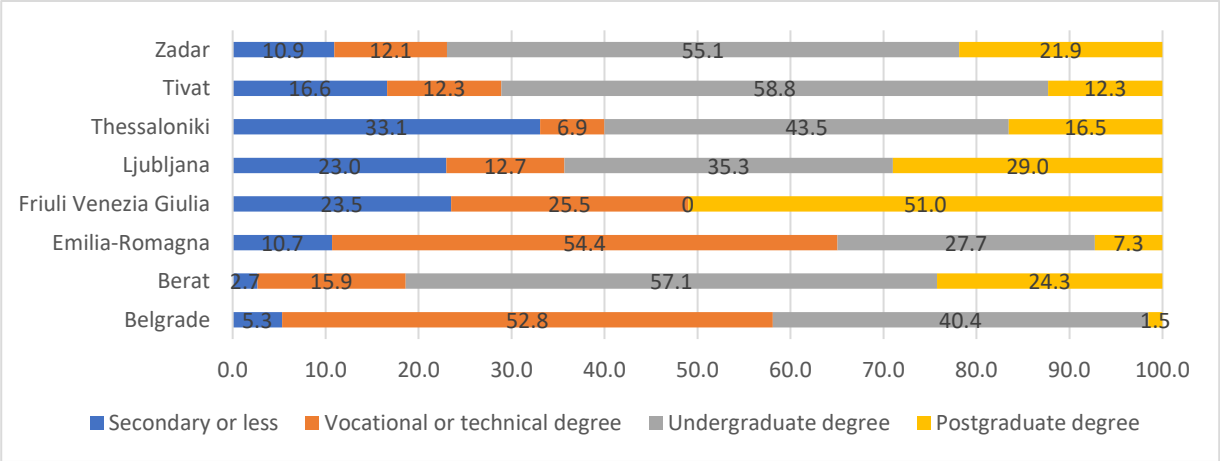
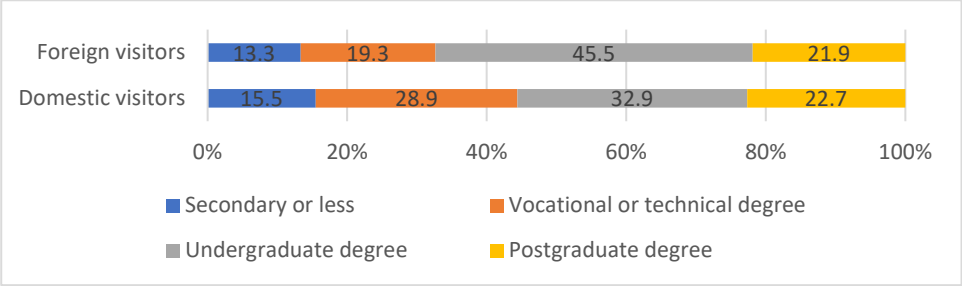


Figure 32: Educational level at ADRION level (in %)



Q7: Status of employment

More than half of respondents in all destination except Friuli Venezia Giulia Region were employed. In Emilia-Romagna and Zadar, their share was over 70 %. In Belgrade and Friuli Venezia Giulia Region, almost one third of respondents were self-employed. Almost 60 % of both domestic and foreign visitors of ADRION region were employed.

Figure 33: Employment status per case (in %)

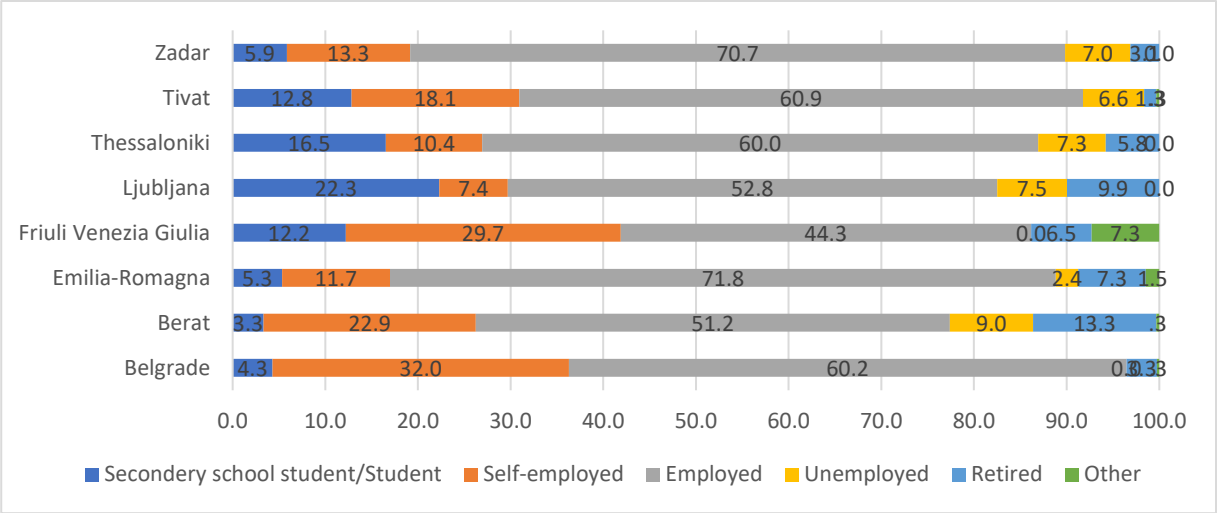
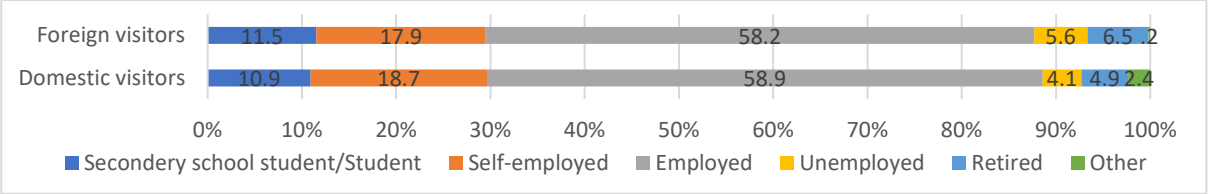


Figure 34: Employment status at ADRION level (in %)



Q8: Income category (personal - annual)

When it comes to income categories of visitors, large differences can be seen between project partners. Emilia-Romagna recorded the largest share of respondents with more than 40,000 EUR of annual income, while Tivat and Berat had the largest shares of respondents that earn less than 10,000 EUR per year. At ADRION level there were more respondents with a yearly income lower than 10,000 EUR among domestic visitors (40 %) than foreign visitors (26.2 %).

Figure 35: Income category per case (in %)

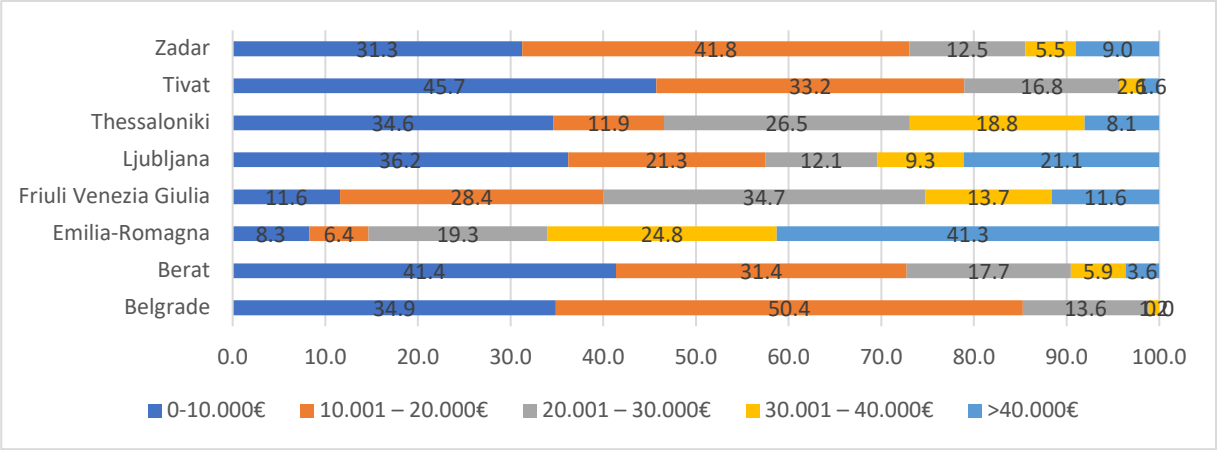
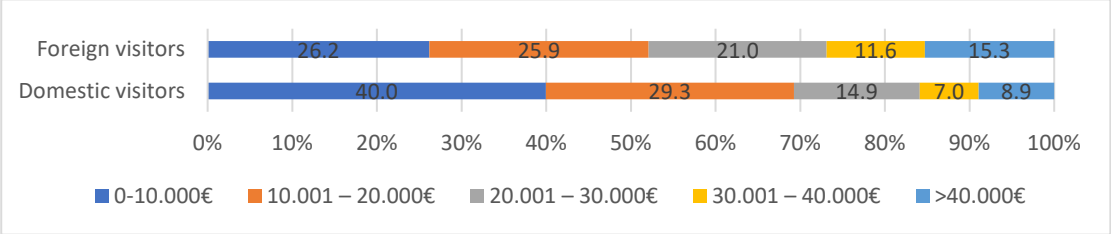


Figure 36: Income category at ADRION level (in %)



Q9: Driving license

A large majority of respondents in all destinations held a driving license. Their share was the highest in both Italian destinations and the lowest in Thessaloniki. At ADRION level, the share of driving license owners was slightly higher among domestic visitors than foreign visitors.

Figure 37: Driving license per case (in %)

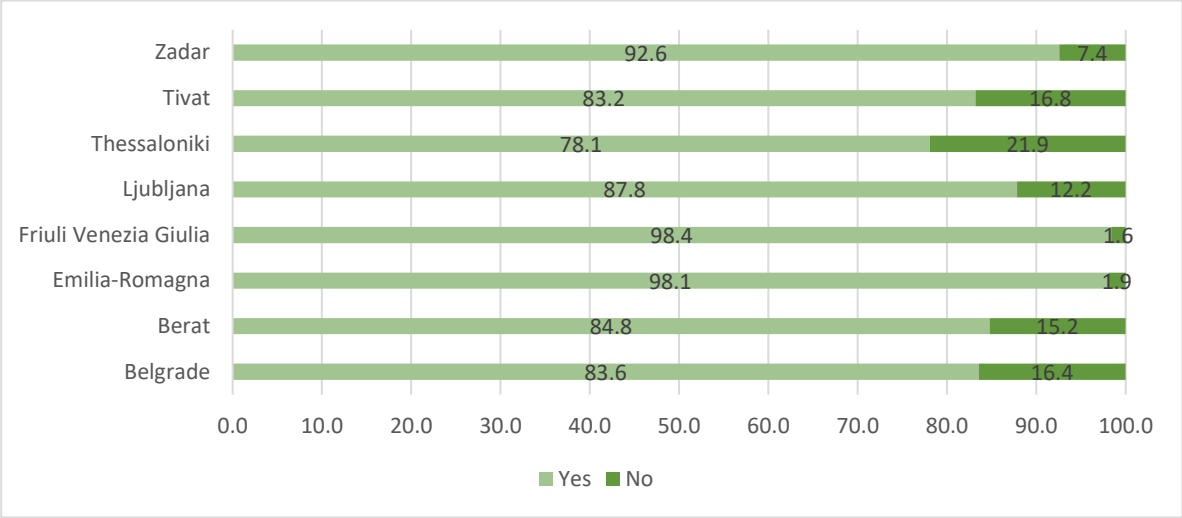
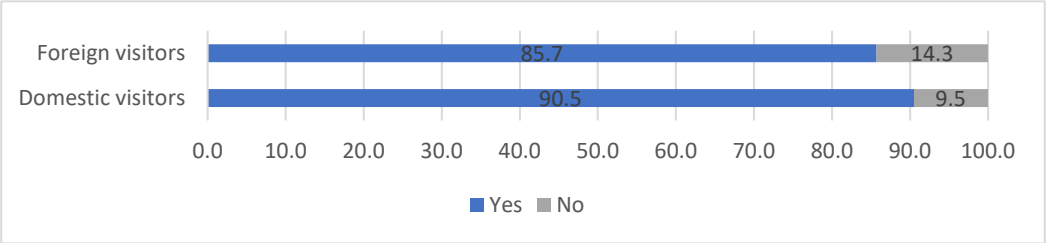


Figure 38: Driving license at ADRION level (in %)



Q10: Car ownership

Most respondents in all destinations owned a car. The share of car owners was the highest in Emilia-Romagna Region and Belgrade, and the lowest in Ljubljana and Thessaloniki. The results show that among respondents there were holders of a driving license who do not own a car. At ADRION level, the share of car owners was higher among domestic than foreign visitors.

Figure 39: Car ownership per case (in %)

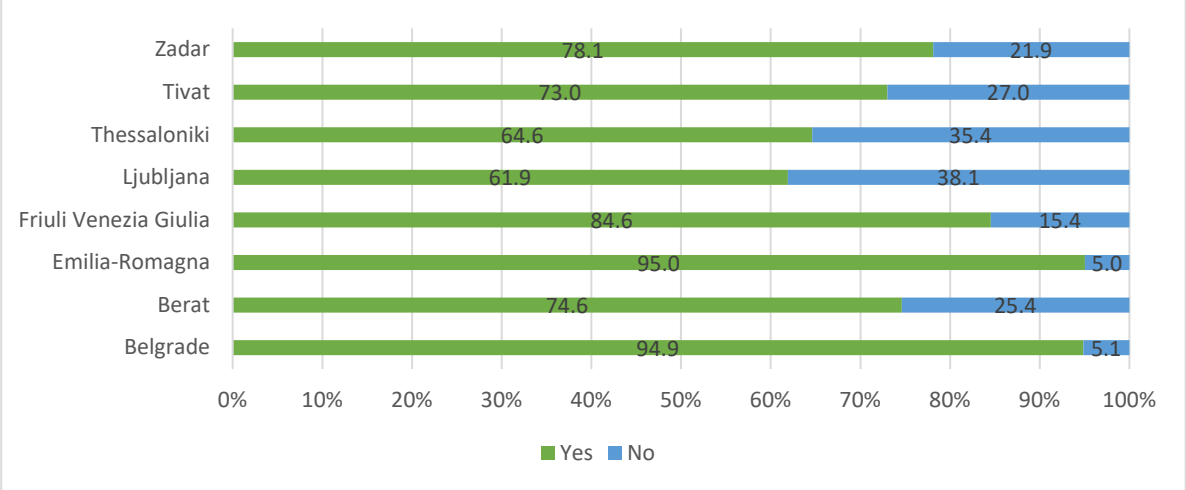
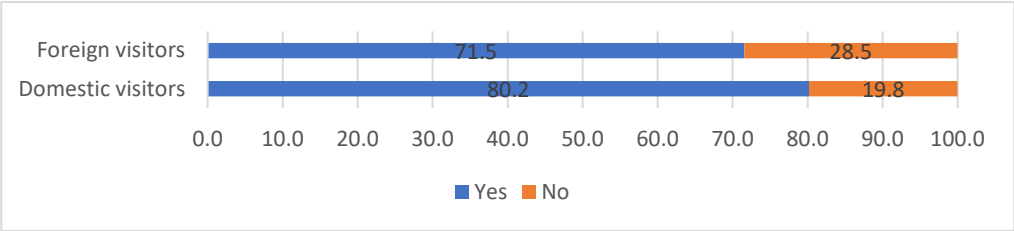


Figure 40: Car ownership at ADRION level (in %)



Q11: Is this the first time you are visiting "name of destination"?

All visitors surveyed in Zadar visited the city for the first time, while in other destinations the share of first-time visitors was much lower. At ADRION level, over 70 % of domestic visitors have already visited the destination previously, while less than a 40 % of foreign visitors have done so. Results from Thessaloniki,

Emilia-Romagna Region, Ljubljana, Zadar, Tivat and Belgrade are additionally interpreted by project partners below. Central European Initiative – Executive Secretariat (Friuli Venezia Giulia Region) and University of Belgrade are responsible for adding interpretation since input was not delivered on time.

Figure 41: First visit of destination per case (in %)

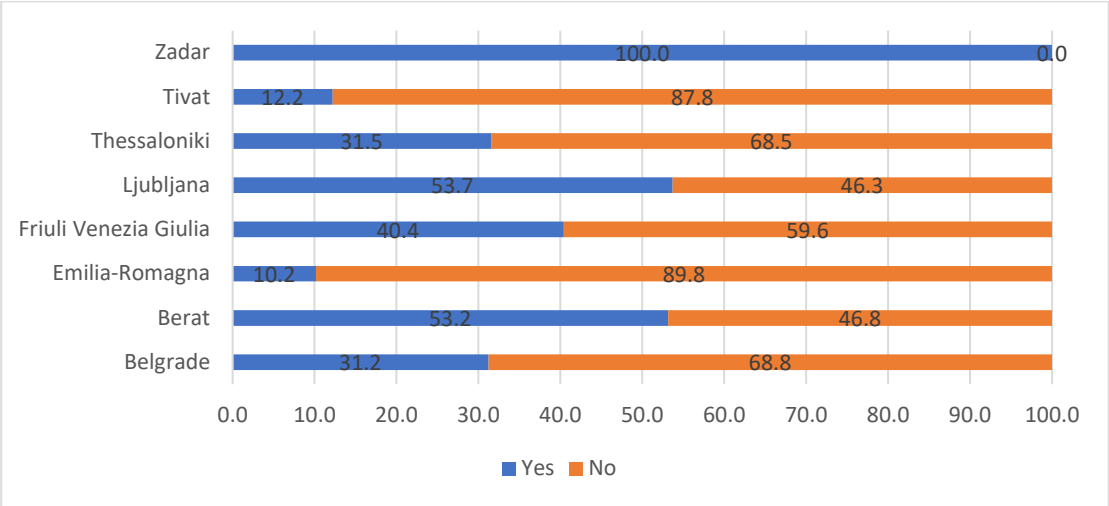
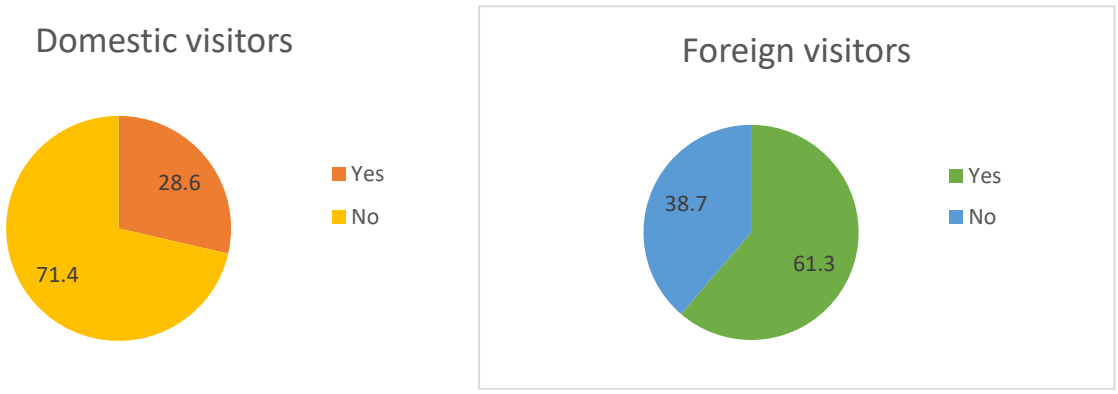


Figure 42: First visit of destination at ADRION level (in %); joined graphs



Regional Council of Berat: According to the survey's data, 53.2 % of participants were visiting Berat for the first time. This information is useful for the design of tourism policies and initiatives, considering that a good share of tourists revisits the city. Revisiting the city is most common for domestic tourists, or tourists from neighbouring countries, and less common for international tourists from Western Europe, Asia and the USA.

Institute for Transport and Logistic Foundation: The high percentage of tourists that already had visited the Emilia-Romagna coastal areas is strictly related to the fact that due to Covid-19 emergency the surveyed tourists were mainly local people usually visiting the coastal areas every year for a brief holiday period or for long presences in rented homes.

Institute of Traffic and Transport Ljubljana: Domestic visitors have already visited the destination previously, so they have already seen all the main attractions and would be more willingly to join our touristic package,

while many foreign visitors are the first-time visitors, so we would need strong marketing to engage them in our package.

HIT CERTH: In Thessaloniki's case 31.5 % of tourists visited Thessaloniki for the first time, while the rest of tourists have already visited the city in the past (mainly people visiting friends and/or family). Taking into consideration the fact that tourists' arrivals in Thessaloniki city have fallen sharply due to Covid -19 pandemic during the summer of 2020, this is a promising and in parallel an optimistic fact for the city's tourism future. It seems that even under these new-found circumstances, the city still remains an attractive tourism destination with major possibilities of becoming one of the top destinations in Adrion.

Municipality of Tivat: First time visitors have a significant share, although "repeaters" are dominant. Final output from this questionnaire will give us better insight into data related with the importance of concept of "first impression" and first visit.

City of Zadar: The results show that a 100 % of surveyed tourists have visited Zadar at least once in the past. Due to the Covid-19 pandemic, not all tourists were examined in the destination, and part of the survey was conducted online, so methodologically the original formulation of this question would not give the right results. These results imply that the surveyed tourists are at least in some degree familiarized with the destination and that they have probably used one or more transport modes while visiting Zadar in the past. Taking that into consideration, it might be easier to present these types of tourists with new and/or improved means of transport in Zadar, since they already have some experience with it. In that way, it could also be easier to cooperate with these tourists in improving mobility in Zadar for their and the destinations well-being.

Q12: How many times have you visited "name of destination" (including this one)?

The number of visits varies greatly among destinations. At ADRION level, it is clear that foreign visitors have visited the destination fewer times than domestic visitors.

Figure 43: Number of visits at ADRION level (in %)

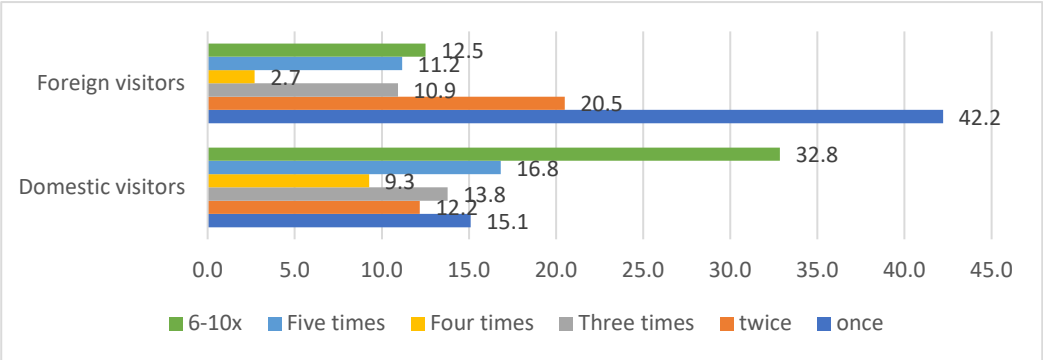
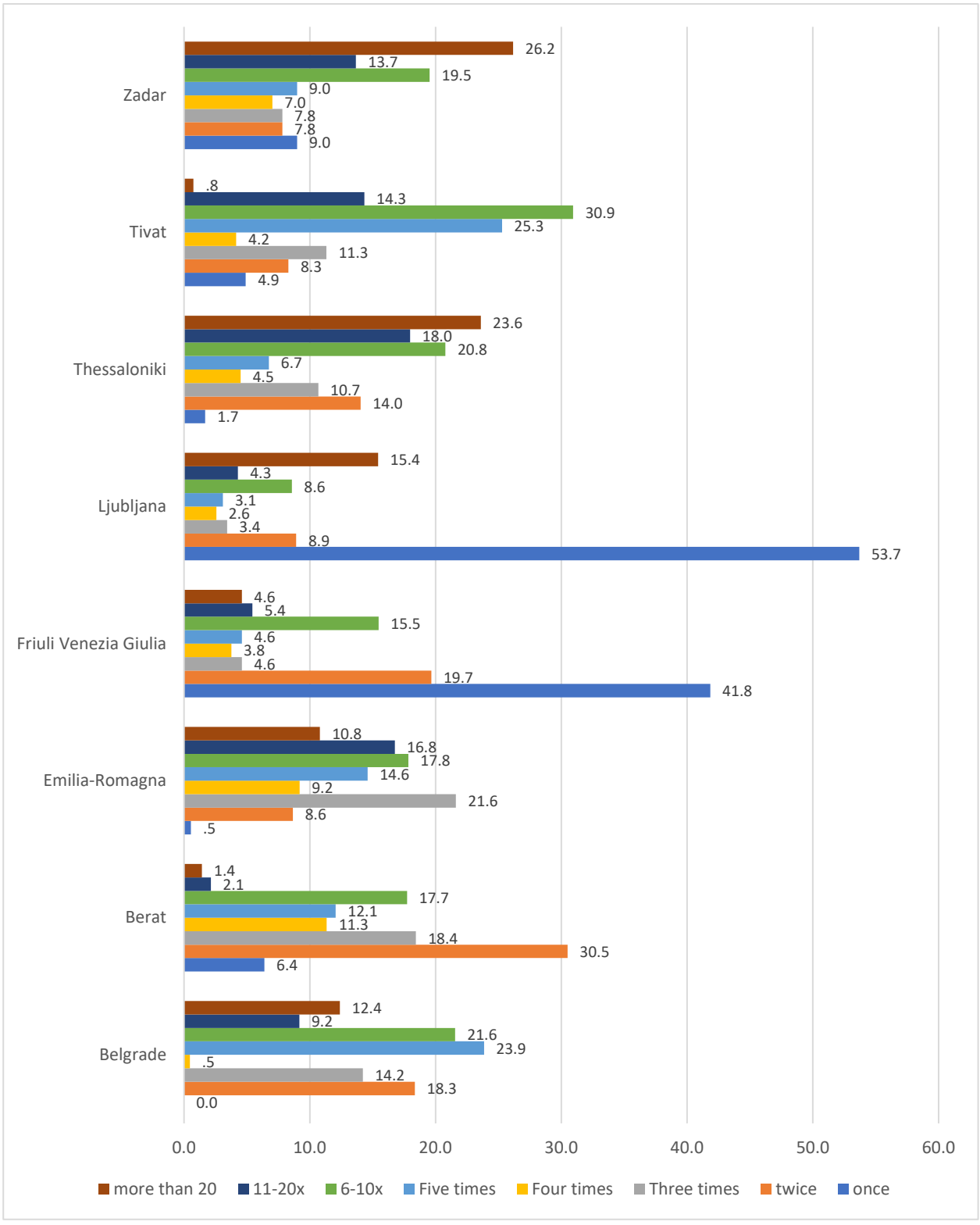


Figure 44: Number of visits per case (in %)



Q13: How many nights did you stay / are you staying?

On average, foreign visitors stayed in ADRION region longer than domestic visitors.

Figure 45: Number of overnight stays per case (in %)

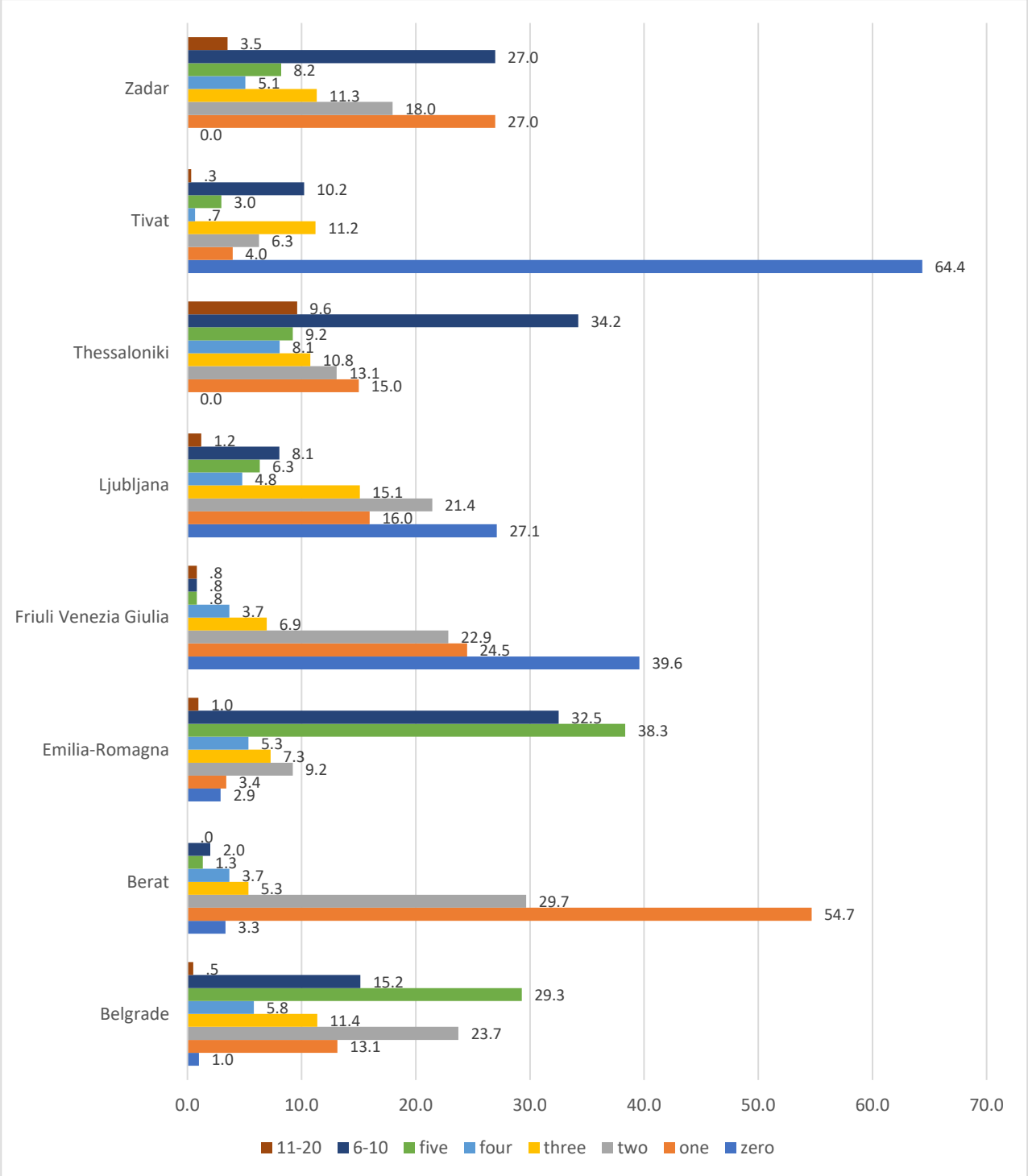
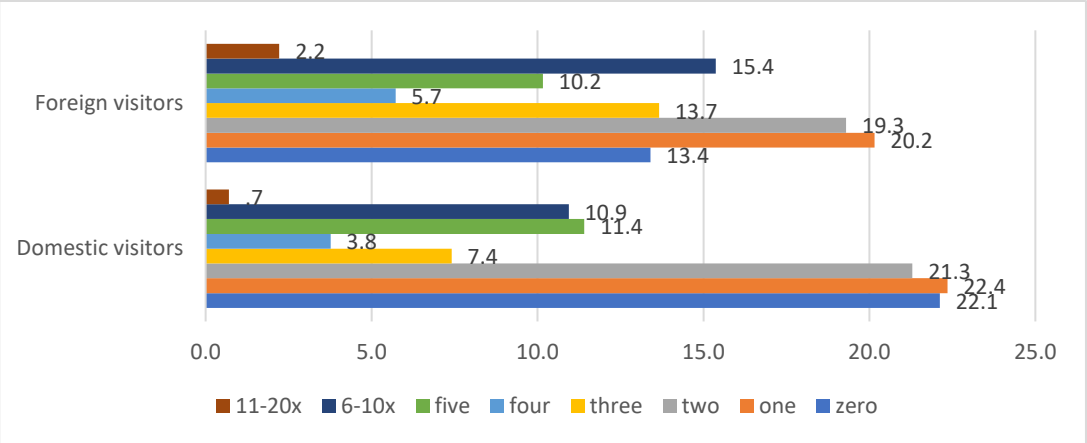


Figure 46: Number of overnight stays at ADRION level (in %)



Q14: How many people (family members / partners only) are traveling with you, including yourself?

With the exception of Tivat, the largest share of visitors was travelling in a group of two (29 – 59 %), which is also true for the entire ADRION region. The share of solo travellers was the biggest in Thessaloniki.

Figure 47: Number of people visitors were traveling with per case (in %)

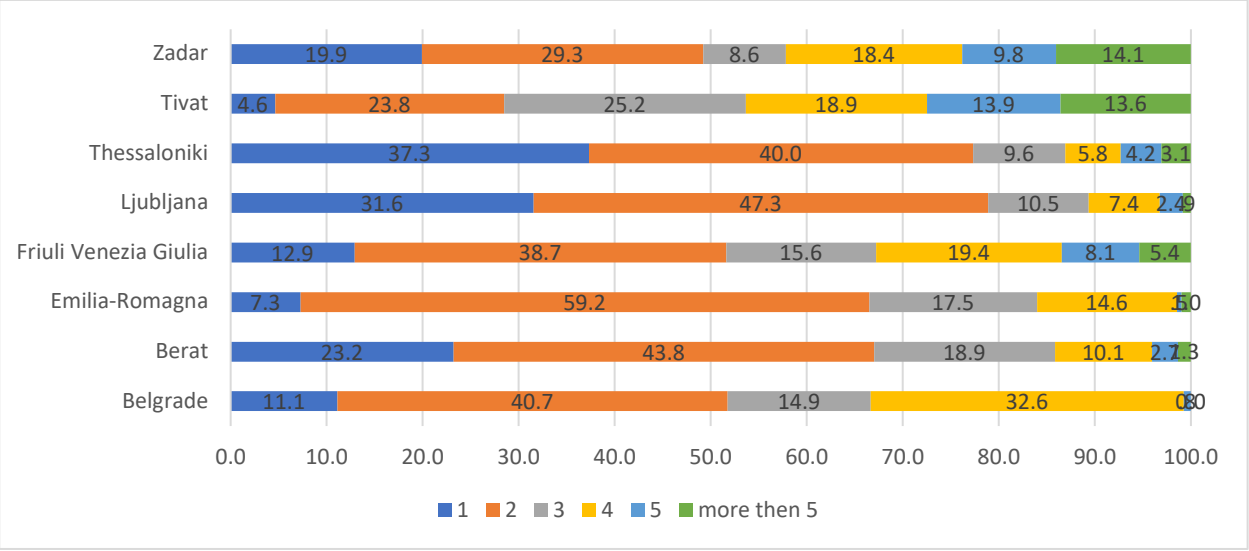
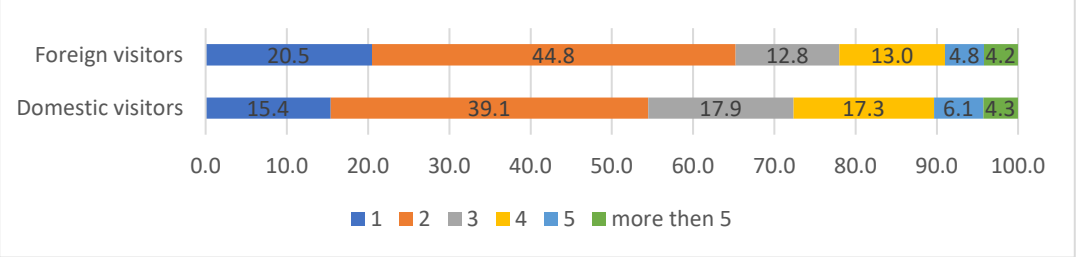


Figure 48: Number of people visitors were traveling with at ADRION level (in %)



Q15: Type of travel

Independent travellers generally have more freedom in choosing their means of transport than participants in organized package tours. Almost half of visitors came to Berat on an organised package tour, while the share of such visitors was tiny in other destinations. At ADRION level, fewer foreign visitors travelled independently (83.5 %) than domestic visitors (97.3 %). Results from Thessaloniki, Emilia-Romagna Region, Ljubljana, Zadar, Tivat and Belgrade are additionally interpreted by project partners below. Central European Initiative – Executive Secretariat (Friuli Venezia Giulia Region) and University of Belgrade are responsible for adding interpretation since input was not delivered on time.

Figure 49: Type of travel per case (in %)

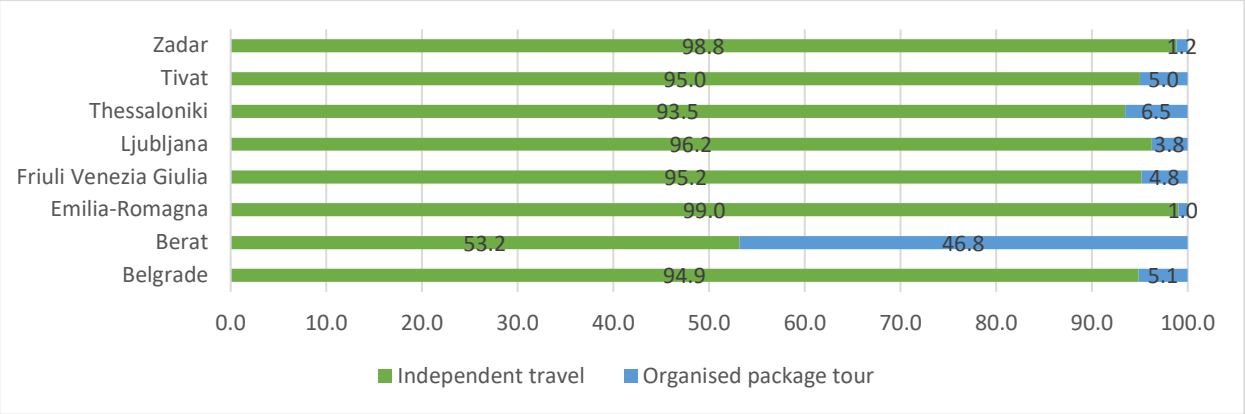
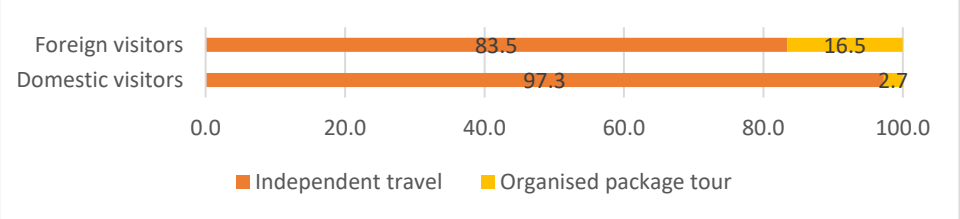


Figure 50: Type of travel at ADRION level (in %)



Regional Council of Berat: Almost half of visitors came to Berat on an organised package tour. Considering the characteristics of the city, most tourists prefer to visit it as part of an organised package including other destinations in Albania, or larger tours in the Balkans. According to our data, domestic tourists generally travel independently, while foreign tourists prefer organized package tours. In the context of the project, this represents a good potential for the usage of integrated touristic packages through the SUSTOURISMO mobile application.

Institute for Transport and Logistic Foundation: We don't have official statistics helping us on understanding if this percentage of independent tourists in the Rimini area are representative or not. In any case we can say that in general independent travellers are the largest part of the tourists reaching the Rimini area.

Institute of Traffic and Transport Ljubljana: More than 96 % were independent travellers which is better for our touristic package, so more people could be influenced to join the tour, whereas organized groups have already set attractions to be seen.

HIT CERTH: In Thessaloniki, 9 out of 10 (93.5 %) of respondents are independent travellers. From one side this can be justified by the large amount of people declaring to have visit the city more than once in the past (7 out of 10), leading to the conclusion that they are already familiar with the city and act more autonomously. From the other side, as highlighted in question Q4 the sample was not the most representative due to Covid-19 restrictions. Hence, there was no need for organized package tours for tourists visiting Thessaloniki to meet friends or family.

Municipality of Tivat: Share of independent visitors is representative and gives us insight into structure of distribution channels as well as structure of tourist offer in Tivat, as explained in report previously. Moreover, significant share of independent visitors confirms that our destination is following modern trends related to independent travel and need for sustainable and approachable mobility options. Further improvements are necessary, related to sustainable and approachable modes of transportation.

City of Zadar: Most of the surveyed visitors prefer independent travel (98.8 %), as opposed to organized package tours (1.2 %). According to the Croatian Bureau of Statistics, the share of individual tourists in the total structure of overnights was 57 %, as opposed to 43 % organized tourists. It is a very high discrepancy in the data collected in the survey in 2020 and the statistics in 2019, but this difference could best be explained when taking into account the COVID-19 pandemic, where tourist mostly travelled individually, as there were a lot of travel restrictions and the majority of organized travels were cancelled and forbidden. Actually, data collected in 2020 is completely different and not comparable to tourist structures and profiles from the previous years.

Q16: Which transport mode did you use for coming to "name of destination" (choose all that apply)?

Question 16 enabled multiple answers. The options were: car, airplane, bicycle, interurban public bus, motorbike, touristic bus (or Flixbus), camper van, ship, rail, cruise ship, and other. Only the top 3 choices at each destination and entire ADRION region are shown.

The results show that the use of private vehicle is the predominat transport mode for both domestic and foreign visitors. This might be explained by the the proximity of ADRION countries allowing the use of private vehicles. On the other side, the table outlines rather low environmental concerns of visitors as interurban buses and trains are rarely used. Also, it outlines rather poor railway and airplane connections.

Table 5: Transport modes used for coming to destination; top 3

Belgrade	Berat	Emilia-Romagna	Friuli Venezia Giulia	Ljubljana
Car – 75.8 %	Car – 46 %	Car – 76.2 %	Car – 67.9 %	Car – 71 %
Airplane – 13.4 %	Touristic bus (or Flixbus) – 45 %	Rail – 21.4 %	Rail – 28.2 %	Rail – 14.6 %
Interurban Public Bus – 10.6 %	Airplane – 36.8 %	Interurban Public Bus – 1.5 %	Touristic bus (or Flixbus) – 5.6 %	Interurban Public bus – 9.1 %

Thessaloniki	Tivat	Zadar	ADRION Domestic visitors	ADRION Foreign visitors
Airplane – 67.3 %	Car – 95.1 %	Car – 83.2 %	Car – 76.8 %	Car – 58.4 %
Car – 18.1 %	Interurban Public bus – 16.1 %	Interurban Public Bus – 10.2 %	Rail – 13.4 %	Airplane – 29.4 %
Interurban Public Bus – 9.2 %	Airplane – 12.8 %	Airplane – 9 %	Interurban Public Bus – 8.8 %	Touristic bus (or Flixbus) – 16.5 %

Q17: Why did you choose to use this/these transport mode/modes for your trip?

At the level of pilot cities, reasons for choosing a certain mode of transport varied greatly. In general, most visitors chose their transport mode because it was comfortable and fast, which was also true at ADRION level. The third most common reason was the best cost. Further, reasons for choosing modes of transport are linked with specific transport modes in Table 6 and Table 7 (at ADRION level, for domestic and foreign visitors). The key reason for coming to destination with a car was comfort for both domestic and foreign visitors.

Figure 51: Reasons for choosing modes of transport at ADRION level (in %)

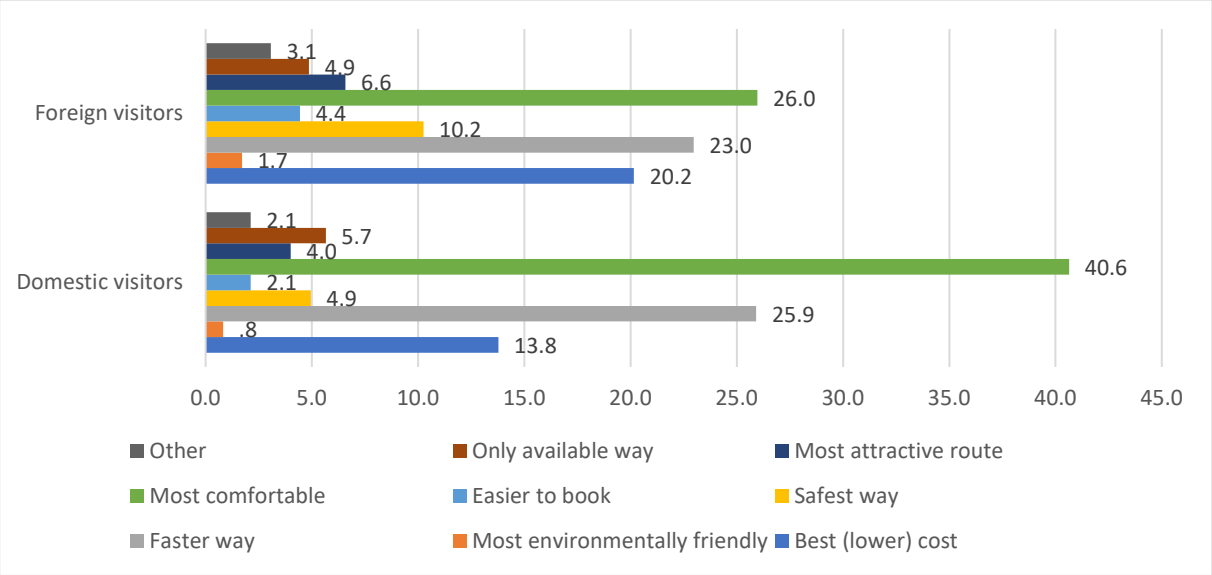


Figure 52: Reasons for choosing modes of transport per case (in %)

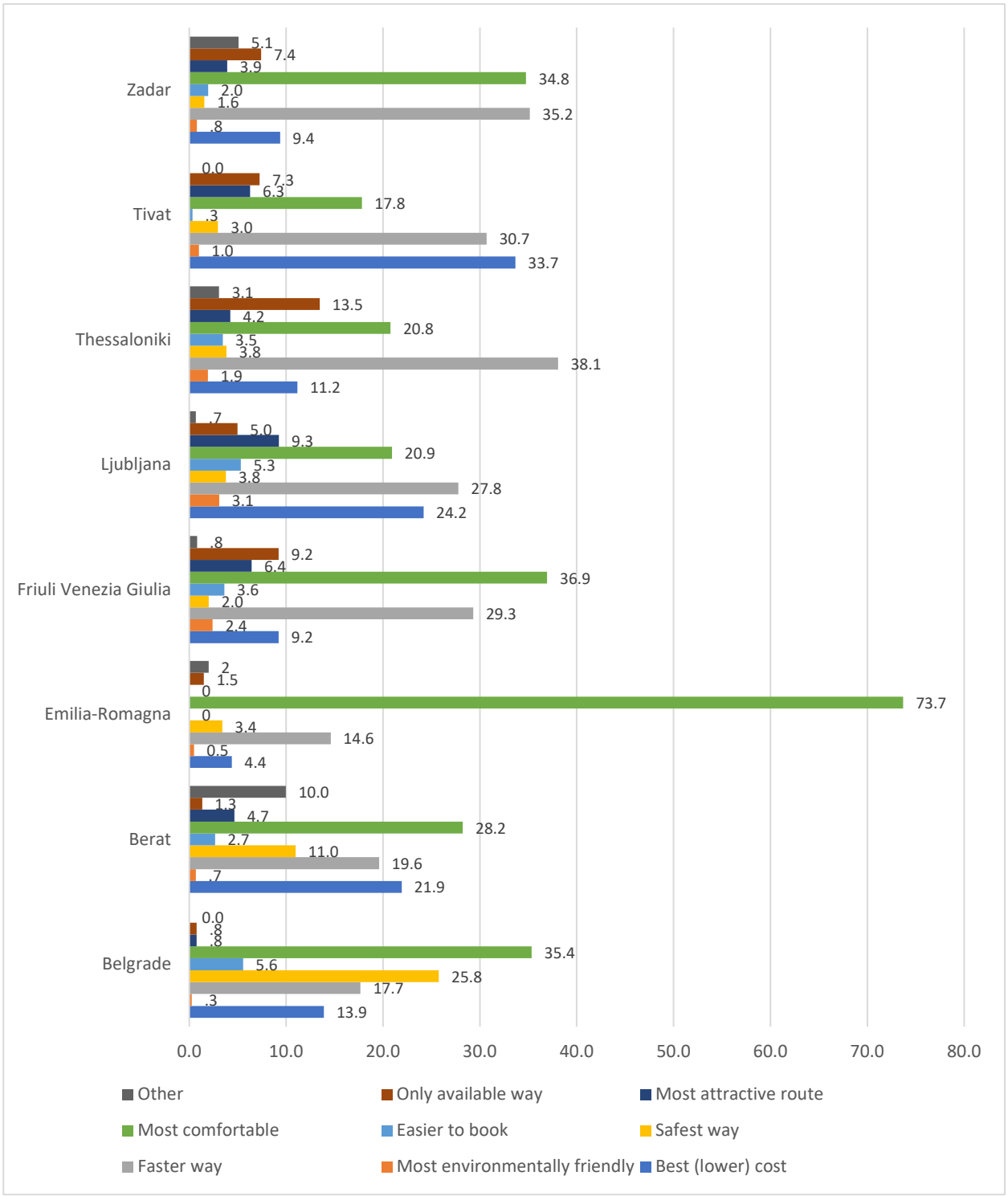


Table 6: Reasons for choosing modes of transport for coming to destination per transport mode at ADRION level; domestic visitors

	Best (lower) cost	Most environment-ally friendly	Faster way	Safest way	Easier to book	Most comfortable	Most attractive route	Only available way	Other
Car	11.5 %	0.8 %	27.8%	5.7 %	1.5 %	42.7 %	3.7 %	4.1 %	2.3 %
Airplane	8.6 %		31.4%	8.6 %	8.6 %	20.0 %		22.9 %	
Bicycle	14.8 %		37.0%	7.4 %		18.5 %	18.5 %		3.7 %
Interurban Public Bus	46.7 %	1.3 %	25.3%	4.0 %	4.0 %	5.3 %	4.0 %	8.0 %	1.3 %
Motor bike	25.0 %		50.0%			8.3 %	8.3 %	8.3 %	
Touristic Bus (or Flixbus)	22.9 %		28.6%		2.9 %	25.7 %	14.3 %	5.7 %	
Camper Van	16.7 %		25.0%			33.3 %	16.7 %	8.3 %	
Ship			35.0%	10.0 %		30.0 %	20.0 %	5.0 %	
Rail	14.0 %	1.8 %	23.7%	0.9%	2.6 %	46.5 %	3.5 %	7.0 %	
Cruise ship	100.0 %								

Table 7: Reasons for choosing modes of transport for coming to destination per transport mode at ADRION level; foreign visitors

	Best (lower) cost	Most environment-ally friendly	Faster way	Safest way	Easier to book	Most comfortable	Most attractive route	Only available way	Other
Car	17.3 %	0.7 %	23.1 %	12.7 %	2.2 %	29.3 %	6.9 %	4.5 %	3.2 %
Airplane	8.1 %	1.7 %	33.7 %	8.7 %	7.6 %	27.6 %	3.2 %	5.5 %	3.8 %
Bicycle	21.7 %	8.7 %	13.0 %	13.0 %		13.0 %	21.7 %	8.7 %	
Interurban Public Bus	50.8 %	3.3 %	8.2 %	3.3 %	4.9 %	16.4 %	4.9 %	4.9 %	3.3 %
Motor bike	33.3 %		16.7 %		16.7 %		16.7 %	16.7 %	
Touristic Bus (or Flixbus)	35.2 %	1.6 %	14.5 %	14.5 %	6.2 %	21.2 %	1.6 %	4.1 %	1.0 %
Camper Van	25.0 %		2.8 %		2.8 %	27.8 %	33.3 %	5.6 %	2.8 %
Ship	47.4 %	5.3 %		5.3 %		15.8 %	26.3 %		
Rail	31.4 %	20.0 %	17.1 %		2.9 %	11.4 %	11.4 %	5.7 %	
Cruise ship									

Q18: Please state your level of satisfaction (using a scale from 1 – Not at all satisfied to 5 – Very satisfied) from the transport mode stated above (for the combination of transport modes in case of using more than one mode of transport)

A large majority of visitors in all destinations were very satisfied or satisfied with their transport mode. The highest average satisfaction level with transportation was recorded in Emilia-Romagna Region (4.8 out of 5) and the lowest in Belgrade (4.1 out of 5). The average satisfaction level with transportation at ADRION level was the same among domestic and foreign visitors (4.3). The mean satisfaction level with specific mode of transport depended greatly on the number of people that used this transport mode – the mean satisfaction is most credible for car use, since the number of visitors using cars was the highest.

Figure 53: Level of satisfaction with modes of transport per case (in %)

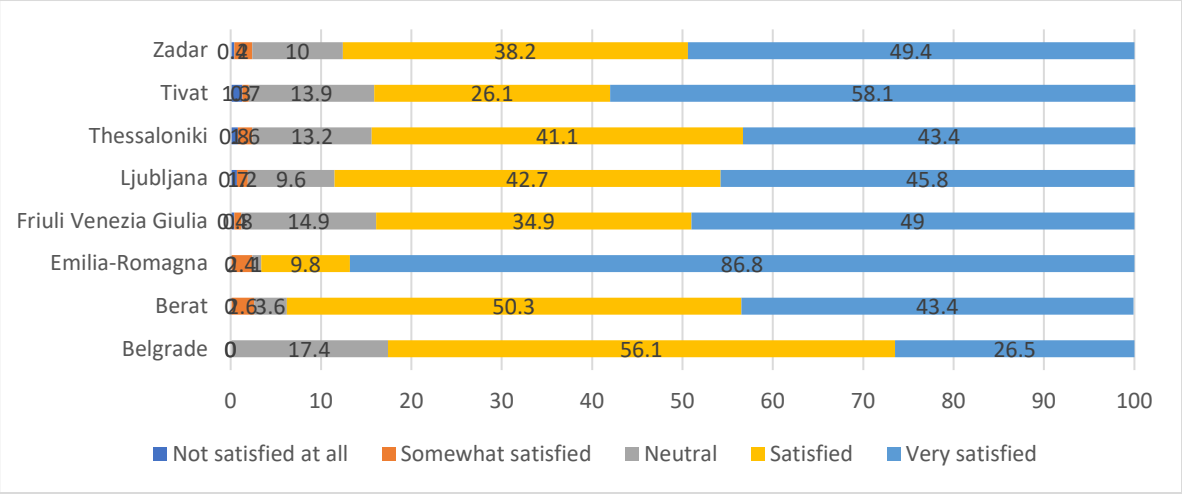


Figure 54: Level of satisfaction with modes of transport at ADRION level (in %)

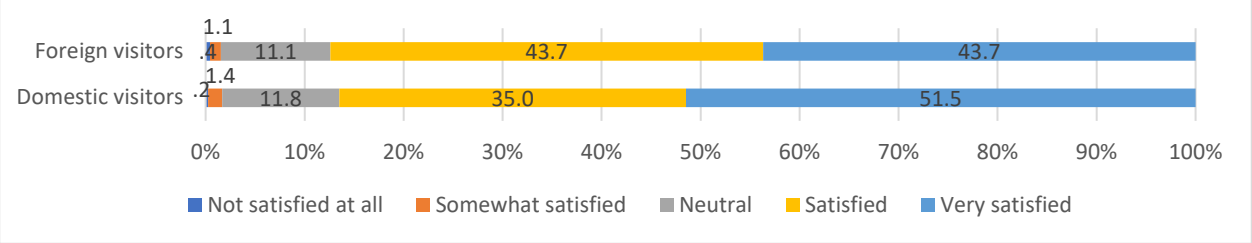


Table 8: Mean satisfaction with modes of transport per case and at ADRION level

Mean satisfaction	Belgrade	Berat	Emilia-Romagna	Friuli Venezia Giulia	Ljubljana	Thessaloniki	Tivat	Zadar	**Average**
Car	4.1	4.4	4.8	4.3	4.4	4.2	4.4	4.4	4.375
Airplane	4.1	4.5	5.0	4.2	4.4	4.3	4.5	4.4	4.425
Bicycle		4.4	4.0		4.3		4.6	3.5	4.16

Interurban Public Bus	3.9	3.2	4.7		4.1	4.3	4.4	4.2	4.114
Motorbike		4.3		4.0	3.4		4.5	4.0	4.04
Touristic Bus (or Flixbus)	3.0	4.4	5.0	4.2	4.1	4.0	4.2	3.8	4.0875
Camper Van		4.9	4.5	5.0	4.4		4.4	2.0	4.2
Ship		4.0				3.0	4.5	4.1	3.9
Rail			4.6	4.3	4.2	4.3		5.0	4.48
Cruise ship								4.0	4.0
Other			4.0					4.3	4.15
Average	**4.1**	**4.4**	**4.8**	**4.3**	**4.4**	**4.2**	**4.4**	**4.3**	**4.176**

Mean satisfaction	ADRION Domestic visitors	ADRION Foreign visitors	**Average**[4]
Car	4.4	4.3	4.35
Airplane	4.4	4.3	4.35
Bicycle	4.3	4.4	4.35
Interurban Public Bus	4.0	4.3	4.15
Motorbike	4.5	3.7	4.1
Touristic Bus (or FLiXBUS)	4.1	4.3	4.2
Camper Van	4.4	4.4	4.4
Ship	4.4	4.0	4.2
Rail	4.4	4.5	4.45
Cruise ship	4.0		4.0
Average	**4.3**	**4.3**	

Q19: Please state the main reason for choosing "name of destination" for your visit

The dominant reasons for choosing destinations across most destinations were sightseeing and visiting friends and family. At seaside destinations, sea and sun was also a popular answer, especially in Emilia-Romagna Region (77.1 %). At ADRION level, these three reasons were also dominant, followed by business tourism. More foreign visitors (54.5 %) were interested in sightseeing than domestic visitors (26.7 %). Results from Thessaloniki, Emilia-Romagna Region, Ljubljana, Zadar, Tivat and Belgrade are additionally interpreted

[4] Different averages of mean satisfaction with modes of transport calculated at ADRION level (domestic and foreign visitors) and for all cases together are the result of a slightly different data bases, as explained under Methodology.

by project partners below. Central European Initiative – Executive Secretariat (Friuli Venezia Giulia Region) and University of Belgrade are responsible for adding interpretation since input was not delivered on time.

Figure 55: Main reason for visitation per case (in %)

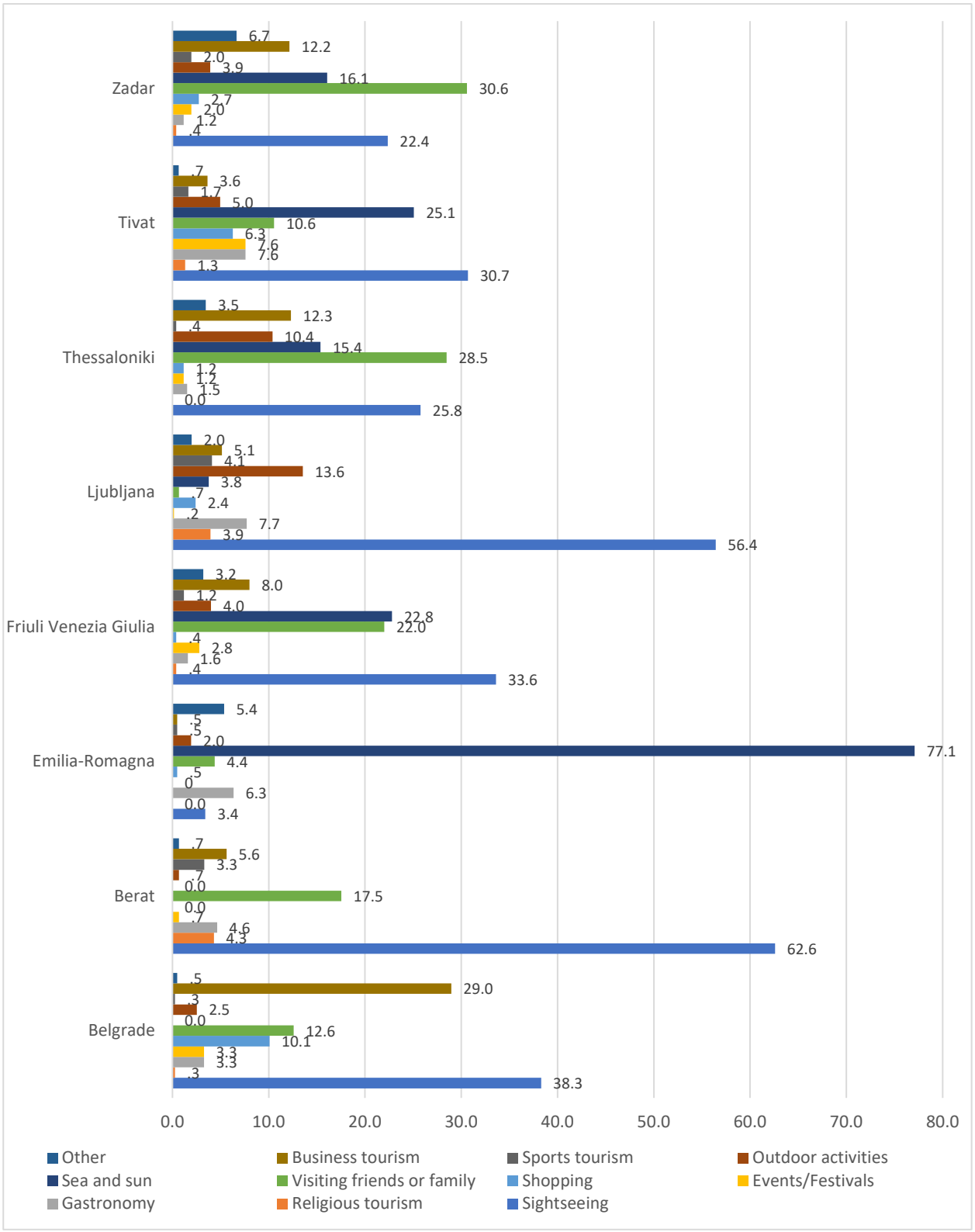
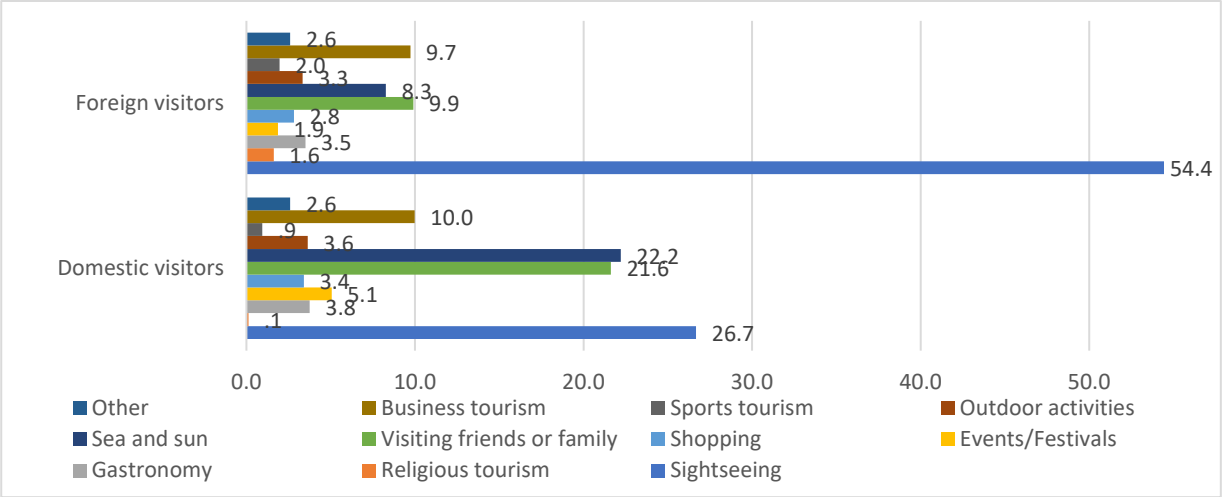


Figure 56: Main reason for visitation at ADRION level (in %)



Regional Council of Berat: The main reasons for visiting Berat are sightseeing and visiting friends and family, which are well aligned with the touristic flows in the region. International tourists arrive in the city mainly for sightseeing, while domestic tourists have additional reasons for visiting, such as visiting friends and family. Other reasons, such as religious purposes, sports, recreation and leisure and business tourism are less common reasons for visiting Berat. In the context of the project, this represents a good potential for using the mobile application as a tool for providing tourists/visitors with information about main touristic destinations in and around the city of Berat.

Institute for Transport and Logistic Foundation: The Emilia-Romagna costal area is famous in Italy and abroad mainly as a seaside destination (even if in the last years a lot of efforts were done in order to have a wider tourist offer). The predominance (77.1 %) of the sea and sun reason was absolutely expected. This is strongly related to the period the surveys were conducted.

Institute of Traffic and Transport Ljubljana: Sightseeing, outdoor activities and gastronomy are the most representative reason of visit to Ljubljana, which speaks in favour of our tourist package, in which it seems necessary to include the offer of food and drinks.

HIT CERTH: For Thessaloniki case almost 1 out of 3 respondents declared they have visited the city for meeting friends and relatives (28.5 %). This can be considered as a rather high percentage for Thessaloniki's visitors (probably not a representative one comparing to previous years' similar surveys, when most of tourists seem to have visit the city for 'sea and sun' reasons or 'sightseeing' reasons) and can be easily explained by the fact that many visitors decided to spend their holidays in friends and relatives for safety reasons, due to Covid-19 emergency situation occurred. Respectively, selecting the 'sea and sun' answer as a reason for visiting the city can be considered as a rather low percentage for Thessaloniki case, taking into consideration its proximity to Halkidiki, a destination one hour away from the city and one of the top summer tourism destinations in North Greece. From the other hand 25.8 % of respondents declared to have visited the city for sightseeing reasons, highlighting that its rich historical and cultural heritage, can further expand the city's reputation as one of the most attractive tourism destinations in Greece.

Municipality of Tivat: Results about main reason of visit are representative and show that our destination is well structured in context of tourism products and services, followed by distinctive positioning and branding. Further improvements are necessary, related to diversification of tourist destination integral product.

City of Zadar: Data can be best compared to the data produced by TOMAS 2019 research. TOMAS research is one of the oldest continuous research on visitors' characteristics in Europe. TOMAS 2019 research was conducted in Croatia in the period from May 2019 to March 2020 on total 13,582 visitors (both domestic and foreign). The presented data from the Sustourismo survey varies a lot compared to the travel motivation for visiting Zadar County stated in the survey TOMAS 2019 (conducted by the Institute of Tourism), where spending holidays was the main reason for travel for most of the surveyed visitors (95.4 %), followed by business (1.5 %), visiting family and friends (0.9 %), health related reasons (0.4 %), education (0.5 %) and religious reasons (0.8 %). Again, due to the pandemic in 2020 and all travel restrictions, the motivation stated in the survey does not surprise, as most of the accommodation and tourism facilities were closed during the period when the survey was conducted. So, the majority of travels were based on visiting close people, such as friends and relatives. Another reason for such results can be found in the period when the survey was conducted, it being the post-season when tourists cannot enjoy the sun and sea element.

Q20: What transport mode / modes did you mostly use (or are you using) for your trips within the city? (up to 3 choices in order of frequency of usage)

Respondents were asked about the transport mode they used within the city. They picked up to 3 choices in order of frequency or usage, hence the results are shown in three separate tables. In Berat, Emilia-Romagna Region, Friuli Venezia Giulia Region, Ljubljana and Thessaloniki walking was the most used mode of transport, while private vehicles were most commonly used in Belgrade, Tivat, Zadar. These were the most used modes of transport within the cities overall, followed by city bus, rented vehicle and e-scooter (only in Emilia-Romagna Region). As the first choice, sea transport was picked only in Thessaloniki (0.5 %) and city train only in Belgrade and Berat (0.3 % both). Metro and tram were not picked as a first choice in any of the destinations. Taxi and bicycle were used by smaller shares of respondents. Private and rented vehicles include cars, motorbikes, camper vans etc.

Private vehicle, city bus and walking were the most popular transport modes among domestic and foreign visitors of ADRION region. As second and third choice, another popular option was a taxi. 44.2 % of domestic visitors and 31 % of foreign visitors in the region listed private vehicle as their first choice of transportation within the pilot cities, which represents the main challenge that Sustourismo project is addressing.

Results from Thessaloniki, Emilia-Romagna Region, Ljubljana, Zadar, Tivat and Belgrade are additionally interpreted by project partners below. Central European Initiative – Executive Secretariat (Friuli Venezia Giulia Region) and University of Belgrade are responsible for adding interpretation since input was not delivered on time.

Table 9: Transport within the city – First choice; top 3

Belgrade	Berat	Emilia-Romagna	Friuli Venezia Giulia	Ljubljana
Private vehicle – 68.6 %	On foot – 62.5 %	On foot – 73.4 %	On foot – 36.5 %	On foot – 46.8 %

City bus – 13.4 %	Private vehicle – 24.6 %	Private vehicle – 11.3 %	Private vehicle – 30.1 %	Private vehicle – 31 %
On foot – 8.1 %	Rented vehicle – 8 %	E-scooter – 7.9 %	City bus – 13.3 %	City bus – 12.2 %
Thessaloniki	Tivat	Zadar	ADRION Domestic visitors	ADRION Foreign visitors
On foot – 32.3 %	Private vehicle – 57.8 %	Private vehicle – 58.6 %	Private vehicle – 44.2 %	On foot – 46.3 %
Private vehicle – 25.5 %	On foot – 19.9 %	On foot – 31.3 %	On foot – 35 %	Private vehicle – 31 %
Rented vehicle – 16.2 %	City bus – 11 %	City bus – 4.3 %	City bus – 8.4 %	City bus – 9.8 %

Table 10: Transport within the city – Second choice; top 3

Belgrade	Berat	Emilia-Romagna	Friuli Venezia Giulia	Ljubljana
On foot – 59.3 %	On foot – 27.9 %	Bicycle – 28.4 %	City bus – 29 %	City bus – 30.9 %
City bus – 18.2 %	Taxi – 19.7 %	On foot – 27.3 %	On foot – 27 %	On foot – 18.9 %
Taxi – 11.7 %	Rented vehicle – 15.7 %	E-scooter – 15.9 %	Private vehicle – 23 %	Bicycle / Private vehicle – 16.7 %
Thessaloniki	Tivat	Zadar	ADRION Domestic visitors	ADRION Foreign visitors
On foot – 27.9 %	On foot – 21.1 %	Private vehicle – 37 %	On foot – 32 %	On foot – 29.6 %
Private vehicle – 22.1 %	City bus – 20.7 %	On foot – 29.6 %	Private vehicle – 20.4 %	City bus – 18.8 %
City bus – 21.3 %	Taxi – 15.1 %	City bus – 13.4 %	City bus – 18.7 %	Taxi – 13.8 %

Table 11: Transport within the city – Third choice; top 3

Belgrade	Berat	Emilia-Romagna	Friuli Venezia Giulia	Ljubljana
Taxi – 37.9 %	City bus – 22.2 %	On foot – 26.1 %	Private vehicle – 28 %	City bus – 25.3 %
On foot – 36.4 %	Rented vehicle – 21 %	City bus / Bicycle – 21.7 %	City bus / Taxi – 20 %	Rented vehicle – 23.5 %
City bus – 12.3 %	Bicycle / Private vehicle – 19.8 %	Taxi / Private vehicle – 13 %	City train – 12 %	Private vehicle – 18.5 %
Thessaloniki	Tivat	Zadar	ADRION Domestic visitors	ADRION Foreign visitors
Private vehicle – 25.5 %	Taxi – 32.1 %	On foot – 32.7 %	Private vehicle – 21 %	Taxi – 24.1 %
On foot – 23.4 %	City bus – 16.2 %	Private vehicle – 29.2 %	On foot – 20.3 %	On foot – 19.5 %
City bus – 17 %	On foot – 14.8 %	City bus – 13.5 %	City bus – 18.3 %	City bus – 17.9 %

Regional Council of Berat: The most common used transportation modes in Berat are on foot (62.5 %) followed by private vehicles (24.6 %) and rented vehicles (8 %). This information is aligned with the current estimations, especially considering the characteristics of the city in terms of tourism (i.e., the city is relatively small, and the main points of touristic interests lie in proximity to one another). This information is useful for designing and implementing the touristic packages, which heavily rely on walking tours. The responses also reflect a lack of alternative transportations modes within the city, such as bicycle usage, or other green transportation modes.

Institute for Transport and Logistic Foundation: The Emilia-Romagna coastal cities are not so big and usually the tourists reach these cities for enjoy the sea and the beaches. So it is clear that the tourists' first transport option within the city is on foot (73.4 %).

Institute of Traffic and Transport Ljubljana: Almost 50 % of visitors are using walking around the city, since Ljubljana is a small city and almost everything is in walking distance. We see the opportunity to encourage use of sustainable mobility transport modes such as bikes and scooters.

HIT CERTH: On foot, private vehicle and city bus are the three top answers regarding the transport mode used for trips within the city of Thessaloniki. Walking seems to be the most preferable option regarding the first and the second choices (32.3 % and 27.9 % respectively), a fact that can be easily explained considering that the majority of historical and cultural sites and museums are all concentrated in the city centre and at close distance from each other. However, more efforts should take place to enhance the existing pedestrian infrastructures and implement a coherent pedestrian network in order a remarkable shift from private vehicle (concentrating 25.5 % and 22.1 % in the first two choices and 25.5 % in the third one) to alternative transport modes to be achieved. In the same line, an extra boost should also be given in the provided by the city urban bus services as this option concentrates the lowest percentages in all three choices. Issues regarding good connectivity, road network coverage and reliability in time schedules should also be considered regarding the visitors' real needs and requirements. Finally, the absence of bicycle and scooter use indicates that the specific transport modes are not in visitors' most preferable options, a fact that should be considered in the immediate future for the design and provision of quality services regarding this type of alternative transport modes.

Municipality of Tivat: Alternative means of transportation, such as electric boat, e-bike and tuk tuk, were rated as most desired for travel to Salina, whereas for Luštica Bay, which is located 15 km out of the city centre, most preferred modes of transportation are an electric boat, bus and tuk tuk. Bus, jeep and bike are the preferred modes of transport of visitors when they want to visit Vrmac. Considering these results, public transport (e.g., bus) has to be carefully planned to address the needs of hikers and similar active visitors, as well as mentioned means of transportation.

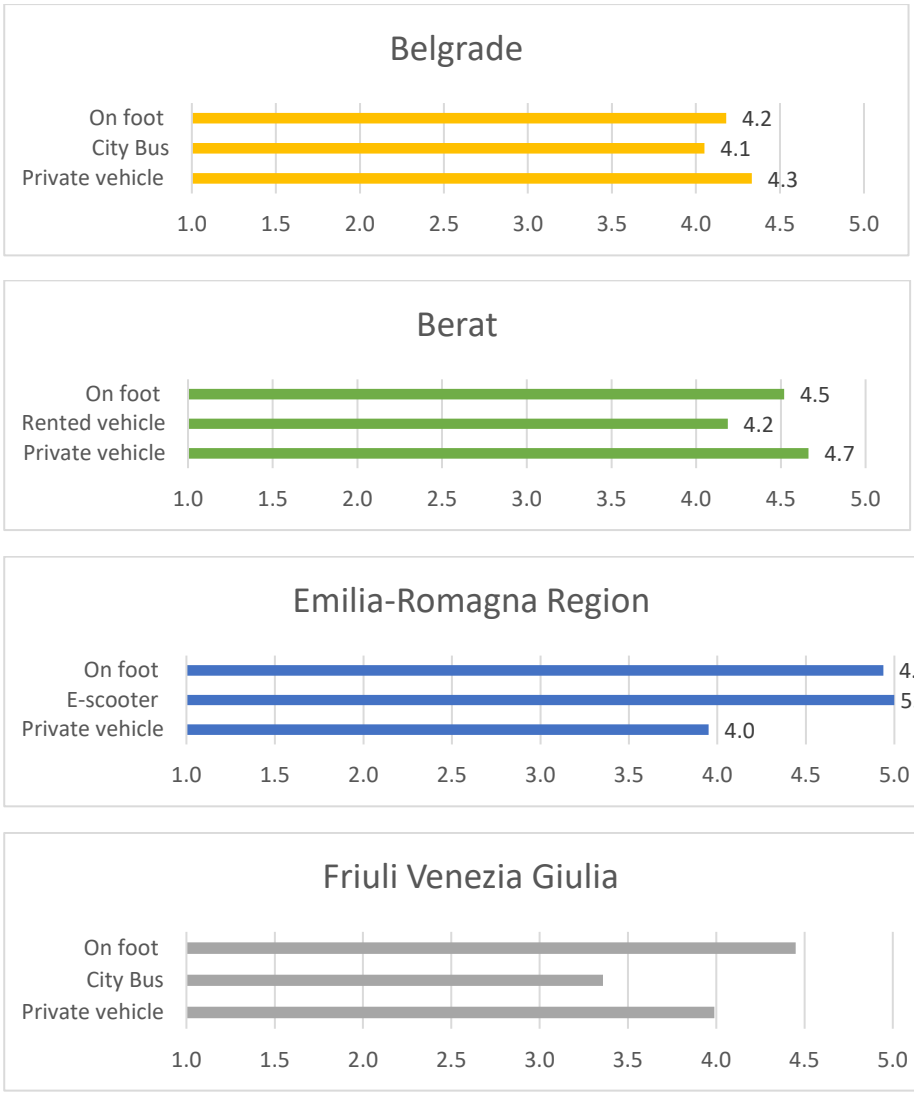
City of Zadar: The top three choices respondents listed as their first choice for transportation modes within Zadar were private vehicles (58.6%), travelling on foot (31.3%) and city bus (4.3%). Due to the pandemic, as it was stated earlier, the majority of tourists arrived individually and by private vehicles, as it was the safest choice for their travels. This is also one of the reasons for the previously listed shares in the transportation modes. Tourist decided to stay safe and to travel within the city in a private vehicle. The fact that a significant

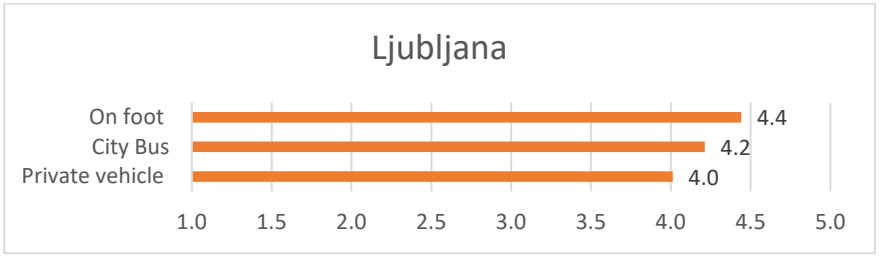
share of surveyed tourists prefers travelling on foot could also suggest that there is a potential to better develop the concept of slow tourism in Zadar, supporting sustainable travelling and taking time to explore the destination at a slower pace. This is also a very good indicator for the development of sightseeing routes that can be done by foot in the city of Zadar.

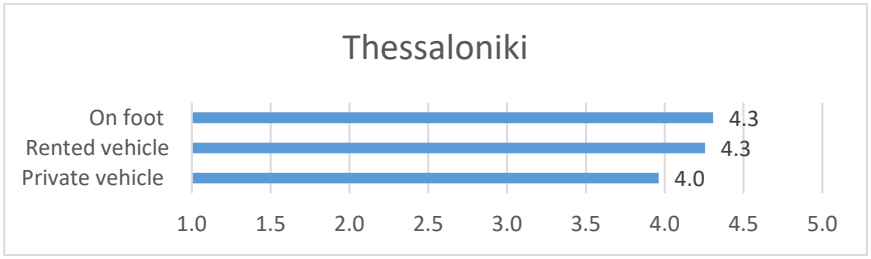
Q21: Please state your level of satisfaction (using a scale from 1 – Not at all satisfied to 5 – Very satisfied) from the transport mode (or modes) stated above

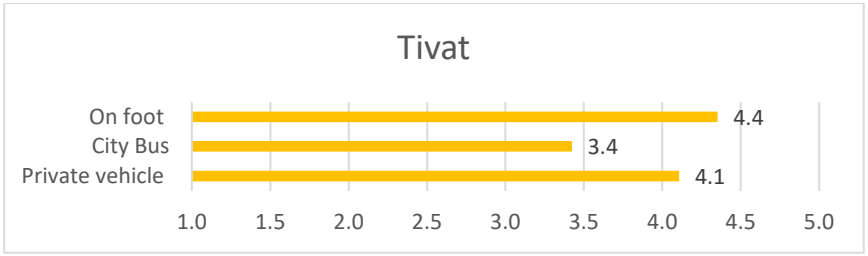
Average level of satisfaction with different modes of transport within the city is shown on a scale 1 – 5 separately for each project partner and entire ADRION region. Modes of transport not selected in Q20 are omitted. Moreover, only top 3 answers (first choice) are shown for each case and ADRION region to avoid unrepresentative average levels of satisfaction calculated on the basis of only a few answers.

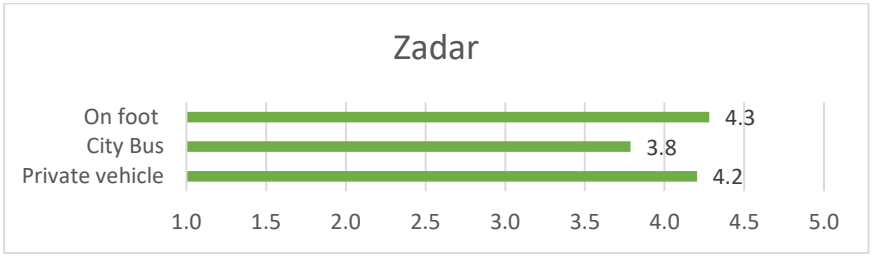
Figure 57: Average level of satisfaction with modes of transport within the city; joined graphs

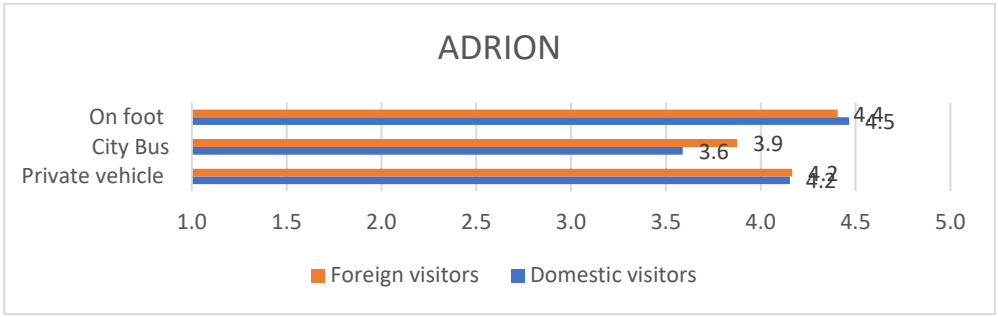












Q22: Why did you mainly choose to use this/these transport mode/modes?

Most visitors of the ADRION region chose a specific transport mode within the city because it was the most comfortable way. Their share was 38.2 % among domestic visitors and 22.4 % among foreign visitors. The second most common reason was that the transport mode selected was the fastest. These two reasons were also dominant in all destinations except for Berat (main reason – most attractive way) and Belgrade (most

comfortable way). Further, reasons for choosing modes of transport are linked with specific transport modes in Table 12 and Table 13 (at ADRION level, for domestic and foreign visitors). The key reason for choosing a private or rented vehicle, which are mostly cars, is again the comfort, especially among domestic visitors of ADRION.

Figure 58: Reasons for choosing transport modes within the city at ADRION level (in %)

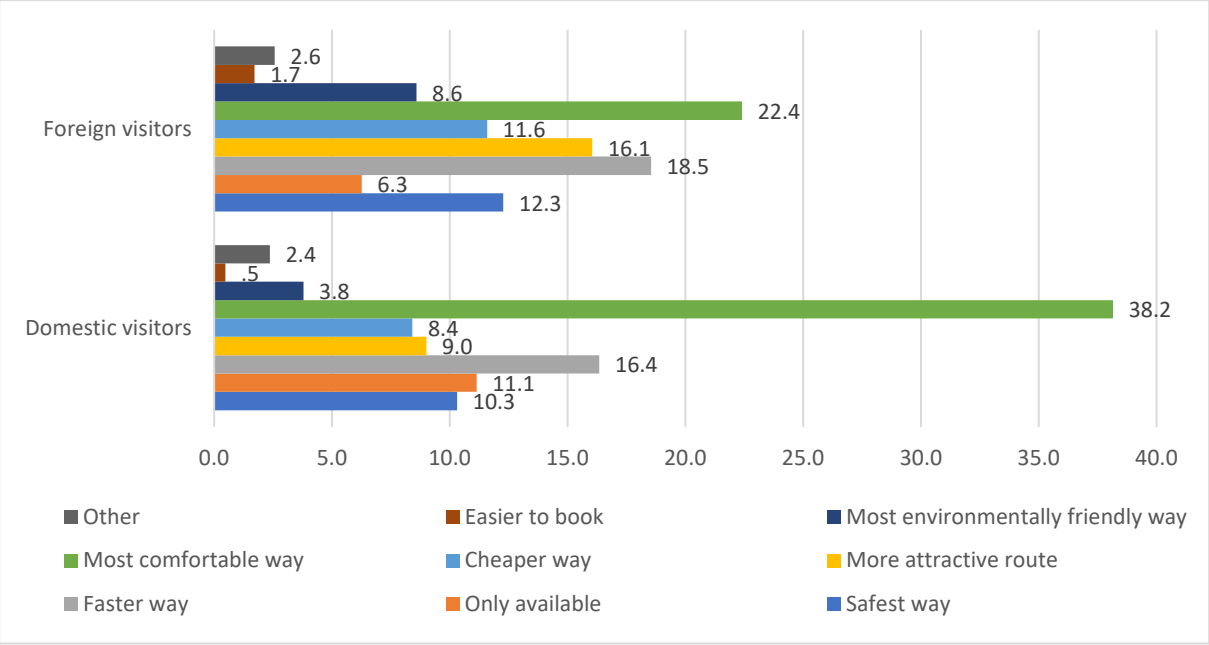


Figure 59: Reasons for choosing transport modes within the city per case (in %)

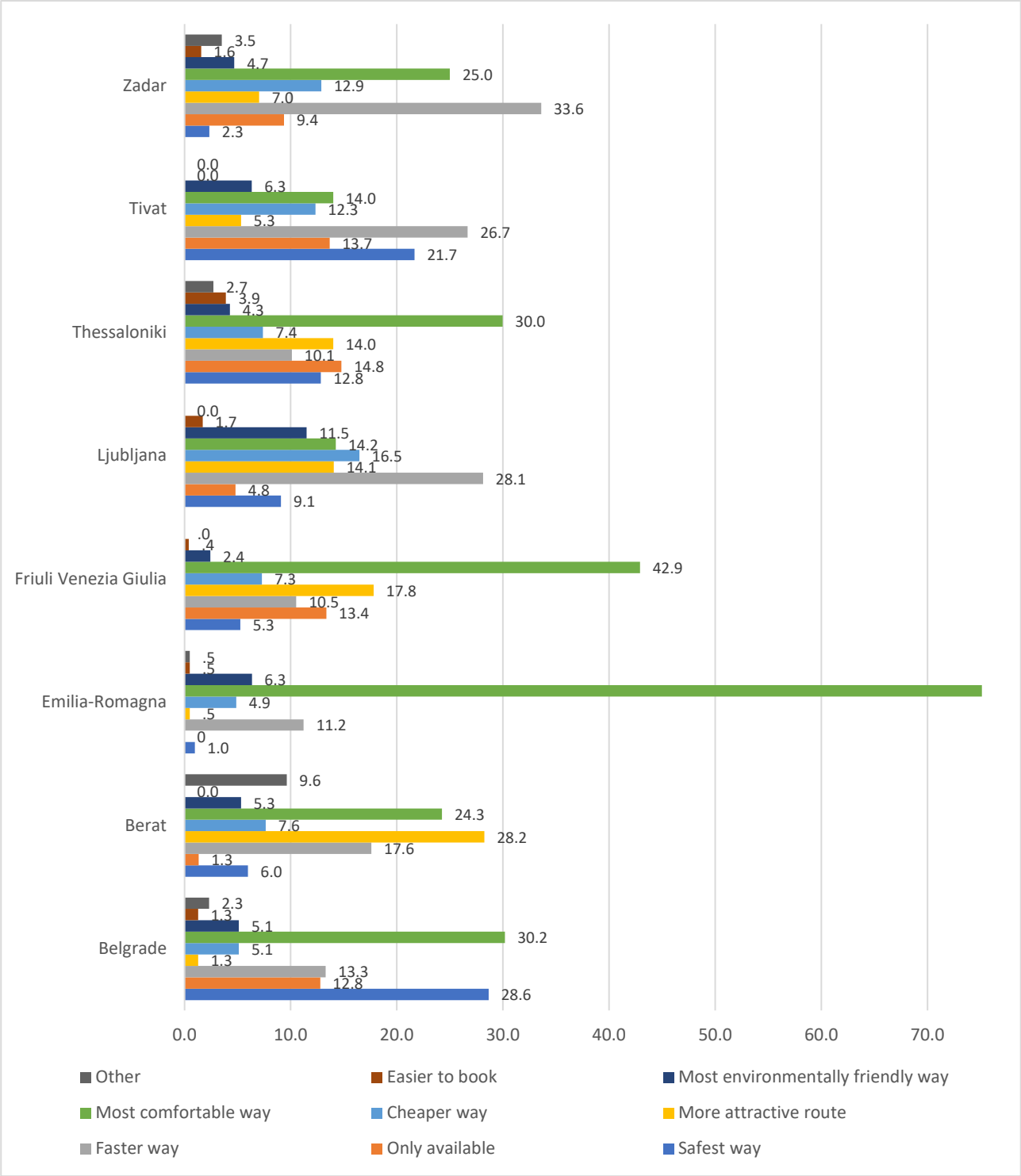


Table 12: Reasons for choosing modes of transport within the city per transport mode at ADRION level; domestic visitors

	Safest way	Only availa-ble	Faster way	More attractive route	Cheap-er way	Most comfortable way	Most environment-ally friendly way	Easier to book	Other
Private vehicle	13.8 %	11.1 %	22.9 %	6.3 %	5.4 %	35.8 %	1.7 %	0.4 %	2.8 %
Rented vehicle	16.5 %	14.3 %	14.3 %	4.4 %	8.8 %	34.1 %		1.1 %	6.6 %
City Bus	11.3 %	14.0 %	19.4 %	5.0 %	21.2 %	20.3 %	5.4 %	0.5 %	3.2 %
City train			40.0 %		20.0 %	40.0 %			
Sea transport	6.1 %	15.2	30.3 %	15.2 %	0.0 %	15.2 %	15.2 %	3.0 %	
Bicycle	6.5 %	9.7	19.4 %	10.8 %	8.6 %	24.7 %	12.9 %	1.1 %	6.5 %
E-scooter	3.0 %		33.3 %	6.1 %	6.1 %	45.5 %	6.1 %		
On foot	6.9 %	10.5 %	14.5 %	11.9 %	9.8 %	38.4 %	5.2 %	0.4 %	2.5 %
Taxi	12.6 %	18.5 %	21.8 %	9.2 %	7.6 %	20.2 %	3.4 %	0.8 %	5.9 %

Table 13: Reasons for choosing modes of transport within the city per transport mode at ADRION level; foreign visitors

	Safest way	Only availa-ble	Faster way	More attractive route	Cheap-er way	Most comfortable way	Most environment-ally friendly way	Easier to book	Other
Private vehicle	20.0 %	7.8 %	24.7 %	7.0 %	7.0 %	24.9 %	4.1 %	0.8 %	3.7 %
Rented vehicle	17.1 %	3.3 %	23.8 %	6.1 %	7.7 %	28.7 %	3.3 %	1.1 %	8.8 %
City Bus	13.0 %	12.4 %	19.7 %	7.0 %	20.9 %	13.6 %	8.2 %	2.4 %	2.7 %
City train		28.6 %			28.6 %	28.6 %			14.3 %
Sea transport	15.6 %	18.8 %	25.0 %	12.5 %		15.6 %	12.5 %		
Bicycle	9.0 %	2.6 %	11.6 %	22.6 %	13.5 %	18.1 %	19.4 %	1.9 %	1.3 %
E-scooter	11.4 %	8.6 %	22.9 %	14.3 %	11.4 %	8.6 %	14.3 %	2.9 %	5.7 %
On foot	10.2 %	5.7 %	14.8 %	21.1 %	11.2 %	23.3 %	9.9 %	1.3 %	2.5 %
Taxi	19.3 %	6.7 %	25.2 %	8.0 %	12.2 %	19.7 %	5.0 %	1.7 %	2.1 %

Q23: What gaps/difficulties did you encounter during your trips within the city? (state all that apply)

Heavy traffic was highlighted as the biggest difficulty encountered during visitors' trips within the city in Belgrade (90 %), Tivat (48 %), Ljubljana (24.5 %) and Friuli Venezia Giulia Region (17.1 %). This result can be connected with the fact that private vehicle was chosen as the top transport mode choice in these cities. In

Berat, 42.4 % of visitors were missing more appropriate infrastructure for alternative transport modes, while in Thessaloniki 20.4 % of visitors were bothered by inadequate public transport services provision and low public services quality. In Zadar and Emilia-Romagna Region, the largest share of visitors chose “other” as one of the answers. Around of a third of both domestic and foreign visitors at ADRION level recognized the biggest gap in heavy traffic. Results from Thessaloniki, Emilia-Romagna Region, Ljubljana, Zadar, Tivat and Belgrade are additionally interpreted by project partners below. Central European Initiative – Executive Secretariat (Friuli Venezia Giulia Region) and University of Belgrade are responsible for adding interpretation since input was not delivered on time.

Figure 60: Gaps and difficulties encountered during trips within the city at ADRION level (in %)

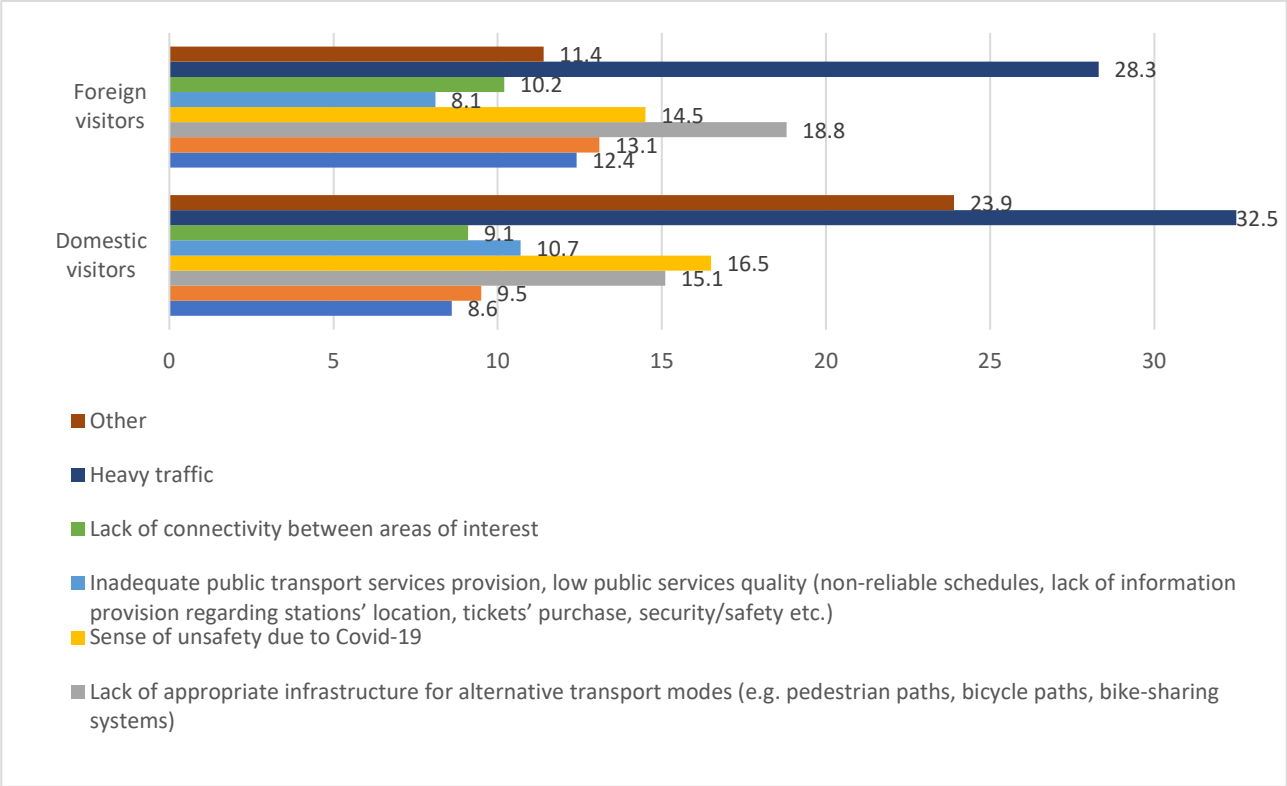
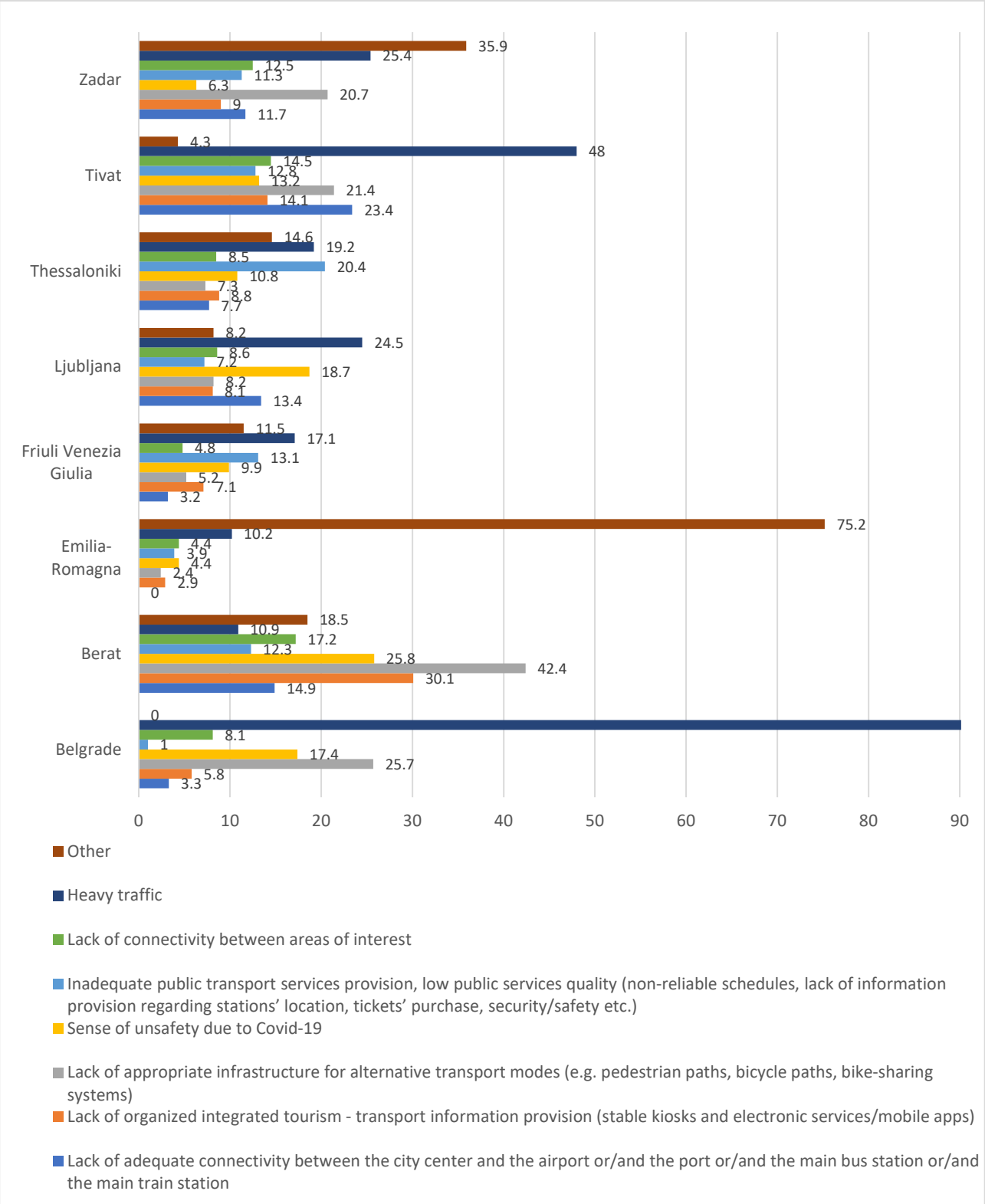


Figure 61: Gaps and difficulties encountered during trips within the city per case (in %)



Regional Council of Berat: In Berat, 42.4 % of visitors were missing more appropriate infrastructure for alternative transport modes, followed by lack of organized integrated tourism – transport information provision, and issues related to the Covid-19 pandemic. Infrastructure plays an important role and has an important effect on tourism in the region, especially in relation to poor road infrastructure to access touristic destinations outside of the city, as well as key destinations within the city (e.g., the road to the city's castle). In addition, there is no bicycle network within the city that would facilitate and allow the use of greener modes of transportation within the city. Furthermore, there is still room for improvement for providing adequate, reliable, organized and integrated information regarding the tourism and mobility options.

Institute for Transport and Logistic Foundation: In relation the Emilia-Romagna case, the low percentage of gaps related to traffic, lack of public transport connections, etc. is strictly related to the fact people mainly have on foot travel at urban level (see Q20).

Institute of Traffic and Transport Ljubljana: Gaps such as heavy traffic and bad connectivity were expected, since most people are still driving cars through and around Ljubljana and there are poor sustainable transport connection in the city.

HIT CERTH: In Thessaloniki's case heavy traffic seems to be the major difficulty tourists encountered during their staying in the city (20.4 %), while the public transport services provision was assessed as inadequate by 19.2 % of respondents. Also, a sense of unsafety due to Covid-19 pandemic has been declared, which may arise from the low quality of public transport services (overcrowded buses, non-reliable time schedules, etc.). The above-mentioned issues, indicate that there is a lot to be done in the city for improving the mobility services and especially those supporting the use of public transport as well as the use of alternative transport modes (walking, bicycle, etc.)

Municipality of Tivat: In context of mobility within the city, local traffic needs better organisation and improved infrastructure for all means of transportation, especially for biking.

City of Zadar: After the option 'other' (35.9 %), the two mostly noted gaps or difficulties within the city were heavy traffic (25.4 %) and a lack of appropriate infrastructure for alternative transport modes, such as pedestrian paths, bicycle paths, bike-sharing systems (20.7 %). These answers would suggest that the traffic in Zadar is insufficiently developed for the current tourist demand and certain improvements need to be made as to better the flow of traffic in the city, especially in the high season. Traffic could also be additionally improved by investing in the development of alternative transport modes (i.e., bicycles, e-scooters, etc.), as the respondents answers also suggest.

Q24: Did you / Will you visit other touristic areas outside the city?

The largest share of visitors traveling to touristic areas outside the city was recorded in Tivat (80.5 %), followed by Ljubljana with 70.2 %, Zadar with 60.2 %, Berat with 55.5 % and Thessaloniki with 51.9 %. This result can be connected with the need for integrated mobility packages enabling visitors to travel outside the city. The smallest share of such visitors was recorded in Belgrade (17.5 %). At ADRION level, there were no large differences between domestic and foreign visitors.

Figure 62: Visitation of other touristic areas outside the city (in %)

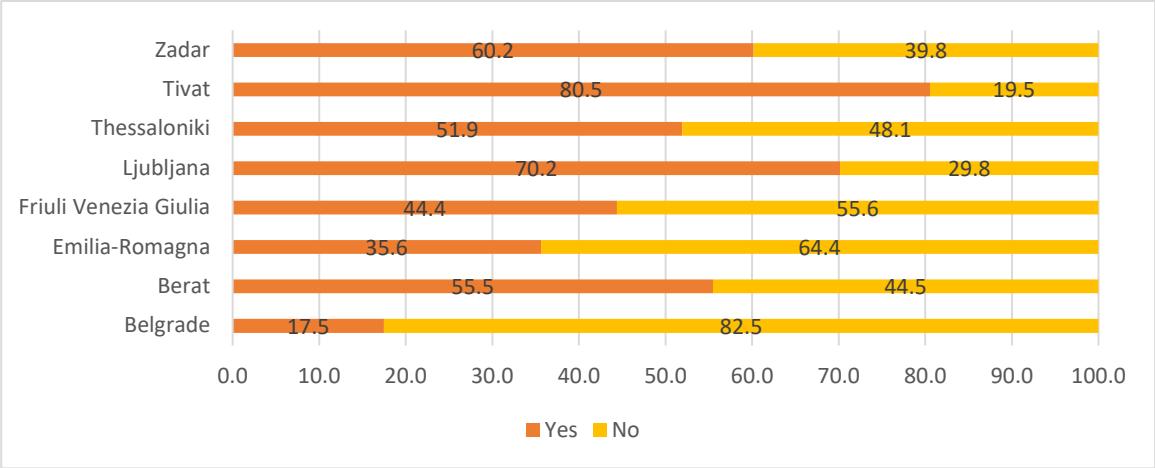
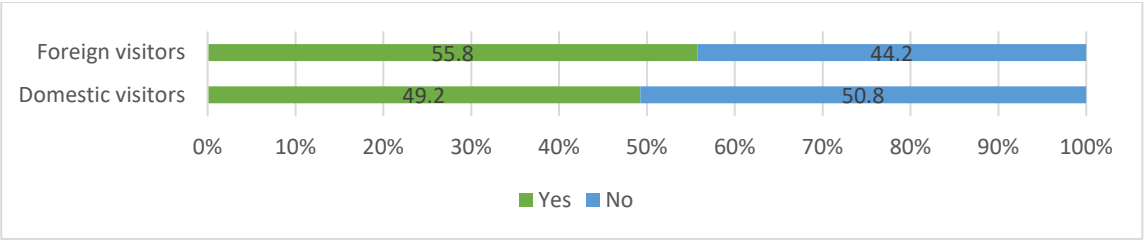


Figure 63: Visitation of other touristic areas outside the city at ADRION level (in %)



Q25: What transport mode / modes did you mostly use (or are you using) for your trips outside the city? (up to 3 choices in order of frequency)

Respondents declaring to have visited areas outside the city, were asked about the transport mode they used for such trip(s). They picked up to 3 choices in order of frequency or usage, hence the results are depicted in three separate tables. In all destinations and at ADRION level as well (among domestic and foreign visitors), private vehicles were the most commonly used mode of transport (considering first choice answers), while rented vehicles and interurban public buses were also popular. As the first choice, touristic bus (or Flixbus) was chosen in Berat, Zadar and among foreign visitors at ADRION level. Train was only chosen as the first choice in Emilia-Romagna Region and sea transport only in Tivat. Other transport modes were only picked as the second or third option.

Table 14: Transport outside the city – First choice; top 3

Belgrade	Berat	Emilia-Romagna	Friuli Venezia Giulia	Ljubljana
Private vehicle – 86.8 %	Private vehicle – 43.7 %	Private vehicle – 61.6 %	Private vehicle – 56.8 %	Private vehicle – 69.9 %
Interurban Public bus – 8.8 %	Touristic bus (or Flixbus) – 32.9 %	Interurban Public Bus – 30.1 %	Rented vehicle – 21.6 %	Rented vehicle – 10.5 %
Rented vehicle – 4.4 %	Rented vehicle – 16.8 %	Train – 6.8 %	Interurban Public Bus – 12.6 %	Interurban Public bus – 9.5 %

Thessaloniki	Tivat	Zadar	ADRION Domestic visitors	ADRION Foreign visitors
Private vehicle – 54.7 %	Private vehicle – 72 %	Private vehicle – 85.9 %	Private vehicle – 72.6 %	Private vehicle – 58.2 %
Rented vehicle – 22.6 %	Interurban Public Bus – 14.8 %	Interurban Public Bus – 4.9 %	Interurban Public Bus – 11.9 %	Rented vehicle – 13.7 %
Interurban Public Bus – 10.9 %	Sea transport – 4.5 %	Touristic bus (or Flixbus) – 3.2 %	Rented vehicle – 8.4 %	Touristic bus (or Flixbus) – 12 %

Table 15: Transport outside the city – Second choice; top 3

Belgrade	Berat	Emilia-Romagna	Friuli Venezia Giulia	Ljubljana
Interurban Public Bus – 63.6 %	Rented vehicle – 30.7 %	Train – 44.4 %	Sea transport – 68.4 %	Interurban Public Bus – 42.9 %
Train – 22.7 %	Private vehicle – 20 %	Bicycle – 22.2 %	Private vehicle / Taxi – 10.5 %	Train – 17.3 %
Taxi – 9.1 %	Interurban Public bus / Taxi – 16 %	Private vehicle / Interurban Public Bus – 16.7 %	Train / Bicycle – 5.3 %	Rented vehicle – 12 %
Thessaloniki	Tivat	Zadar	ADRION Domestic visitors	ADRION Foreign visitors
Private vehicle – 34.2 %	Interurban Public Bus – 27.2 %	Private vehicle – 49.2 %	Private vehicle – 25.1 %	Interurban Public Bus – 25.8 %
Sea transport – 15.8 %	Rented vehicle – 23 %	Interurban Public Bus – 12.9 %	Interurban Public Bus – 24.2 %	Rented vehicle – 19.6 %
Interurban Public bus – 13.2 %	Taxi – 15.5 %	Sea transport / On foot – 11.4 %	Sea transport – 18.7 %	Taxi – 13.8 %

Table 16: Transport outside the city – Third choice; top 3

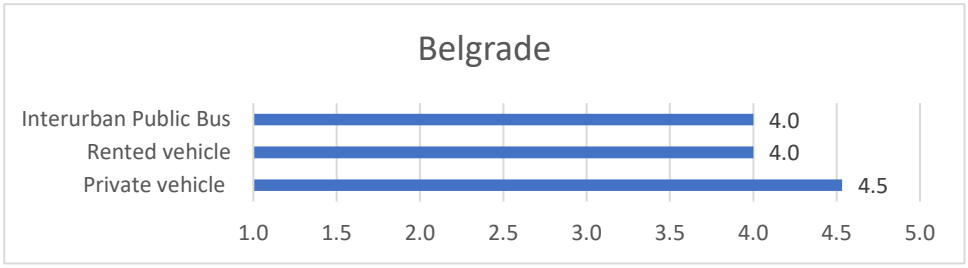
Belgrade	Berat	Emilia-Romagna	Friuli Venezia Giulia	Ljubljana
Train – 50 %	Interurban Public Bus – 32.3 %	Rented vehicle / Touristic bus (or Flixbus) / Bicycle – 25 %	Private vehicle / Sea transport / Bicycle – 33.3 %	Touristic bus (or Flixbus) – 32.9 %
Touristic bus (or Flixbus) – 40 %	Private vehicle / Rented vehicle – 24.2 %	Private vehicle / Interurban Public Bus – 12.5 %	/	Interurban Public bus – 18.6 %
Rented vehicle – 10 %	Taxi – 8.1 %	/	/	Train – 17.1 %
Thessaloniki	Tivat	Zadar	ADRION Domestic visitors	ADRION Foreign visitors
Private vehicle – 45.8 %	Taxi – 37 %	Private vehicle – 47.8 %	Private vehicle – 26 %	Interurban Public bus – 21.7 %

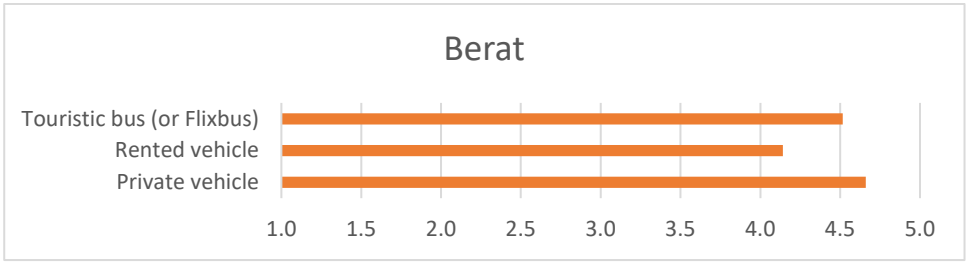
Sea transport – 20.8 %	Interurban Public Bus – 17.2 %	On foot – 14.2 %	Taxi – 18.3 %	Taxi – 20.3 %
Rented vehicle / Taxi / Bicycle / On foot – 8.3 %	Bicycle – 13 %	Sea transport – 10.6 %	Interurban Public Bus – 13 %	Private vehicle / Rented vehicle – 11.3 %

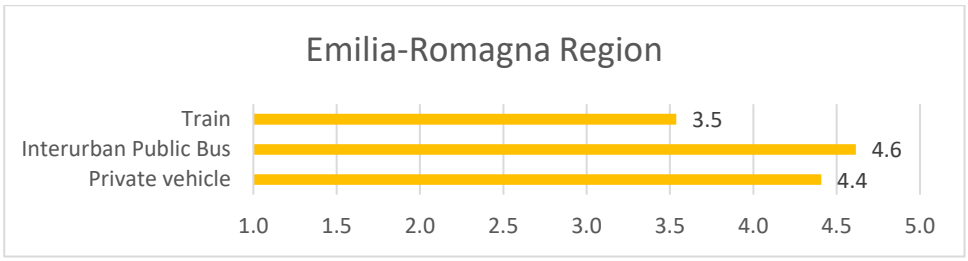
Q26: Please state your level of satisfaction (using a scale from 1 – Not at all satisfied to 5 – Very satisfied) from the transport mode (or modes) stated above

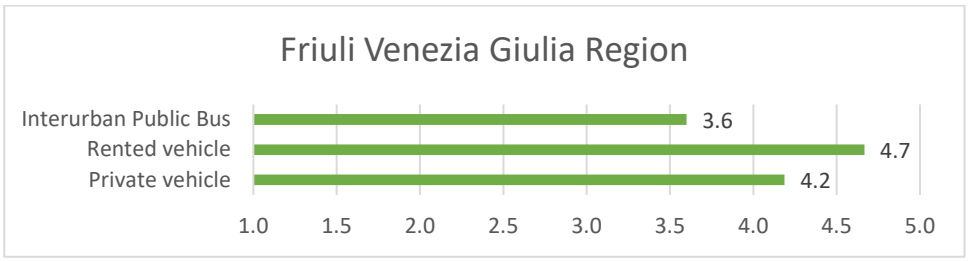
Average level of satisfaction with different modes of transport within the city among respondents who said they have travelled outside the city is shown on a scale 1 – 5 separately for each project partner and entire ADRION region. Modes of transport not selected in Q25 are omitted. Moreover, only top 3 answers (first choice) are shown for each case and ADRION region to avoid unrepresentative average levels of satisfaction calculated on the basis of only a few answers. At ADRION level, visitors were most satisfied with the following modes of transport – private vehicle, walking and rented vehicle, and least satisfied with interurban public bus, train and taxi.

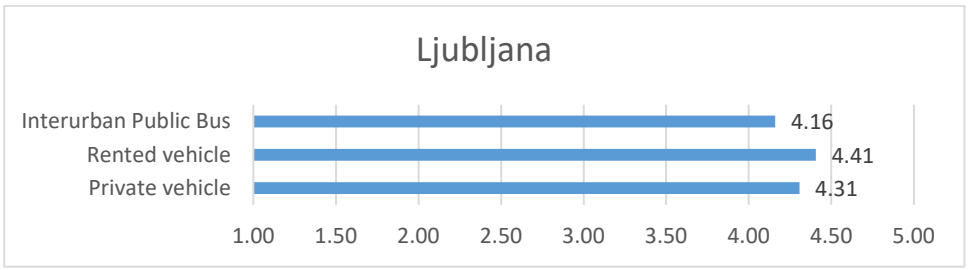
Figure 64: Average level of satisfaction with modes of transport outside the city; joined graphs

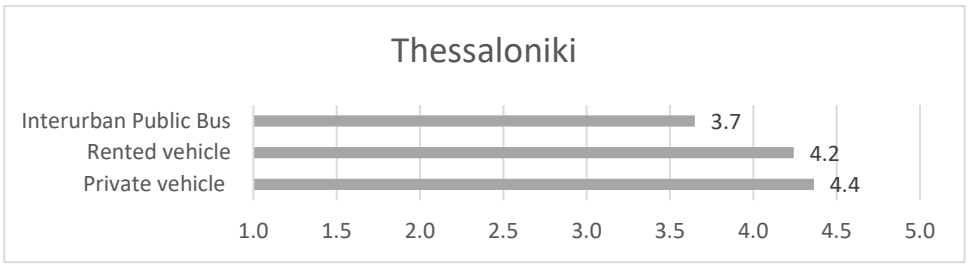


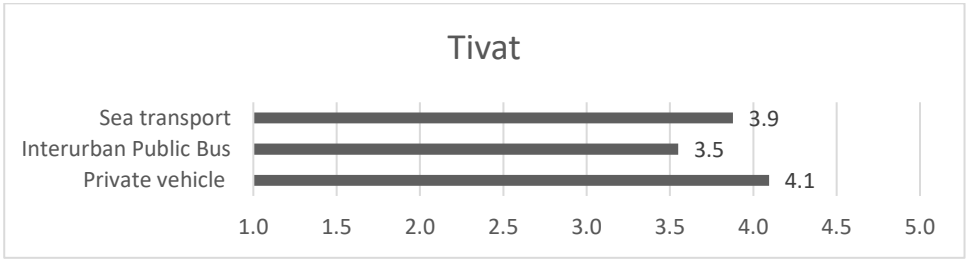


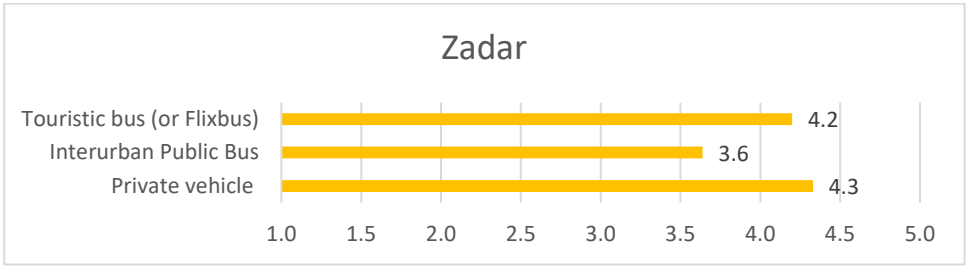


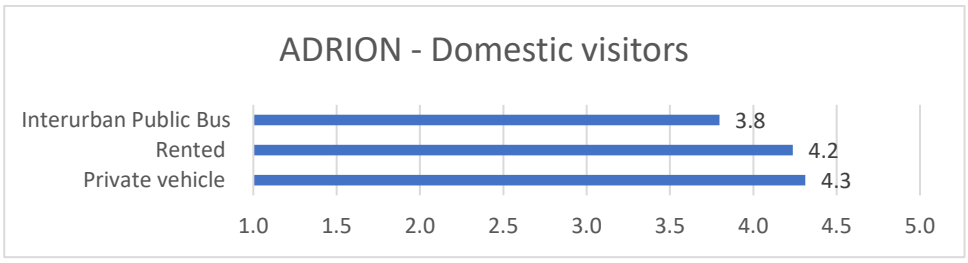

Friuli Venezia Giulia Region
Interurban Public Bus
Rented vehicle
Private vehicle
3.6
4.7
4.2
1.0 1.5 2.0 2.5 3.0 3.5 4.0 4.5 5.0

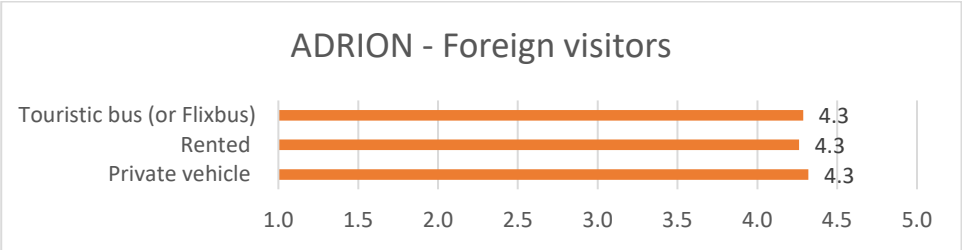

Ljubljana
Interurban Public Bus
Rented vehicle
Private vehicle
4.16
4.41
4.31
1.00 1.50 2.00 2.50 3.00 3.50 4.00 4.50 5.00


Thessaloniki
Interurban Public Bus
Rented vehicle
Private vehicle
3.7
4.2
4.4
1.0 1.5 2.0 2.5 3.0 3.5 4.0 4.5 5.0


Tivat
Sea transport
Interurban Public Bus
Private vehicle
3.9
3.5
4.1
1.0 1.5 2.0 2.5 3.0 3.5 4.0 4.5 5.0


Zadar
Touristic bus (or Flixbus)
Interurban Public Bus
Private vehicle
4.2
3.6
4.3
1.0 1.5 2.0 2.5 3.0 3.5 4.0 4.5 5.0


ADRION - Domestic visitors
Interurban Public Bus
Rented
Private vehicle
3.8
4.2
4.3
1.0 1.5 2.0 2.5 3.0 3.5 4.0 4.5 5.0



Q27: What gaps/difficulties did you encounter during your trips outside the city? (state all that apply)

Regarding trips outside the city, heavy traffic was again a dominant difficulty encountered across most destinations and at ADRION level, while in Zadar and Emilia-Romagna Region, the majority of visitors selected the answer "other". Other results are shown in the below figures. Results from Thessaloniki, Emilia-Romagna Region, Ljubljana, Zadar, Tivat and Belgrade are additionally interpreted by project partners below. Central European Initiative – Executive Secretariat (Friuli Venezia Giulia Region) and University of Belgrade are responsible for adding interpretation since input was not delivered on time.

Figure 65: Gaps and difficulties encountered during trips outside the city at ADRION level (in %)

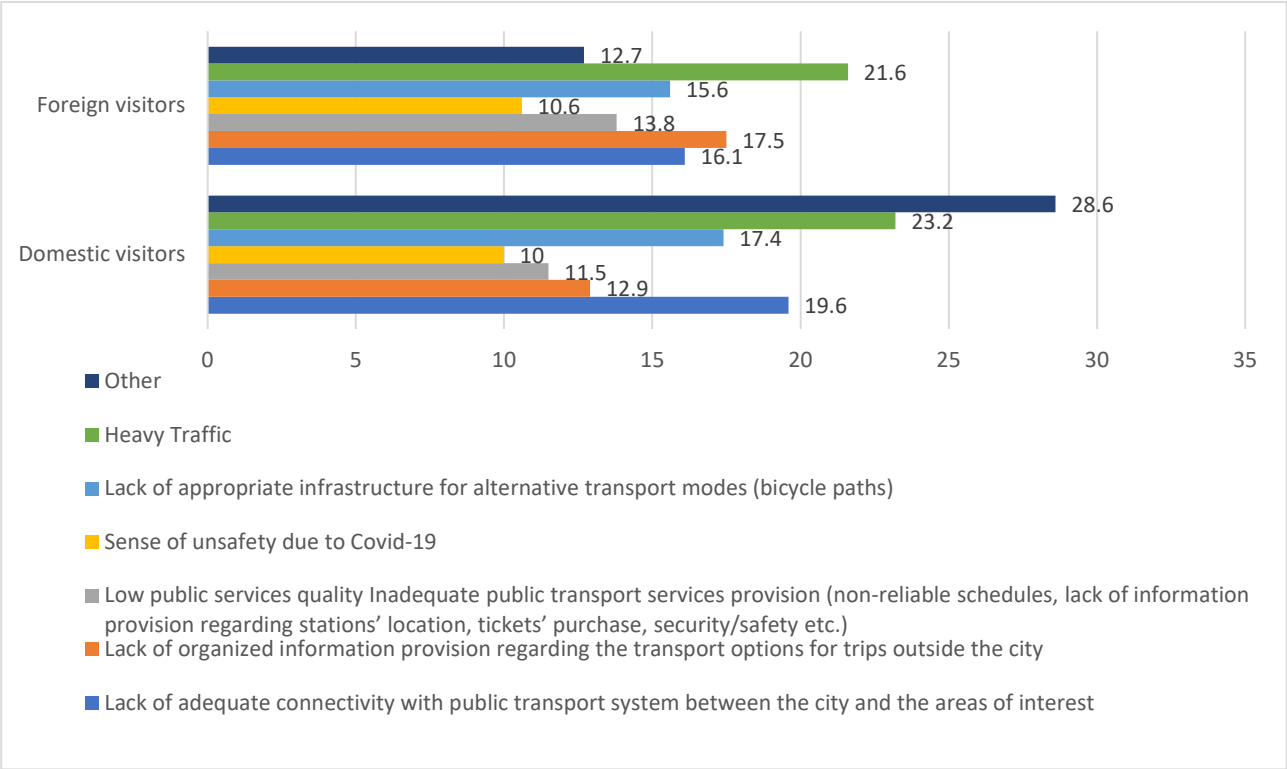
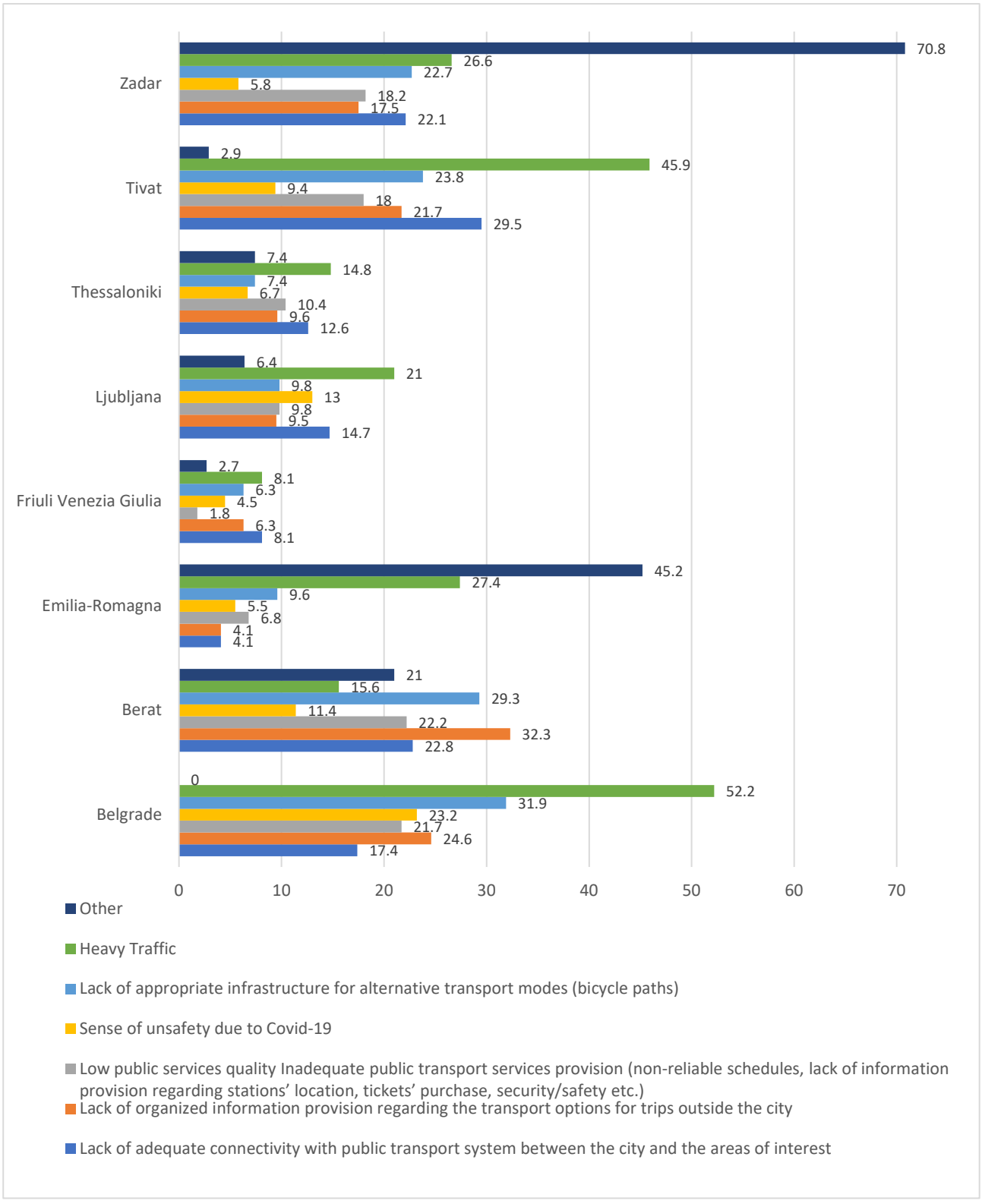


Figure 66: Gaps and difficulties encountered during trips outside the city per case (in %)



Regional Council of Berat: According to the survey's results, the main issue is the lack of organized information regarding the transport options for trips outside of the city. Currently, the inter-urban buses do not have a high quality of services, and run in very limited times. This, in turn, affects their usage by tourists, as indicated in the survey. Public transportation does not cover several touristic destinations outside of the city. Such trips are also very difficult to be organized with alternatives modes of transportation (such as bicycles), due to the lack of appropriate infrastructure.

Institute for Transport and Logistic Foundation: Also in this case, in relation the Emilia-Romagna case, the low percentage of gaps related to traffic, lack of public transport connections, etc. is strictly related to the fact people mainly have on foot travels at urban level (see Q20).

Institute of Traffic and Transport Ljubljana: Heavy traffic and bad connectivity are the biggest problems in Ljubljana and Slovenia in general, since most people are still driving cars and there is a lack of sustainable transport offers in Slovenia, which would be time efficient, either they are too slow to be competitive or there is bad connection to other transport modes.

HIT CERTH: The survey's results indicate that regarding trips outside the city, the main difficulties tourists encountered during their staying in Thessaloniki, are the heavy traffic (14.8 %), the lack of adequate connectivity with public transport systems between the city and the areas of interest (12.6 %), the low public transport services quality (10.4 %) and the lack of organized information provision regarding the available transport options (9.6 %). Public transportation seems that does not connect properly the main touristic destinations located outside of the city, while also there are not relevant infrastructures to support the use of alternative transport modes (bicycles).

Municipality of Tivat: In context of mobility outside the city, walking has a great potential, especially in case of Salina and Vrmac. This mode needs to be efficiently linked and synchronized with the public transport options and other alternative means of transport (e.g., e-bike, tuk tuk).

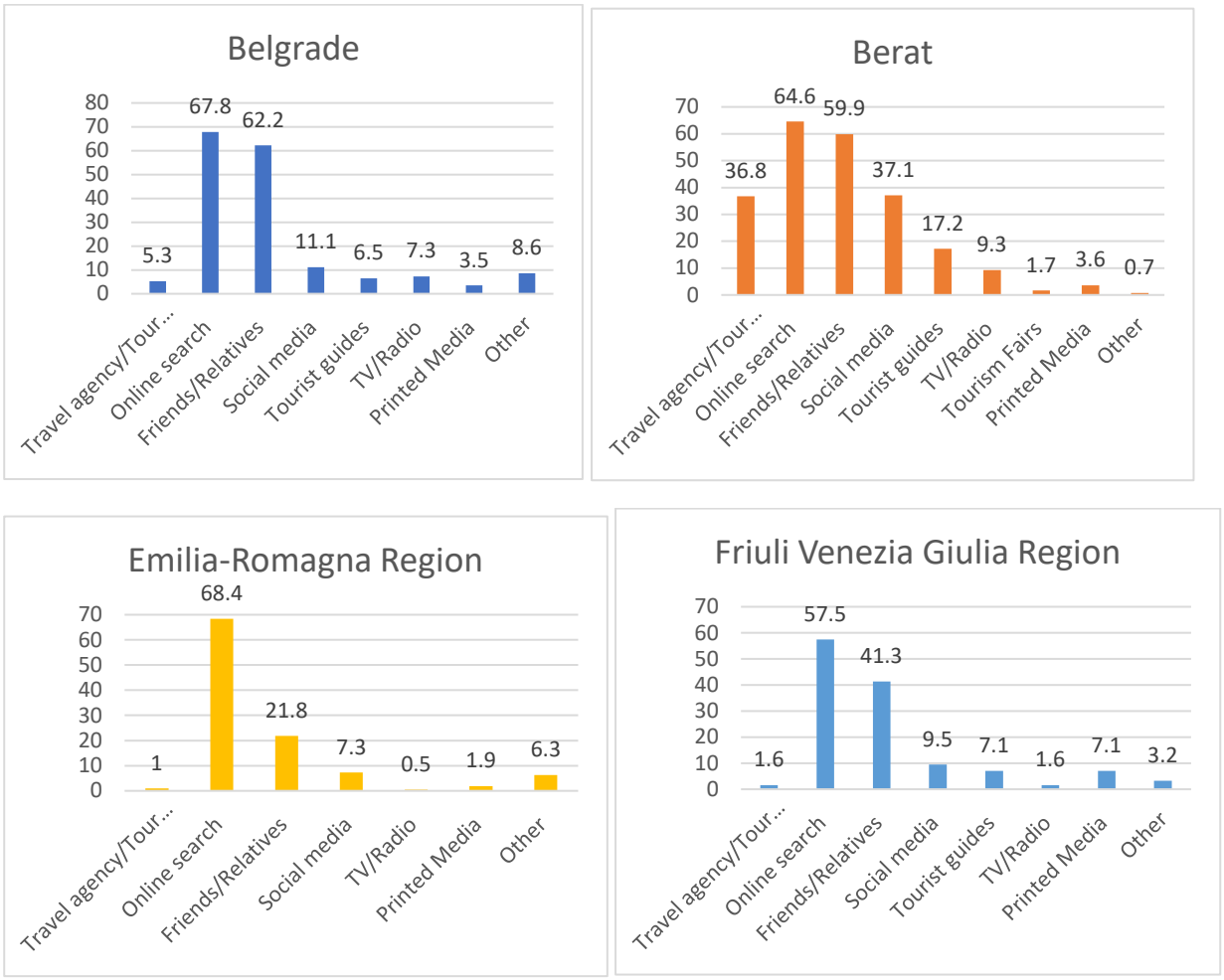
City of Zadar: Although the answer 'other' is the most prevalent one, most of the gaps/difficulties listed have received a significant share of answers: heavy traffic – 26.6 %, lack of inappropriate infrastructure for alternative transport modes (bicycle paths) – 22.7 %, lack of adequate connectivity with public transport system between the city and the areas of interest – 22.1 %, low public services quality/Inadequate public transport services provision (non-reliable schedules, lack of information provision regarding stations' location, tickets' purchase, security/safety etc.) – 18.2 %, lack of organized information provision regarding the transport options for trips outside the city – 17.5 %, sense of unease due to Covid-19 – 5.8 %. This would suggest that the traffic outside the city of Zadar needs improvement in many different aspects and that currently there is an issue in mobility of tourists when travelling outside the city. This is especially represented in the public transport facilities. All the stated results indicate that it is necessary to improve the basic transport infrastructure, but also alternative transport models for bicycles and other sustainable transport facilities. This would have an impact on lowering the emission of CO2 and other negative effects of traditional transport modes. It would also surely reduce traffic jams, especially during the high season in the destination. Another very important conclusion, given the results of the conducted survey, is that it is necessary to

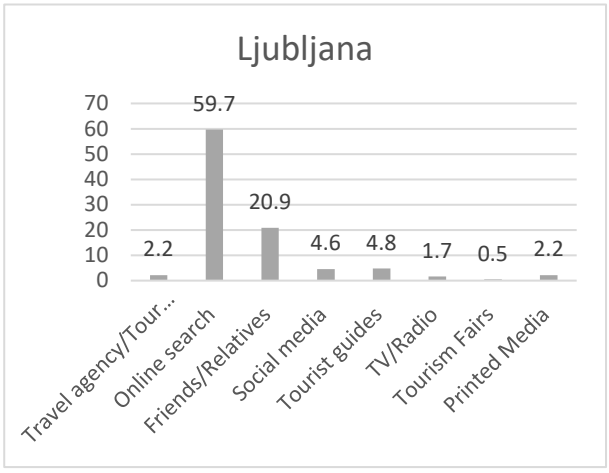
improve the flow of information and to offer tourists a transparent platform where they can find all the data that they need to travel outside the city in a more sustainable way.

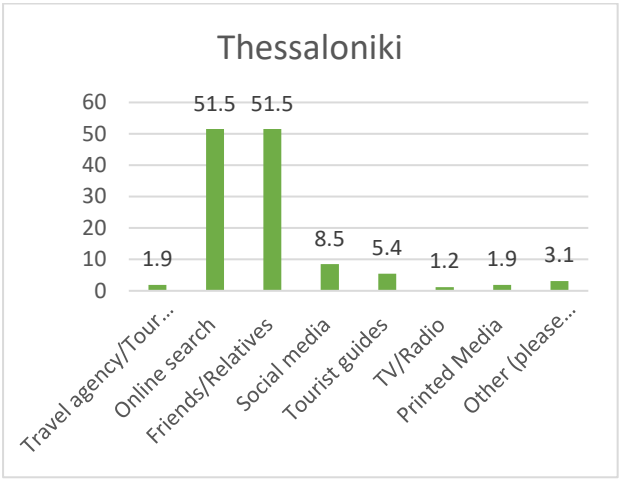
Q28: Before or during your trip how did you get informed regarding your stay (places to stay, places to visit, how to reach your final destination, how to move within the city, etc)?

Most visitors of the ADRION region as well as of individual destinations got information regarding their stay through online search or friends and relatives. High share of visitors getting informed through online search indicates potential in the use of an integrated mobile app – SUSTOURISMO app.

Figure 67: Sources of information about the stay (in %); joined graphs




Ljubljana
70
60
50
40
30
20
10
0
2.2
59.7
20.9
4.6
4.8
1.7
0.5
2.2
Travel agency/Tour...
Online search
Friends/Relatives
Social media
Tourist guides
TV/Radio
Tourism Fairs
Printed Media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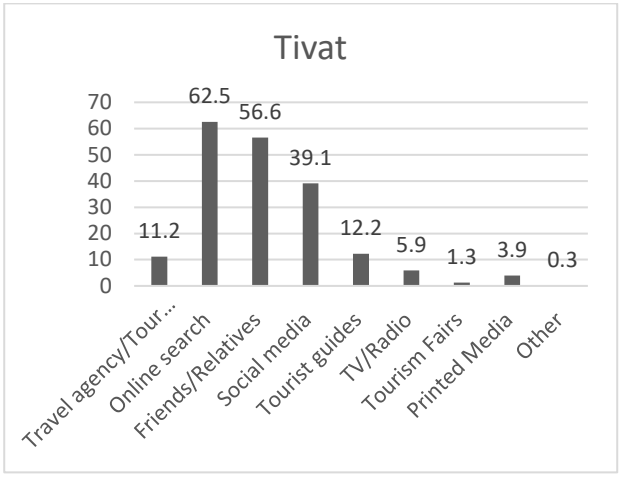
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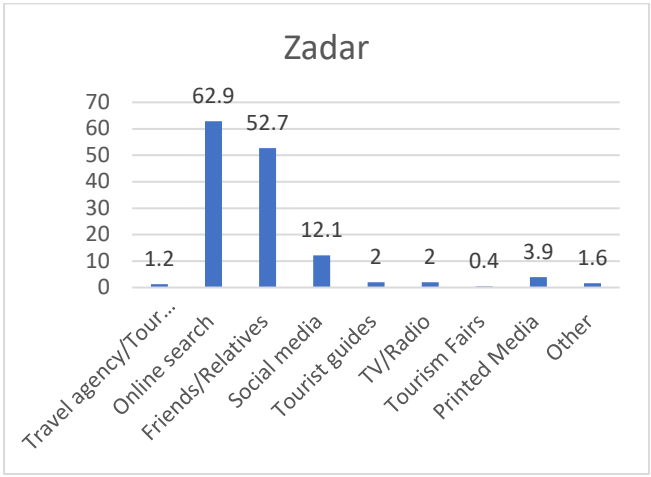
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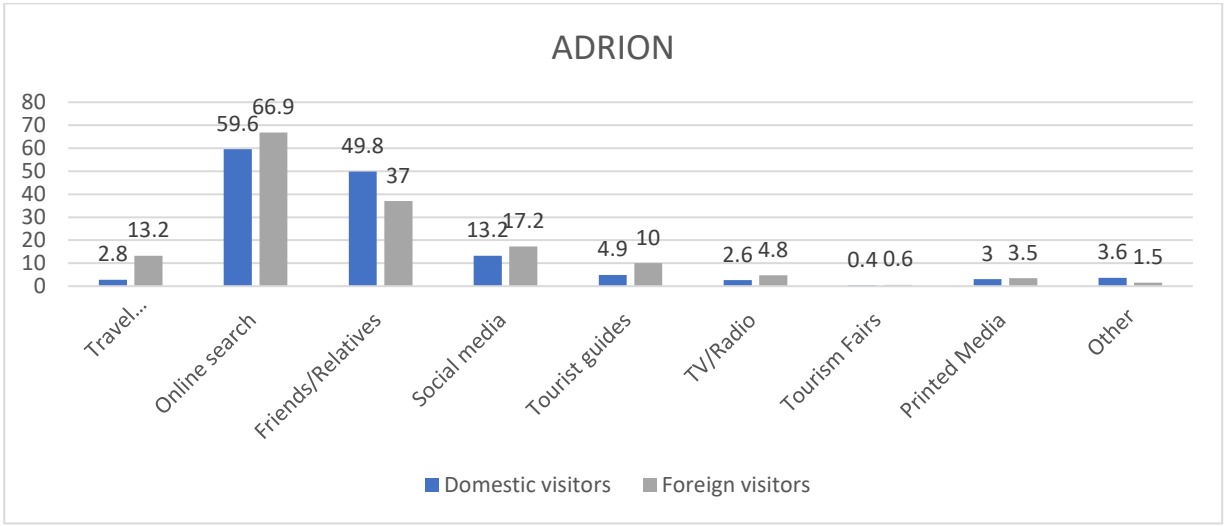
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Social media
Tourist guides
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Printed Media
Other
Domestic visitors
Foreign visitors

Q29: Are you willing to use a mobile app in order to get touristic information regarding the place you visit, providing in parallel information regarding transport modes you used, level of satisfaction for using these modes, etc?

The results show the largest share of visitors are willing to use a mobile app to get touristic information in Berat (88.7 %), Belgrade (86.4 %) and Tivat (83.2 %), and the smallest, but still over a half, in Friuli Venezia Giulia Region (60 %) and Thessaloniki (60.2 %). At ADRION level, their share amounts to approximately 75 %. The prospects of developing the SUSTOURISMO mobile app are therefore great at both per case and regional level.

Figure 68: Willingness to use a mobile app in order to get touristic information per case (in %)

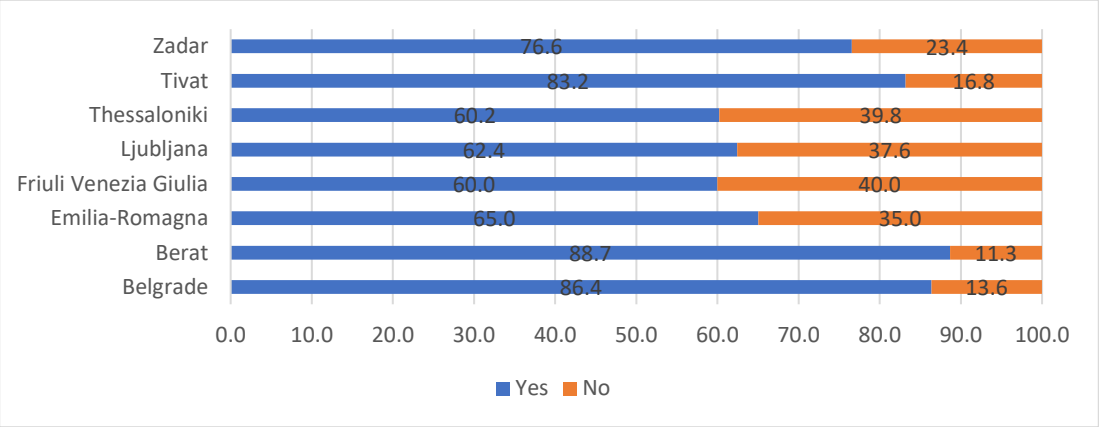
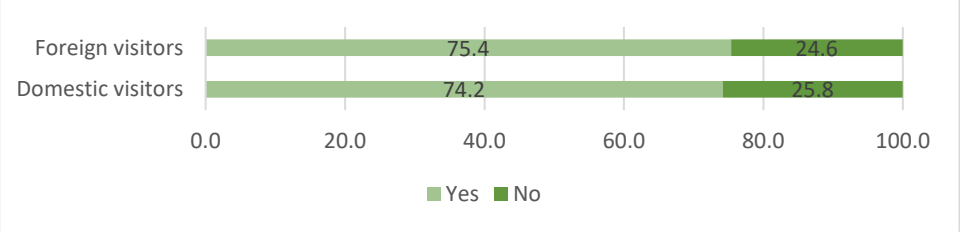


Figure 69: Willingness to use a mobile app in order to get touristic information at ADRION level (in %)



Q30: To what kind of information would you like to have access through a mobile application regarding the city you are visiting? (state all that apply)

With a few exceptions, answers about the type of information visitors would like to access through a mobile app were quite evenly distributed among the offered options. In Emilia-Romagna Region, the most popular option was information on organized events during visitors' staying. At ADRION region, information about points of interest within the city was most desired by both domestic and foreign visitors. Only the respondents declared that they would use a mobile app in order to get touristic information, answered this question.

Figure 70: Information respondents would like to access through a mobile app per case (in %)

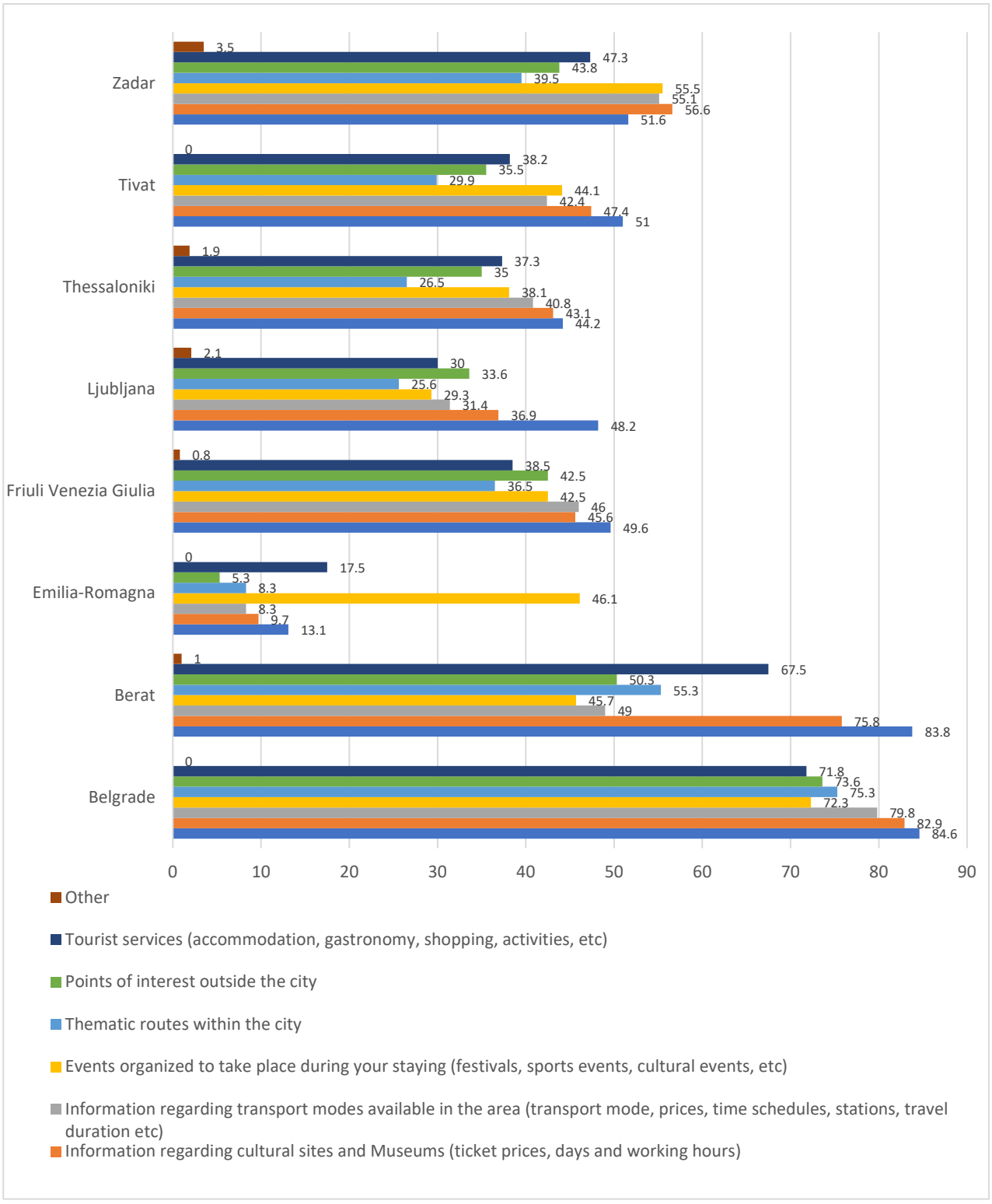
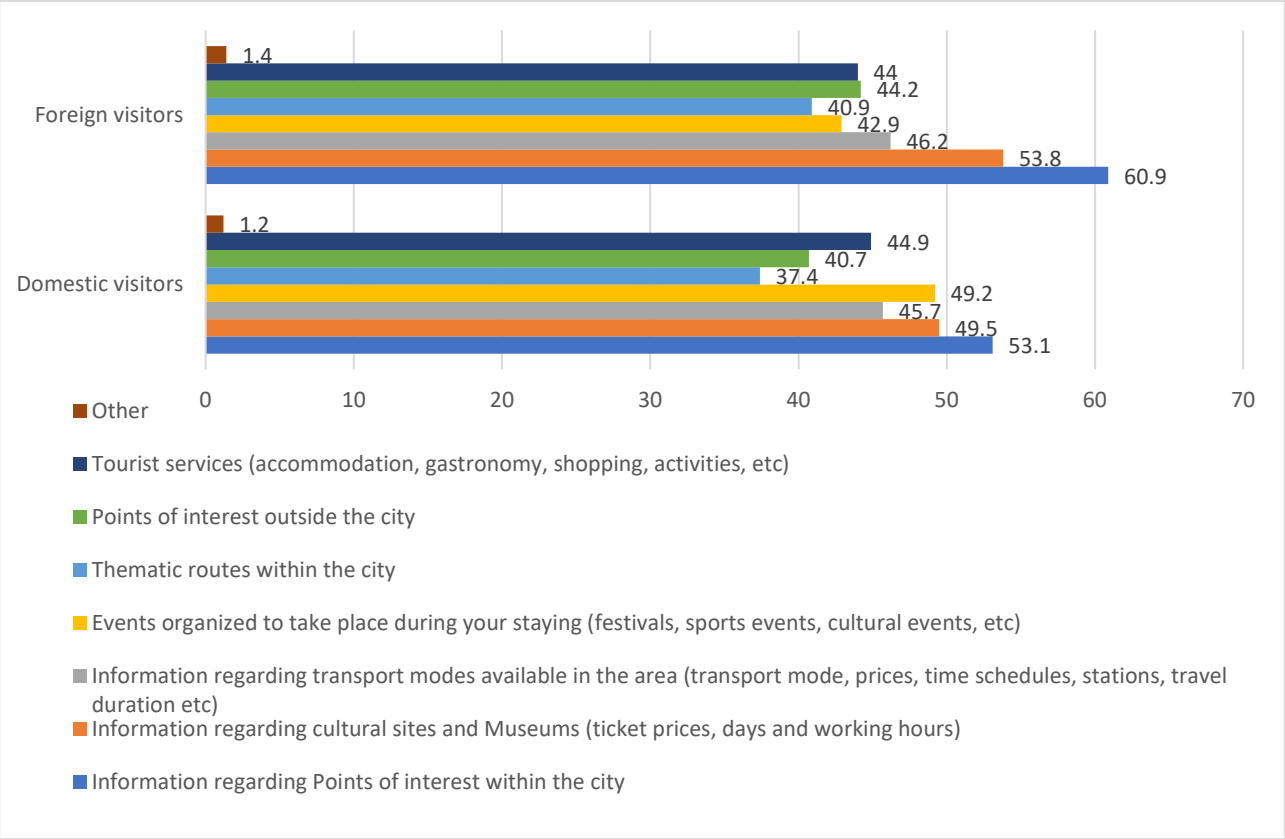


Figure 71: Information respondents would like to access through a mobile app at ADRION level (in %)



Q31: What kind of rewards would you mainly prefer in case of using the app?

At the ADRION level, answers were quite evenly distributed between the three options offered, both among domestic and foreign visitors. At individual destinations, results show more differences in preferences. In Zadar and Friuli Venezia Giulia Region the majority of visitors prefers discount on transport modes, while in Emilia-Romagna Region, Berat and Belgrade, the most popular option was offers regarding hotels, restaurants and cafe-bars. Only respondents who said they would use a mobile app in order to get touristic information, answered this question.

Figure 72: Desired type of rewards offered by the app per case (in %)

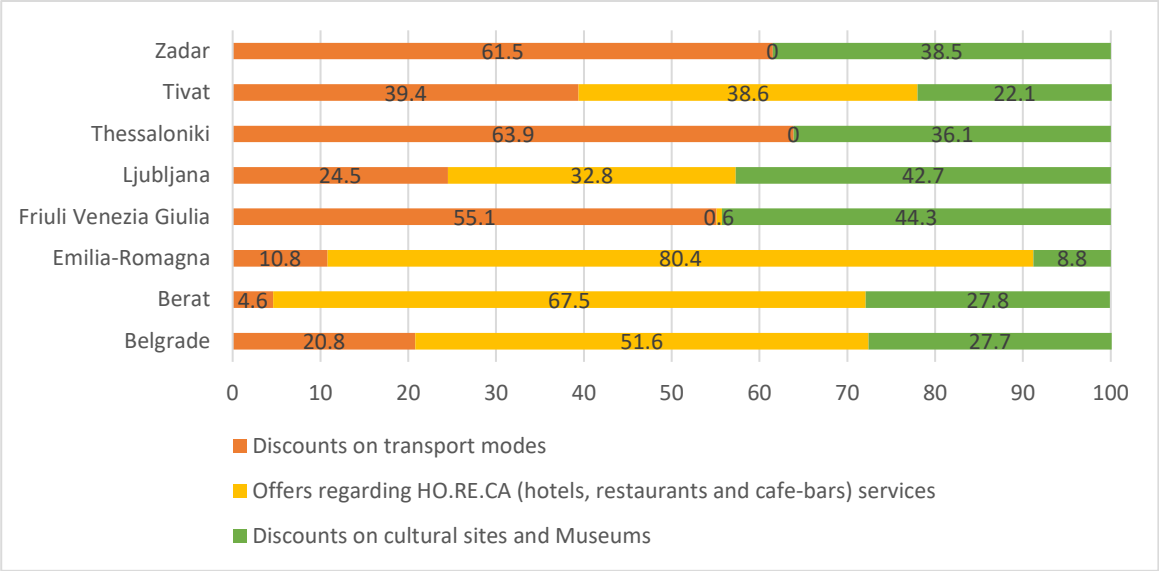
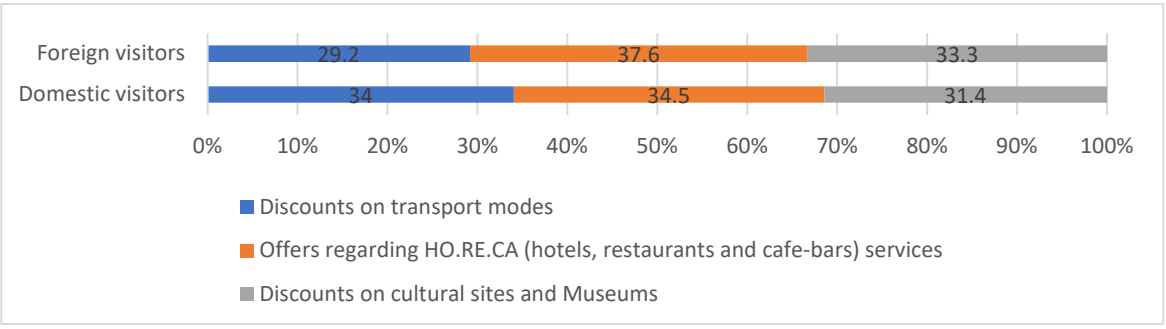


Figure 73: Desired type of rewards offered by the app at ADRION level (in %)



Q32: Would you use such an app more frequently in case you were awarded for that?

With the exception of Thessaloniki[5], visitors are more likely to use the mobile app in case they are awarded for it, which is also true at the ADRION level – for domestic and foreign visitors. Only respondents who declared they would use a mobile app in order to get touristic information, answered this question.

[5] This result can be justified taking into account the fact that due to Covid-19 pandemic, responding visitors were mainly people visiting friends and relatives, which were already familiar with the city.

Figure 74: Willingness to use the app in case of awards per case (in %)

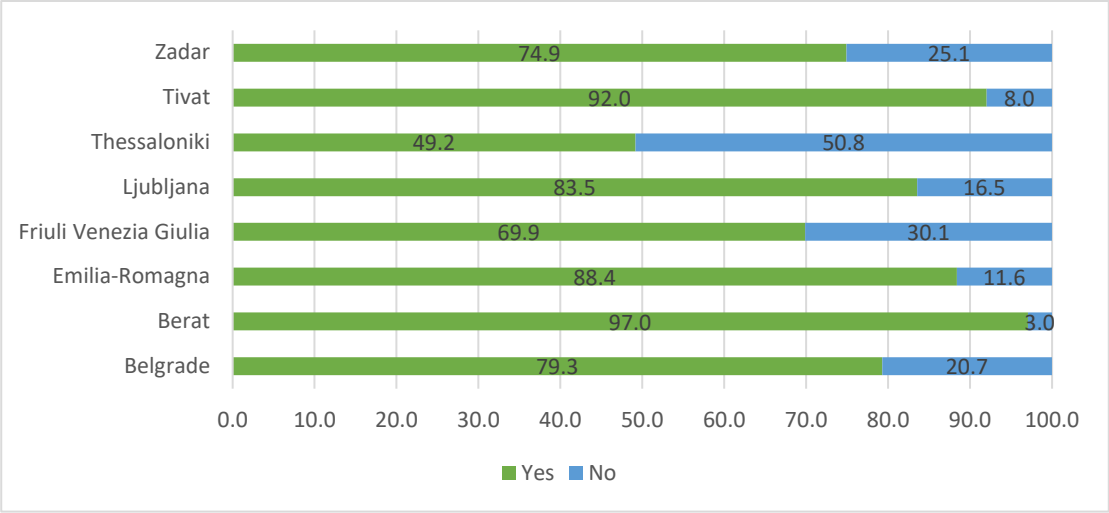
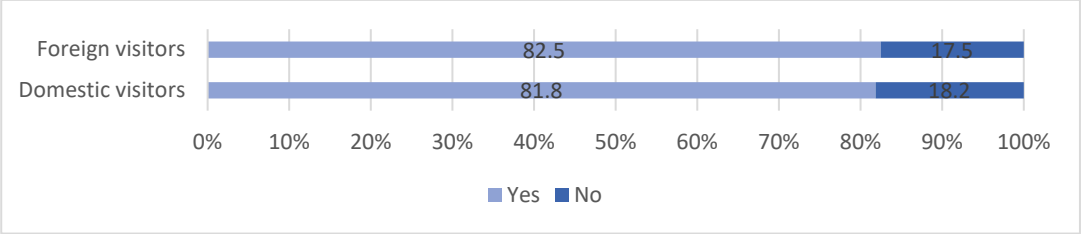


Figure 75: Willingness to use the app in case of awards at ADRION level (in %)



Q33: Would you like to have the possibility through the app to express your complaints regarding touristic and transport services?

In both Italian destinations, visitors are less inclined to express complaints regarding touristic and transport services through the mobile app[6], but in other destinations most visitors would like to have this option. Their share is the largest in Berat (98.5 %) and Belgrade (90.7 %). At ADRION level, the share of visitors who want to express complaints through the app is larger among foreign than domestic visitors. Only respondents who declared they would use a mobile app in order to get touristic information, answered this question.

[6] This finding can be partially explained by the fact that sample of resnpodents in both Italian pilot cities included almost only domestic visitors, who may be more skeptical when evaluating services provided in their country or are already familiar with the provided services and have no more expectations.

Figure 76: Desire to express complaints through the app per case (in %)

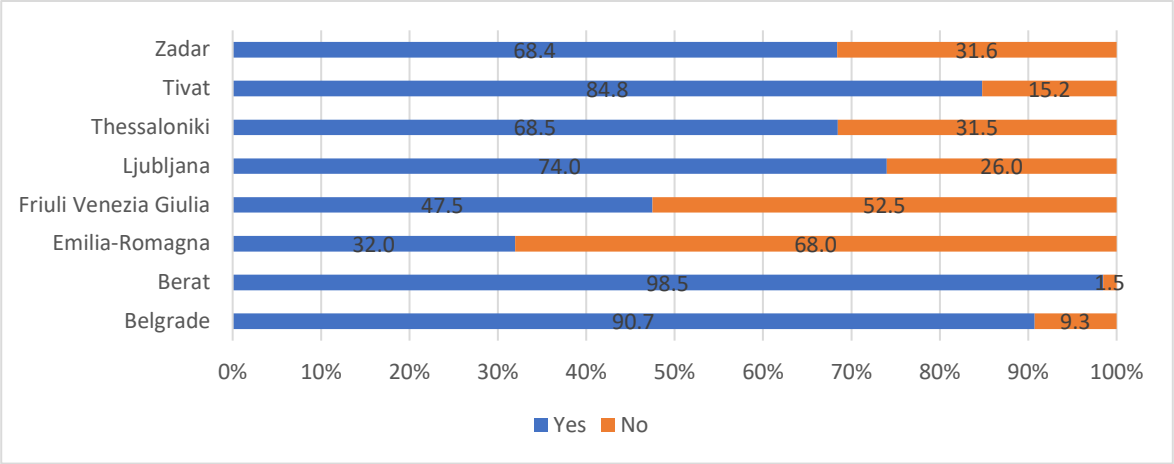
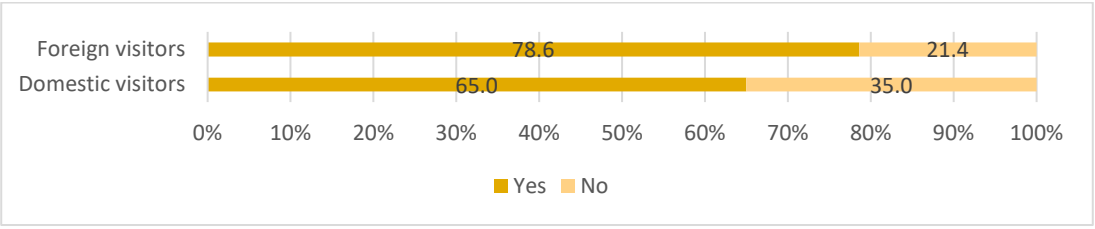


Figure 77: Desire to express complaints through the app at ADRION level (in %)



2.3 Key takeaways

- In all destinations except Ljubljana (respondents belonged to the younger category of 25-34) , as well as at ADRION level, the age group of 35-54 years was the most represented.
- Over half of respondents in all destination except Friuli Venezia Giulia Region, as well as at ADRION level were employed. The categories employed and self employed concentrate the highset precentages in all cases.
- Respondents with an undergraduate degree were dominant among domestic and foreign visitors of the ADRION region.
- Large annual income differences are seen between visitors of different destinations within ADRION. At ADRION level there were more respondents with a yearly income lower than 10,000 EUR among domestic visitors (40 %) than foreign visitors (26.2 %).
- In all destinations together, 853 of domestic visitors (42 %) and 1,172 of foreign visitors (58 %) were included in the survey. Out of 853, 443 domestic visitors were surveyed in Emilia-Romagna Region and Friuli Venezia Giulia Region, which surveyed domestic visitors almost exclusively (in Emilia-Romagna Region, 25 foreign visitors were surveyed) due to Covid-19 related limitations. Among foreign visitors of the ADRION region, Germans (22.4 %), Italians (9.4 %), Slovenians (8.5 %) and Serbians (7.3 %) were dominant.

- Due to difficulties of capturing foreign visitors on spot, several project partners were forced to employ alternative methods of surveying (online, by phone). Answers are expected to differ between surveyed tourists traveling in 2020 (during a global pandemic, mostly domestic visitors) and tourists who visited the pilot cities in previous years and were contacted, as their profiles and needs are quite distinct.
- Answers are expected to differ between surveyed tourists traveling in 2020 (during a global pandemic, mostly domestic visitors) and tourists who visited the pilot cities in previous years, as their profiles and needs are different.
- A large majority of respondents in all destinations and at ADRION region held a driving license and owned a car.
- Over 70 % of domestic visitors in ADRION region have already visited a specific destination previously, while less than a 40 % of foreign visitors have done so.
- Foreign visitors have visited specific destinations fewer times than domestic visitors.
- Foreign visitors stayed in ADRION region longer than domestic visitors.
- With the exception of Tivat, the largest share of visitors was travelling in a group of two, which is also true for the entire ADRION region. The share of solo travellers was the biggest in Thessaloniki – possibly due to the fact that respondents were mainly people visiting friends and relatives, which is not representative of pre-pandemic time.
- The share of independent travellers was much higher than the share of people traveling on an organised package tour everywhere except for Berat. At ADRION level, fewer foreign visitors travelled independently (83.5 %) than domestic visitors (97.3 %).
- Car was the most popular mode of transport when traveling to all destinations except Thessaloniki, where airplane was the top answer.
- Most visitors chose their transport mode used to travel to a destination because it was the most comfortable, fastest, or cheapest. A large majority of them were very satisfied or satisfied with their transport mode.
- The dominant reasons for choosing destinations across most destinations were sightseeing and visiting friends and family. At seaside destinations, sea and sun was also a popular answer. More foreign visitors (54.5 %) were interested in sightseeing than domestic visitors (26.7 %).
- For trips within the city, walking and using a private vehicle (cars, motorbikes, camper vans etc.) were the preferred modes of transport, while city bus was also a popular option.
- Most visitors of the ADRION region chose a specific transport mode within the city because it was the most comfortable way (38.2 % of domestic and 22.4 % of foreign visitors). The second most common reason was that a specific transport mode was the fastest.
- Heavy traffic was highlighted as the biggest difficulty encountered during visitors' trips within cities of ADRION region.

- In all destinations and at ADRION level as well (among domestic and foreign visitors), private vehicles were the most commonly used mode of transport, while rented vehicles and interurban public buses were also popular for trips outside the city.
- Visitors of the ADRION region were most satisfied with the following modes of transport – private vehicle, walking and rented vehicle, and least satisfied with interurban public bus, train and taxi.
- Regarding trips outside the city, heavy traffic was once again noticed as a dominant difficulty encountered across most destinations as well as at ADRION level.
- Most visitors of the ADRION region as well as of individual destinations got information regarding their stay through online search or friends and relatives.
- About 75 % of visitors of the ADRION region were willing to use a mobile app to get touristic information. Information about points of interest within the city was the most desired information to be provided by both domestic and foreign visitors.
- With the exception of Thessaloniki, visitors are more likely to use the mobile app in case they are awarded for it, which is also true at the ADRION level – for domestic and foreign visitors. The preferences about the type of award differ among destinations and are evenly distributed at ADRION level.
- In both Italian destinations, visitors are less inclined to express complaints regarding touristic and transport services through the mobile app, but in other destinations most visitors would like to have this option. At ADRION level, the share of visitors who wish to express complaints through the app is larger among foreign than domestic visitors.

3. Survey results - local parts

The survey of each project partner included the common transnational part and a customised local part, the purpose of which was to receive visitor input about pilot actions. Local parts of the surveys were analysed by each partner. Their results and pilot actions are summarised below. The ratio between domestic and foreign visitors surveyed can be seen in the analysis of the transnational part of the survey (Methodology and Q4).

Results from Thessaloniki, Emilia-Romagna Region, Ljubljana, Zadar, Tivat and Belgrade are additionally interpreted by project partners below for each case – they have explained how survey results influenced their pilot development and which insights they got. Central European Initiative – Executive Secretariat (Friuli Venezia Giulia Region) is responsible for adding this explanation since input was not delivered on time. Regional Union of Municipalities of Eipirus is responsible for adding results of local part of the survey as well as the explanation of their influence on the pilot.

3.1 The case of Thessaloniki

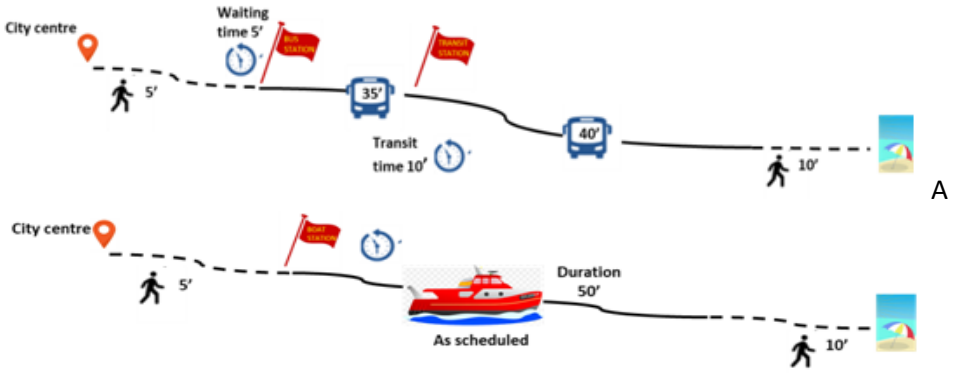
Thessaloniki's pilot includes design, development and provision of two touristic packages: a) a guided walking trip along city's main monuments and points of interest while experiencing local gastronomy treasures; b) an

opportunity for experiencing the city by bicycle while being connected to nearest beaches by traditional small ferryboats.

1. 27 % of visitors would use an integrated touristic card during their stay in the city (pre-paid card for free access to specific touristic and transport services). No significant difference is observed between foreigners and Greeks. Lower income visitors are more likely to use an integrated touristic card than visitors with higher annual income. Young visitors are more willing to use the touristic card (35 %), than respondents aged between 36 and 55 (22 %) and older (10 %).
2. Regarding card services, free access to museums and cultural sites is more popular with foreigners that with Greeks (71 % to 60 % respectively), whereas Greeks prefer free access to special events (festivals, sport events etc.) by 50 % to 33 %.
3. On average, visitors are willing to pay 19.4 EUR for a touristic card that includes 5 trips using the Urban Public Transportation System, free access to 2 city museums/cultural sites and use of bike sharing system for 1 hour.
4. On average, visitors are willing to pay 51.8 EUR for a touristic card that includes 8 trips using the Urban Public Transportation System, 2 trips using the Interurban Public Transportation System, free access to 3 city museums/cultural sites, free access to 1 cultural/archaeological/other site of interest outside Thessaloniki Prefecture (e.g., Vergina, Mount Olympus) and use of bike sharing system for 2 hours.
5. On average, visitors are willing to pay 79.8 EUR for a touristic card that includes 12 trips using Urban the Public Transportation system, 4 trips using the Interurban Public Transportation system, free access to 3 city museums/cultural sites, free access to 2 cultural/archaeological/other site of interest outside Thessaloniki Prefecture (e.g., Vergina, Mount Olympus) and use of bike sharing system for 3 hours.
6. 26 % of visitors are willing to participate in organized walking tours within the city centre of Thessaloniki with a professional touristic guide. No significant difference is observed between foreigners and Greeks, while young visitors are more willing to participate in such tours.
7. Visitors are willing to pay 20 EUR for a 2-hour organized walking tour within the city and 26.3 EUR for a 3-hour tour of such kind. For a 3-hour organized walking tour, a significant difference is observed between Greek and foreign visitors (21.4 EUR and 28.6 EUR respectively).
8. 22 % of visitors are interested to participate in organized bicycle tours within the city centre of Thessaloniki with a professional touristic guide. Young visitors are more willing to participate in organized bicycle tours (26 %) than respondents aged between 36 and 55 (20 %) and older (8 %).
9. Visitors are willing to pay 19.3 EUR for a 2-hour organized bicycle tour within the city and 25.9 EUR for a 3-hour tour of such kind. For a 3-hour organized bicycle tour, a significant difference is observed between Greek and foreign visitors of Thessaloniki (23 EUR and 27.8 EUR respectively).

10. 21 % of visitors prefer scenario A for reaching the east side of Thessaloniki (where beautiful beaches are located) from the city centre, which takes 105 minutes, costs 1.10 EUR and includes bus travel. 79 % of visitors prefer scenario B, which takes 65 minutes, costs 5 minutes and includes sea transport. No significant difference is observed between Greek and foreign visitors.

Figure 78: Scenario A and scenario B for reaching the east side of Thessaloniki from the city centre



HIT CERTH: The survey conducted had as a goal to identify the city's tourist and mobility needs. The information collected was used for the design of the most appropriate touristic packages for Thessaloniki case. In more detail:

Thessaloniki is a city that attracts tourists for the 'Sea and Sun' product, however, there are less known and currently unexplored aspects and provisions the city can offer that worth further investing in; i.e. cultural and natural areas, history, gastronomy, creative industries etc. Based on the survey's results, organized walking tours or bicycle tours within the city centre of Thessaloniki with a professional touristic guide is an intervention that tourists would be interested to participate in. The fact that a number of points of interest are located within the city centre (museums, monuments, archaeological sites, etc.) combined with the fact that heavy traffic is one of the biggest difficulties tourists encountered during their staying in Thessaloniki for trips within the city, led to the first touristic package idea conception, where the design and development of guided walking or bicycle tours passing by the most famous points of historical and cultural interest, is proposed. In such a case sustainable tourism development through sustainable mobility can be achieved, as the use of alternative transport modes will upgrade the environment's quality and achieve a modal shift in favour of walking and bicycling.

Daily excursions to the east part of Thessaloniki where beautiful beaches are located seemed to highly interest tourists, willing to travel there combining sustainable transport modes (e.g. walking-sea transport or walking -bus transport). However, a low-quality level of the services provided seems to turn them in favour of private or rented vehicle use. This is somehow confirmed by the fact that a high use of rented cars both for intra-city and inter-city trips was declared in the survey, revealing the need to intervene and offer sustainable mobility alternatives of high quality to tourists. The ranking of 'heavy traffic' and 'lack of connectivity' at the top of the lists of problems faced also support the identified intervention necessity. Taking into account the above-mentioned issues, the idea of proving tourists the option to travel to the east part of the city by sea transport was created. For boosting furthermore, the sustainable tourism via

sustainable mobility, the package also included a gastronomy walking tour, taking advantage of the city's rich reputation regarding its traditional cuisine.

Finally, tourists and especially younger people, showed their interest to have access and use an integrated mobile application which provides them touristic information while also gives them the floor to express their ideas and complaints, regarding the provided touristic and mobility services of the city. This need is fulfilled through the SUSTOURISMO app development and gives the floor to a further city's digital evolution.

3.2 The case of Epirus Region

The case of Igoumenitsa

Research period:16/03/2021– 08/2021

Sample: tourists, male and female,18+years old

Research method: Online and on the spot interviews

Content:

Part A: Socio-economic questions

Part B: Questions regarding tourists' trips

Part C: Igoumenitsa' s Pilot

Part A: Socio-economic questions

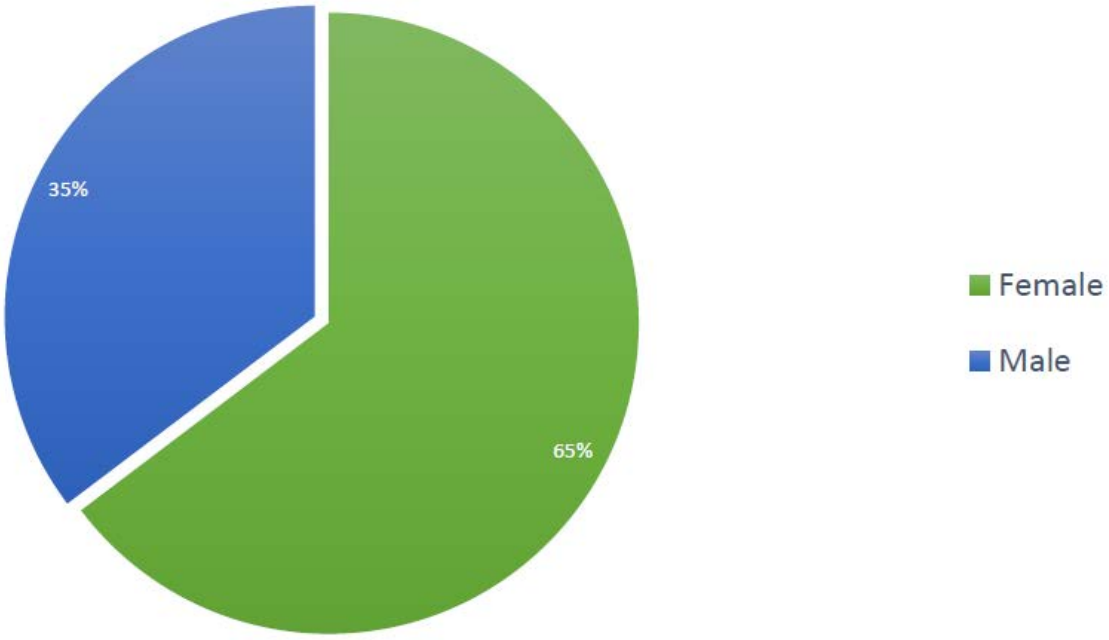


Figure 79: Part A, Igoumenitsa, question gender

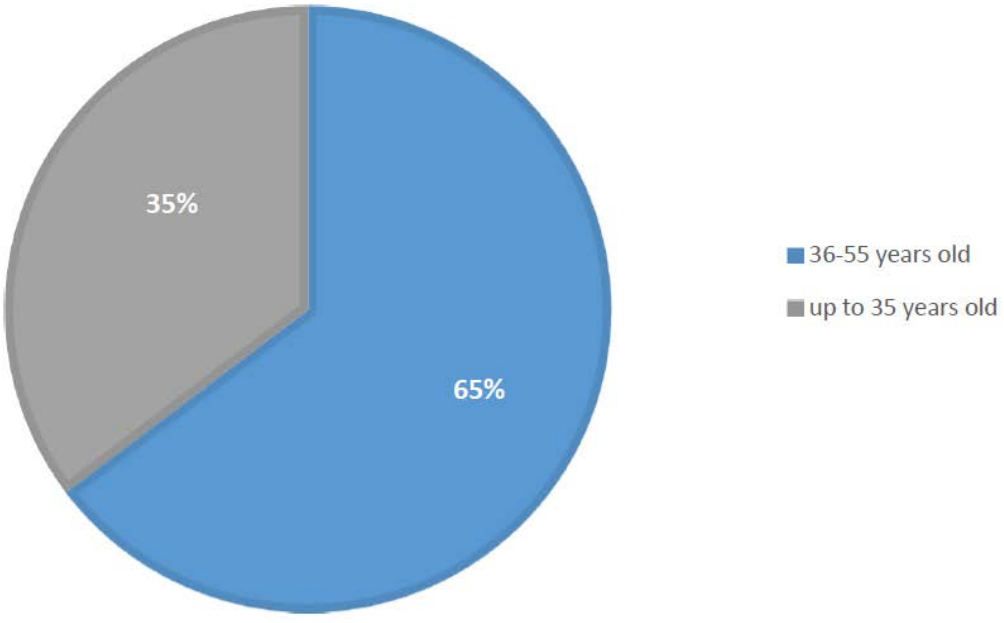


Figure 80: Part A, Igoumenitsa, question age

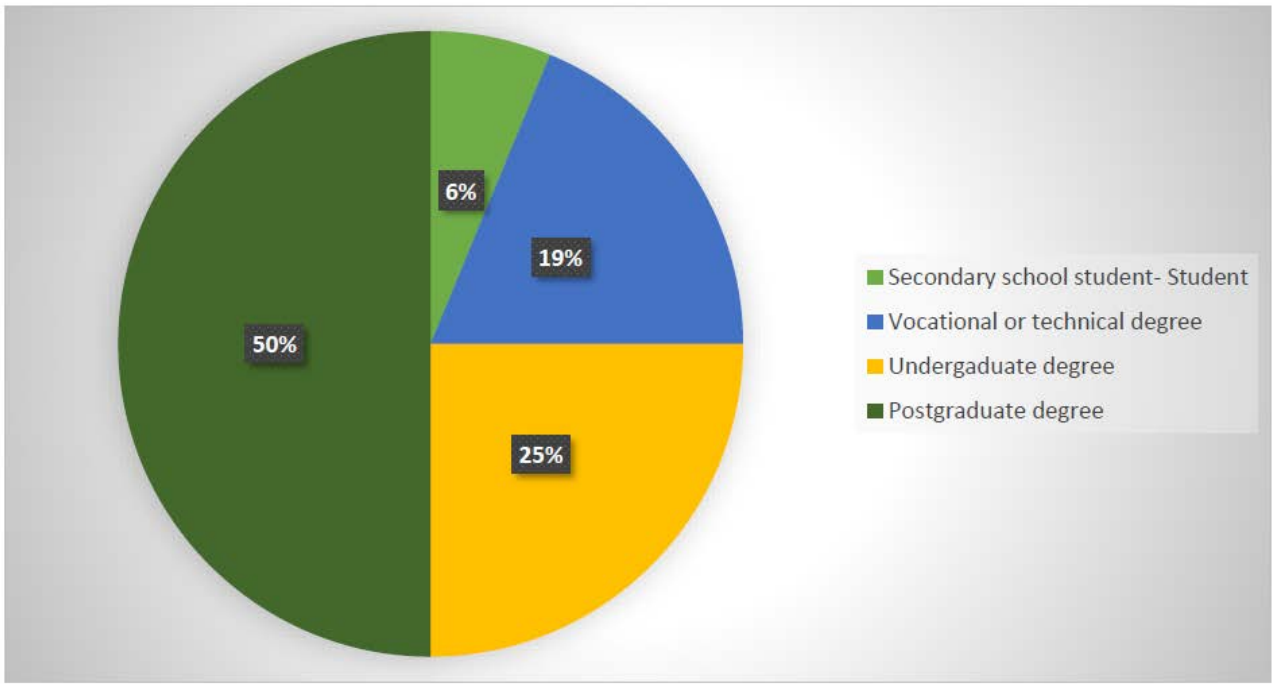


Figure 81: Part A, Igoumenitsa, question education

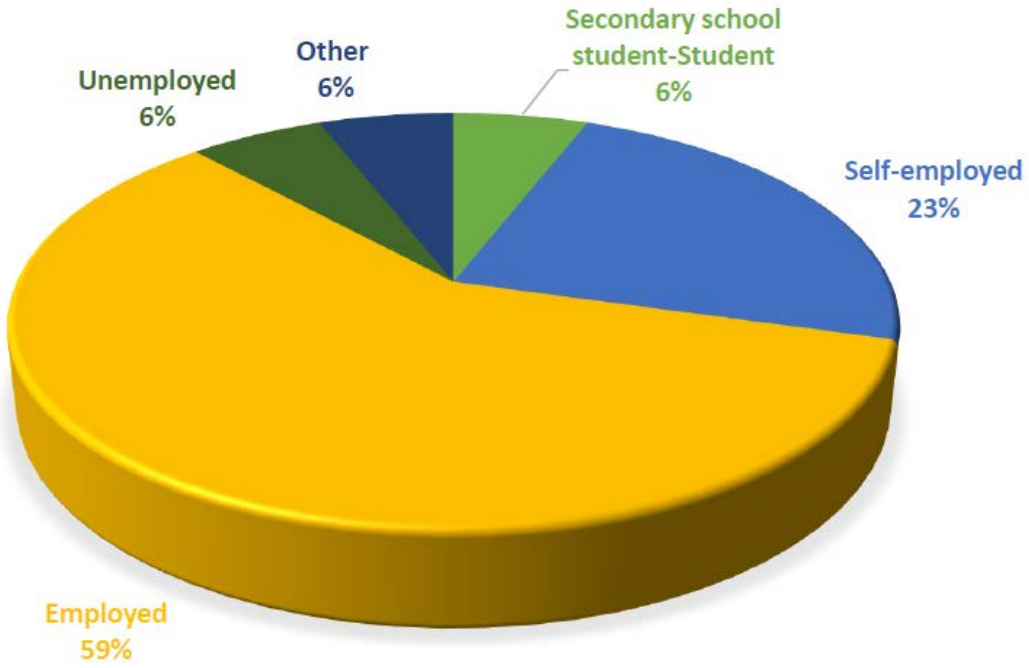


Figure 82: Part A, Igoumenitsa, question status

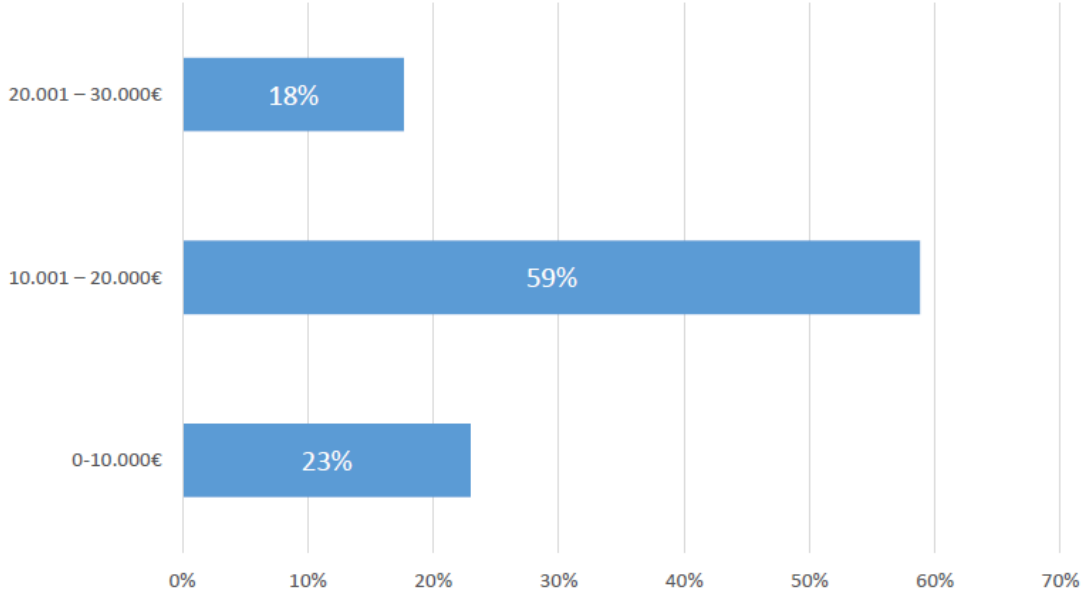


Figure 83: Part A, Igoumenitsa, question income

PART B: Questions regarding tourists' trips

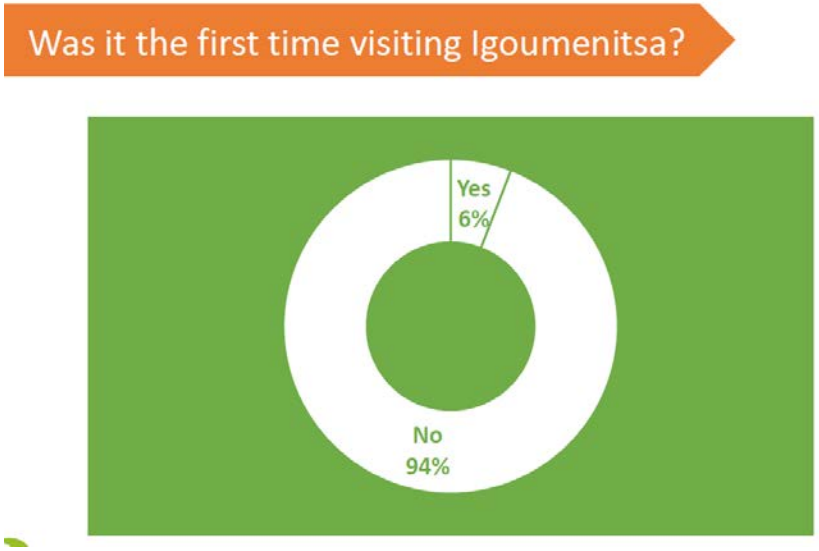


Figure 84: Part B, Igoumenitsa, 'was it your first time in Igoumenitsa'

How many times have you visited Igoumenitsa?

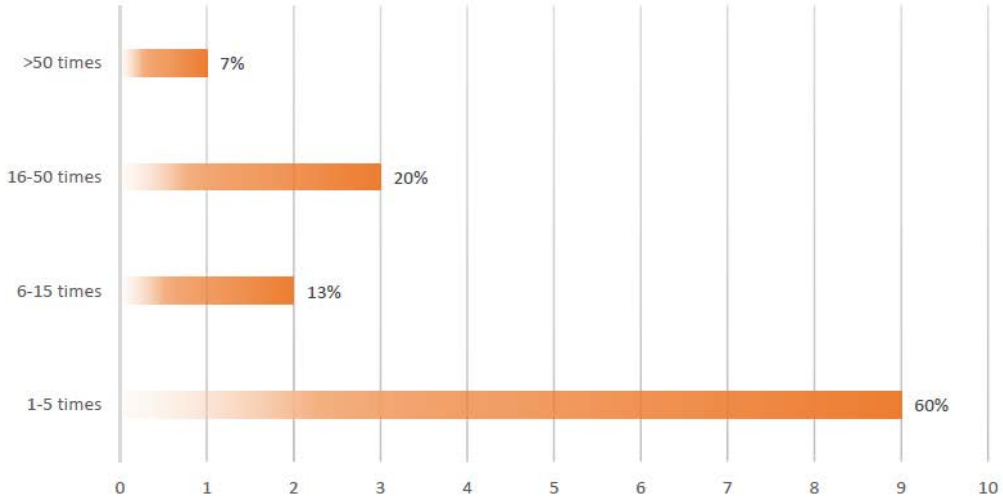
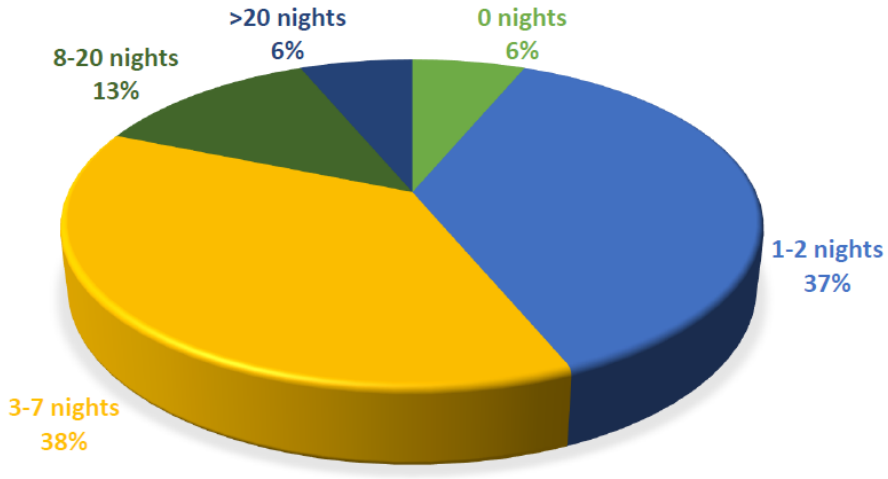


Figure 85: Part B, Igoumenitsa, number of previous visits

How many nights did you stay?



Average number of nights: **4,4**

Figure 86: Part B, Igoumenitsa, number of stays

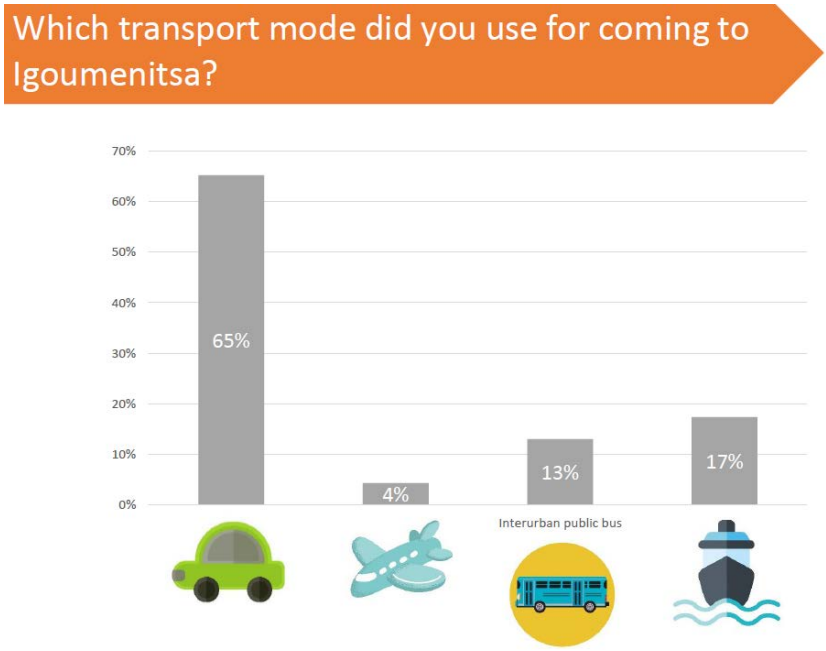


Figure 87: Part B, Igoumenitsa, transport mode of Greek tourists

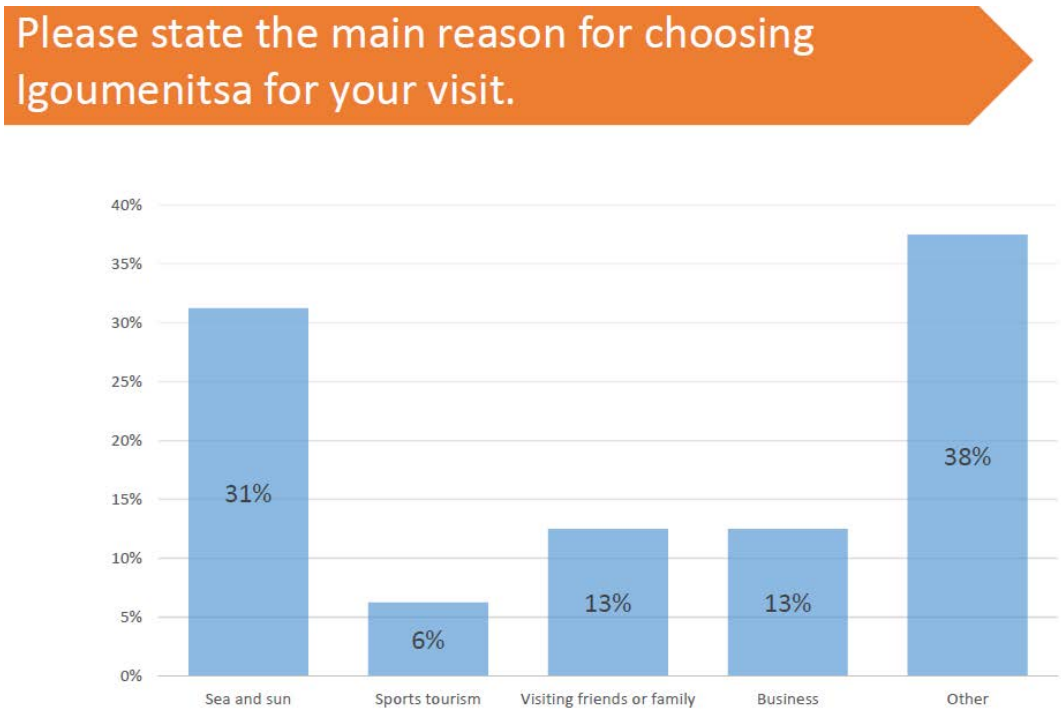


Figure 88: Part B, Igoumenitsa, reason of trip

What gaps/difficulties did you encounter during your trips within the city?

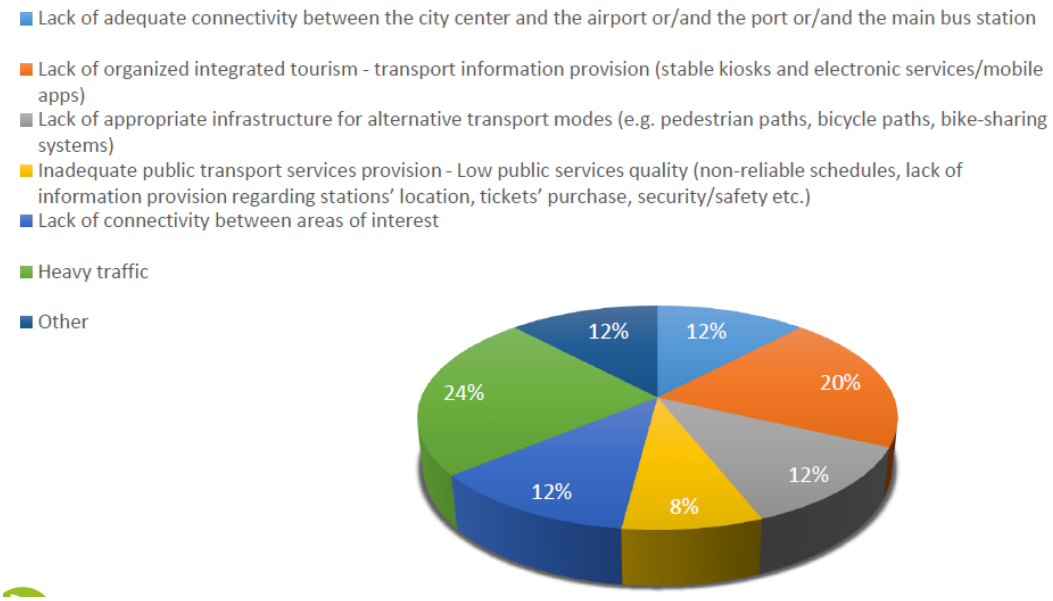


Figure 89: Part B, Igoumenitsa, main difficulties encountered in the city

Did you visit other touristic areas outside the city?

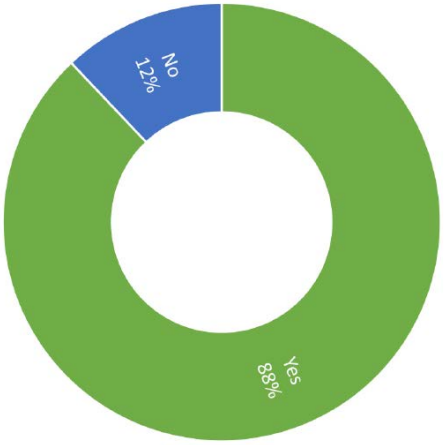


Figure 90: Part B, Igoumenitsa, 'did you visist other outside igoumenitsa placed'

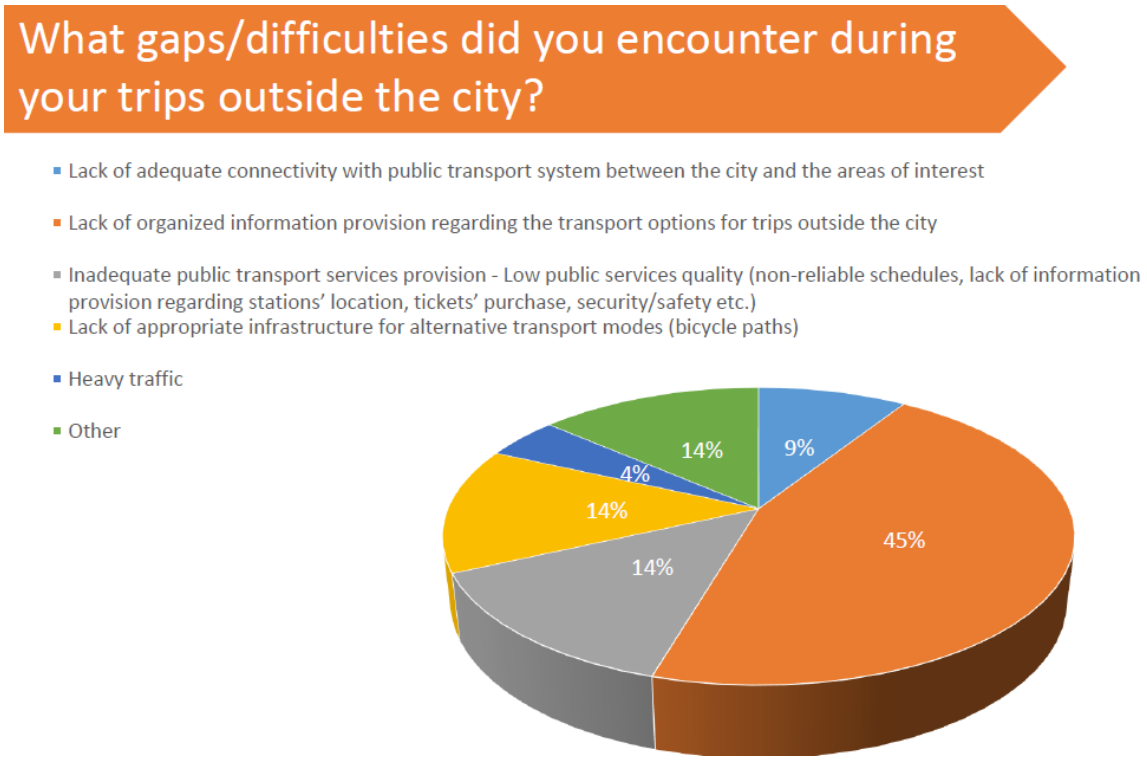


Figure 91: Part B, Igoumenitsa, question main difficulties encountered in out of the city trips

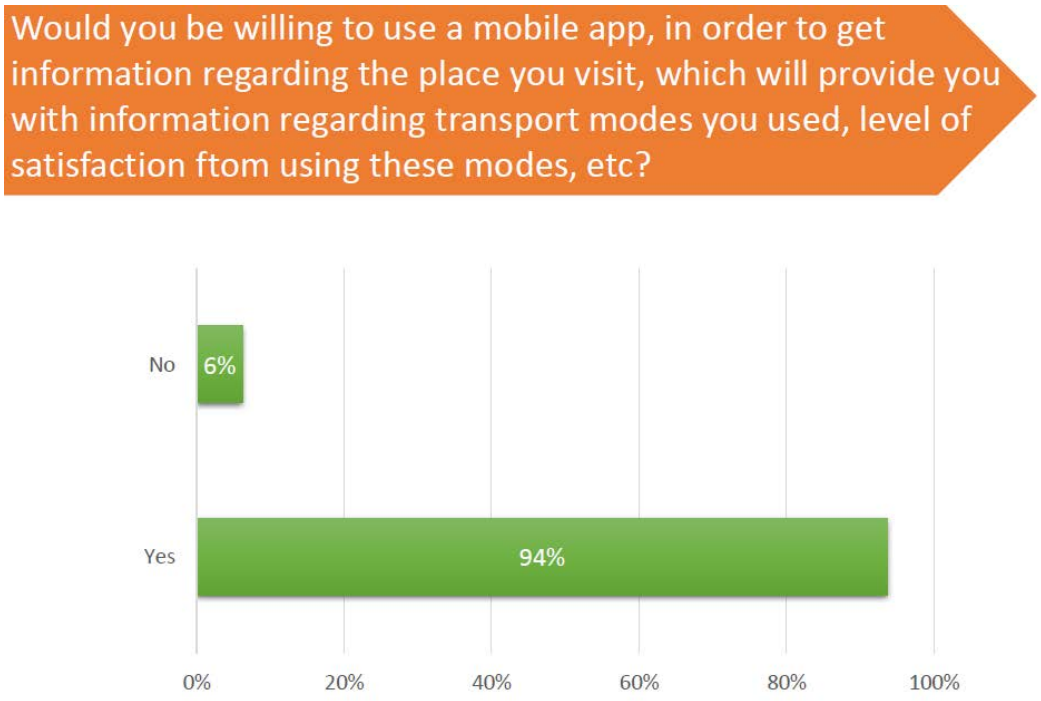


Figure 92: Part B, Igoumenitsa, question willingness to use a touristic app

As it seems from the answers, **20%** of the visitors would like to have access to information regarding **cultural sites and museums** (ticketprices, days and working hours), while **18%** would like to get information regarding **points of interest** within the city. Third choice in the tourists' preference with a percentage of **14%** is access to information regarding **events** during their staying (festivals, sports events, cultural events,etc) and **thematic routes** within the city. Information about **transport modes** available in the area (transportmode, prices,time schedules, stations, travel durationetc) and **points of interest outside the city** come next (**12%**), while information regarding **tourist services** (accommodation, gastronomy, shopping, activities etc) is last in the order of preference (**8%**).

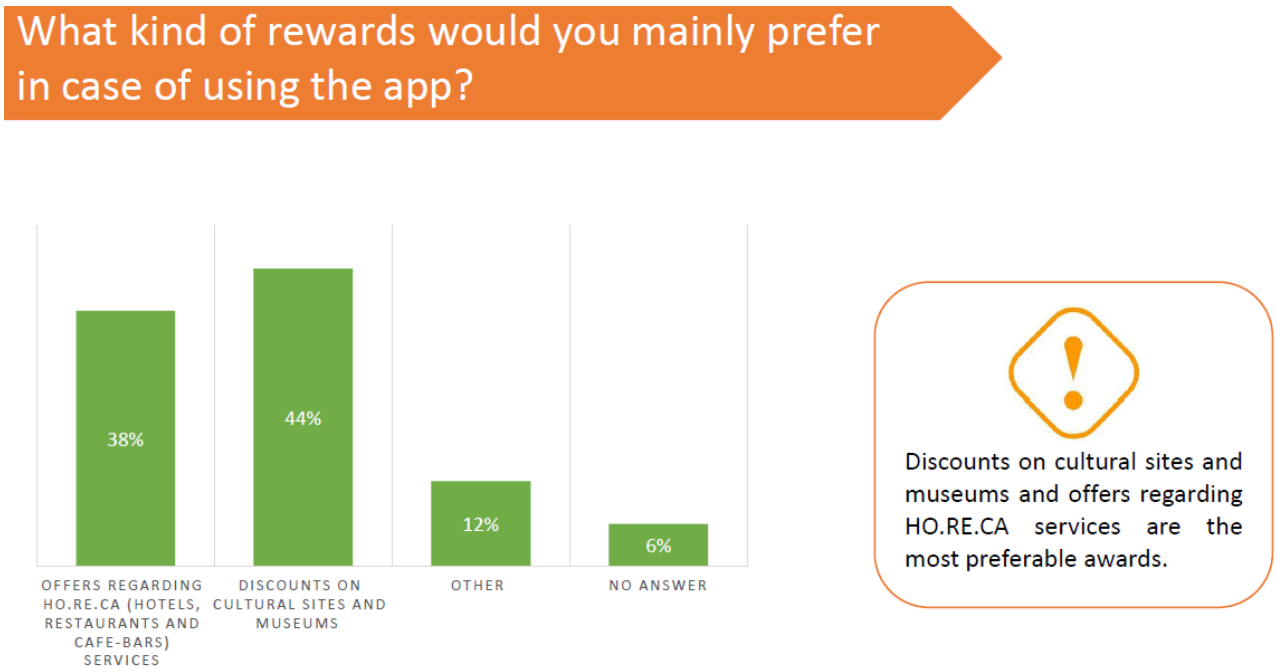


Figure 93: Part B, Igoumenitsa, question rewards for using an app

PART C: Igoumenitsa' s Pilot

Would you use an integrated touristic card during your staying in the city? (pre-paid card for free access to specific touristic and transport services)

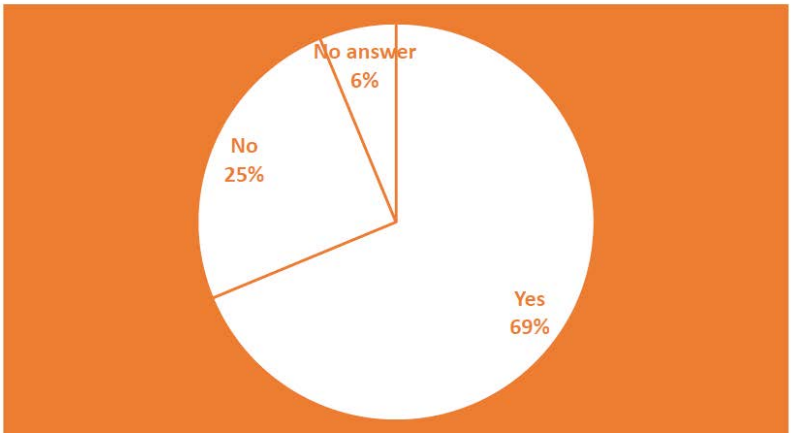


Figure 94: Part C, Igoumenitsa, question a

What kind of services would you like the card to cover?

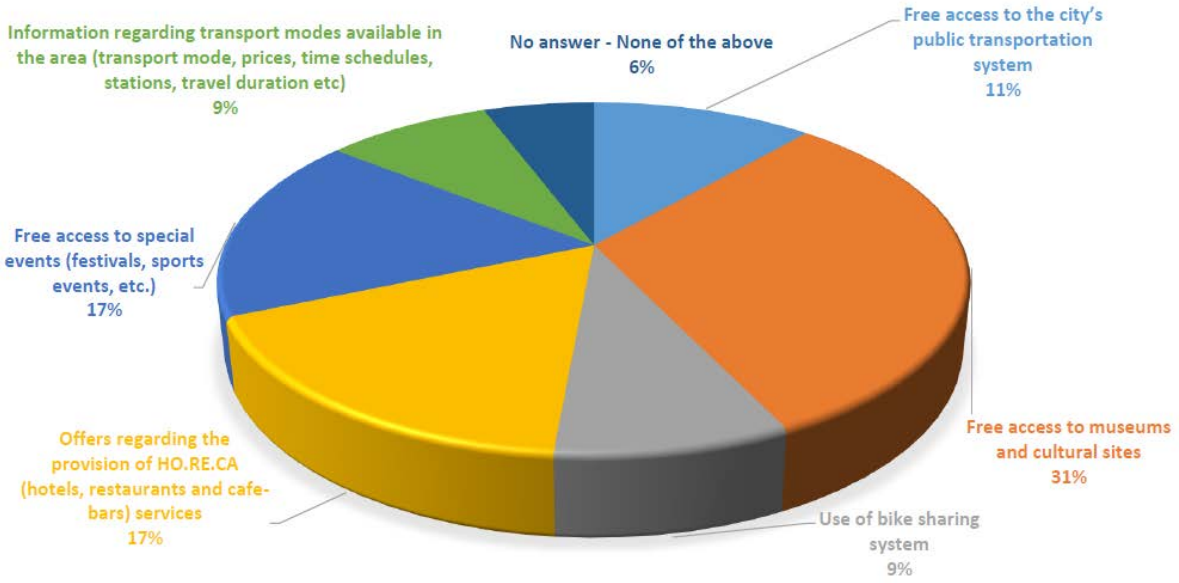
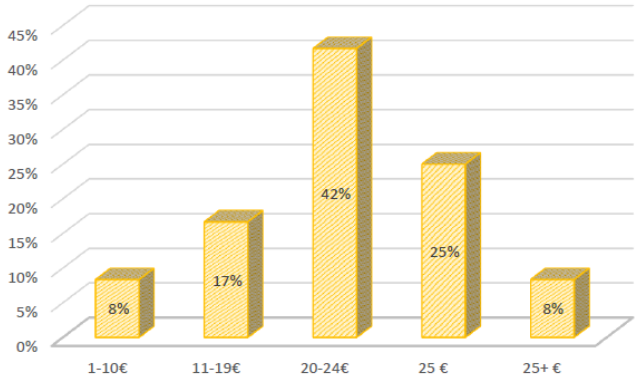


Figure 95: Part C, Igoumenitsa, question b

In the case of bying a touristic card what amount of money are you willing to pay? For each case please state the amount that you would be willing to pay.

Case A**: 5 trips using the Urban Public Transportation System, free access to 2 city museums/cultural sites, use of bike sharing system for 1 hour. **Estimated cost 25 €.

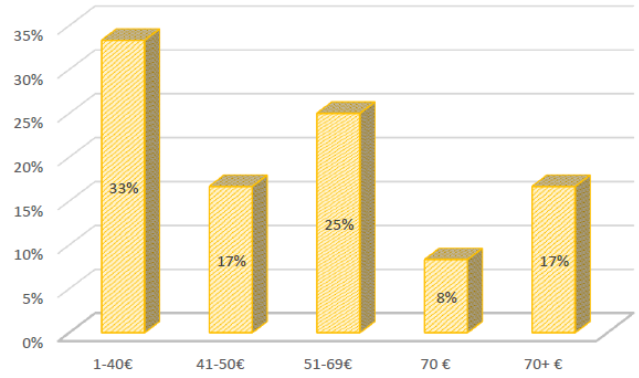


Average price: 21 €

Figure 96: Part C, Igoumenitsa, question c

In the case of bying a touristic card what amount of money are you willing to pay? For each case please state the amount that you would be willing to pay.

Case B**: 8 trips using the Urban Public Transportation System, 2 trips using the Interurban Public Transportation System, free access to 3 city museums/cultural sites, free access to 1 archeological/ other site of interest in Epirus, use of bike sharing system for 2 hours. **Estimated cost: 70 €

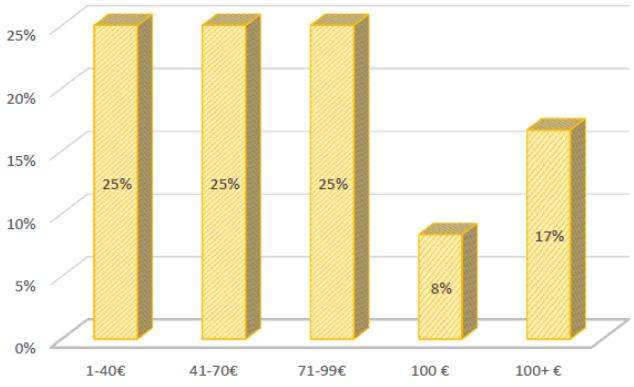


Average price: 55 €

Figure 97: Part C, Igoumenitsa, question d

In the case of bying a touristic card what amount of money are you willing to pay? For each case please state the amount that you would be willing to pay.

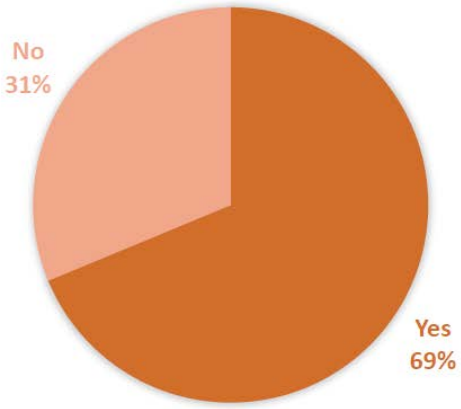
Case C**: 12 trips using the Urban Public Transportation system, 4 trips using the Interurban Public Transportation system, free access to 3 city museums/cultural sites, free access to 2 cultural/archeological/ other site of interest in Epirus, use of bike sharing system for 3 hours. **Estimated cost: 100€.



Average price: 83 €

Figure 98: Part C, Igoumenitsa, question e

If it was possible, would you be interested in participating in organized walking tours within the city and the surrounding area of Igoumenitsa?

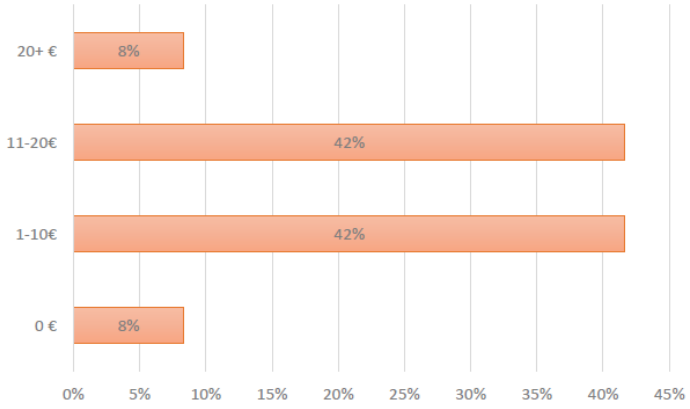


There is willingness to participate in organized walking tours

Figure 99: Part C, Igoumenitsa, question f

In such a case what amount of money would you be willing to pay?

***Case A**: For a two-hour trip within the city*



Average price: 12 €

Figure 100: Part C, Igoumenitsa, question g

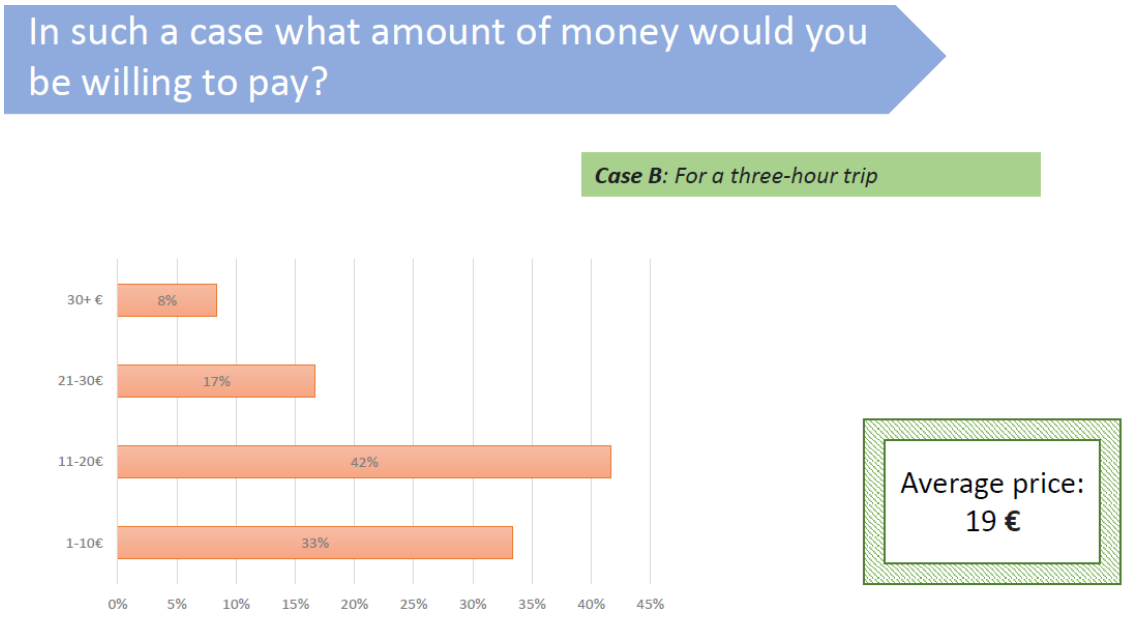


Figure 101: Part C, Igoumenitsa, question h

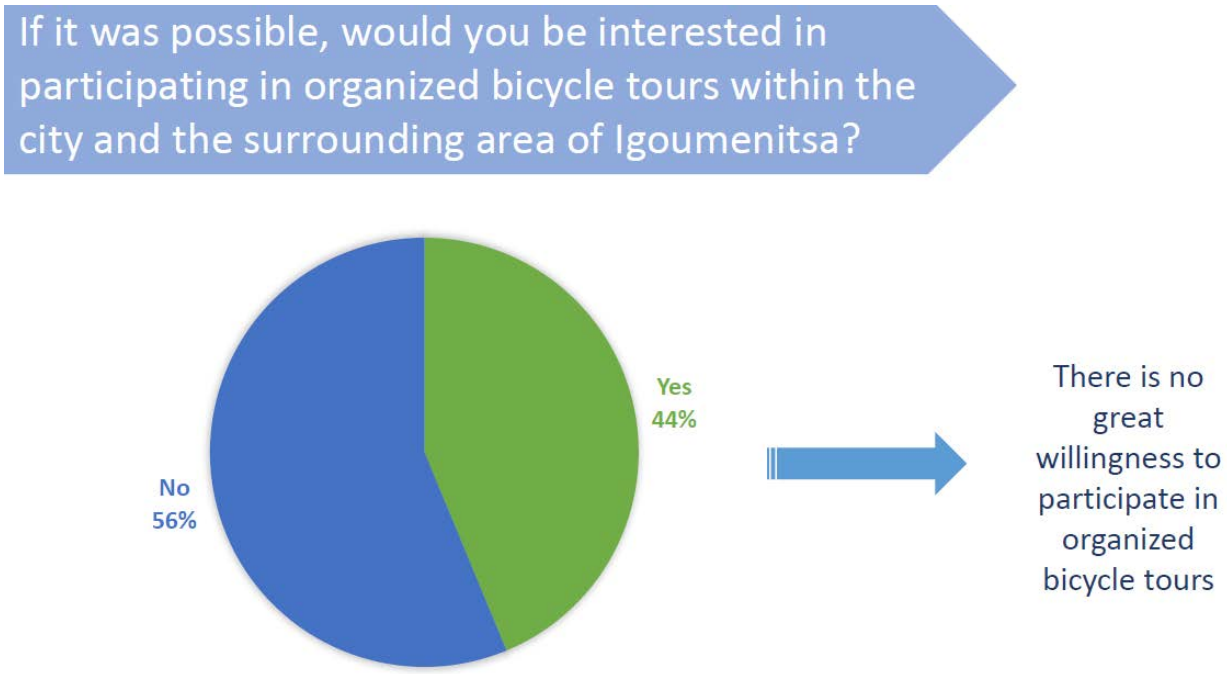
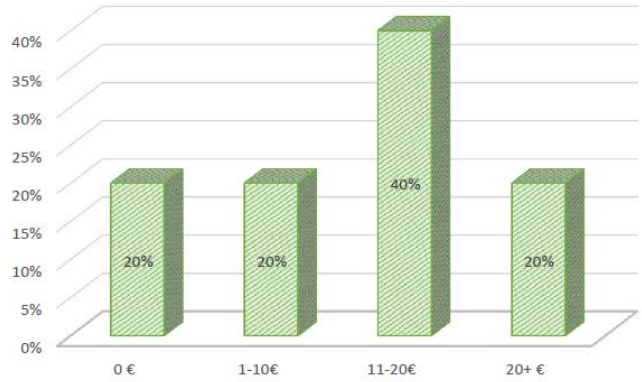


Figure 102: Part C, Igoumenitsa, question i

In such a case what amount of money would you be willing to pay?

***Case A**: For a two-hour trip*

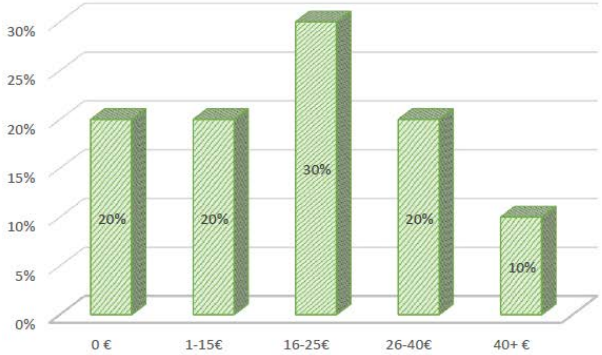


Average price: 15 €

Figure 103: Part C, Igoumenitsa, question j

In such a case what amount of money would you be willing to pay?

***Case B**: For a three-hour trip*



Average price: 21 €

Figure 104: Part C, Igoumenitsa, question k

The case of Preveza

Research period:16/03/2021– 08/2021

Sample: tourists, male and female,18+years old

Research method: Online and on the spot interviews

Content:

Part A: Socio-economic questions

Part B: Questions regarding tourists' trips

Part C: Igoumenitsa' s Pilot

Part A: Socio-economic questions

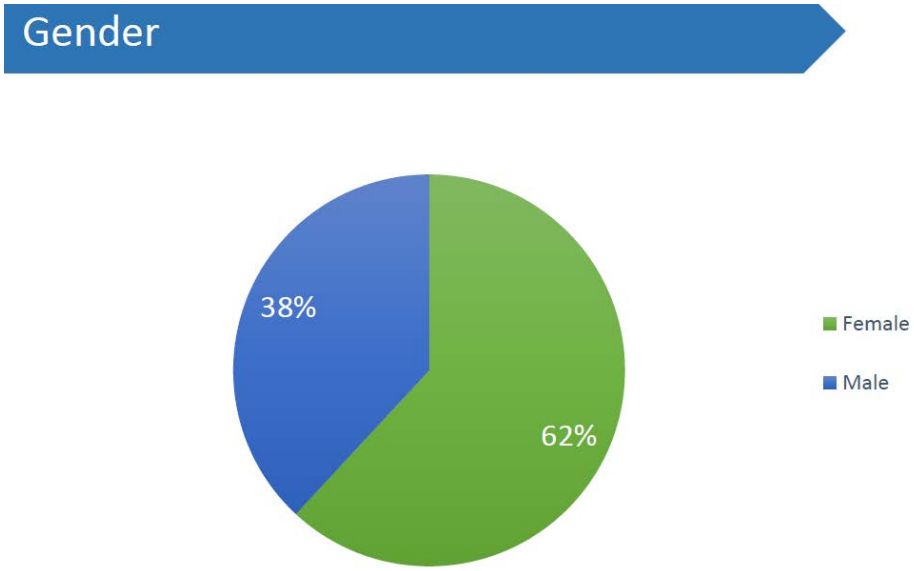


Figure 105: Part A, Preveza, gender

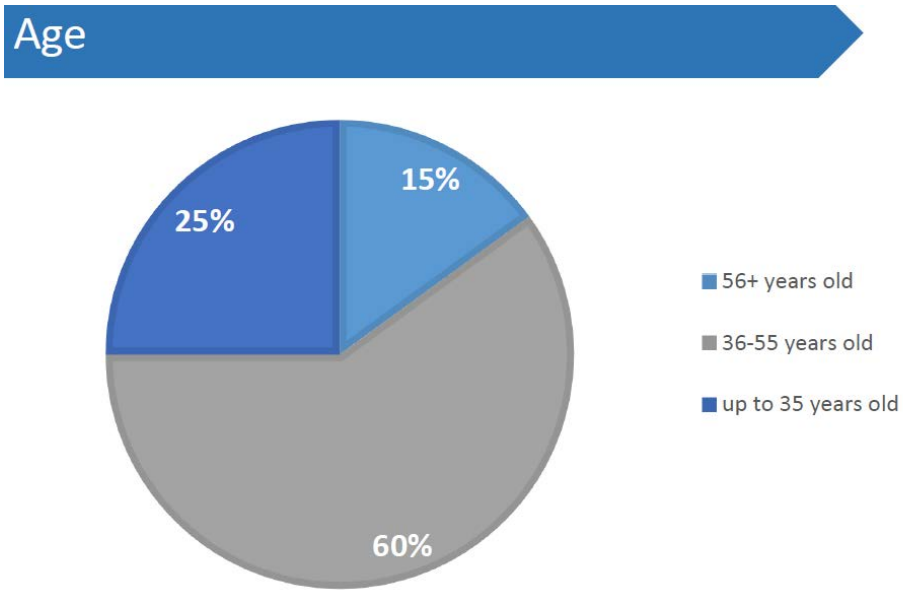


Figure 106: Part A, Preveza, age

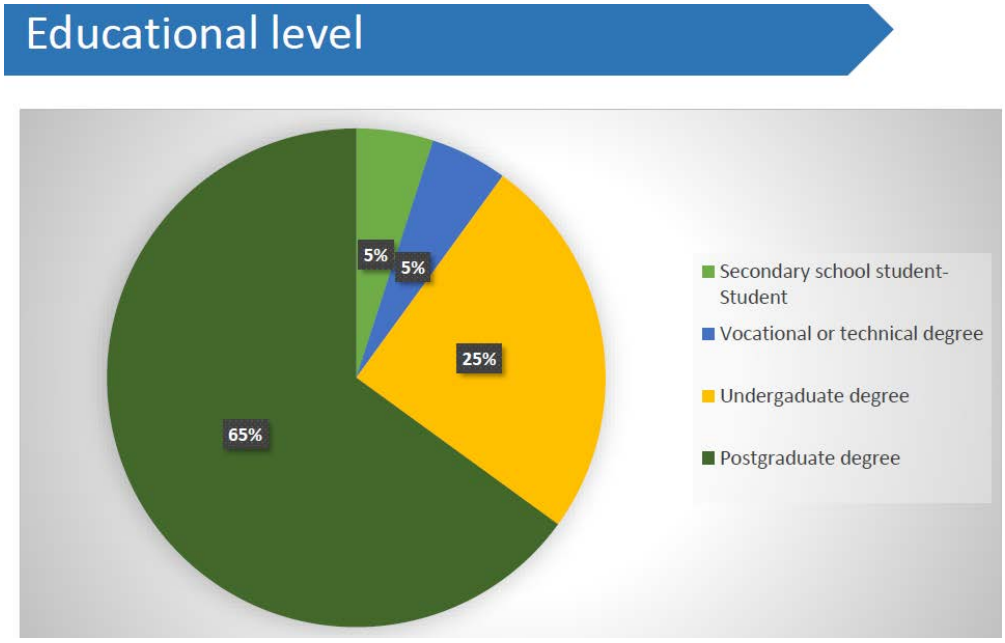


Figure 107: Part A, Preveza, educational level

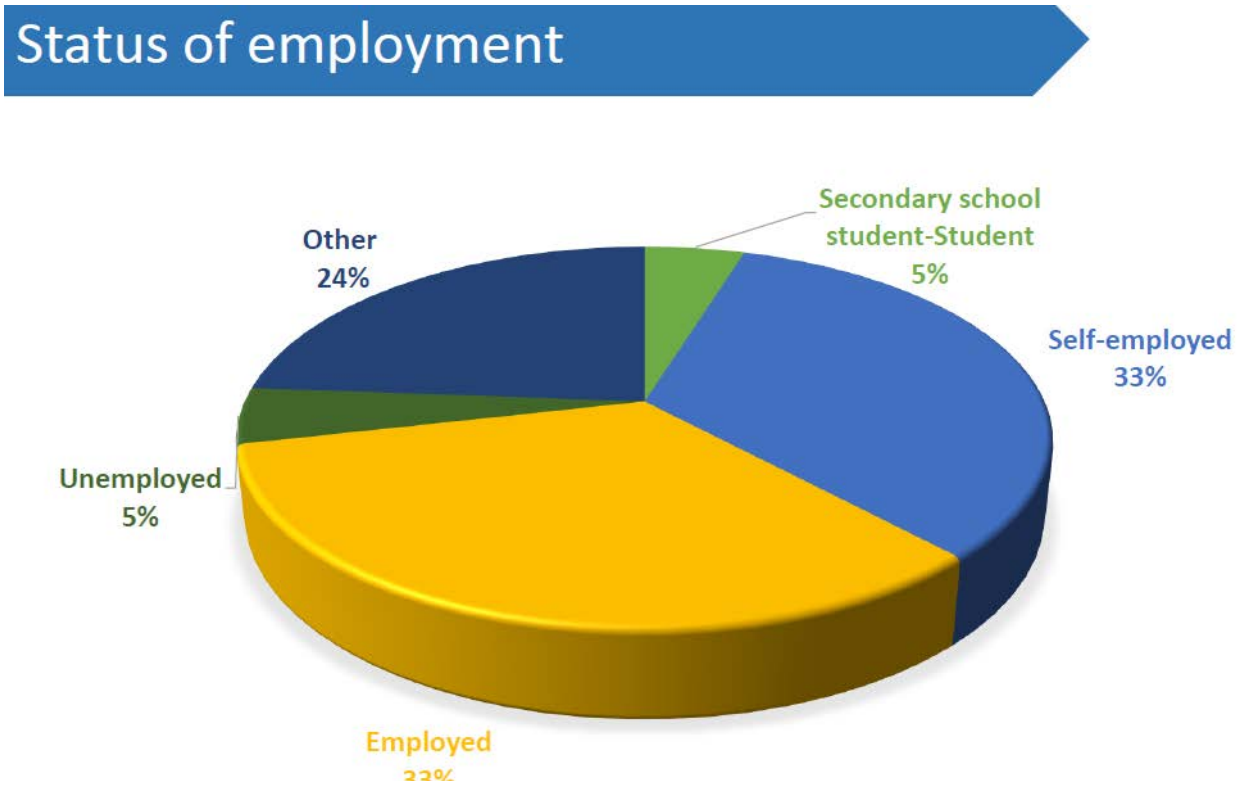


Figure 108: Part A, Preveza, employment status

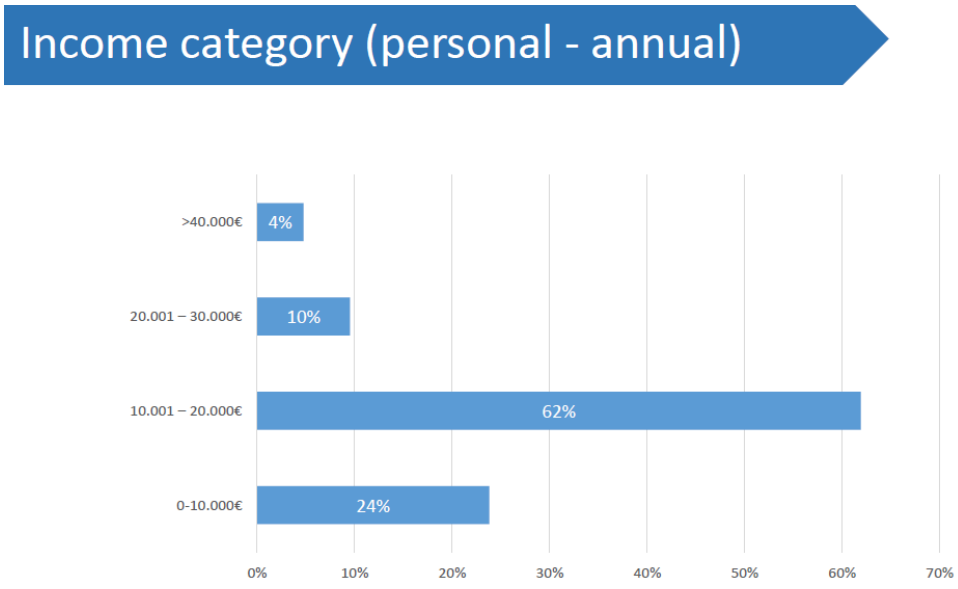


Figure 109: Part A, Preveza, income

PART B: Questions regarding tourists' trips

Was it the first time visiting Preveza?

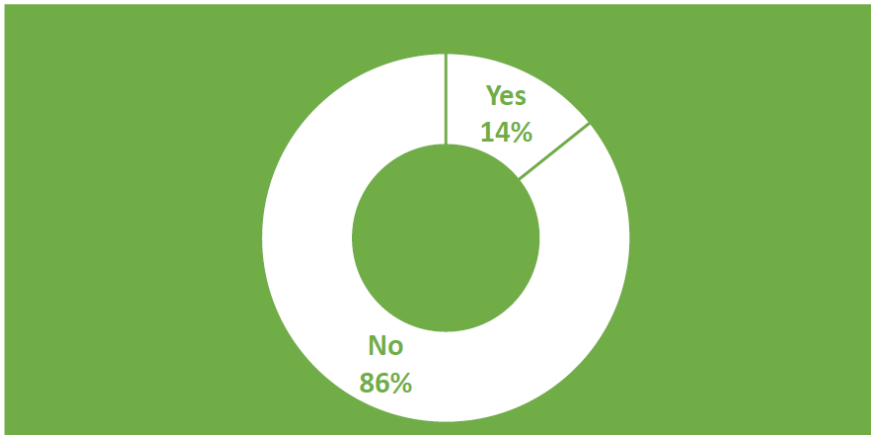


Figure 110: Part B, Preveza, 'was it your first time in Preveza'

How many times have you visited Preveza?

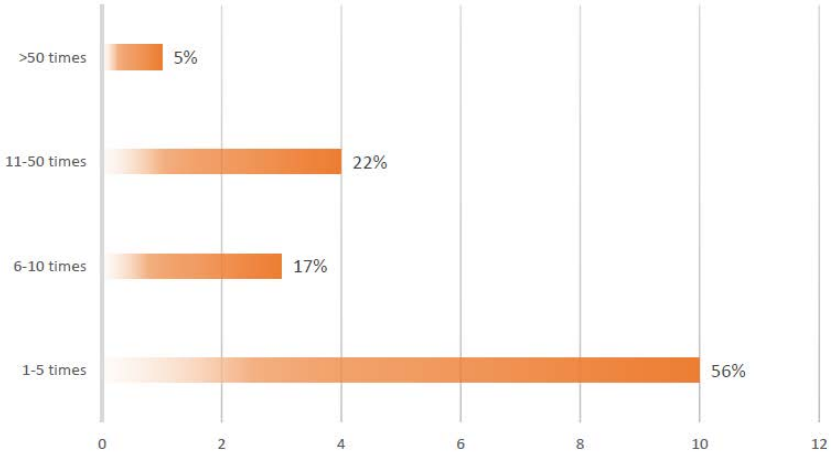


Figure 111: Part B, Preveza, 'how many times have you visited Preveza?'

How many nights did you stay?

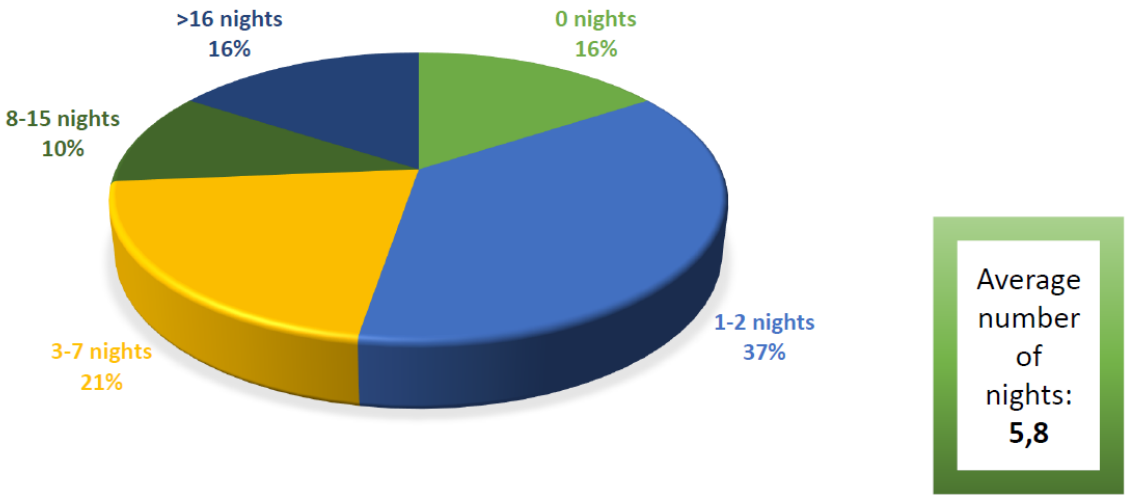


Figure 112: Part B, Preveza, 'how many times did you stay?'

Which transport mode did you use for coming to Preveza?

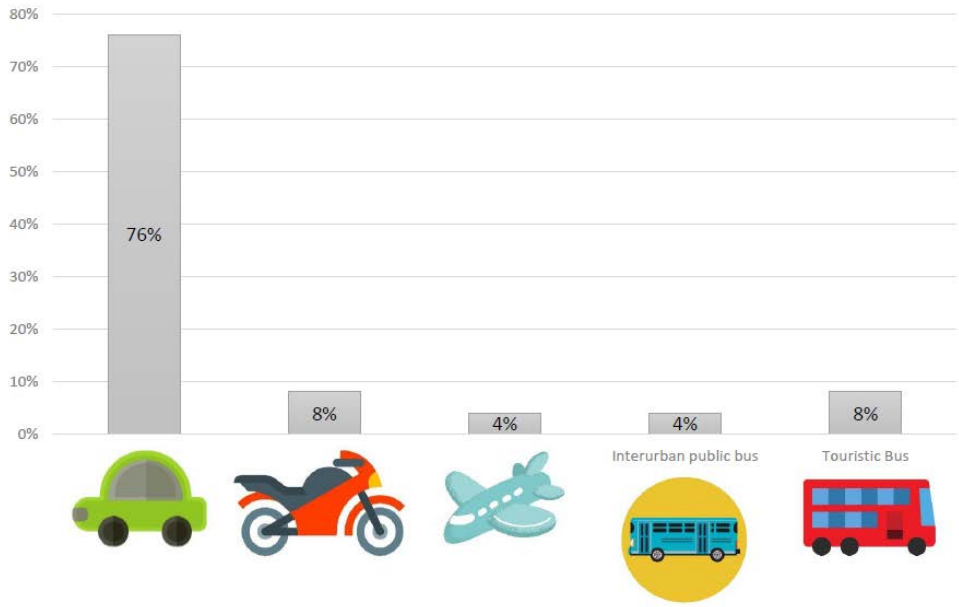


Figure 113: Part B, Preveza, transport mode used by Greek tourists

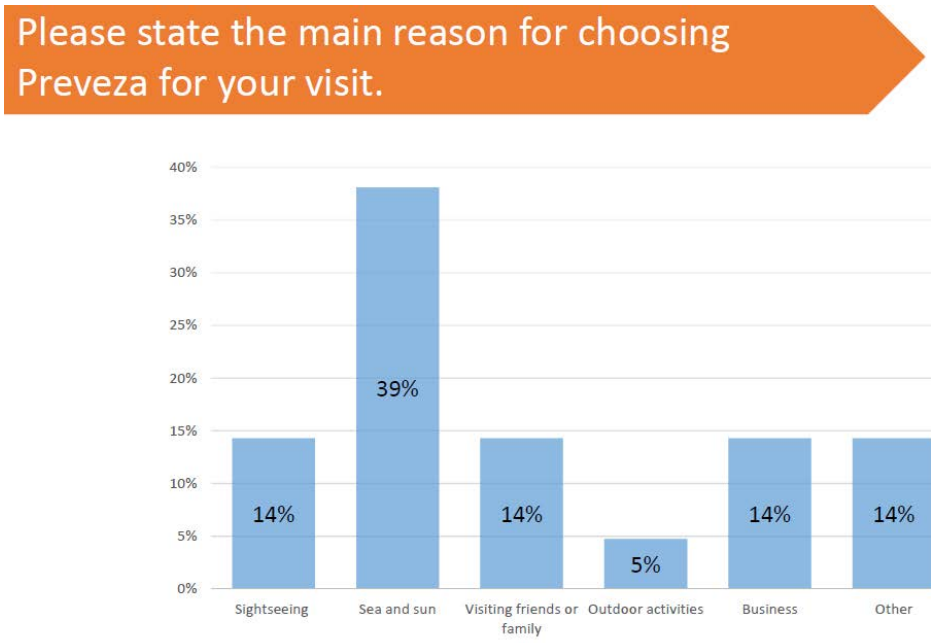


Figure 114: Part B, Preveza, main reason for choosing Preveza

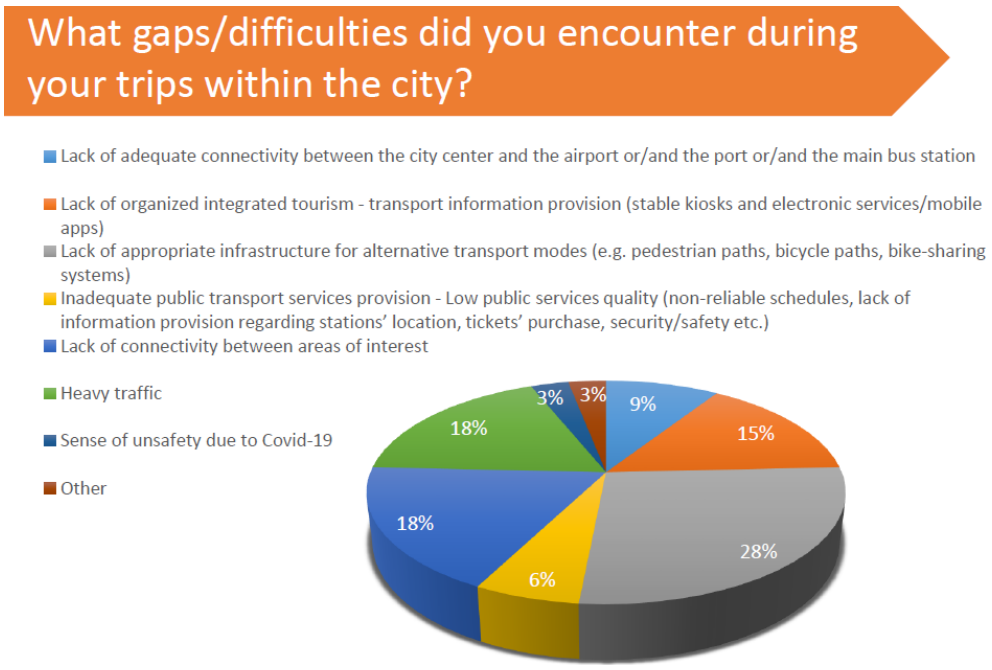


Figure 115: Part B, Preveza, gaps while travelling in Preveza

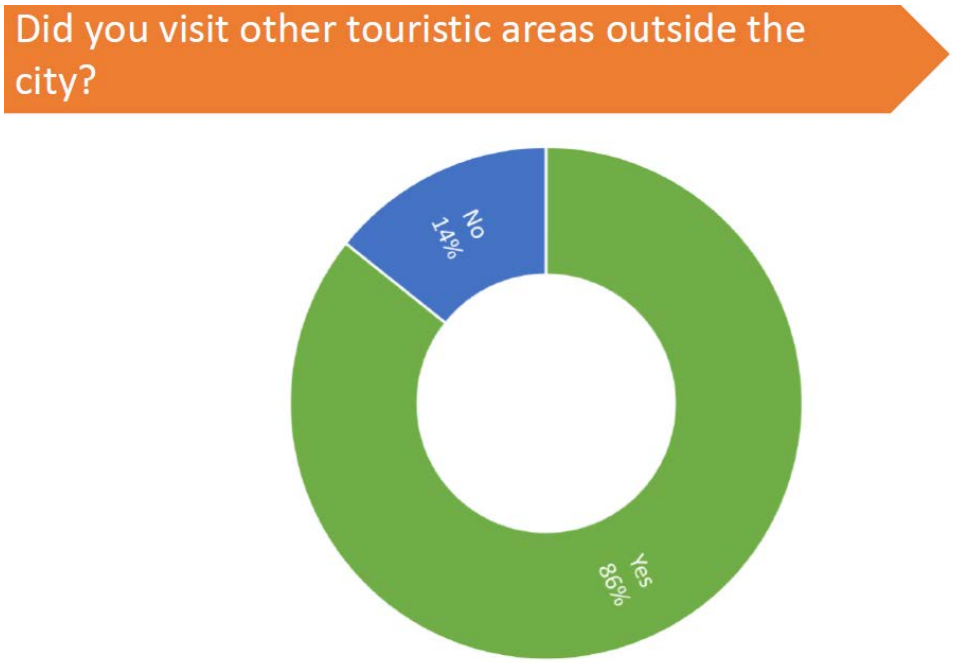


Figure 116: Part B, Preveza, 'did you visit areas outside Preveza'

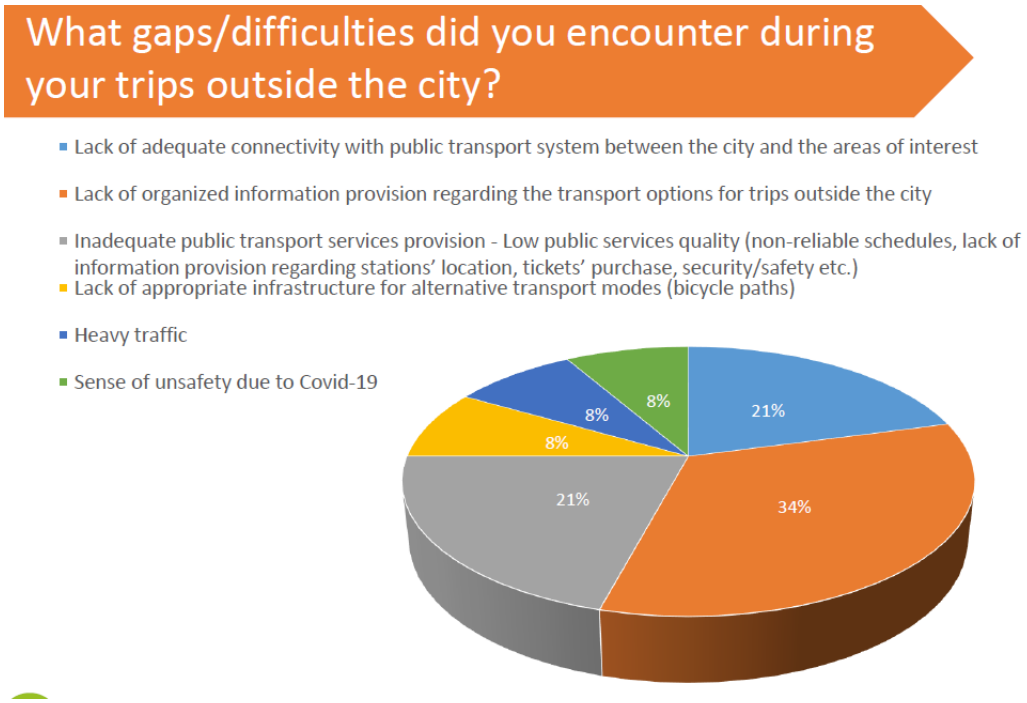


Figure 117: Part B, Preveza, gaps while travelling outside Preveza

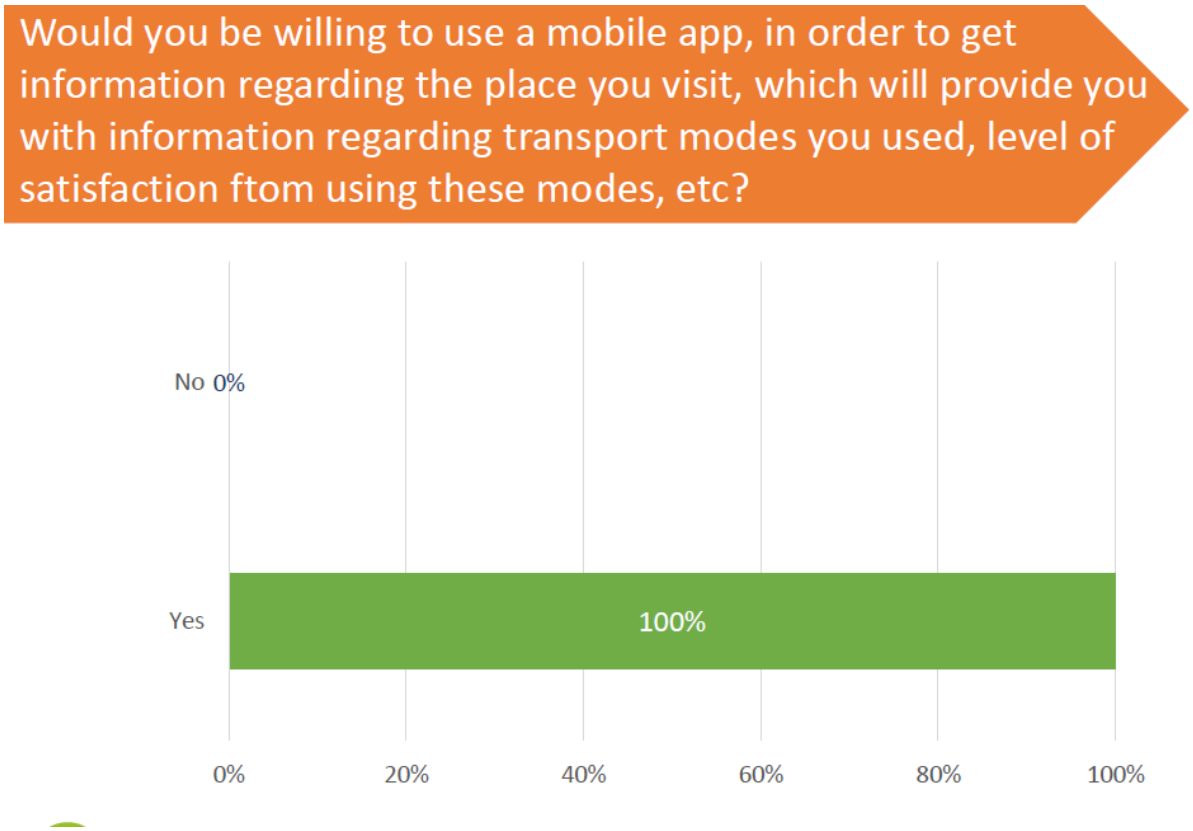


Figure 118: Part B, Preveza, willingess to use a touristic info

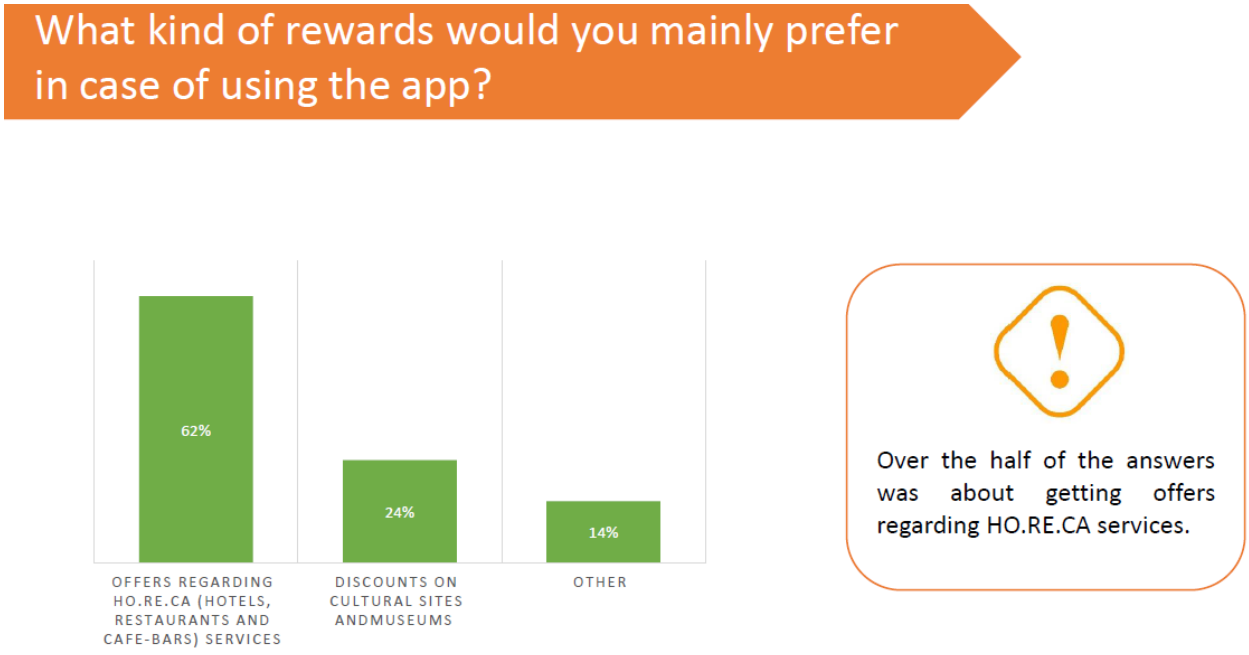


Figure 119: Part B, Preveza, type of rewards for using the app

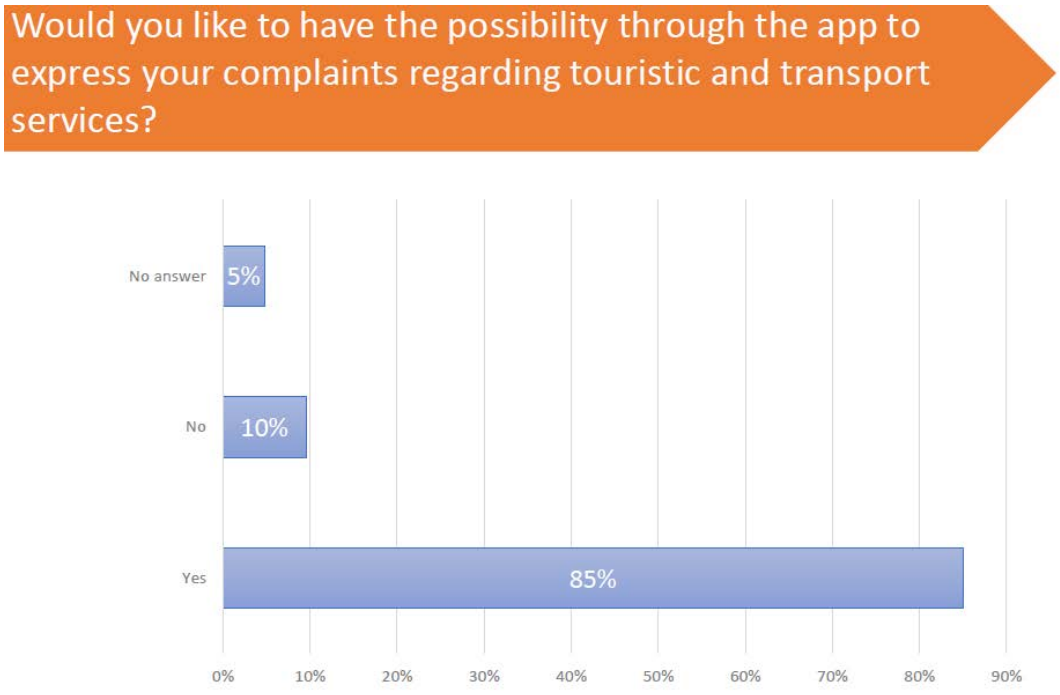


Figure 120: Part B, Preveza, crowdsourcing interest

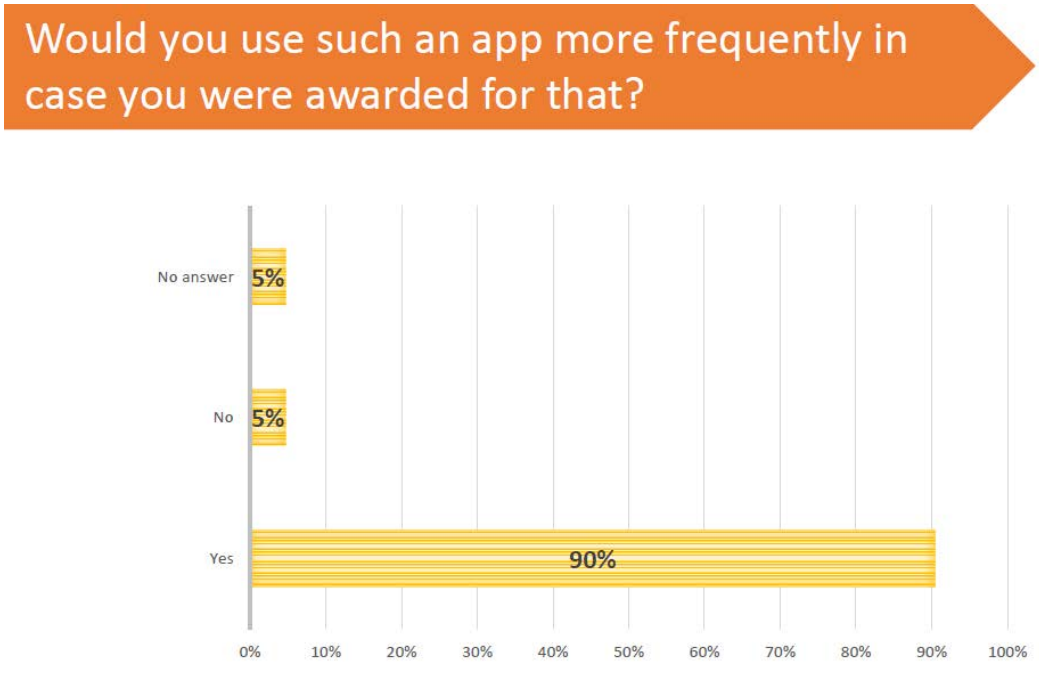


Figure 121: Part B, Preveza, value of rewards while using an app

PART C: Preveza' s Pilot

Would you use an integrated touristic card during your staying in the city? (pre-paid card for free access to specific touristic and transport services)

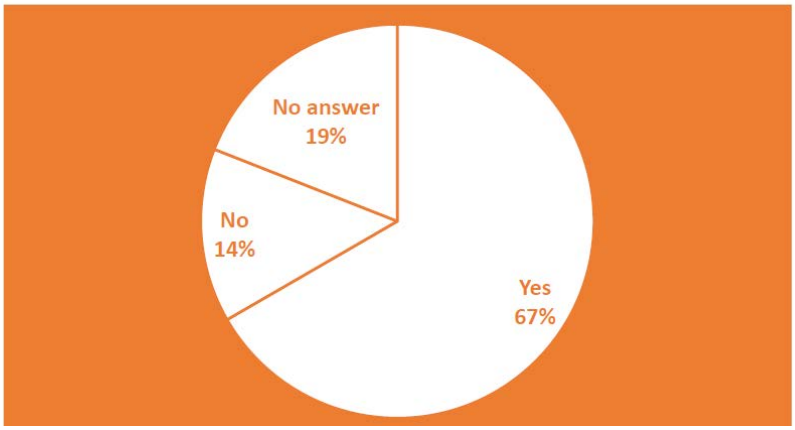


Figure 122: Part C, Preveza, willingess to use an integrated card

What kind of services would you like the card to cover?

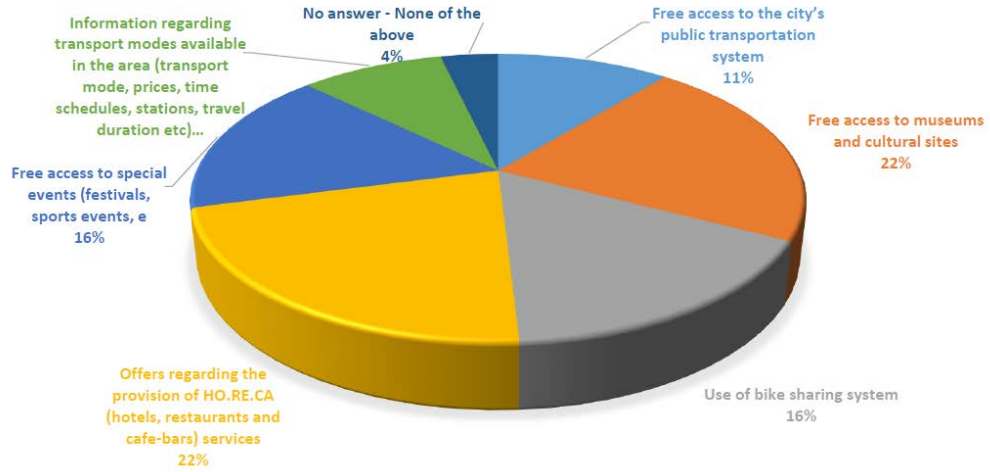
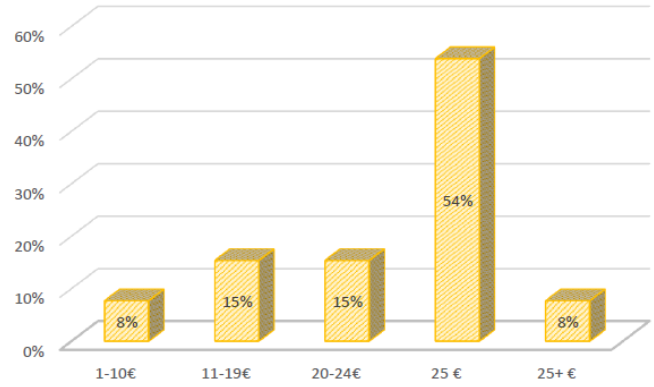


Figure 123: Part C, Preveza, type of services in an integrated touristic card

In the case of bying a touristic card what amount of money are you willing to pay? For each case please state the amount that you would be willing to pay.

Case A**: 5 trips using the Urban Public Transportation System, free access to 2 city museums/cultural sites, use of bike sharing system for 1 hour. **Estimated cost 25 €.

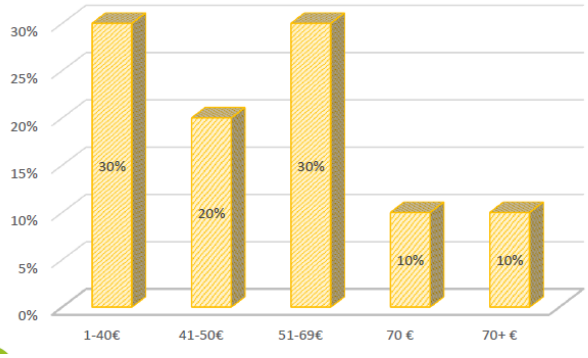


Average price: 23 €

Figure 124: Part C, Preveza, case A scenario (willingness to pay)

In the case of bying a touristic card what amount of money are you willing to pay? For each case please state the amount that you would be willing to pay.

Case B**: 8 trips using the Urban Public Transportation System, 2 trips using the Interurban Public Transportation System, free access to 3 city museums/cultural sites, free access to 1 archeological/ other site of interest in Epirus, use of bike sharing system for 2 hours. **Estimated cost: 70 €

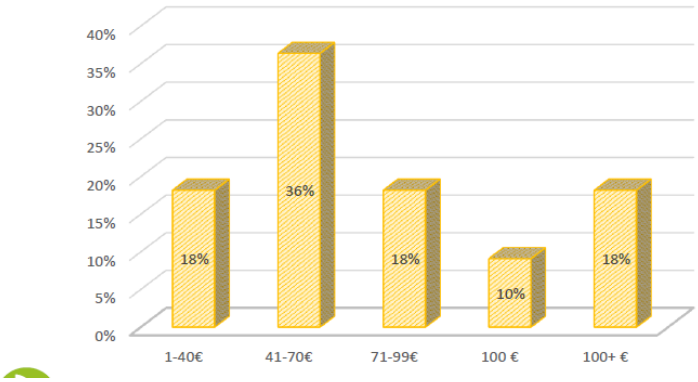


Average price: 54 €

Figure 125: Part C, Preveza, case B scenario (willingness to pay)

In the case of bying a touristic card what amount of money are you willing to pay? For each case please state the amount that you would be willing to pay.

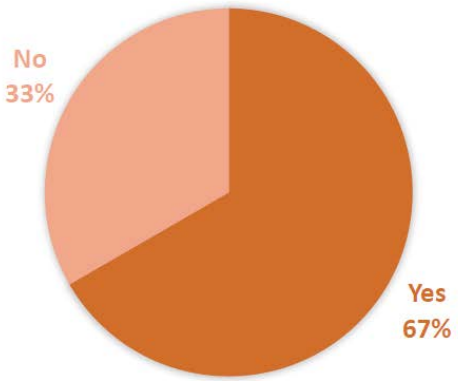
Case C**: 12 trips using the Urban Public Transportation system, 4 trips using the Interurban Public Transportation system, free access to 3 city museums/cultural sites, free access to 2 cultural/archeological/ other site of interest in Epirus, use of bike sharing system for 3 hours. **Estimated cost: 100€.



Average price: 85 €

Figure 126: Part C, Preveza, case C scenario (willingness to pay)

If it was possible, would you be interested in participating in organized walking tours within the city and the surrounding area of Preveza?



There is willingness to participate in organized walking tours

Figure 127: Part C, Preveza, willingness for a walking tour

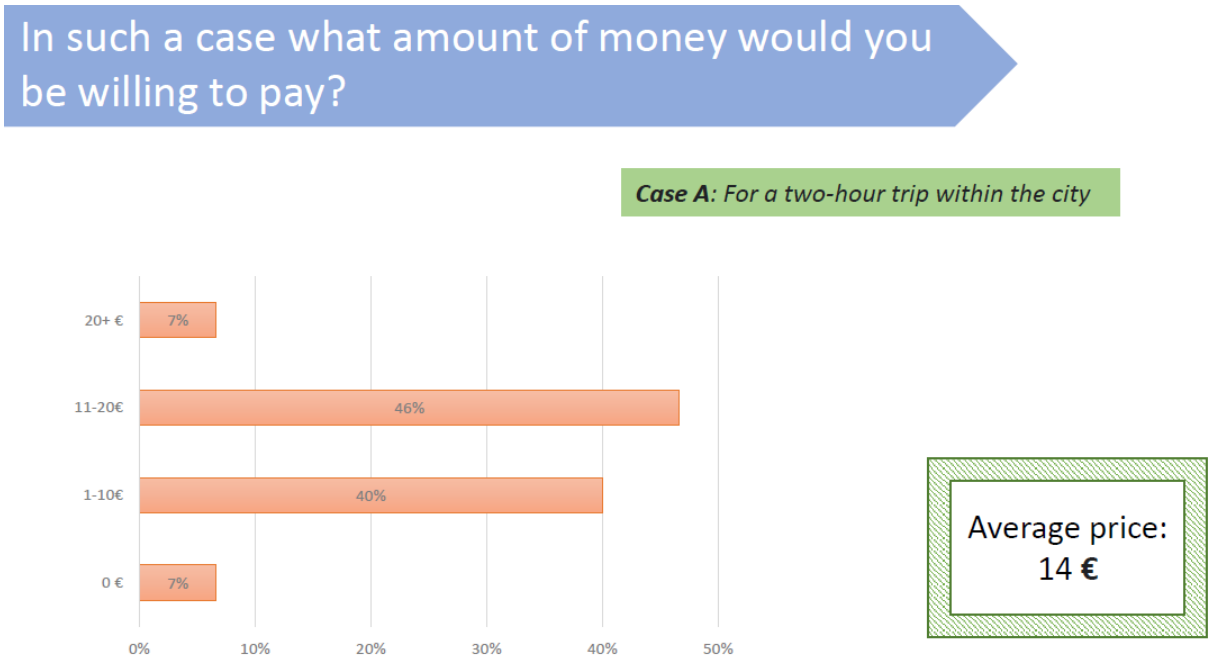


Figure 128: Part C, Preveza, willingness for a walking tour (case A)

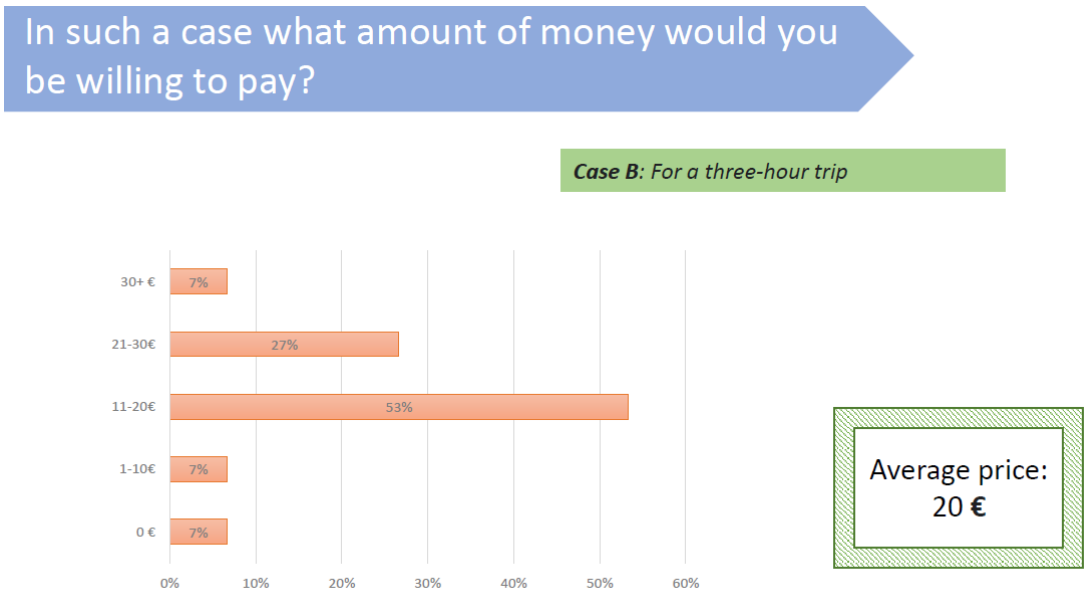


Figure 129: Part C, Preveza, willingness for a walking tour (case B)

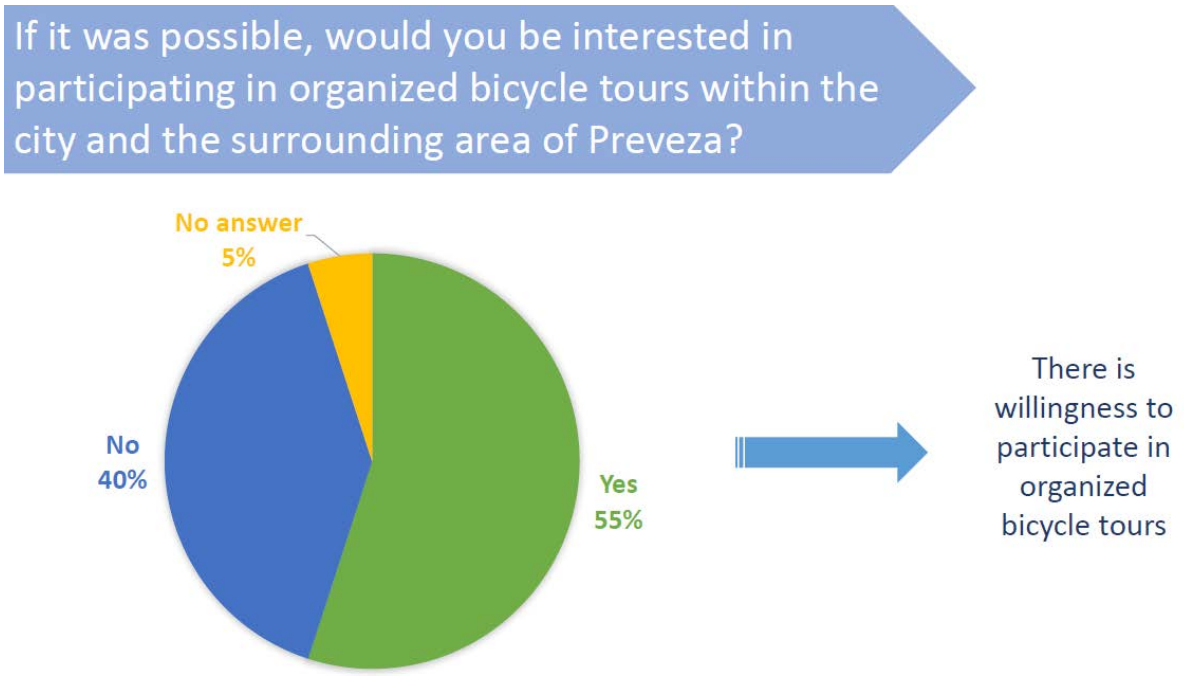


Figure 130: Part C, Preveza, willingness for a bicycle tour

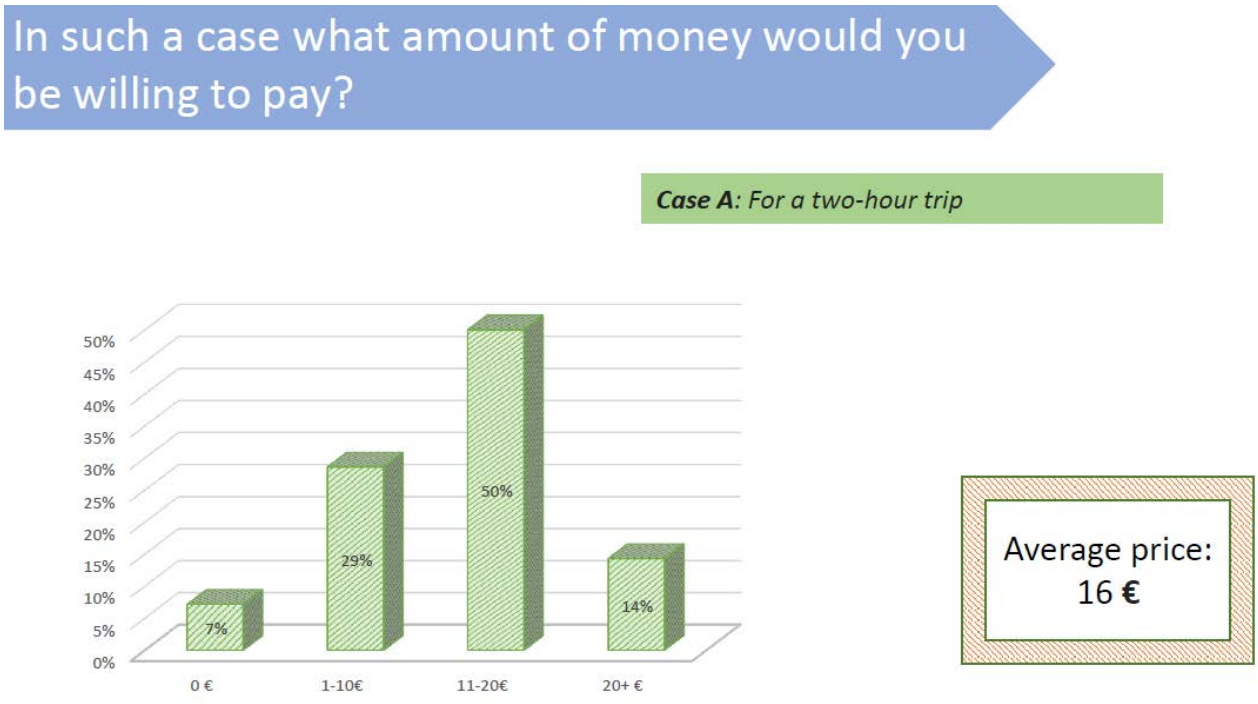


Figure 131: Part C, Preveza, willingness for a walking tour (case A)

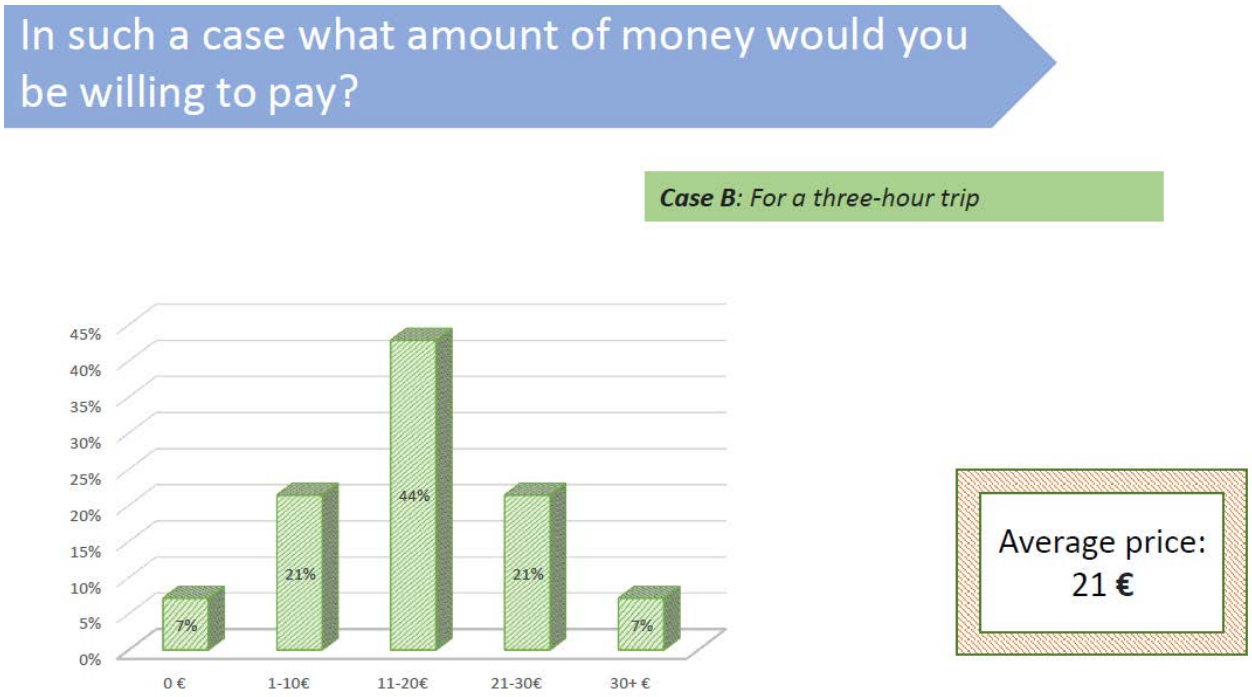


Figure 132: Part C, Preveza, willingness for a walking tour (case B)

3.3 The case of Emilia-Romagna Region

The Emilia-Romagna pilot is related to the integration of sustainable tourism promotion innovations in the existing regional sustainable mobility App called Roger, which already offers parking services in 50 cities within the region and public transport tickets for all regional public transport operators. The pilot intends to develop and test additional innovative tools for the promotion of the nexus among sustainable tourism and sustainable mobility.

Integration of new tools in Roger app include: a) Integrated Rail/Bus ticket for tourists travelling in the Romagna sub-region; b) Commuters with a rail season ticket can benefit of a free of charge public transport in the destination city; c) Kids up to 17 years old get a free annual ticket for public transport in the whole region. The planned extension of the Roger App further includes integration with bike sharing and electric car sharing systems.

1. Out of 62 respondents, 46 (74.2 %) were aware of the ROGER app, while 16 (23.8 %) had never heard of it. This can be attributed to the relatively short time of the ROGER app being in operation (since March 2019) and to the overall lack of promotion activities.
2. Among visitors who were aware of the ROGER app, about a half know the app, but have never used it. A bit over 30 % of them use the app at least once a month, almost 20 % use it 2-5 times per month

and only 1 respondent (2.2 %) uses it regularly. These data also show the need of a more effective promotion activity of the app.

3. Regarding the integration of the app with other sustainable mobility services dedicated to tourists, out of 217 surveyed visitors 44.7 % declared their positive opinion, while 22.1 % were against the idea. Others did not reply or don't have an opinion.
4. Visitors recognized the following sustainable mobility services as the most useful ones to integrate into the app: Bike rental (36.1 %), Bike sharing (25.8 %), Electric scooter rental (35 %), Tourist packages (30.9 %), other (6.2 %).
5. Interest of visitors regarding the app showing carbon emissions related to their behaviour was balanced between interested (50.2 %) and not interested visitors (49.8 %).
6. 23 % of surveyed visitors were willing to change their way of travel in advance when aware of significant related CO_2 emissions and 77 % were not.
7. 49.3 % of respondents chose lower cost as their priority when choosing a transport mode, while 50.7 % of them chose shorter time of transport as the main reason.

Institute for Transport and Logistic Foundation: The survey was very important for the Emilia-Romagna Sustourismo case study in order to understand the main mobility and touristic needs of the tourists visiting the Emilia-Romagna coastal areas. Even if the data are not so representative of the real touristic flows and compositions in the period before the Covid-19 emergency, it is clear the main needs of the tourists. They are mainly tourists visiting these areas for enjoy the sea and in case visiting the Emilia-Romagna main touristic attractions. All these evidences were used to plan our Susturismo pilot, foreseen to support the tourists visiting the main Ravenna monuments (a lot of them are UNESCO World Heritage sites) using an innovative integrated tickets allowing to use for 3 or 7 days all the public transport solutions available in the Romagna area (both public buses and trains).

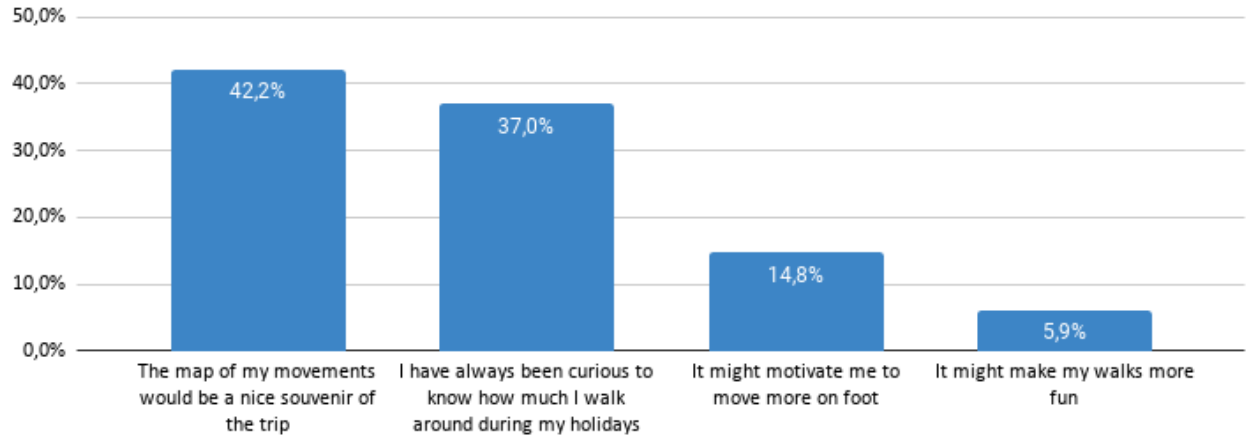
3.4 The case of Friuli Venezia Giulia Region

The specific pilot implementation area within the Friuli Venezia Giulia Region covers the centres of Trieste, Aquileia and Grado. The pilot action will exploit the potential offered by the Sustourismo project app to engage visitors in adopting more sustainable modes of transport. One of the most promising options seems to be the launch of a promotional initiative, which will invite tourists to discover the target areas on foot, activating the app's pedometer function. Thanks to an agreement with local tourist businesses and attractions, visitors who demonstrate that they have walked a certain number of steps or reached certain attractions on foot will be able to benefit from discounts and special offers.

1. Considering the app will make mobility in Trieste/Grado/Aquileia more sustainable by providing information on visitors' movements, over half of respondents (57.6 %) would spend 10 minutes registering to be able to use the app, 30.8 % would not and 11.6 % only if there are rewards.

2. Among the ones who would not register, almost half said they might be interested, but the registration requires too much time, 27 % don't want their trips to be recorded, 16.2 % are not comfortable using apps and 8.1 % don't find it interesting.
3. More than half of respondents (53.8 %) answered they would use a pedometer function on the app, which would allow them to track their walk around Triste on a map and see how much they have walked. 33.5 % answered they would not and 12.7 % would do this only if the app was combined with a game.
4. Among respondents, who were willing to use a pedometer function, 42.2 % would do so because the map would be a nice souvenir of the trip, 37 % were curious to know how much they walk around during holidays, 14.8 % thought the app might motivate them to move more on foot, and 5.9 % thought that it might make their walks more fun.
5. Among respondents, who were not willing to use a pedometer function, 38.1 % said they are not interested, 26.2 % did not want their trips to be recorded, 16.7 % were not comfortable using apps, 9.5 % thought that it might be interesting, but they already use a step counter app/tool, 9.5 % thought that it might be interesting, but they would prefer to spend time in different ways.

Figure 133: Reasons for using a pedometer function on a mobile app in Trieste/Grado/Aquileia



3.5 The case of Ljubljana

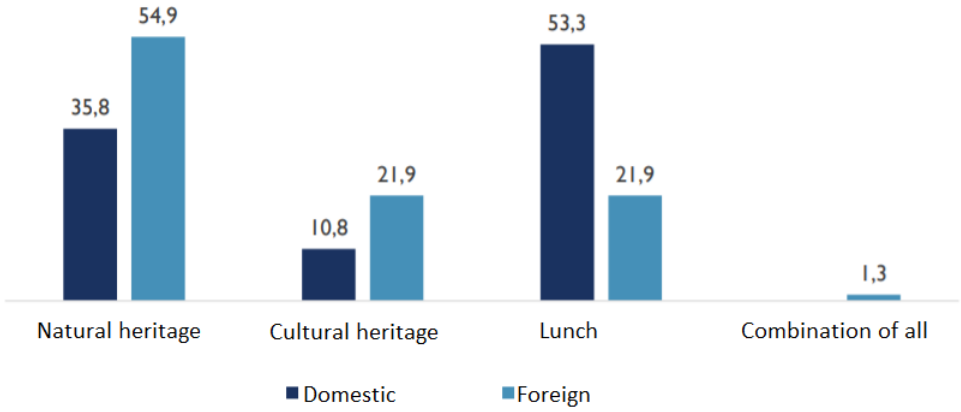
Ljubljana Moors are the largest Slovene and southernmost European wetlands. Due to its rich biodiversity and important heritage, the area is protected by the Ljubljana Marsh Nature Park, which covers almost 160 km2 large plain and is as such ideal for cycling and other forms of sustainable tourism. This site is, however, less know to foreign tourists due to bad connectivity to the City of Ljubljana.

The pilot objectives are to improve the attractiveness of the bike & rail sustainable tourism offers from the Ljubljana main train station. The pilot action will focus on defining the needs of tourists coming to the main train station that would like to visit Ljubljana Marsh Nature Park by bike.

The desired results of the pilot project include an integrated tourist offer, restructuring and renewal of tourism infrastructure, integration of public passenger transport into the tourist offer with emphasis on railways, improved planning on regional level, and new innovative tourist products / tourist packages.

1. More than half of both domestic (53.1 %) and foreign (55.5 %) visitors would participate in an organised cycling tour in the Ljubljana Marshes. Among those not interested in such a tour, there is an above-average share of men, respondents older than 50, less educated and self-employed.
2. Among respondents who would participate in the tour, most were willing to spend 4 hours on an organized cycling tour in the Ljubljana Marshes, while the smallest share would spend an entire day on such a tour (additional answers were 6 hours and 2 hours).
3. The most suitable tour length for domestic and foreign visitors is 15 to 20 km.
4. Most respondents would rather ride a classic bicycle in the Ljubljana Marshes than an electric bicycle.
5. Over a third of domestic visitors (37.1 %) would be willing to pay up to 10 EUR more for a tour with an electric bicycle, 28.1 % would not pay any additional amount, while 25.5 % would pay 11-20 EUR more. In regards to foreign visitors, 33 % of them would pay 11-20 EUR more, 28.8 % would pay up to 10 EUR more, and 25.3 % would pay nothing extra. The average value of additional payment for a tour with an electric bicycle is 11,71 EUR among domestic, and 13,94 EUR among foreign visitors.
6. More than half of domestic tourists (53.3 %) would like to have lunch when visiting the Ljubljana Marshes, while more than half of foreign tourists (54.9%) would like to see natural heritage as part of the additional offer. There is less interest about cultural heritage.
7. When choosing a guided or a self-guided tour, the result was the same for domestic and foreign visitors. Two thirds of visitors would like to make an independent tour of the Ljubljana Marshes with navigation, while one third would prefer a guided tour.
8. About 70 % of domestic and foreign visitors would pick a river boat transport to the Ljubljana Marshes and return with a train, others would take a train both ways.
9. A large majority of domestic and foreign visitors would go on an additional 30-minute hike to a viewpoint with a picturesque church during the cycling tour.
10. For a guided 4-hour cycling tour in the Ljubljana Marshes, which includes bike rental and public transport from the Ljubljana city centre and back, most domestic and foreign visitors would be willing to pay between 30 and 40 EUR.

Figure 134: The preferred additional offer during a cycling tour of the Ljubljana Marshes



Institute of Traffic and Transport Ljubljana: In addition to Ljubljana, foreign tourists intend to visit tourist areas outside Ljubljana and want information about attractions outside the city. Therefore, the supply of sustainable tourist products outside Ljubljana is an opportunity. More than six tenths of respondents would be willing to use the mobile application. A good three-quarters of tourists would mostly like information on points of interest in the city, followed by information on cultural sites and museums, therefore app should consider discounts for visiting cultural sights and museums in Ljubljana. The biggest problems for foreign tourists during their travels outside the city were the lack of adequate public transport connections between the city and areas outside the city. Organized cycling routes to the Ljubljana Marshes would be attended by more than half of foreign tourists. Most of the respondents would rather ride a classic than an electric bicycle on the way through the Ljubljana Marshes, therefore the Ljubljana case should consider both options when preparing the pilot case. A good half of tourists would like to have lunch when visiting the Ljubljana Marshes and would like to see a natural heritage as part of an additional offer, therefore food suppliers as stakeholders should be considered. Two thirds of tourists would like an independent tour of the Ljubljana Marshes with navigation, and one third would choose a guided tour. Pilot case Ljubljana could be divided into guided and self-guided bike tour. The vast majority of domestic and foreign tourists would also make a short hike to the lookout point.

3.6 The case of Zadar

The aim of the pilot action is to improve the environment and emphasise elements of natural and cultural heritage within the Adriatic region, through the reduction of environmental pollutants caused by the increasing use of private vehicles of tourists traveling to the region. For this reason, a new cycling route will be designed and implemented within city of Zadar.

1. More than half of domestic (52.9 %) and foreign visitors (61.1 %) would be willing to use a mobile application which would provide information about cycling in the city of Zadar.

2. More than half of domestic (56.7 %) and foreign visitors (64.4 %) use their own bicycles in their place of residence.
3. The largest share of domestic (35.2 %) and foreign visitors (38.8 %) uses a bicycle in their place of residence for the purpose of recreation, followed by everyday activities (22.8 % - domestic visitors, 27.6 % - foreign visitors) and transport to work (13.5 %- domestic visitors, 17.2 % - foreign visitors).
4. Over a half of domestic (69.7 %) and foreign visitors (60.0 %) never carry a bicycle with them on a holiday/travel, while less than a third carries it with them only sometimes.
5. 57.7 % of domestic visitor surveyed never choose a holiday destination based on the possibility to use a bicycle within the destination, whereas 27.4 % sometimes do that. The majority of foreign visitors surveyed (40.0 %) sometimes chooses a holiday destination based on this factor, but also a significant share of them never does (38.9 %).
6. A vast majority of both domestic (87.5 %) and foreign visitors (81.1 %) did not carry their bicycle on their last trip to Zadar. Their reasons vary and are shown in Figure 58.
7. In regards to domestic tourists, the highest average satisfaction rate was noted for regulation and quality of bicycle traffic (average 3.2). The lowest average satisfaction rate was noted for regulation and quality of shipping traffic (average 2.4). For foreign tourists, the highest average satisfaction rate was also noted for regulation and quality of bicycle traffic (average 2.8) and the lowest for regulation and quality of pedestrian traffic (average 2.2). Other options included regulation and quality of stationary traffic, public transport and road traffic.
8. Just under half of domestic tourists (42.3 %) think that Zadar is a destination that is suitable for using a bicycle. Around two-thirds of domestic tourists (65.6 %) also find that Zadar is a bike-friendly destination.
9. In regards to domestic tourists, an average satisfaction rate of 3.6 was noted for: availability of information on cycling infrastructure, marking of bicycle paths and routes, arrangement of bicycle paths and routes, and connection of bicycle paths and routes. Possibility to rent bicycles scored the lowest average satisfaction rate (3.0). For foreign tourists, an average satisfaction rate of 3.1 was noted for connection of bicycle paths and routes, and availability of bicycle parking spaces. Possibility to rent bicycles has also scored the lowest average satisfaction rate (2.6). Other average satisfaction values are shown if Figure 59.
10. Just under half of domestic (46.6 %) and around two-thirds of foreign tourists (66.7 %) have not rented a bicycle to use like a mode of transport in Zadar and Zadar County during their last visit.
11. Out of domestic tourists that have used a bicycle or would use them in the future, the largest share would use it for the purpose of recreation (14.9 %). The largest share of foreign tourists would use it for sightseeing of various cultural and natural attractions (16.3 %). The least interest is shown towards using a bicycle to drive to the bus station, sea or airport, etc.

12. The average price domestic visitors would be willing to pay to rent a bicycle for a day was 3.77 EUR, while foreign visitors would on average pay 5.85 EUR.
13. Just under half of domestic (44.2 %) and just over half of foreign tourists (57.8 %) would be willing to use a bicycle during their next visit to Zadar and Zadar County.
14. Just under half of domestic tourists (46.2 %) do not know if they would be willing to recommend Zadar as a bike-friendly destination to their family, friends and relatives. Just under half of foreign tourists (47.8 %) would be willing to do so.

Figure 135: Reasons for not carrying a bicycle on the last trip to Zadar

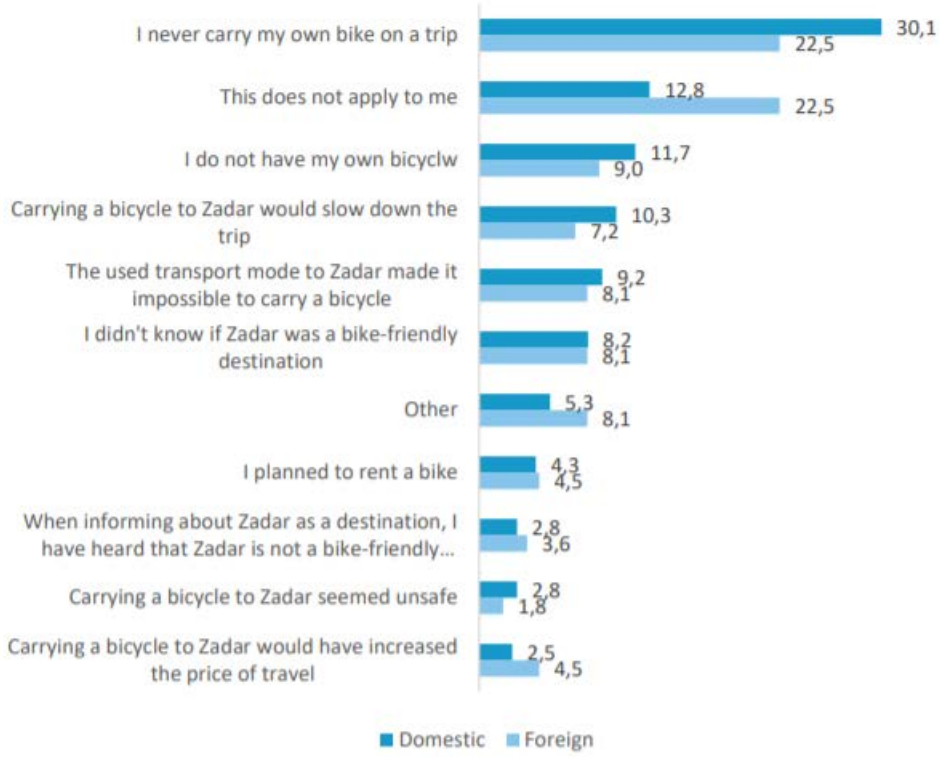
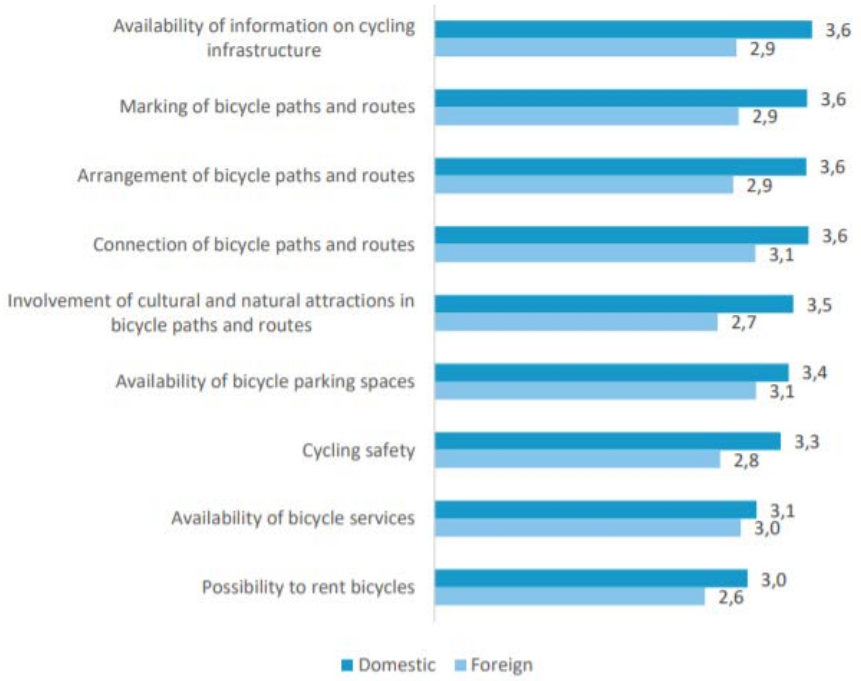


Figure 136: Satisfaction with elements fo Zadar as a bike-friendly destination



City of Zadar: Findings obtained through the conducted survey can be very valuable for achieving the project objective. In this sense, it is important to emphasize that survey respondents are interested in utilization of mobile application with the aim of enhancing the usage of more sustainable transport modes. As survey results showed, more than half of both domestic (52.9 %) and foreign visitors (61.1 %) would be willing to use a mobile application which would provide information about cycling in the city of Zadar. Therefore, pilot development primarily encompassed designing various routes that promote cycling (and walking combined) as a mean of sightseeing. Furthermore, an additional finding speaks volumes about the readiness of visitors to apply principles of sustainability when visiting Zadar. When asked about types of rewards they would mainly prefer in case of using the app, the majority of visitors prefers discounts on transport modes as a type of reward they could receive. This could be an important information for local policy-makers, that gives a valuable insight into the need to implement different changes that could improve the quality of public transport. So, the mobile application development could represent an initial phase of the overall process of public transport 'enhancement' in the city of Zadar.

Although respondents expressed willingness to use a mobile application which would provide information about cycling, less than half of domestic visitors (42.3 %) and 65.6 % of foreign visitors think that Zadar is a bike-friendly destination. Also, it is important to notice that most tourists (58.6 %) still use private vehicles for transportation within the city and only 4.3 % of them use city buses. The rest of the surveyed tourist (31.3 %) travel within the city on foot, but considering a large percentage of tourists using private vehicles, it is necessary to focus on more sustainable modes of transport. All the insights from the conducted research represent a useful and important base for pilot development in Zadar, but also for all levels of decision-makers who are directly or indirectly involved in planning and organizing (public) transport in Zadar and Zadar

County. In addition to that, all results indicate that it is very important to inform and educate tourists visiting the city, as well as the locals, regarding sustainable models of mobility within and outside the city of Zadar, with the aim of further developing tourism in a more sustainable way.

3.7 The case of Tivat

The pilot action of Tivat includes three potential tourist packages: a) Tivat walking tour including city tour and Gornja Lastva – Sv Vid; b) Tivat Salina active tour (birdwatching, cycling, hiking, SUP); c) Tivat highlights tour (e.g., Luštica Bay by tuk tuk or alternative mean of transportation).

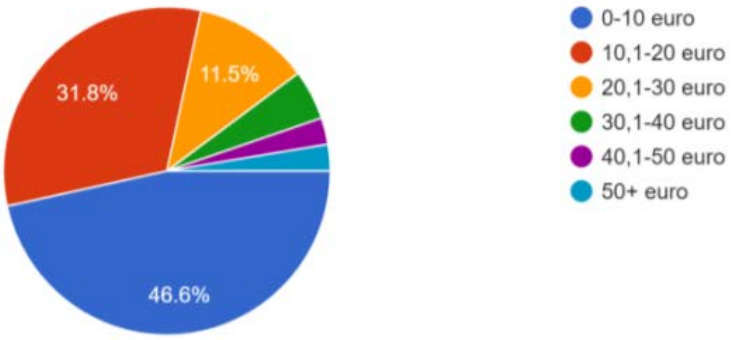
The pilot objectives are to improve the attractiveness of the mentioned attractions as well as their connectivity inside the wider Tivat area. The pilot action will focus on defining needs of tourists when traveling from Tivat city centre to Salinas, Luštica Bay, and Gornja Lastva by different modes of mobility (bike, e-bike, tuk-tuk, walking).

Activities and packages will be designed in order to promote sustainable tourism and high-quality environmental standards in touristic areas. They will include the Sustourismo app, the potential of embedding the Sustourismo app into existing popular apps, rewards for tourists that will boost the app downloads and use, and finally new touristic packages. The end results of the pilot will be a reconceptualization of existing tourists offer in the mentioned areas with a focus on sustainable tourism and soft mobility development.

1. Most of surveyed visitors (63.6 %) expressed their positive attitude towards involvement in organized guided tours within the city centre (e.g., City Park, Porto Montenegro).
2. Almost half of respondents were willing to pay a maximum of 10 EUR per person for a guided 90-minute walking tour within the city centre, while 31.8 % would pay up to 20 EUR.
3. For a guided 90-minute biking tours within the city centre, 42.5 % of respondents were willing to pay up to 10 EUR, 29.2 % would pay up to 20 EUR, and 15.4 % would pay no more than 30 EUR.
4. For a guided 90-minute tour on an electric bicycle, a third of respondents would pay up to 10 EUR, another third would pay up to 20 EUR, and 21 % were willing to pay the maximum amount of 30 EUR.
5. The results are similar for a guided 90-minute tuk tuk tour. 35.7 % of respondents would pay up to 10 EUR for participating, 28.5 % would pay no more than 20 EUR, and 18.4 % of respondents would pay up to 30 EUR.
6. The results show a significant interest (78.4 %) in a birdwatching experience with a professional guide at Salina.
7. For a 90-minute walking tour of Salina, 41 % of respondents were willing to pay up to 10 EUR, 30.8 % would pay up to 20 EUR, and over 27 % would be willing to pay 30 EUR or more. The results are very similar for a biking tour of Salina, while respondents are willing to pay more for an e-biking tour of Salina (over 35 % would pay 30 EUR or more). Tuk tuk experience of Salina has highest share of visitors that are interested to spend more than 30 EUR for a guided 90-minute tour (18.4 %).

8. Cycling is considered very popular among surveyed visitors. Over 78 % of them were interested in renting a bike or an e-bike to visit attractions outside the city.
9. Almost 90 % of respondents said they would rather use an electric boat inside the Boka Bay than a conventional diesel boat to visit other attractions.
10. Alternative means of transportation, such as electric boat, e-bike and tuk tuk, were rated as most desired for travel to Salina. In terms of costs, most of surveyed visitors (75.1 %) are willing to pay less than 10 EUR for the transport to Salina.
11. For Luštica Bay, which is located 15 km out of the city centre, most preferred modes of transportation are an electric boat, bus and tuk tuk. Most of surveyed visitors (60 %) are willing to pay between 5 and 15 EUR to reach Luštica Bay. Relatively lower prices are related with preferred modes of transport (e.g., boat and bus).
12. Bus, jeep and bike are the preferred modes of transport of visitors when they want to visit Vrmac. Considering distance and hilly terrain, public transport (e.g., bus) has to be carefully planned to address the needs of hikers and similar active visitors.
13. Regarding the transport to Vrmac hill, most respondents (61.6 %) were interested in prices between 1 and 10 EUR.
14. As a transport mode, walking has a great potential, especially in case of Salina and Vrmac. This mode needs to be efficiently linked and synchronized with the public transport options and other alternative means of transport (e.g., e-bike, tuk tuk).

Figure 137: The amount of money visitors of Tivat are willing to pay for a guided 90-minute walking tour in the centre



Municipality of Tivat:
Pilot development has been influenced and modified in following way:

1. **Guided / nonguided tours structure**. As indicated, most of surveyed visitors (63.6 %) expressed their positive attitude towards involvement in organized guided tours within the city centre (e.g., City Park, Porto Montenegro).

2. **Price level.** As indicated, almost half of respondents were willing to pay a maximum of 10 EUR per person for a guided 90-minute walking tour within the city centre, while 31.8 % would pay up to 20 EUR. For a guided 90-minute biking tours within the city centre, 42.5 % of respondents were willing to pay up to 10 EUR, 29.2 % would pay up to 20 EUR, and 15.4 % would pay no more than 30 EUR. For a guided 90-minute tour on an electric bicycle, a third of respondents would pay up to 10 EUR, another third would pay up to 20 EUR, and 21 % were willing to pay the maximum amount of 30 EUR. The results are similar for a guided 90-minute tuk tuk tour. 35.7 % of respondents would pay up to 10 EUR for participating, 28.5 % would pay no more than 20 EUR, and 18.4 % of respondents would pay up to 30 EUR. The results show a significant interest (78.4 %) in a birdwatching experience with a professional guide at Salina. For a 90-minute walking tour of Salina, 41 % of respondents were willing to pay up to 10 EUR, 30.8 % would pay up to 20 EUR, and over 27 % would be willing to pay 30 EUR or more. The results are very similar for a biking tour of Salina, while respondents are willing to pay more for an e-biking tour of Salina (over 35 % would pay 30 EUR or more). Tuk tuk experience of Salina has highest share of visitors that are interested to spend more than 30 EUR for a guided 90-minute tour (18.4 %).
3. **Preferable mode of transport**. As indicated, cycling is considered very popular among surveyed visitors. Over 78 % of them were interested in renting a bike or an e-bike to visit attractions outside the city.

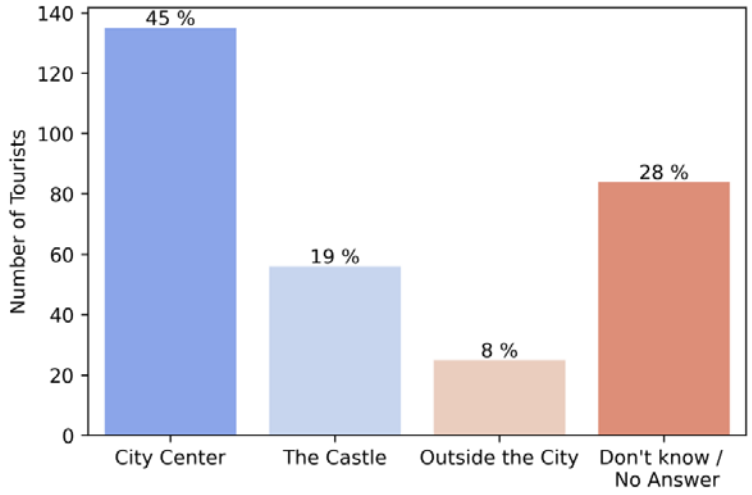
3.8 The case of Berat

The pilot action of Berat will focus on three key components: a) exploring the historic centre and UNESCO protected neighbourhoods on foot or by bicycle; b) experience tourism in surrounding areas through nature and adventurous tourism (wine and agro tourism, rafting in the Osumi canyons, paragliding from the Gorica hills etc.); c) using an integrated touristic card (pre-paid card for free access to specific touristic and transport services).

1. A dominating majority of visitors (83 %) are in favour of participating in organized walking tours within the historic centre of Berat with a professional touristic guide.
2. When choosing a type of guided walking tour, more than a half of respondents (53 %) would prefer a 3-hour tour including the city's castle alongside with the famous Mangalem and Gorica quarters, while 37 % would rather pick a 2-hour tour including only the castle of the city. 11 % either did not wish to answer or did not favour any of the alternatives in particular.
3. 59 % of respondents were in favour of participating in an organized biking tour. In general, younger visitors were more willing to go on this type of a tour.
4. The most preferred biking tour scenario was a tour through the entire city, which was selected by 45 % of respondents. A tour at the castle grounds was selected by 19 % of respondents, and a tour in the surrounding areas (Roshnik's village), which is more challenging, was selected by only 8 % of respondents.

5. 80 % of surveyed visitors would participate in organized tours outside the city of Berat (surrounding areas) with a professional touristic guide.
6. The most desired option regarding tours outside of the city was “adventurous sports such as rafting and paragliding”, selected by 55.7 % of respondents, followed by “agro tourism and winery destinations” selected by 52.7 % of them. The option of “Cultural sites and museums” was selected by 34.7 % of respondents, while 11.7 % of them would rather pick a different option. Participants were allowed to select up to three alternatives.
7. When asked whether they are interested in the use of an integrated touristic card, 43% of surveyed visitors responded in favour, 26 % were opposed, and 31 % were undecided or preferred not to answer.
8. The most desired services of an integrated touristic card were: “offers regarding hotels, restaurants and café-bars”, selected by 50.7 % of respondents, “free access to special events”, selected by 37.7 % of respondents, “free access to museums and cultural sites”, selected by 37.3 % of respondents, “use of a bike sharing system”, selected by 20.3 % of respondents, and finally “free access to public transportation”, selected by 16.7 % of respondents.

Figure 138: The preferred area for a bike tour in Berat



Regional Council of Berat: The insights and information derived from the surveys’ results helped RCB shape the pilot development and the integrated touristic packages, in an effort to meet some of the visitors’ needs.

More specifically, a large majority of tourists visit Berat for the purpose of sightseeing, and travel within the city by foot. This allows the RCB to focus the pilot development of the city of Berat on presenting and offering detailed information regarding the main points of touristic interests in the city. Therefore, the integrated touristic packages contain organized walking tours to such destinations.

Considering that almost half of the tourists either have or want to visit areas outside of the city, the second touristic package will be focused on activities that will be organized in destinations outside of the city. Such activities will include rafting, hiking, nature exploration, or guided visits to wineries and agro-touristic

destinations. This, in addition, serves the purpose of extending the duration of the visitors' stay, which according to the survey's results, currently ranges between 1 and 2 nights on average.

One of the main issues identified by tourists were the lack or poor infrastructure facilities, mostly referring to a lack of bicycle lanes. This is also a factor that is considered by RCB in order to promote an increased usage of bicycles within the integrated touristic tours.

As aforementioned, another identified gap included the lack of organised integrated tourism – transport information provision, both for within and outside the city. In the context of this project, this need could be met through the use of the SUSTOURISMO mobile application, which will provide information regarding sites within the city, mobility options, and will offer rewards for tourists (such as discounts on site visits, reduced transport tickets, discounts on bicycle rentals, and more). The surveys' results indicate a high interest of tourists to use a mobile application as means for acquiring information on the main points of destination in and outside the city. This influences the development of the pilots for RCB focusing on the usage of information systems and technology as tools for promoting sustainable tourism initiatives. For instance, the application will provide links to virtual tours to museums.

In conclusion, the conducted surveys were a helpful tool to acquire meaningful information from a satisfying sample of tourists. This will help RCB shape the upcoming activities in the context of the project, in order to meet and address the needs presented by the visitors.

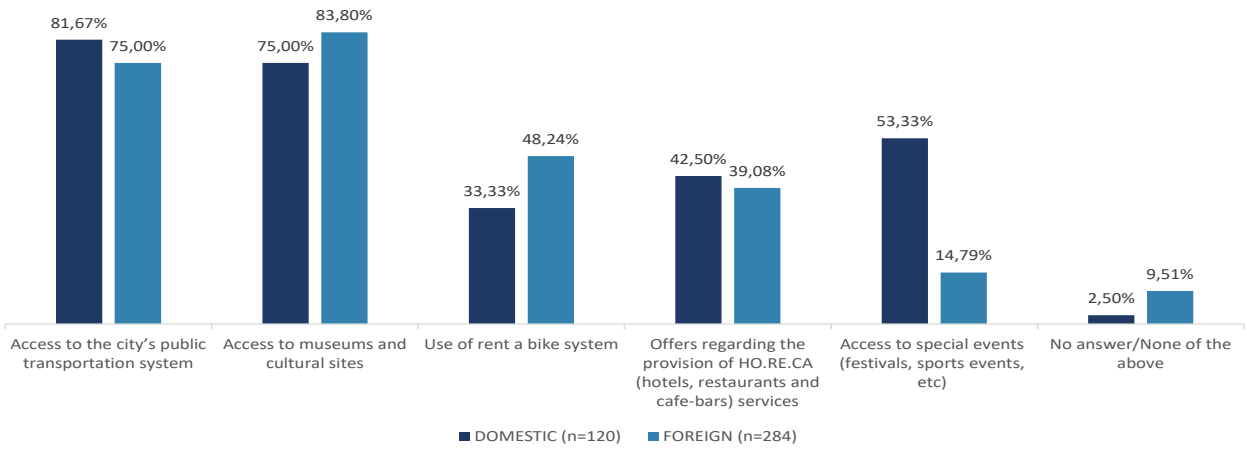
3.9 The case of Belgrade

The pilot action idea is to improve the way of visiting the capital by stimulating sustainable modes of transport and protecting the environment. The pilot will promote walking tours in the city and the use of bicycles as an alternative mode of transport. A new walking tour in the city centre will include many points of interest such as cultural monuments, museums, Orthodox temples etc. The second tour will address the insufficiently used potential of touring the city by bicycle, especially on the path along the Danube and Sava rivers. This tour will be completed at Ada Ciganlija, where tourists can choose to continue cycling or use some of the many facilities offered here.

1. Most visitors would use an integrated card during their stay in the city (95 % of domestic and nearly 90 % of foreign respondents).
2. 75 % of domestic and nearly 84 % of foreign visitors would like the integrated card to include access to museums and cultural facilities, while approximately 82 % of domestic and 75 % of foreign visitors would like it to include urban public transport. As for foreign tourists, bicycle rental is next on the list with 48 %. In the case of domestic tourists, 53 % would like the card to include access to various events such as festivals, sports events and similar.
3. A large majority of visitors (71 % of domestic and 70 % of foreign visitors) would pay more than 10 EUR for an integrated card offering 5 trips with the urban public transport, free access to 2 city museums/cultural sites and 1 hour of bike rental.

4. 80 % of domestic visitors would pay 21 – 30 EUR for an integrated card offering 8 trips with the urban public transport, 2 trips with the interurban public transport, free access to 3 city museums/cultural sites, free access to 1 point of interest outside Belgrade (e.g., archaeological site of Vincha) and 2 hours of bike rental. The same amount would be set aside by 53 % of foreign tourists, while nearly 40 % would pay more.
5. 60 % of domestic and 36 % of foreign visitors would pay 51 – 60 EUR for an integrated card including 12 trips with the urban public transport, 4 trips with the interurban public transport, free access to 3 city museums/cultural sites, free access to 1 point of interest outside Belgrade (e.g., archaeological site of Vincha), a trip with an open top bus, boat tour and 3 hours of bike rental. Others would pay less.
6. The majority of domestic and foreign visitors (90 % and 83 % respectively) expressed interest to participate in an organized walking tour with a professional guide within the city centre.
7. For a two-hour walking tour of this type, all domestic respondents and 86 % of foreign respondents were willing to spend up to 5 EUR. About 13 % of foreign visitors would pay 6 – 10 EUR. For the same type of tour lasting 3 hours, 80 % of domestic and a third of foreign visitors would pay a maximum of 10 EUR. 20 % of domestic and a half of foreign visitors would pay 10 – 20 EUR.
8. 60 % of domestic and 76 % of foreign tourists would like to participate in an organized bicycle tour within the centre with a professional tourist guide.
9. More than a half of both domestic and foreign respondents would pay up to 5 EUR to participate in an organised bicycle tour. As much as 41 % of domestic and 24 % of foreign tourists did not answer.
10. When choosing between travel by bicycle and public transport to reach Ada Ciganlija from the city centre, less than a third of foreign visitors chose public transport, while their share among domestic visitors was larger and amounted to 51 %.

Figure 139: Services visitors of Belgrade would like the integrated touristic card to include



University of Belgrade: The high percentage (68.6 %) of tourists who opt for a car as the first choice of means of transport during a tour of Belgrade indicates that it is difficult to give up the comfort that the car provides. Most likely, since walking is highest option in the second choice (59.3 %), tourists decide to go on shorter routes on foot. The tourists also stated that during the tour of the city, one of their biggest gaps for them are traffic jams (90 %), i.e. heavy traffic. That is why, by changing habits, alternative ways of touring the city are one of the good solutions for tourists.

Although a large number of tourists opted for a car for the first option of touring Belgrade, a significant number chose walking as a way to tour the city. In this regard, we noticed the readiness and possibility to organize pilot walking tour in the centre of Belgrade. In addition, in order to change the habits of tourists, bicycle tours came into consideration during the formation of tourist pilots. The data obtained by the survey indicate that there is room for such routes to be included in the offer to tourists.

4. Joint SWOT analysis

Survey results highlight strengths, weaknesses, threats and opportunities regarding the sustainability mobility nexus of the ADRION region, especially related to tourism.

Table 17: Joint SWOT analysis

Strengths	Weaknesses
- Accessibility of public transport (low costs, dense network of stations and stops, accessible vehicles) in various ADRION destinations - Extensive network of cycling paths in some destinations (e.g, Ljubljana) - Popularity of walking as a mean of transport within cities - Public green spaces and protected natural areas, which encourage soft mobility - Rich and diverse cultural and natural heritage that can be explored on foot / by bicycle - Strategic position of ADRION as an intersection of tourist flows - High level of safety within cities, which encourages walking	- Extensive use of private vehicles by domestic and foreign visitors to travel to destinations and to visit sights inside and outside the cities, which causes pollution - Heavy traffic as the key transport-related difficulty encountered by visitors of ADRION - Lack of dedicated cycling paths, which leads to unsafe cycling on roads in some destinations - Imbalanced transport connections among countries within ADRION - Imbalanced transport connections between coastal and inland areas of ADRION - Small share of visitors caring about how environmentally friendly a specific transport mode is; their decisions are based on travel time, comfort level and cost - Points of interest are adequately connected with public transport within cities; sights outside the cities are more difficult to reach without a private vehicle

	- Outdated public transport vehicle fleets, running on fossil fuels - Uneven infrastructure development between different ADRION regions - Poor railways connections and "passenger unfriendly" train timetables in some destinations - Relatively low current level of digitalization in most pilot cities - Lack of innovations and incentives for innovations in most pilot cities - Different development stages between countries
Opportunities	**Threats**
- Extended pedestrianization of city centres, specific streets or other public spaces for promoting non-motorized transportation - Extension of cycling path networks - Growing number of soft mobility projects in urban areas – bike sharing, e-car sharing, Park & Ride systems etc. - General electrification of public and private vehicles - Use of urban waterways (rivers, sea) for sustainable travel with environmentally-friendly boats - Strengthening the integration of different modes of public transport (one card for various transport modes, harmonized public transport timetables) - Use of Sustourismo app for more sustainable visitation of ADRION region, which is encouraged with awards - Growing tourism demand - New technologies used for encouraging sustainable mobility	- Increased use of private vehicles due to health risks related to public transport (environmental degradation, pollution and climate change) - Delays and cancellations of soft mobility projects due to new post-pandemic recovery related priorities and a lack of funds - Rise of cruise tourism, which is known as a less sustainable type of travel with many negative side effects for the natural environment and local inhabitants - Low usage of the Sustourismo app due to market saturation, low awareness or uselessness - Poor infrastructure in some pilot cities supporting the use of alternative transport modes - Deficient information provision

Conclusion

A short overview of the economy, tourism sector and transport network of project partners within the ADRION region shows significant developmental differences between destinations. Nevertheless, they face similar challenges regarding the development of sustainable mobility and environmentally-friendly behaviour of visitors. Despite the implementation of innovative soft mobility projects, which are more advanced and numerous in some areas of ADRION than others, private vehicles are still the most popular mode of transport for visitors when traveling to the destination and visiting other sights nearby due to shorter travel time and comfort, while walking is the preferred way of moving around within the cities. This causes many adverse effects on the environment, negatively impacts the quality of life of locals, and worsens the overall experience of visitors.

Although the samples of the surveyed visitors were smaller than desirable in several destinations and visitor flows were heavily disturbed by Covid-19 related travel restrictions, we can still cautiously postulate about some of their characteristics. Most adult visitors of ADRION region have a driving license and own a car. Domestic visitors tend to visit specific destinations more times, but stay there for a shorter time than foreign visitors. Both groups most often travel independently and in pair. The top reasons for holidays in the ADRION regions are sightseeing, visiting friends and family, and sea and sun (at seaside destinations). In general, visitors use private transport more often than public transport and are more satisfied with it, even though they recognize heavy traffic as the biggest difficulty encountered during their visit. They mostly search for information about their stay online and are willing to use an informative touristic mobile app, especially in case of awards.

The objective of the customized local parts of the survey was to get visitor feedback about the planned pilot actions. Project partners can use the results of local parts of the survey to further improve the pilot in a way that it will fit the mobility needs of visitors even better, while still following the principles of sustainability. In Berat and Belgrade, the local part of the survey provided feedback on the desired type of walking and biking tours in and outside of the city, and the preferred services to be included in an integrated touristic card. Visitor preferences regarding the services included in a touristic mobile app were also analysed in Emilia-Romagna Region, Friuli Venezia Giulia Region and Thessaloniki, while the local part of the survey conducted in Ljubljana focused on the desired parameters of a cycling tour in the Ljubljana Marshes (lengths, duration, prices, additional offer, transportation). In Tivat, visitors shared their opinions on walking, cycling, e-cycling and tuk tuk tours in the city centre and nearby attractions. The local part of the survey conducted in Zadar included many questions about the cycling habits of visitors, providing useful information on how to make the city more bike-friendly.

Appendices

APPENDIX A: Transnational part of the survey

The transnational part of the survey is attached to the Report 1.3.1 as a PDF file. A version that was used in Thessaloniki is presented.

APPENDIX B: Local parts of the survey[7]

Thessaloniki

The local part of the survey from Thessaloniki is included in the attached Appendix A.

Emilia Romagna Region

1. Do you know the App Roger?

☐ Yes ☐ No

2. If yes, how many times did you used this Roger app in a month?

☐ Only 1 ☐ 2-5 ☐ Regularly

3. Are you interested in the integration of touristic services in the Roger App?

☐ Yes ☐ No

4. If yes, which kind of touristic sustainable mobility services?

☐ Bike rental
☐ Bike/e-bike sharing service
☐ E-scooters
☐ Tourist packages
☐ Other (please specify) ……

5. Are you interested to have an app monitoring your CO2 emissions?

☐ Yes ☐ No

6. Are you available to change your travel choices if you know in details how pollutant is your actual trip?

☐ Yes ☐ No

7. Travel Scenarios and Public Transport: Do you prefer the lowest cost or the shortest time spent on a trip with PT?

☐ Lowest Cost ☐ Shortest time

Friuli Venezia Giulia Region

[7] Central European Initiative - Executive Secretariat (Friuli Venezia Giulia Region), City of Zadar and University of Belgrade are responsible for adding their local parts of the survey since input was not delivered on time.

MISSING

Ljubljana

Due to its format, the local part of the survey used in Ljubljana is also attached separately to this report.

Zadar

MISSING

Tivat

1. Would you be interested to participate in organized tours within the city centre (e.g. City park, Porto Montenegro) of Tivat with a professional touristic guide?

☐ Yes

☐ No

☐ DK/NA

2. In such a case what amount of money are you willing to pay?

- For a 90 minutes tour within the city WALKING – Amount: _____
- For a 90 minutes tour within the city BIKING – Amount: _____
- For a 90 minutes tour within the city E-BIKING – Amount: _____
- For a 90 minutes tour within the city by TUK TUK – Amount: _____

3. Would you be interested to participate in birdwatching tours at Tivat Salina with a professional guide?

☐ Yes

☐ No

☐ DK/NA

Tivat Salina "Solila"

This local attraction nearby Tivat is an oasis of unspoiled nature which provides shelter for some rare species of birds like cormorants. Solila is a special botanical and animal reserve. It is situated in the swamp area of the coastal part of the Bay of Tivat. The most interesting fact for tourists and birdwatchers is that this area is home to very rare bird species. They all find their shelter here, in Solila. This area of 150 ha is home to 111 bird species, 49 of which are related only to aquatic/water habitats. Some of the attractive bird species that can be seen here are: ibises, cranes, auks, large curlews, godwits, lapwings etc. Solila is an attractive place to visit throughout the year. However, spring bird

migration is recommended for passionate birdwatchers - a period from February to the end of April.

4. In such a case what amount of money are you willing to pay?

- For a 90 minutes tour HIKING – Amount: _____
- For a 90 minutes tour by BIKE – Amount: _____
- For a 90 minutes tour by E-BIKE - Amount: _____
- For a 90 minutes tour by TUK TUK - Amount: _____

5. Would you be interested to rent bike (or e-bike) to visit attractions outside city center (e.g. Salina, village Gornja Lastva, Luštica Bay)?

☐ Yes

☐ No

☐ DK/NA

Luštica Bay

Luštica Bay is part of Luštica peninsula, one of the most preserved natural pearls of the Montenegrin coast. It is positioned in the hinterland of high mountains, right on the coastline. Clean air, clear emerald Adriatic Sea, unspoiled natural beauty and tranquility all blended with active lifestyle make this place unique. Luštica Bay offers a wide range of ecologically constructed properties, both residential and business. Luštica Bay will be a state-of-the-art town with a wealth of leisure, spa, entertainment and community facilities. While it is only at the early stages of development, there are already many facilities in pace for residents to exclusively enjoy.

Gornja Lastva

Gornja Lastva is a settlement which reflects the well-known Mediterranean ambience. Stone is the main and basic building material in Gornja Lastva, a place hidden among the abundance of Mediterranean plants and herbs. Old stone houses, which were built, ruined and rebuilt throughout the centuries, were replaced by more contemporary houses. Most of them were abandoned and ruined, but the uniqueness of traditional construction practice has remained throughout centuries. There is still a 19 century olive mill, drawn by human strength, which has not changed. Olives can still be grinded in it. In the past, inhabitants used to gather together at the mill to make olive oil- this was also an amazing social and cultural event, with singing, wine and home- made food involved..

6. Would you be interested to use more electric boats inside the Boka Bay to visit other attraction in Tivat municipality (e.g. island Our Lady of Mercy, St. Marco, Luštica Bay), rather than conventional di?

☐ Yes

☐ No

☐ DK/NA

St. Marco

Our Lady of Mercy

7. Six main modes of transportations are at your disposal to visit Tivat Salina (5km from city center). Please rate them from most (1) to least (6) preferable for you and indicate max price that you are willing to pay:

Mode of transportation	Rate from 1 - 6	MAX price (Euro)
Electric boat		

Bus		
Tuk-tuk		
Rent-a-Bike/e-bike		
Rent-a-motorbike (e.g. vespa)		
Rent-a-car		

8. Six main modes of transportations are at your disposal to visit Luštica Bay (15km from city center). Please rate them from most (1) to least (6) preferable for you and indicate max price that you are willing to pay:

Mode of transportation	Rate from 1 - 6	MAX price (Euro)
Electric boat		
Bus		
Tuk-tuk		
Rent-a-Bike/E-bike		
Rent-a-motorbike (e.g. vespa)		
Rent-a-car		

9. Six main modes of transportations are at your disposal to visit rural countyside on Vrmac hill (9km from city center uphill). Please rate them from most (1) to least (6) preferable for you and indicate max price that you are willing to pay:

Mode of transportation	Rate from 1 - 6	MAX price
Bus		
Tuk-tuk		
Rent-a-Bike/E-bike		
Rent-a-motorbike (e.g. vespa)		
Rent-a-car		

Rent-a-jeep		

10. Walking/hiking as mobility option is at your disposal to visit different attractions in Tivat. Please insert YES/NO for each option:

LOCAL ATTRACTIONS:	*Mobility mode*		
	Walking all the way	*Walking in one way (e.g. bus or boat in return)*	*No walking*
TIVAT SALINA "SOLILA" ✓ 5km from city center ✓ flat terrain)			
LUŠTICA BAY ✓ 15km from city centre ✓ flat terrain			
VRMAC HILL ✓ 9km from city center ✓ uphill			

Berat

1. Would you be interested to participate in organized walking tours *within* the historic centre of Berat with a professional touristic guide?

☐ Yes
☐ No
☐ DK/NA

2. In such a case, which of the following scenarios would you prefer?

☐ 2 hours walking tour in the historic area of the city's castle (visiting museums, cultural and religious sites)
☐ 3 hours walking tour including the city's castle, and the famous Mangalem and Gorica quarters

3. What amount of money would you be willing to pay for the above-mentioned walking tours?

☐ 2 hours walking tour: Amount _____
☐ 3 hours walking tour: Amount _____

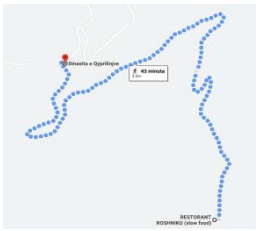
4. Would you be interested to participate in organized bicycle tours within the city centre of Berat with a professional touristic guide?

- ☐ Yes
- ☐ No
- ☐ DK/NA

5. In such case, which of the following scenarios would you prefer? Please note that these scenarios include three different levels of difficulties

a) City center – low

b) Berat's castle – medium



c) Roshnik's village – high

- ☐ Option a) Biking in the city center (low level of difficulty). Experience the city by bike while moving from the Tomori's stadium to the Velabisht's bridge and back
- ☐ Option b) Biking in the castle of Berat (medium level of difficulty). Bike to the castle and experience its characteristics street and neighborhoods.
- ☐ Option c) Biking in the Roshnik's village (high level of difficulty). This option requires more experienced bikers

6. What amount of money would you be willing to pay for the above mentioned walking tours?

- ☐ Option a: amount _____
- ☐ Option b: amount _____
- ☐ Option c: amount _____

7. Would you be interested to participate in organized tours *outside* the city of Berat (surrounding areas) with a professional touristic guide?

- ☐ Yes
- ☐ No
- ☐ DK/NA

8. In such case, which of the following alternatives would you prefer?

- ☐ Agro-tourism and winery destinations (e.g, Çobo, Alpeta, Nurellari)
- ☐ Cultural sites and monuments outside the city of Berat
- ☐ Adventurous sports such as hiking and rafting (e.g., Osumi canyons)

9. In which of the following adventurous sporting activities would you be more interested to participate inBerat with a professional touristic guide, assuming each activity has the same price (approximately 50 Eur)?

- ☐ Hiking and sightseeing in Bogova's waterfall (packed up lunch included)
- ☐ Rafting in the Osumi canyons
- ☐ Paragliding from Gorica's hills

10. Would you use an integrated touristic card during your staying in the city? (pre-paid card for free access to specific touristic and transport services)

- ☐ Yes
- ☐ No
- ☐ DK/NA

11. What kind of services would you like the card to cover? (Please select up to THREE options)

- ☐ Free access to the city's public transportation system
- ☐ Free access to museums and cultural sites
- ☐ Use of bike sharing system
- ☐ Offers regarding the provision of HO.RE.CA (hotels, restaurants and cafe-bars) services
- ☐ Free access to special events (festivals, sports events, etc)
- ☐ No answer/None of the above

12. In the case of buying a touristic card what amount of money are you willing to pay? For each case please state the amount that you would be willing to pay?

Belgrade

MISSING

APPENDIX C: Local part of the survey of PED (PP2)

Epirus

The local part of the survey of Igoumenitsa and Preveza, along with the analysis can be found in Appendix C.